
MSUS overall report 2023

October 2023

transportfocus 

 **BVA** BDRC



Contents

• Background and methodology	3
• Key findings	6
• Part 1 – Key metrics	9
• Overall satisfaction	9
• Recommendation of MSA	15
• Satisfaction with toilet	20

• Part 2 – Detailed experience	26
• Experience for users with impairment	27
• Reason for stopping at MSA	31
• Arrival at MSA	35
• What visitors did at MSA	39
• Experience with facilities	41

• Experience with food and drinks	50
• Mood on arrival and exit	64
• Epic experience	69
• Improvements	76
• Respondent profile	82
• Appendix	89



Background and methodology



Background

Background

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

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

Transport Focus engaged BVA BDRC to conduct the survey of user satisfaction with MSAs in England, Scotland and Wales.

Key objectives:

- Measure user satisfaction across all MSAs at overall level and specifically around provision and standard of facilities
- Identify changes in satisfaction over time
- Identify what MSAs can do to improve the user experience and define what makes exceptional experiences

A two-stage approach

A two-stage approach

Overall, MSUS 2023 covered 120 MSAs across England (107), Scotland (7) and Wales (6).

Fieldwork ran between 17 May - 11 July 2023. Individual MSAs equally weighted within the data, meaning each site counts equally towards overall results.

Number of MSAs covered in this report per operator

 7

 28

 50

 35

A two-part survey

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 (detailed experience).

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 interviewers 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 5 x 6.5 hour interview shifts were completed at each individual MSA in 2023.

Across the 120 MSAs we collected 30,774 key metrics surveys.

2

Detailed experience

After the key metrics interview, users were invited via their preferred method (SMS, email, QR code) to answer additional questions online, or by taking another 10 minutes with the interviewer on the tablet.

Across the 120 MSAs we collected 5,700 detailed experience surveys.

Key findings



Key findings from the three key metrics

Overall satisfaction

- 94% of MSA visitors were satisfied with their overall experience, with 63% being 'very satisfied'. In 2022, 93% were satisfied and 61% very satisfied.
- Extra achieved the highest satisfaction rating at 96%. The other three operators closely followed, all with a satisfaction rate of 94%. Notably, Welcome Break achieved the largest year-on-year improvement, with an increase of 3 percentage points. Professional and HGV drivers showed relatively lower levels of satisfaction compared to these groups.
- Younger visitors (aged 16 to 34) had the highest levels of satisfaction at 96% satisfied. While older (55+) and disabled visitors reported slightly lower overall satisfaction, both at 93%.

Net Promoter Score

- The overall NPS for all MSAs is +38, representing an increase of 3 points compared to 2022. 52% of visitors are 'Promoters,' while 13% are categorised as 'Detractors.'
- Extra has the highest NPS (+54), then Roadchef, Moto, and Welcome Break have NPS scores ranging from +36 to +40.
- The highest NPS is among Leisure visitors. In contrast, HGV drivers, while showing an improvement of +5 points vs. 2022, still give the lowest NPS at +29.
- There is a clear correlation between the time spent at the MSA and NPS. Visitors who spend more time tend to give higher NPS ratings.

Satisfaction with toilets

- 82% of MSA visitors used the toilet facilities during their visit.
- 92% of visitors were satisfied with the toilets, a 3 percentage point improvement on 2022.
- Extra is the highest operator with 93% satisfied. All operators score more than 90% this year.
- Moto and Welcome Break contributed significantly to the overall increase, with improvements of +4 and +6 percentage points respectively on 2022.
- Professionals, HGV drivers, and Disabled visitors reported relatively lower levels of satisfaction with the toilets.

Main findings from detailed survey

Detailed satisfaction with MSAs

- The majority of MSA visitors are satisfied with the clarity of approach signs, the road surfaces in the MSAs and layout of the parking area. Safety and security of the vehicle once parked and overall impression of the building walking up to it, received higher ratings than in 2022.
- Ratings for cleanliness, outdoor seating, and the range of facilities available have improved by around 3% points since 2022.
- Visitors' experiences with EV charging facilities at MSAs are generally positive. There has been a decline in satisfaction compared to 2022, on value for money.
- HGV facilities consistently receive lower ratings compared to other aspects.
- There is room for improvement on the service offered to users who have a disability. A third do not think the MSA catered well for their impairment.

Food and drinks

- Visitors consistently rate food and drink aspects at MSAs well, with top ratings for the availability of seating (for eating in) and the friendliness and helpfulness of the staff. These aspects are also showing year-on-year improvement.
- However, perceptions of value for money are lower for both eating in and takeout options
- Costa Coffee emerges as the most used brand or food and drink purchases across the MSA network.
- The experience of using self-serve touchscreen machines or apps for ordering is mostly rated as better or the same as over the counter, for those choosing this method.

Other findings

- Generally, stopping at an MSA improves a visitor's mood. 30% arrived feeling stressed, tired or frustrated, but only 5% left feeling this way.
- 62% experienced one or more of these factors which are linked to NPS and satisfaction with visit:
 - went above and beyond the usual level of service
 - made you feel valued
 - Took care to fully understand your needs
 - Provided you with helpful advice
- 18% noticed efforts to reduce environmental impact at the MSA.



Key metrics: Overall satisfaction with MSAs



Overall satisfaction

Summary (%)

Total satisfied with all MSA sites 2023
(very + fairly satisfied %)



● Total satisfied 2023

Total satisfied with all MSA sites 2022
(very plus + fairly satisfied %)



● Total satisfied 2022



Very satisfied



Fairly satisfied



Neither



Fairly dissatisfied



Very dissatisfied



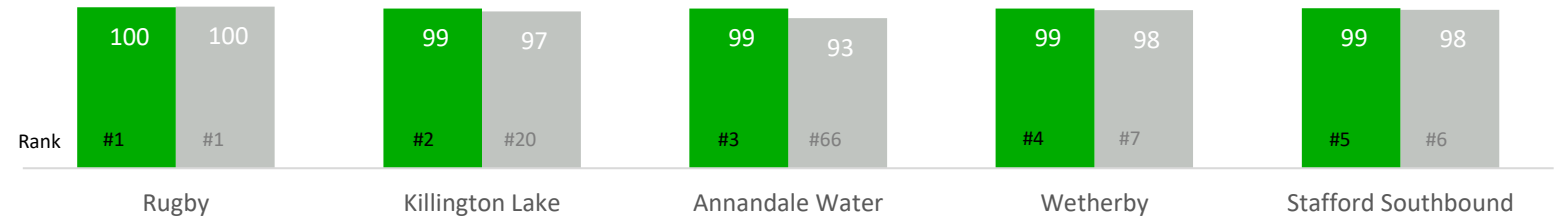
Overall satisfaction

Summary (%)

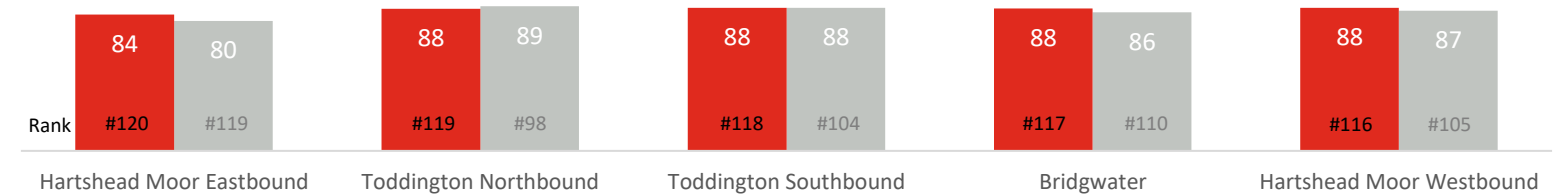
Total satisfied with all MSA sites 2023 (%)



