

Motorway Services User Survey 2023

October 2023



Introduction

Motorway service areas (MSAs) are often a critical part of our journeys. Most of us have felt tired or hungry, run short of fuel or just needed a comfort break when on a long drive. Some of us plan where to stop in advance, returning to MSAs where we have had a good experience in the past, or where we know what services and brands to expect, but others take pot luck. Whatever our approach, the good news is that most of us will be satisfied with what we find when we pull off the motorway for a break, and many will leave happier, and more relaxed.

Our research looks not only at how satisfied MSA users are overall, but also at the detail of what makes users satisfied, as well as ranking MSAs by individual site and by operator. This year Transport Focus spoke to more than 30,000 visitors at 120 motorway services in England, Scotland and Wales. In 2022, we adopted a new research method which enabled us to ask more detailed questions of a subset of respondents. This was a successful approach and one that we have continued this year. This enables us to compare results and see which MSAs have improved over the last 12 months and to look in detail at the factors that have contributed to these improvements.

We have also added new questions on sustainability, whether users are travelling alone, with others and/or with children, and the impact of the cost-of-living crisis on travel and vehicle use; these questions add richness to our insights.

This report focuses on user satisfaction, the factors that influence it and what to do to increase it. At an overall level, MSAs are performing well, and each of the operators have some exceptionally high-scoring sites. At an individual level, even the highest performing sites could improve. This report offers insight into how to do so: we expect operators will continue to use this to improve satisfaction for their customers.



Overall satisfaction is high

Overall, 94 per cent of MSA users say they are very or fairly satisfied with the experience they have just had at the MSA. This is an excellent result for the industry as it builds on last year's already high bar of 93 per cent satisfied and includes 63 per cent of the total who said 'very' satisfied. All four operators perform well; Extra has an overall score of 96 per cent satisfied across all its sites, while Moto, Roadchef and Welcome Break all have overall scores of 94 per cent. Overall satisfaction for individual MSAs ranges from 100 per cent (Rugby, Moto) down to 84 per cent (Hartshead Moor East, Welcome Break).

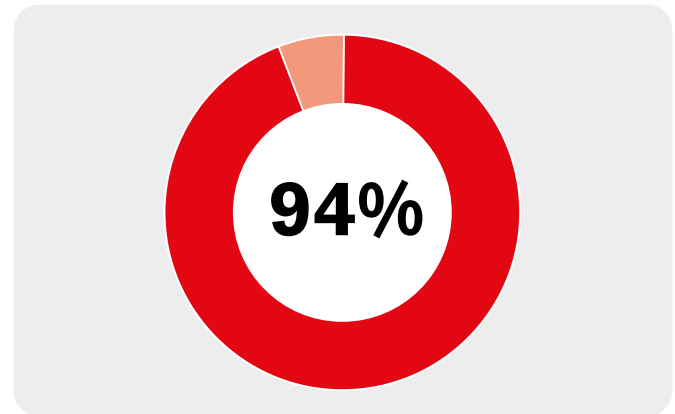
With the sector as a whole performing well it can be dispiriting for the operators whose MSAs are at

"Enjoyed the opportunity to sit outside for coffee and snack."

the bottom of the league tables. However, operators can take heart from the fact that the lowest overall satisfaction score at any site is 84 per cent, up four percentage points on last year.

The MSAs are ranked in order of overall satisfaction score – first ranked on those who say they are very or fairly satisfied – and then by the proportion who are very satisfied.

Overall satisfaction



Overall satisfaction by MSA (%)