Highest rated MSAs



Lowest rated MSAs



*Ranks show top 5 and bottom 5 individual sites compared to their rank last year

Overall satisfaction

Operator comparison

Visitors' satisfaction
across operators (%)

Overall
satisfaction (%)

All MSAs
2023 2022
94 93

EXTRA

2023
2022



96
96

moto

2023
2022



94
93

roadchef

2023
2022



94
94

Welcome Break

2023
2022



94
91

● Fairly satisfied ● Very satisfied

Total satisfied

Overall satisfaction (1/2)

Overall
satisfaction (%)

All MSAs
2023 2022
94 93

All MSAs across GB

Total satisfied (%)

	2023	2022		2023	2022		2023	2022		2023	2022
1 Rugby	100	100	16 Birch Westbound	97	97	31 Tibshelf Southbound	96	97	46 Telford	95	90
2 Killington Lake	99	97	17 Frankley Northbound	97	92	32 South Mimms	96	95	47 Durham	95	95
3 Annandale Water	99	93	18 Trowell Northbound	97	95	33 Washington Northbound	96	92	48 Blackburn with Darwen	95	99
4 Wetherby	99	98	19 Medway Westbound	97	97	34 Peterborough	96	98	49 Oxford	95	97
5 Stafford Southbound	99	98	20 Woodall Southbound	97	85	35 Beaconsfield	96	94	50 Baldock	95	96
6 Corley Southbound	99	97	21 Abington	97	91	35 Tamworth	96	88	51 Charnock Richard SB	95	83
7 Chester	99	96	22 Hopwood Park	96	95	37 Fleet Northbound	96	97	51 Strensham Northbound	95	99
8 Reading Eastbound	99	93	23 Woolley Edge Southbound	96	95	38 Hamilton	96	94	53 Leicester Forest East SB	95	94
9 Leeds Skelton Lake	98	96	24 Corley Northbound	96	97	39 Sarn Park	96	97	54 Michaelwood Northbound	95	91
10 Ferrybridge	98	88	25 Heston Westbound	96	94	40 Hilton Park Northbound	95	92	55 Leicester Forest East NB	95	95
11 Donington Park	98	99	26 Birchanger Green	96	83	41 Woolley Edge Northbound	95	84	56 Watford Gap Northbound	95	92
12 Northampton Northbound	98	97	27 Doncaster North	96	95	42 Washington Southbound	95	98	57 Burtonwood	95	94
13 Burton-in-Kendal	98	98	28 Heston Eastbound	96	96	43 Rownhams Westbound	95	94	58 Newport Pagnell NB	95	90
14 Maidstone	98	97	29 Southwaite Southbound	96	91	44 Warwick Southbound	95	84	59 Charnock Richard NB	95	93
15 Reading Westbound	97	97	30 Stirling	96	-	45 Birch Eastbound	95	94	60 Gretna Green	95	88

Overall satisfaction (2/2)

Overall
satisfaction (%)

All MSAs
2023 2022
94 93

All MSAs across GB

Total satisfied (%)

	2023	2022		2023	2022		2023	2022		2023	2022
61 Hilton Park Southbound	94	92	76 Bothwell	94	87	91 Gordano	93	86	106 Knutsford Northbound	91	98
62 Warwick Northbound	94	87	77 Kinross	93	-	92 Leigh Delamere WB	93	93	107 Taunton Deane NB	90	94
63 Watford Gap Southbound	94	95	78 Frankley Southbound	93	85	93 Winchester Southbound	93	96	108 Woodall Northbound	90	87
64 Chieveley	94	97	79 Exeter	93	96	94 Membury Westbound	92	88	109 Newport Pagnell SB	90	89
65 Cullompton	94	95	80 Michaelwood Southbound	93	95	95 Knutsford Southbound	92	89	110 Rownhams Eastbound	90	92
66 Pease Pottage	94	94	81 Southwaite Northbound	93	90	96 Keele Southbound	92	95	111 Membury Eastbound	89	89
67 Cobham	94	93	82 Leigh Delamere Eastbound	93	94	97 Lancaster Northbound	92	92	112 Sandbach Southbound	89	89
68 Winchester Northbound	94	90	83 Magor	93	94	98 Blyth	92	93	113 Cardiff Gate	89	92
69 Strensham Southbound	94	95	84 Sandbach Northbound	93	94	99 Swansea	92	-	114 Sedgemoor Northbound	89	90
70 Tibshelf Northbound	94	96	84 Thurrock	93	93	100 Clacket Lane Westbound	92	95	115 Lancaster Southbound	88	83
71 Pont Abraham	94	93	86 Norton Canes	93	93	101 Clacket Lane Eastbound	92	95	116 Hartshead Moor WB	88	87
72 Stafford Northbound	94	97	87 Northampton Southbound	93	97	102 Sedgemoor Southbound	91	91	117 Bridgwater	88	86
73 Trowell Southbound	94	95	88 Fleet Southbound	93	95	103 Taunton Deane SB	91	92	118 Toddington Southbound	88	88
74 Medway Eastbound	94	99	89 Cherwell Valley	93	96	104 Cardiff West	91	-	119 Toddington Northbound	88	89
75 Severn View	94	89	90 Keele Northbound	93	97	104 London Gateway	91	93	120 Hartshead Moor EB	84	80



Key metrics: likelihood to recommend



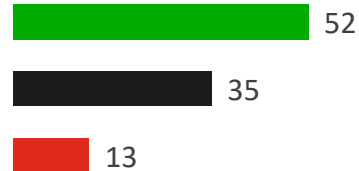
Likelihood to recommend MSA

Summary



Recommendation: Net Promoter Score all MSA sites 2023 (promoters minus detractors)

Overall NPS **38**



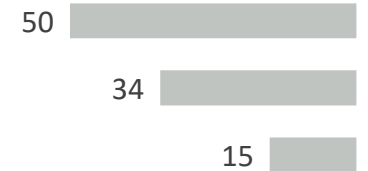
Promoters (9-10)

Passive (7-8)

Detractors (0-6)

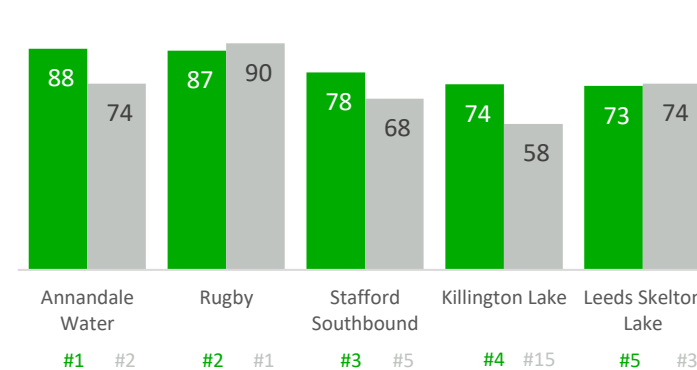
Recommendation: Net Promoter Score all MSA sites 2022 (promoters minus detractors)

35 Overall NPS

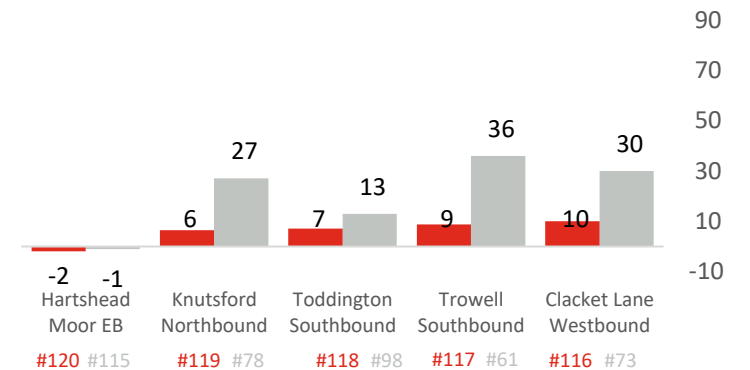


Net Promoter Score (2023 vs 2022)

Highest rated MSAs



Lowest rated MSAs



*Ranks show top 5 and bottom 5 individual sites compared to their rank last year

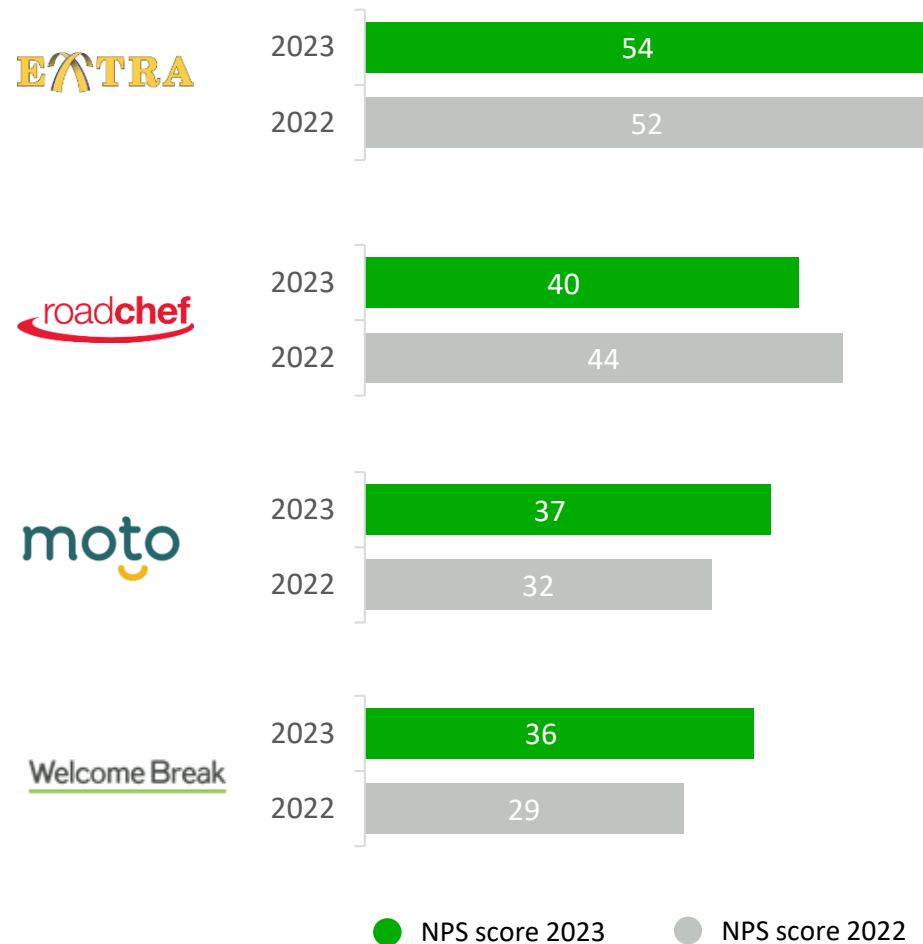
R4. On a scale of 0 to 10, how likely would you be to recommend [name of services] services to someone you know making a similar journey? Base: (2022/2023) All MSAs: (31,252/30,774)

Likelihood to recommend MSA

Operator comparison



Visitors' NPS across operators



Likelihood to recommend MSA (1/2)

All MSAs
NPS Scores
2023 2022
38 35

All MSAs across GB

	2023	2022		2023	2022		2023	2022		2023	2022	Net Promoter Score
1 Annandale Water	88	74	16 Hilton Park Northbound	55	12	31 Donington Park	50	71	46 Tibshelf Southbound	44	51	
2 Rugby	87	90	17 Stirling	54	-	32 Peterborough	50	63	47 Cobham	44	32	
3 Stafford Southbound	78	68	18 Reading Westbound	54	40	33 Doncaster North	49	50	48 Charnock Richard Southbound	43	9	
4 Killington Lake	74	58	19 Baldock	54	50	34 Abington	49	8	48 South Mimms	43	38	
5 Leeds Skelton Lake	73	74	20 Corley Northbound	53	64	35 Gretna Green	49	55	50 Frankley Northbound	42	12	
6 Corley Southbound	64	60	21 Ferrybridge	53	25	36 Woolley Edge Southbound	48	35	51 Maidstone	41	18	
7 Hamilton	62	63	21 Hopwood Park	53	40	37 Durham	47	46	52 Northampton Southbound	40	67	
8 Washington Southbound	60	58	21 Reading Eastbound	53	21	38 Hilton Park Southbound	47	35	53 Cullompton	40	36	
9 Warwick Northbound	59	1	24 Heston Westbound	52	8	39 Exeter	46	57	54 Norton Canes	40	39	
10 Warwick Southbound	58	20	25 Southwaite Southbound	52	25	40 Southwaite Northbound	45	13	55 Newport Pagnell Northbound	40	18	
11 Beaconsfield	58	59	26 Stafford Northbound	52	53	40 Telford	45	22	56 Strensham Northbound	39	58	
12 Birchanger Green	58	11	27 Kinross	52	-	42 Woodall Southbound	45	7	56 Strensham Southbound	39	47	
13 Heston Eastbound	57	24	28 Northampton Northbound	52	46	43 Burton-in-Kendal	45	50	58 Birch Westbound	39	38	
14 Blackburn with Darwen	56	52	29 Oxford	51	45	43 Rownhams Westbound	45	52	58 Leigh Delamere Eastbound	39	42	
15 Wetherby	56	60	30 Chester	51	45	45 Winchester Northbound	45	34	60 Leicester Forest East Northbound	38	19	

(2/2)