■ Extra
 ■ Moto
 ■ Roadchef
 ■ Welcome Break

| Rank | MSA | Total satisfied | Operator |
|------|--------------------|-----------------|---------------|
| 1 | Rugby | 100 | Moto |
| 2 | Killington Lake | 99 | Roadchef |
| 3 | Annandale Water | 99 | Roadchef |
| 4 | Wetherby | 99 | Moto |
| 5 | Stafford South | 99 | Roadchef |
| 6 | Corley South | 99 | Welcome Break |
| 7 | Chester | 99 | Roadchef |
| 8 | Reading East | 99 | Moto |
| 9 | Leeds Skelton Lake | 98 | Extra |
| 10 | Ferrybridge | 98 | Moto |
| 11 | Donington Park | 98 | Moto |
| 12 | Northampton North | 98 | Roadchef |
| 13 | Burton-in-Kendal | 98 | Moto |
| 14 | Maidstone | 98 | Roadchef |
| 15 | Reading West | 97 | Moto |
| 16 | Birch West | 97 | Moto |
| 17 | Frankley North | 97 | Moto |
| 18 | Trowell North | 97 | Moto |
| 19 | Medway West | 97 | Moto |
| 20 | Woodall South | 97 | Welcome Break |
| 21 | Abington | 97 | Welcome Break |
| 22 | Hopwood Park | 96 | Welcome Break |
| 23 | Woolley Edge South | 96 | Moto |
| 24 | Corley North | 96 | Welcome Break |
| 25 | Heston West | 96 | Moto |
| 26 | Birchanger Green | 96 | Welcome Break |
| 27 | Doncaster North | 96 | Moto |
| 28 | Heston East | 96 | Moto |
| 29 | Southwaite South | 96 | Moto |
| 30 | Stirling | 96 | Moto |

| Rank | MSA | Total satisfied | Operator |
|------|-----------------------------|-----------------|---------------|
| 31 | Tibshelf South | 96 | Roadchef |
| 32 | South Mimms | 96 | Welcome Break |
| 33 | Washington North | 96 | Moto |
| 34 | Peterborough | 96 | Extra |
| 35 | Beaconsfield | 96 | Extra |
| 35 | Tamworth | 96 | Moto |
| 37 | Fleet North | 96 | Welcome Break |
| 38 | Hamilton | 96 | Roadchef |
| 39 | Sarn Park | 96 | Welcome Break |
| 40 | Hilton Park North | 95 | Moto |
| 41 | Woolley Edge North | 95 | Moto |
| 42 | Washington South | 95 | Moto |
| 43 | Rownhams West | 95 | Roadchef |
| 44 | Warwick South | 95 | Welcome Break |
| 45 | Birch East | 95 | Moto |
| 46 | Telford | 95 | Welcome Break |
| 47 | Durham | 95 | Roadchef |
| 48 | Blackburn with Darwen | 95 | Extra |
| 49 | Oxford | 95 | Welcome Break |
| 50 | Baldock | 95 | Extra |
| 51 | Charnock Richard South | 95 | Welcome Break |
| 51 | Strensham North | 95 | Roadchef |
| 53 | Leicester Forest East South | 95 | Welcome Break |
| 54 | Michaelwood North | 95 | Welcome Break |
| 55 | Leicester Forest East North | 95 | Welcome Break |
| 56 | Watford Gap North | 95 | Roadchef |
| 57 | Burtonwood | 95 | Welcome Break |
| 58 | Newport Pagnell North | 95 | Welcome Break |
| 59 | Charnock Richard North | 95 | Welcome Break |
| 60 | Gretna Green | 95 | Welcome Break |

Base: All MSA visitors (30,740)

■ Extra
 ■ Moto
 ■ Roadchef
 ■ Welcome Break

| Rank | MSA | Total satisfied | Operator |
|------|---------------------|-----------------|---------------|
| 61 | Hilton Park South | 94 | Moto |
| 62 | Warwick North | 94 | Welcome Break |
| 63 | Watford Gap South | 94 | Roadchef |
| 64 | Chieveley | 94 | Moto |
| 65 | Cullompton | 94 | Extra |
| 66 | Pease Pottage | 94 | Moto |
| 67 | Cobham | 94 | Extra |
| 68 | Winchester North | 94 | Moto |
| 69 | Strensham South | 94 | Roadchef |
| 70 | Tibshelf North | 94 | Roadchef |
| 71 | Pont Abraham | 94 | Roadchef |
| 72 | Stafford North | 94 | Moto |
| 73 | Trowell South | 94 | Moto |
| 74 | Medway East | 94 | Moto |
| 75 | Severn View | 94 | Moto |
| 76 | Bothwell | 94 | Roadchef |
| 77 | Kinross | 93 | Moto |
| 78 | Frankley South | 93 | Moto |
| 79 | Exeter | 93 | Moto |
| 80 | Michaelwood South | 93 | Welcome Break |
| 81 | Southwaite North | 93 | Moto |
| 82 | Leigh Delamere East | 93 | Moto |
| 83 | Magor | 93 | Roadchef |
| 84 | Sandbach North | 93 | Roadchef |
| 84 | Thurrock | 93 | Moto |
| 86 | Norton Canes | 93 | Roadchef |
| 87 | Northampton South | 93 | Roadchef |
| 88 | Fleet South | 93 | Welcome Break |
| 89 | Cherwell Valley | 93 | Moto |
| 90 | Keele North | 93 | Welcome Break |