NPS Scores

2023 2022

Net Promoter Score

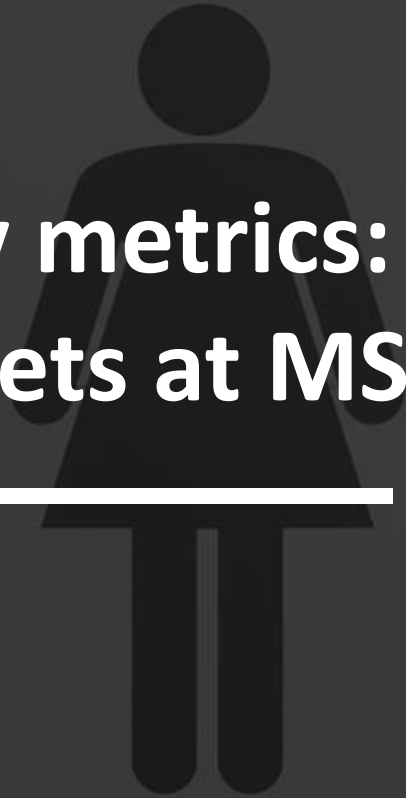
All MSAs across GB

61	Watford Gap Southbound	38	42	75	Washington Northbound	35	38	91	Watford Gap Northbound	27	34	106	Membury Eastbound	17	26
62	Michaelwood Northbound	38	37	77	Woolley Edge Northbound	35	9	92	Swansea	27	-	107	Sandbach Southbound	16	27
63	Magor	38	38	78	Burtonwood	34	61	93	Sedgemoor Southbound	26	25	108	Hartshead Moor Westbound	16	24
64	Lancaster Southbound	37	-12	79	Taunton Deane Northbound	32	44	94	Charnock Richard Northbound	26	23	109	Cardiff Gate	16	21
65	Michaelwood Southbound	37	25	80	Membury Westbound	32	30	95	Thurrock	25	30	110	Sedgemoor Northbound	14	18
66	Tamworth	37	23	81	Keele Northbound	31	52	96	Severn View	24	21	111	London Gateway	14	5
67	Pont Abraham	37	33	82	Fleet Northbound	31	54	97	Newport Pagnell Southbound	24	9	112	Winchester Southbound	13	45
68	Medway Westbound	37	37	83	Pease Pottage	30	46	98	Clacket Lane Eastbound	22	35	113	Toddington Northbound	12	10
69	Bothwell	36	5	83	Tibshelf Northbound	30	45	99	Keele Southbound	21	50	114	Knutsford Southbound	11	-2
70	Leicester Forest East Southbound	36	50	85	Birch Eastbound	30	43	100	Woodall Northbound	21	4	115	Bridgwater	10	-2
71	Cherwell Valley	36	27	86	Frankley Southbound	30	-16	101	Cardiff West	21	-	116	Clacket Lane Westbound	10	30
71	Lancaster Northbound	36	29	86	Leigh Delamere Westbound	30	40	102	Medway Eastbound	19	41	117	Trowell Southbound	9	36
73	Fleet Southbound	36	48	88	Taunton Deane Southbound	29	49	103	Rownhams Eastbound	19	48	118	Toddington Southbound	7	13
74	Chieveley	36	55	89	Trowell Northbound	29	53	104	Blyth	18	30	119	Knutsford Northbound	6	27
75	Gordano	35	8	90	Sarn Park	28	47	104	Sandbach Northbound	18	35	120	Hartshead Moor Eastbound	-2	-1

R4 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? Base: (2022/2023) All MSAs (31,252/30,774)



Key metrics: satisfaction with toilets at MSAs



Satisfaction with the toilets

Summary (%)

Total satisfied with MSA toilets overall 2023 (%)
(very + fairly satisfied %)



Very satisfied

Fairly satisfied

Neither

Fairly dissatisfied

Very dissatisfied

Total satisfied with MSA toilets overall 2022 (%)
(very + fairly satisfied %)



59

30

5

4

3

Satisfaction with the toilets

Summary (%)

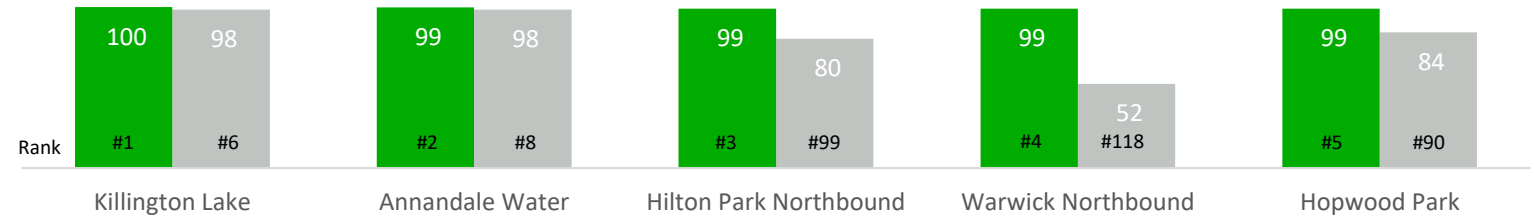
Total satisfaction with MSA toilets 2023 (%)