| Rank | MSA | Total satisfied | Operator |
|------|-----------------------|-----------------|---------------|
| 91 | Gordano | 93 | Welcome Break |
| 92 | Leigh Delamere West | 93 | Moto |
| 93 | Winchester South | 93 | Moto |
| 94 | Membury West | 92 | Welcome Break |
| 95 | Knutsford South | 92 | Moto |
| 96 | Keele South | 92 | Welcome Break |
| 97 | Lancaster North | 92 | Moto |
| 98 | Blyth | 92 | Moto |
| 99 | Swansea | 92 | Moto |
| 100 | Clacket Lane West | 92 | Roadchef |
| 101 | Clacket Lane East | 92 | Roadchef |
| 102 | Sedgemoor South | 91 | Roadchef |
| 103 | Taunton Deane South | 91 | Roadchef |
| 104 | Cardiff West | 91 | Moto |
| 104 | London Gateway | 91 | Welcome Break |
| 106 | Knutsford North | 91 | Moto |
| 107 | Taunton Deane North | 90 | Roadchef |
| 108 | Woodall North | 90 | Welcome Break |
| 109 | Newport Pagnell South | 90 | Welcome Break |
| 110 | Rownhams East | 90 | Roadchef |
| 111 | Membury East | 89 | Welcome Break |
| 112 | Sandbach South | 89 | Roadchef |
| 113 | Cardiff Gate | 89 | Welcome Break |
| 114 | Sedgemoor North | 89 | Welcome Break |
| 115 | Lancaster South | 88 | Moto |
| 116 | Hartshead Moor West | 88 | Welcome Break |
| 117 | Bridgwater | 88 | Moto |
| 118 | Toddington South | 88 | Moto |
| 119 | Toddington North | 88 | Moto |
| 120 | Hartshead Moor East | 84 | Welcome Break |

Users with additional requirements

One of the advantages of conducting a survey with such a large sample is that we can look at distinct groups of MSA visitors to understand which operators are performing the best and which groups of customers are best served.

There are some groups of users who have specific needs when stopping at the MSA, such as people travelling with children, disabled people, HGV drivers and people with electric vehicles (EV) who may need to recharge at the site. HGV and EV drivers have lower than average satisfaction and we will explore the reasons in more detail later.

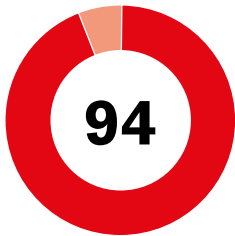
Disabled users score close to the total average score for satisfaction. Around two thirds of disabled users said that the MSA catered well for their impairment (33 per cent very well and 33 per cent quite well), which leaves a lot of room for improvement. The comments show that users are most concerned with ease of access to and the cleanliness and condition of disabled toilets.

However, they also give some insight into the wide range of disabilities that exist and the many ways – often small, inexpensive tweaks - that MSAs could improve users' experience.

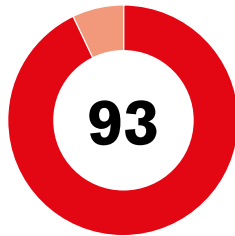
“I have a stoma and need more toilet space.”

“Clear signs are helpful, but the stairs could use higher contrast steps.”

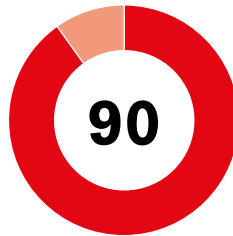
Overall satisfaction by visitor type (%)



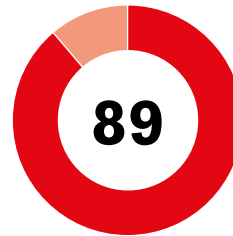
All visitors



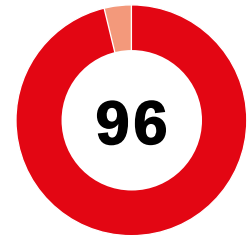
Disabled users



HGV drivers



EV users



With children

Base: All answering, all MSAs (30,740)



Most users would recommend the MSA

When satisfaction scores are so high, there is little to distinguish between the best and worst performers. We therefore introduced another measure, the Net Promoter Score (NPS)*, which is derived from likelihood to recommend the site, in the 2022 survey.

“They have lovely knowledgeable staff and plenty to eat and drink.”

“It’s got good staff, great views, a good place to sit out.”

Overall, the scores in 2023 are extremely high – across industries, an NPS of 50 is considered very good – and the highest performers, Annandale Water (Roadchef) and Rugby (Moto) have scores of 88 and 87 respectively, which is outstanding. The lowest score this year is -2 which is an improvement on last year’s lowest score of -16. Annandale Water has had substantial investment since last year’s survey, with a new seating area and a new Costa coffee shop, so the investment has clearly paid off. Rugby, a new site opened in 2021, is a consistently high performer.

In general, MSAs with high satisfaction scores also have a high NPS, but where this isn’t the case, it can help to diagnose issues at an individual site.

* NPS is calculated by subtracting ‘detractors’ – those who are unlikely to recommend the MSA to someone making a similar journey – from ‘promoters’ – those who would recommend the site.

What leads to an increase in satisfaction?

Although the industry as a whole is doing a good job, as evidenced by these results, at the individual level there are always opportunities to improve. It is helpful, therefore, to explore the performance of those that have improved in more detail, to help us understand which elements of the MSA facilities and service have an impact on satisfaction.

Of the 116 MSAs that took part in the survey both this year and last, 75 have stayed the same or increased their overall satisfaction score. The majority of the 41 sites where scores have decreased the drop is only one or two percentage points, which is not statistically significant.

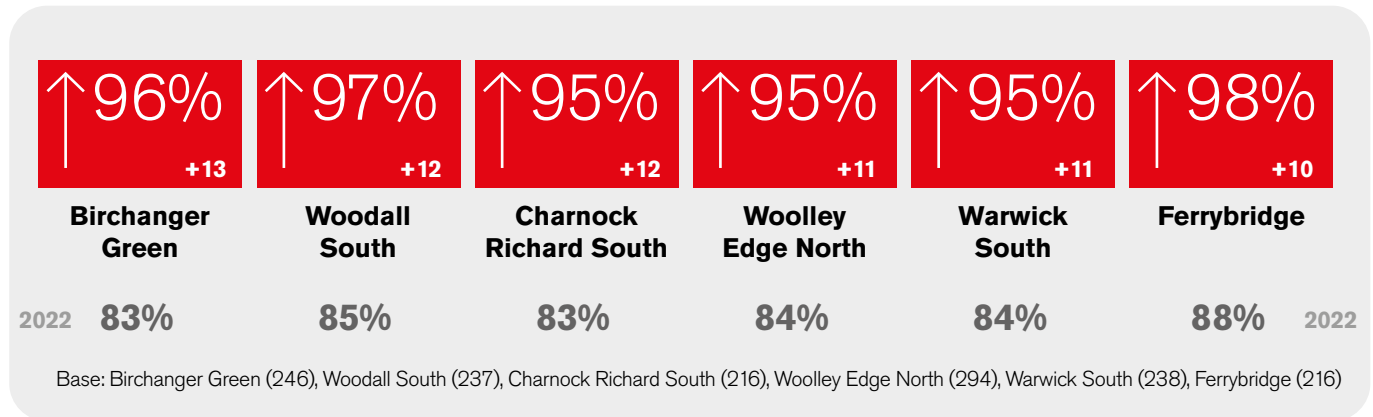
Typically, big improvements are driven by investment in facilities such as toilets. The addition of a new branded store or food outlet can also improve users' experience of a site.

For example, of the six sites that have shown the greatest improvement, five have had new or refurbished toilets – Welcome Break's Birchanger Green, Woodall South, Warwick South, and Moto's Woolley Edge

North and Ferrybridge. Of these some have also had investment in upgraded shops and eateries.



Overall satisfaction - most improved MSAs



Charnock Richard South (Welcome Break) has made notable improvements by working with the site team to deliver excellent service, focussing on cleanliness and responding to customer feedback. A great example of what can be done without investment in infrastructure.

A special mention goes to Welcome Break's Hartshead Moor East which is at the bottom of the rankings for

both overall satisfaction and NPS. The MSA has invested in new toilet facilities but, unfortunately, the works were still underway during the survey period and, for some of the time, had portable toilets in place. Despite the building works, the site's overall satisfaction score has improved by four percentage points, which suggests that there is every reason to expect an improved position in next year's survey.