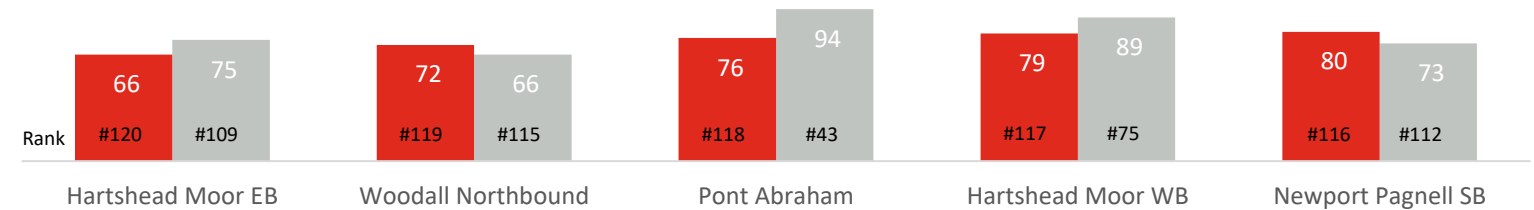
2023
92%

2022
88%

Highest rated MSAs



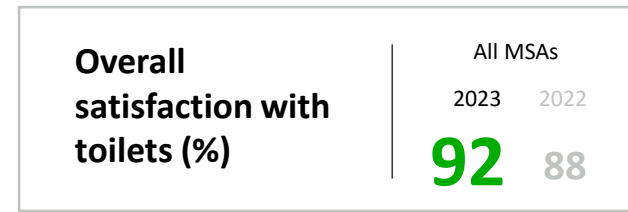
Lowest rated MSAs



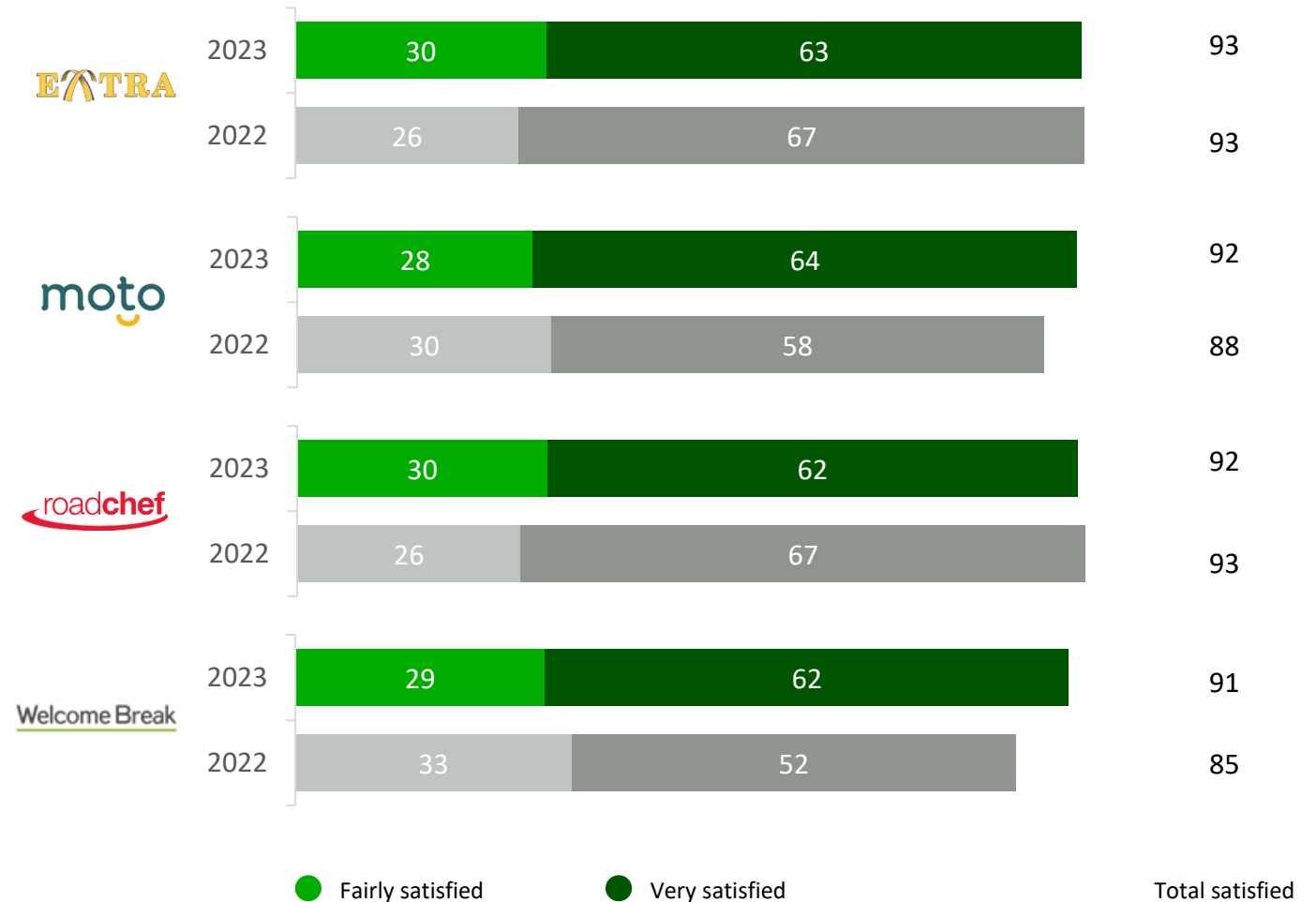
*Ranks show top 5 and bottom 5 individual sites compared to their rank last year

Satisfaction with the toilets

Operator comparison (%)



Visitors' satisfaction across operators (%)



Satisfaction with the toilets (1/2)

Overall
satisfaction
with toilets (%)

All MSAs
2023 2022
92 88

All MSAs across GB

Total satisfied (%)

	2023	2022		2023	2022		2023	2022		2023	2022
1 Killington Lake	100	98	16 Warwick Southbound	97	52	31 Hilton Park Southbound	95	90	46 Trowell Northbound	94	96
2 Annandale Water	99	98	17 Stafford Southbound	97	95	32 Kinross	95	-	47 Burton-in-Kendal	94	95
3 Hilton Park Northbound	99	80	18 Oxford	97	98	33 Heston Eastbound	95	92	48 Newport Pagnell NB	94	89
4 Hopwood Park	99	84	19 Woolley Edge Southbound	97	83	34 Rownhams Westbound	95	95	49 Burtonwood	94	94
4 Warwick Northbound	99	52	20 Charnock Richard SB	97	83	35 Southwaite Southbound	95	85	50 Hamilton	94	94
6 Corley Southbound	99	95	21 Woolley Edge Northbound	96	80	36 Reading Westbound	95	93	51 Gordano	93	78
7 Medway Westbound	99	98	22 Heston Westbound	96	92	37 Norton Canes	95	95	52 Frankley Northbound	93	79
8 Sarn Park	99	98	23 Donington Park	96	98	38 Winchester Northbound	95	88	53 Washington Northbound	93	90
9 Durham	98	94	24 Reading Eastbound	96	71	39 Peterborough	95	96	54 Tibshelf Northbound	93	95
10 Tibshelf Southbound	98	96	25 South Mimms	96	95	40 Medway Eastbound	95	99	55 Membury Westbound	93	94
11 Bridgwater	98	89	26 Michaelwood Northbound	96	90	41 Abington	95	85	56 Sandbach Northbound	93	94
12 Maidstone	98	99	27 Leicester Forest East SB	96	98	42 Cullompton	94	87	57 Northampton Northbound	93	94
13 Leeds Skelton Lake	97	95	28 Leigh Delamere Eastbound	96	92	43 Southwaite Northbound	94	81	58 Chieveley	93	93
14 Rugby	97	99	29 Wetherby	95	97	44 Magor	94	96	59 Blackburn with Darwen	93	97
15 Birchanger Green	97	49	30 Corley Northbound	95	95	45 Frankley Southbound	94	73	60 Winchester Southbound	93	93

Satisfaction with the toilets (2/2)

Overall
satisfaction
with toilets (%)

All MSAs
2023 2022
92 88



All MSAs across GB

Total satisfied (%)

	2023	2022		2023	2022		2023	2022		2023	2022
61 Gretna Green	93	92	76 Birch Westbound	91	95	91 Beaconsfield	89	91	106 Rownhams Eastbound	86	93
62 Washington Southbound	92	95	77 Keele Southbound	91	95	92 Clacket Lane Westbound	89	96	107 Cherwell Valley	85	89
63 Lancaster Southbound	92	65	78 Doncaster North	90	91	93 Telford	88	92	108 Knutsford Southbound	85	77
64 Chester	92	93	79 Tamworth	90	88	94 Woodall Southbound	88	76	109 Severn View	84	91
65 Keele Northbound	92	94	80 Stafford Northbound	90	96	95 Exeter	88	90	110 Fleet Southbound	84	94
66 Taunton Deane SB	92	93	81 Taunton Deane NB	90	93	96 Cobham	88	93	111 Strensham Southbound	84	88
67 Michaelwood Southbound	92	89	82 Fleet Northbound	90	95	97 Sedgemoor Northbound	88	86	112 Cardiff West	84	-
68 Lancaster Northbound	92	81	83 Bothwell	90	75	98 Membury Eastbound	88	85	113 Toddington Southbound	83	80
69 Baldock	92	91	84 Charnock Richard NB	90	93	99 Knutsford Northbound	88	97	114 Trowell Southbound	83	83
70 Northampton Southbound	92	98	85 Clacket Lane Eastbound	90	93	100 Pease Pottage	87	86	115 London Gateway	81	73
71 Strensham Northbound	92	97	86 Birch Eastbound	89	84	101 Watford Gap Northbound	87	88	116 Newport Pagnell SB	80	73
72 Leicester Forest East NB	92	92	87 Watford Gap Southbound	89	87	102 Sedgemoor Southbound	87	81	117 Hartshead Moor WB	79	89
73 Leigh Delamere WB	92	93	88 Swansea	89	-	103 Blyth	87	83	118 Pont Abraham	76	94
74 Ferrybridge	91	79	89 Sandbach Southbound	89	92	104 Toddington Northbound	87	84	119 Woodall Northbound	72	66
75 Thurrock	91	92	90 Cardiff Gate	89	77	105 Stirling	86	-	120 Hartshead Moor EB	66	75