Key contributors to satisfaction

We know that there are some key elements that have a big impact: toilets, food and overall cleanliness have an impact on all customers. HGV facilities and, increasingly, EV facilities make a difference for particular groups. This section looks at each of these in detail.

HGV drivers make up 12 per cent of the visitors we spoke to and are frequent users who know the MSAs well and rely on them to support them to do their jobs; dissatisfaction with HGV facilities is likely to impact overall satisfaction scores.

Only four per cent of all MSA users charged an EV, so this user group will have only a small influence on overall satisfaction scores at the moment. However, this is a growing sector for whom EV facilities are critically important. As this group grows, if users continue to have lower than average satisfaction this will start to bring down overall scores.



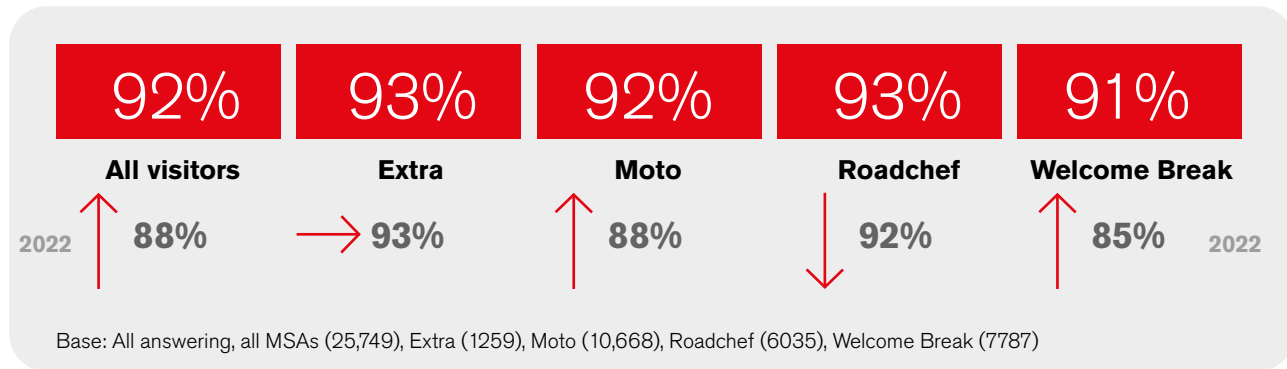
Toilets

Toilets are critically important and must be accessible to all users, and well maintained, clean and pleasant to use. Satisfaction with the toilets overall has increased from 88 per cent in 2022 to 92 per cent in 2023, which is a good improvement for users. Welcome Break and Moto have both improved their satisfaction with toilets considerably, meaning that all operators now have more than 90 per cent satisfaction with this measure.

“Toilets are always clean, always nice hand cream and other bits available.”

“The toilets need updating. Broken locks, bit unsightly overall but not unclean.”

Satisfaction with toilets by operator



The survey asks about the factors that contribute to toilet satisfaction such as number of toilets available, cleanliness and fixtures and fittings. Overall, the least satisfactory element is the fixtures, fittings and décor.

Ensuring that there are toilets that disabled people can access without difficulty is essential. Wherever possible, people with disabilities would like sufficient blue badge parking close to the building and the

accessible toilets close to that parking. Wherever the accessible toilets are situated, they need good signage to help disabled people find them quickly.

It goes without saying that keeping the toilets well maintained, fully supplied with paper, soap and towels, and spotlessly clean is a low-cost way of keeping users satisfied.



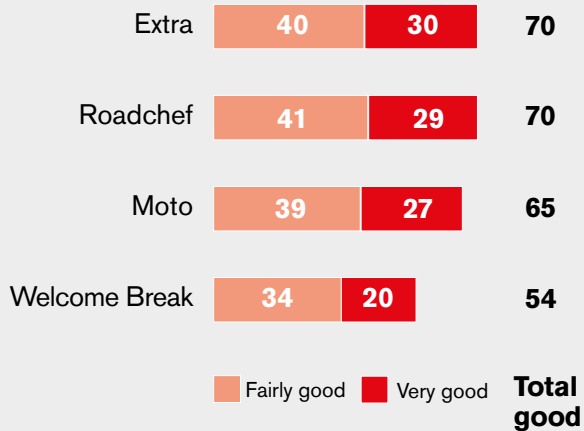
Food and drink

Users are largely happy with the food that is available to eat in the services or to buy and eat in the car. But they are less likely to perceive that it is good value for money. To put this in context, nearly two thirds (64 per cent) do think the food to eat in is good value and more than half (57 per cent) think the takeaway food is good value.