Detailed experience

Findings from the detailed experience survey



MSAs experience for users with impairment



Overall experience for disabled visitors at MSAs

Findings from detailed experience survey (%)



How well did the MSAs cater for impairment 2023 (%)



Very well



Quite well



Neither well nor poorly



Quite poorly



Very poorly

How well did the MSAs cater for impairment 2022 (%)



34



28



22



11



5

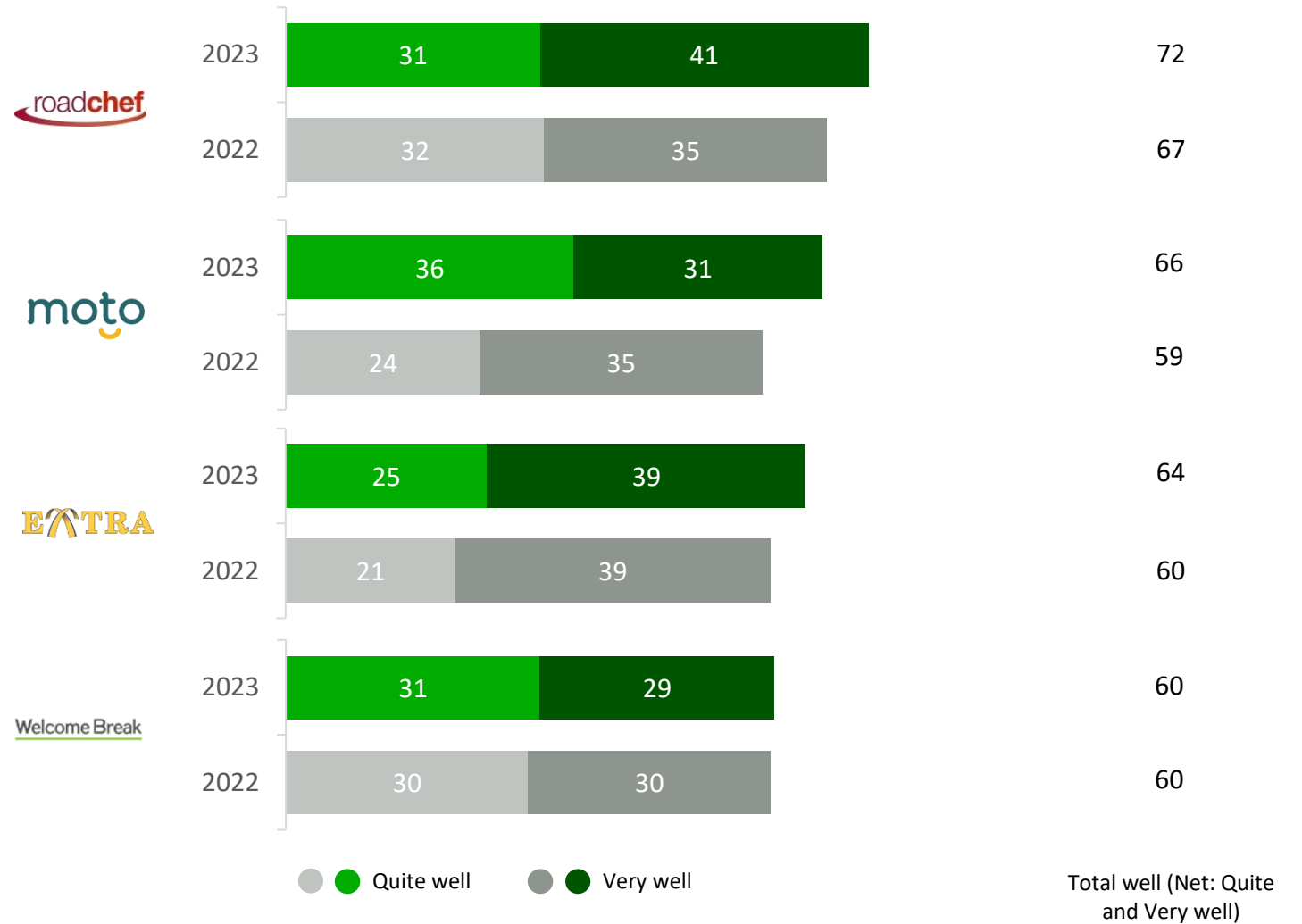


Overall experience for disabled visitors at MSAs

Findings from detailed experience survey (%)



How well impairment is catered for across operators (%)



Q30. How well do you think [MSA] catered for your impairment(s) (or those of the person who was with you)? Base: (2022/2023) Extra: (38*/31*); Roadchef: (148/160); Moto: (201/233); Welcome Break: (106/158) *LOW BASE SIZE

Visitors' opinion on how MSAs catered for their impairment

“

It's a busy and noisy environment. The women's loos are furthest away so you have to navigate around all the entrances to food and retail outlets. It takes a lot for me to focus on where I need to go. I'm not keen on only having the option to order via a tablet and not over the counter. **Chester**

“

There should be a quiet space for those feeling overwhelmed or unable to cope with the foot traffic. **Lancaster Southbound**

“

When you need to put a ramp out to access vehicle you have to put it out into traffic which is not safe. **Peterborough**

“

Toilets a bit too far from the entrance for a person with disabilities. **Michaelwood Northbound**

“

Disabled lift not working. Had to struggle upstairs. Fortunately, a nice man helped me get up the stairs. **Birch Eastbound**

“

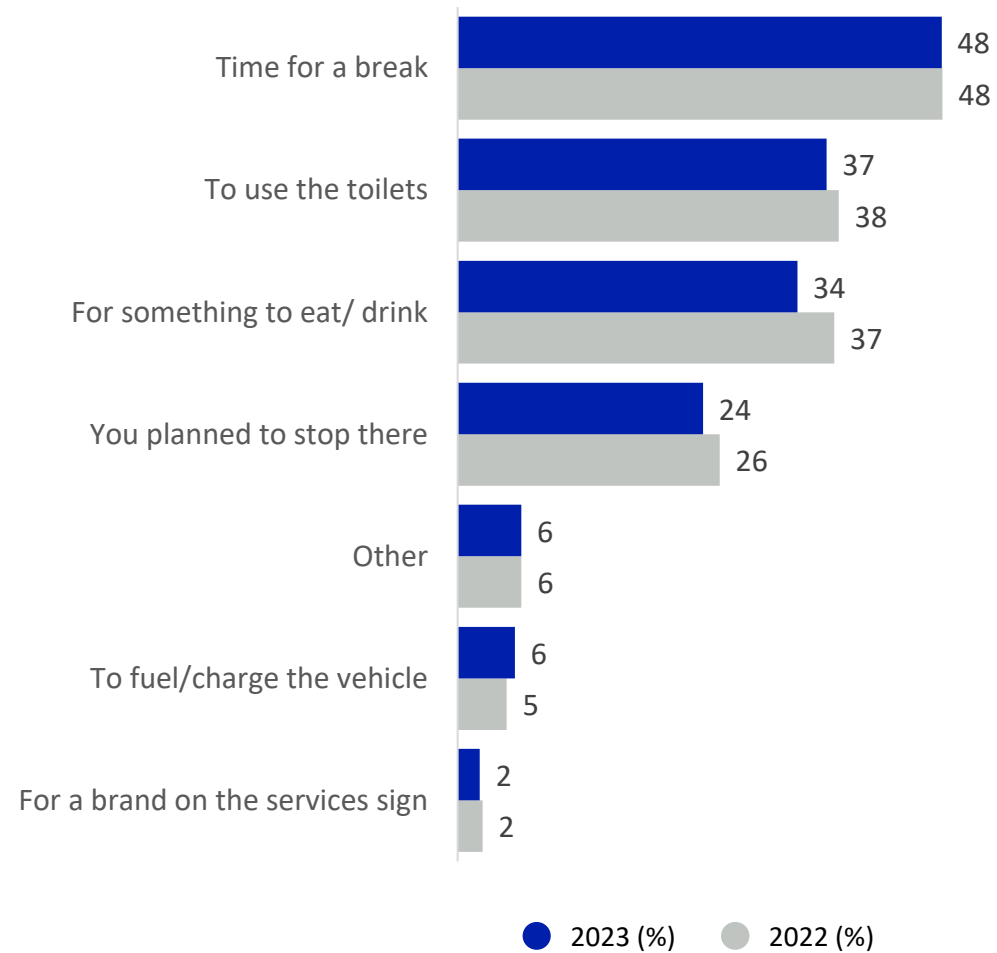
Facilities are good but to get to toilets have to get past queue for food outlets which makes access difficult for wheelchair or crutches. **Tibshelf Southbound**

Reasons for stopping at MSA



Reasons for stopping at MSA

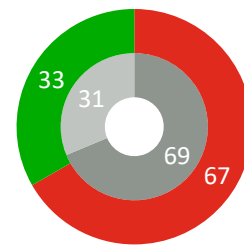
Summary (%)



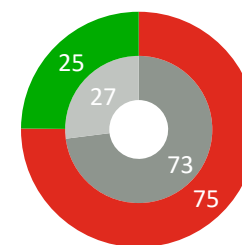
Reasons for stopping at MSAs

Planned to stop - operator comparison (%)

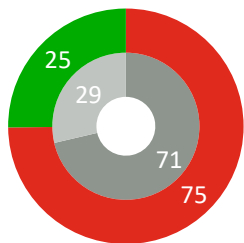
- No – did not plan to stop at a specific MSA 2023
- Yes – planned to stop at a specific MSA 2023
- No - did not plan to stop at a specific MSA 2022
- Yes – planned to stop at a specific MSA 2022



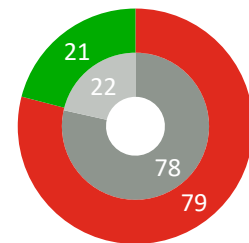
EXTRA



moto



roadchef



Welcome Break

“

Stopped here before and it's clean. **Sedgemoor Southbound**

I've heard great things about this services and thought I would stop to get a coffee and take a break. **Pease Pottage**

Stop here every week on regular journey. Peaceful, comfortable, convenient. **Donington Park**

Convenient, good selection, nice facilities. **Fleet Southbound**

As a lorry driver, I often stay overnight here if I'm in the area and due an overnight break. **Cobham**

Because I knew McDonalds was here. We always stop here, and we needed to charge the car. **Watford Gap Northbound**

It's a convenient point between Gatwick and Birmingham, and has a decent range of eating outlets. **Oxford**

All MSA average

2% stopped at the
(3% 2022) MSA because of a
specific brand

Top 5 brands mentioned (in order of highest mentions)	2023 (%)	2022 (%)
Costa Coffee	18	23
Burger King	14	10
McDonald's	13	17
M&S	13	6
Greggs	10	10

This is not a direct comparison between brands



Arrival at MSA



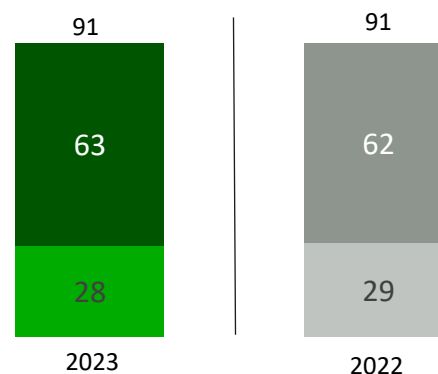
Ratings for approach to MSA (1/3)

Findings from detailed experience
survey (%)



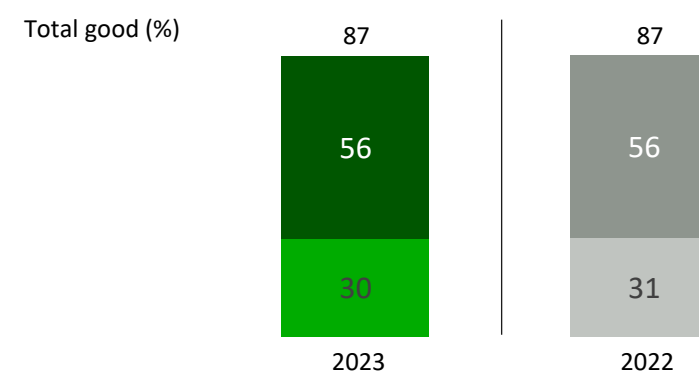
● Very good 2023 ● Very good 2022
● Fairly good 2023 ● Fairly good 2022

The clarity of the approach signs



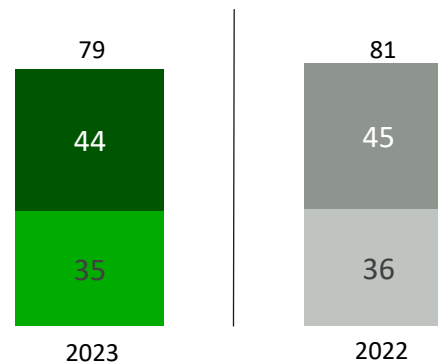
All MSAs

Getting from the slip road to car park



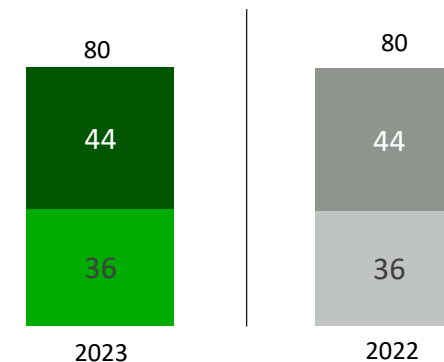
All MSAs

The quality of the road surfaces in the services



All MSAs

The layout of the parking area



All MSAs

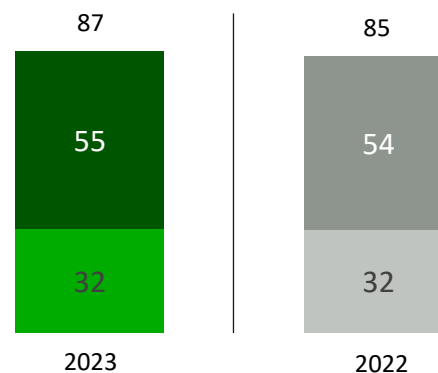
Ratings for approach to MSA (2/3)

Findings from detailed experience
survey (%)