There is a difference in perceptions of value for money by operator, which could relate to the brands that are on site. Users are constrained by the choices that are available, so offering a range of brands at different price points can help to improve perceptions of value. The pattern is the same for food bought to eat in their vehicles.

Having said this, as the cost-of-living crisis continues to affect consumers, users may start to pay more attention to value for money. 27 per cent of users said they are restricting days out and going to fewer places, 15 per cent are using their vehicle less and 22 per cent are going on holiday less – all of which may have an impact on MSAs.

Value for money of food and drink to eat in by operator (%)



Base: All answering, all MSAs (3440), Extra (203), Moto (1390), Roadchef (904), Welcome Break (943)

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

“There wasn’t much choice of food, just fast food and things that are bad for you. Would be good to have healthy options. Not all bread-based items e.g. omelette, salad, fresh soup, cooked breakfast.”

“It would be good to have more gluten free food and drink options available. There were multiple hot food vendors there and there was not a single thing I could eat due to being coeliac. It would be good if there was better catering for allergies and intolerances.”



Electric vehicle charging

EV users' scores are similar to last year, with the biggest change being in how users rate the value for money, which has dropped from 68 per cent saying 'good' in 2022 to 55 per cent this year. Some users asked for the etiquette around usage to be made clear – how to queue and when to use the fast chargers, for example.

There can also be an issue with signage on the approach to the MSA – users don't always know whether an MSA will have charging facilities available. Nearly four fifths of users are happy with wait times – but as some users point out, if wait times creep up, users are at risk of exceeding maximum free parking times at the MSA. It is also critical to ensure that the chargepoints are in working order as people depend on them.

"Only one electric charge point and the AC point did not work. Considering the amount of electric cars on the road now I would have expected many more."

"They need more charger points, we've to wait one hour forty-five and we will probably get charged for parking more than two hours in the carpark."

HGV facilities

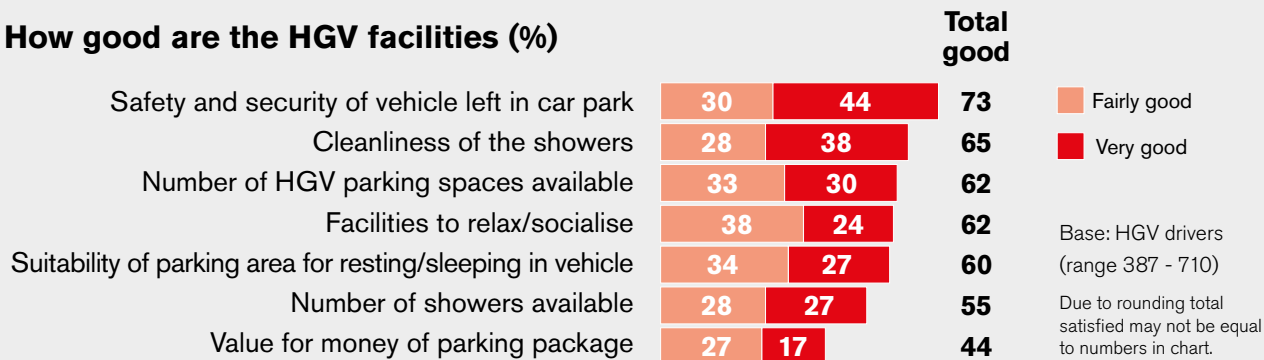
HGV drivers have different needs to other customers. They must stop to comply with driving regulations, and they are often stopping to park overnight, wash, eat their main meal and sleep.

HGV facilities score considerably lower than any other elements in the survey. Their comments suggest that they often feel like the HGV facilities are an afterthought – crowded, poorly maintained, too far from the main services and left to fill up with cars and coaches. HGV drivers are also likely to be using the MSA much later in the evening

than many other customers, and although it is not realistic for MSAs to keep all of the facilities open 24 hours a day, they would like to get a hot, healthy meal when they arrive and have a separate space to relax.

There are concerns about security, how the parking area is managed, and noise at night. 73 per cent of HGV drivers said that safety and security of leaving their vehicle was good, as compared to 87 per cent of users overall. There are also issues with cars, caravans and coaches parking in the HGV area.

How good are the HGV facilities (%)



"Drivers arriving late evening or early hours are very limited on food available. After driving long hours it would be nice to get a hot meal instead of snacks from the outlet open."

"The HGV parking area is terrible. Big ruts. Easy to trip in the dark."

"Would like somewhere to get some proper freshly cooked dinner instead of fast food."



Going above and beyond

How can MSAs improve from good to great? We asked a set of questions designed to understand to what extent users' experiences had been exceptional. Overall, 53 per cent of users who gave an answer, felt there had been care taken to understand their needs, 51 per cent felt valued, 40 per cent felt that the MSA had gone 'above and beyond' usual service and 39 per cent had received useful advice.

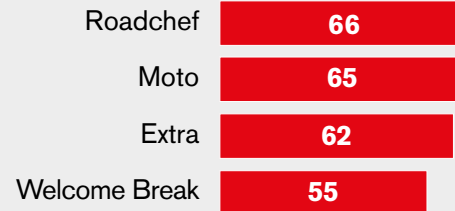
There was some difference between operators, with Roadchef visitors being the most likely to say that they had experienced one or more exceptional experience.

Visitors who had one or more of these experiences were more likely to be satisfied with their visit overall, and more likely to say they would recommend the MSA to others.

"It's simple things like they put the milk in my tea and put the lid on."

"The staff in M&S went above & beyond. Good old-fashioned service with a smile. The lady was really helpful with the self checkout as I'm not too familiar with this. Nothing was too much trouble."

Proportion of visitors reporting 'exceptional' experiences by MSA operator (%)



Base: All answering, all MSAs (5059), Extra (294), Moto (2067), Roadchef (1167), Welcome Break (1431)

It is possible that some of these experiences come from the facilities available and the look and feel of the MSA itself. For example, if there are good, clean accessible toilets available, this might make someone with a disability feel valued. And shiny, newly built MSAs can give a great first impression. However, regardless of the condition of the site, it is the staff that really count when it comes to delighting customers. When users were asked what they had liked about the MSA, the comments overwhelmingly indicated that it was good service and friendly, helpful staff that had made the difference.

“The staff I came into contact with were really friendly and helpful. I was tired and they offered to bring over my drinks and food once I’d paid. I’m always made to feel very welcome at this Costa which is why I always use this particular services.”

“The toilets were quite unpleasant, not clean and lots out of order. Cleanliness in the toilets is really important. I actively avoid services that I know have had dirty toilets on a previous visit.”

Conversely, some of the things that made customers unhappy included rude staff (although this was rare) and failures by staff to maintain high standards, such as dirty toilets, litter or dirty tables in the seating area.

It may be that at busy times staff have to prioritise serving customers rather than clearing tables and keeping areas clean. Or it may be that there are training issues and staff don’t have the skills and experience to delight customers. Either way, staff are the greatest asset the MSA has and can make all the difference between a good and a bad user experience.

The impact of MSAs

Why is all this focus on MSA performance so important? MSAs play a vital role in the lives of road users and when people have a good experience it can lift their mood and send them off rejuvenated and ready to face the rest of their journey. Driving when tired is dangerous and stopping at an MSA for a rest can quite literally save lives. The best evidence for this comes from asking people about their feelings on entering the MSA and then again on leaving.

The experience at the MSA can influence general mood both positively and negatively. 45 per cent of those who were satisfied with their visit had an improved mood (from negative or neutral to positive or neutral), and only three percent left in a more negative mood than when they arrived. Yet among all those who were dissatisfied with their visit, around a third left in a more negative mood than when they arrived. MSA operators must reflect on what they can do to ensure every user is rejoining the road in a better mood than when they stopped.







Summary and conclusions

MSAs are already doing a great job at the overall level. It is at the individual level that there is room for improvement. This research has highlighted the following key areas that individual MSAs can leverage to improve their satisfaction scores among their users.

Toilets

As around a third of people stop specifically so they can use the toilets, and 82 per cent use them during a visit, toilets are a key driver of satisfaction and can set the tone of the visit for all elements of the site. Toilets should be a priority for investment if they are old and need refurbishment, if there are not sufficient for the site so there are queues, and if there are too few disabled toilets or they are not easily accessible. If there is no budget to increase or improve the toilets, much can be done at little or no cost. A razor-sharp focus on cleanliness and upkeep will improve satisfaction, for example, making sure the toilet paper and soap are always topped up, paper towels are available if used, bins are emptied, and the area smells fresh and clean.

Food

In general, users perceive the food as good. The gripes are around value for money and variety, with users requesting healthier food items and more options for those with dietary restrictions. For MSA operators, the key to keeping users happy will be to ensure that there is

sufficient variety offered by a range of brands at a range of price points.

HGV facilities

These can often feel like an afterthought, and it may be that investment needs to be prioritised. Some operators have successfully applied for match funding from National Highways and the Department for Transport, which could help to accelerate improvements. At the least, HGV drivers should be able to find clean facilities, lack of potholes, secure parking and access to a range of food choices – some have suggested a dedicated relaxation area and a cafeteria-style food outlet that is open late. Ideally there should be an attempt to manage the parking area and discourage other vehicles from using it – caravans and coaches need their own spaces too.

Electric vehicle facilities

Improving waiting times and charging speeds - as demand and expectations increase - is one of the challenges the industry faces. The roll out of the

government's Rapid Charging Fund and operators own efforts to improve EV facilities both play a vital role in responding. One of the changes that operators can make now is to improve the information available: better signage on approach and on site would help people to find the chargers when needed, and clear instructions about how to use them and the etiquette expected would help to manage users' expectations and prevent conflict. As with the toilets, keeping the charging points well maintained is paramount. Operators could consider extending free parking if chargepoints are busy.

Staff

As stated earlier, staff are a key asset and driver of satisfaction. Operators can increase satisfaction by ensuring that staff are supported to do more than just the basics, making sure that the MSA is free from litter, eating areas are clean and tables cleared regularly, and the toilets are stocked with paper and soap. Sufficient staffing is key, and staff training may also be required to help them deal with difficult situations and maintain visible, friendly and helpful customer service.

Feeling valued

It is apparent from this report that MSAs have to serve a diverse range of users, all with different needs. We know that MSAs do a great job for the majority of people so it might seem that there is little scope for improvement. However, the survey also reveals the extra touches and the nuances of service that can make users' experiences exceptionally good.

Recognising this diversity is essential and the key to delivering great experiences is to ensure that all users feel valued – not just the 51 per cent who currently say they do – and that their needs are being taken into account. The more operators can offer a wide variety of services and choices, the more likely it is that every user will find something suitable for them. But most importantly, a smile costs nothing and MSA staff can make all the difference between users being dissatisfied or having a good experience and leaving refreshed, relaxed and ready to continue their journeys.



What we did

MSUS 2023 covered 120 MSAs across England (107), Scotland (seven) and Wales (six). Fieldwork ran from 17 May to 11 July 2023. MSUS 2023 repeated the method we developed in 2022. The data collection was split into two elements:

1. Key metrics: face to face interview at the MSA to provide robust scores at the site level.

- 30,774 visitors across 120 MSAs.
- Conducted by interviewers using tablet devices to interview visitors upon exit, covered three key metrics: overall satisfaction, Net Promoter Score (NPS) and satisfaction with toilets.

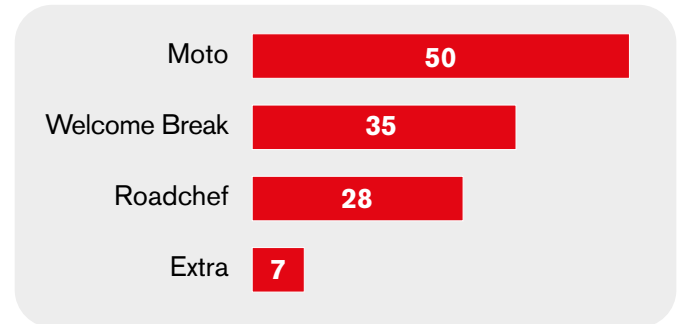
2. Detailed experience survey: done either online after the journey or on site with the interviewer to obtain insight into a range of other measures.

- 5700 visitors across 120 MSAs.
- After the key metrics interview, users were asked to answer additional questions online (invitation by SMS, email, QR code) or by taking another 10 minutes with the interviewer on the tablet.

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

Westmorland, Euro Garages and Stop 24 chose not to take part.

Number of MSAs covered in this report per operator



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www.transportfocus.org.uk

Transport Focus is the operating name of the Passengers' Council

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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.