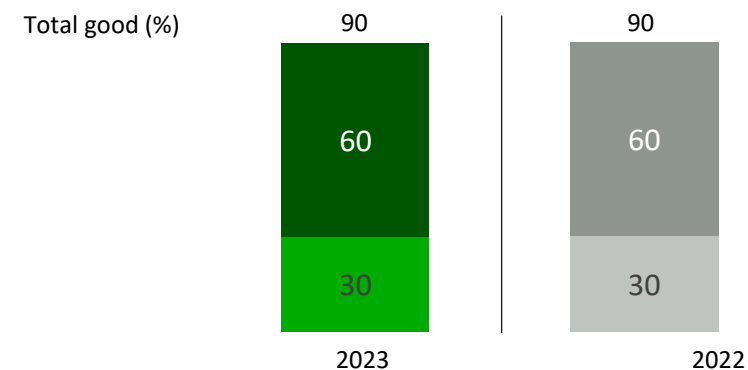
● Very good 2023 ● Very good 2022
● Fairly good 2023 ● Fairly good 2022

The safety and security of vehicle while
left in the car park



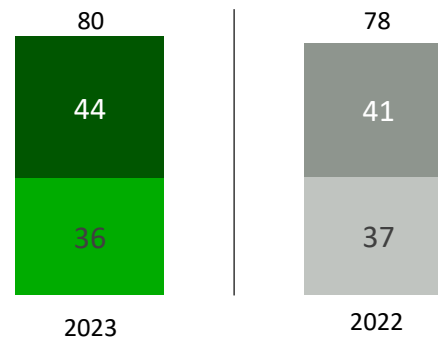
All MSAs

The walk from car park to the building



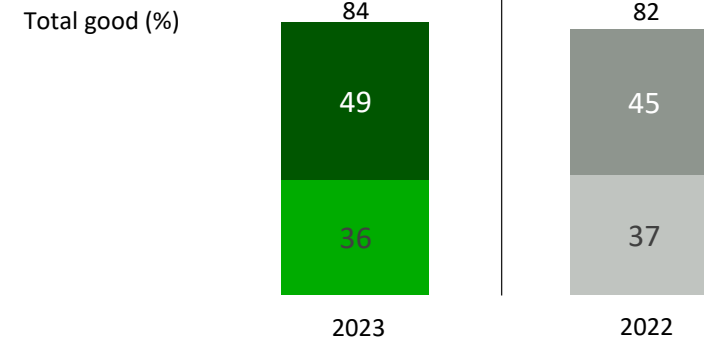
All MSAs

Overall impression of the building walking
to the building



All MSAs

Overall impression of the building
once inside



All MSAs

Ratings for approach to MSA (3/3)

Visitor type



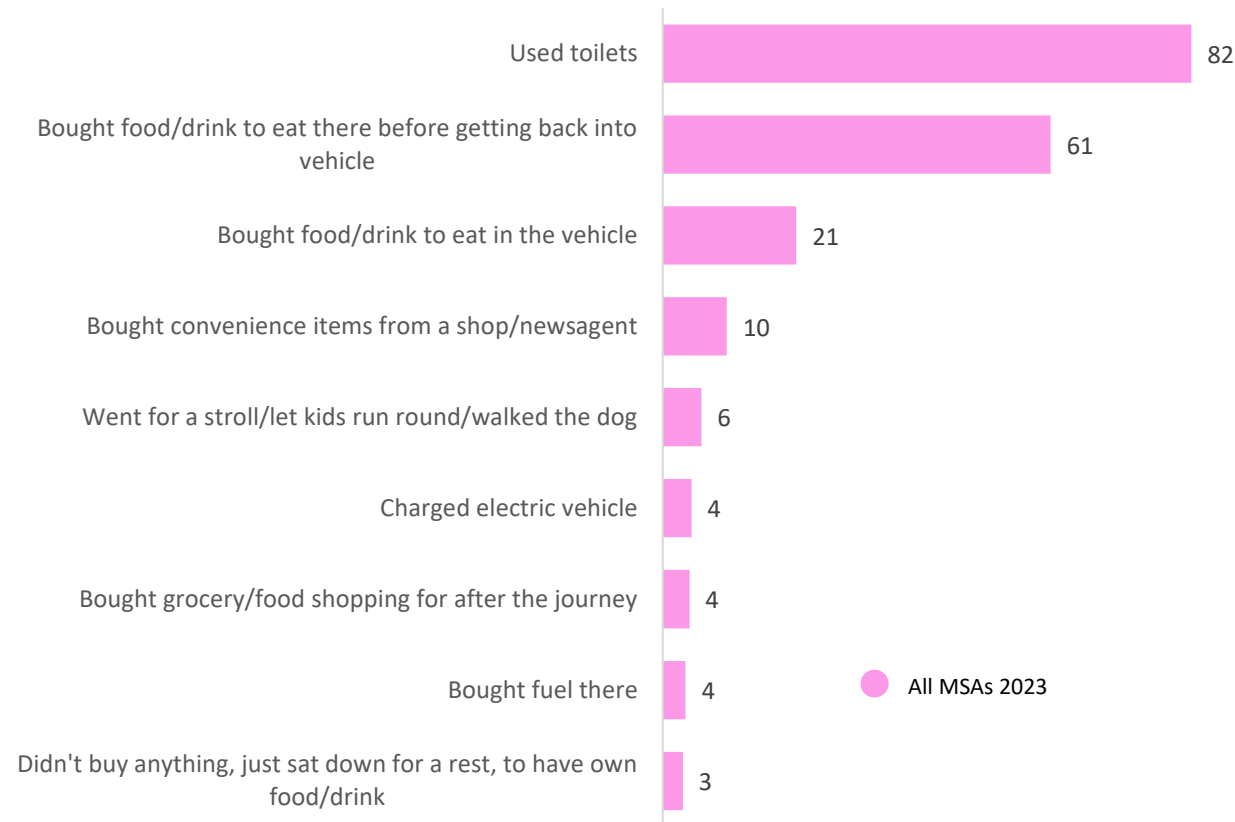
Total good (%)	All MSAs 2023	Leisure	Business	Commuter	Professional	HGV drivers	Disabled visitors
Clarity of approach signs	91	91	90	91	92	91	88
Getting from the slip road to car park	87	87	85	91	86	86	83
The quality of the road surfaces in the services	79	82	76	78	67	65	78
The layout of the parking area	80	82	78	82	72	71	75
The safety and security of vehicle while left in the car park	87	89	88	90	76	74	88
The walk from car park to the building	90	91	90	94	80	79	88
Overall impression of the building walking to the building	80	80	76	80	81	81	78
Overall impression of the building once inside	84	85	80	82	87	87	85

What visitors did at MSA



MSAs visitor type

What visitors did at MSA (%)



● All MSAs 2023

All MSAs 2023 (%)

	Leisure	Business	Commuter	Professional	HGV drivers	Disabled visitors
Used toilets	84	81	67	85	85	81
Bought food/drink to eat there before getting back into vehicle	64	59	55	46	45	62
Bought food/drink to eat in the vehicle	19	24	22	27	28	22
Bought convenience items from a shop/newsagent	10	7	12	10	10	14
Went for a stroll/let kids run round/walked the dog	8	2	4	4	2	9
Charged electric vehicle	4	9	7	1	0	5
Bought grocery/food shopping for after the journey	5	3	4	4	3	5
Bought fuel there	4	3	0	7	8	3
Didn't buy anything, just sat down for a rest, to have own food/drink	3	2	6	5	5	3



Experience with MSA and its facilities



Cleanliness, outdoor seating and range of facilities (1/2)

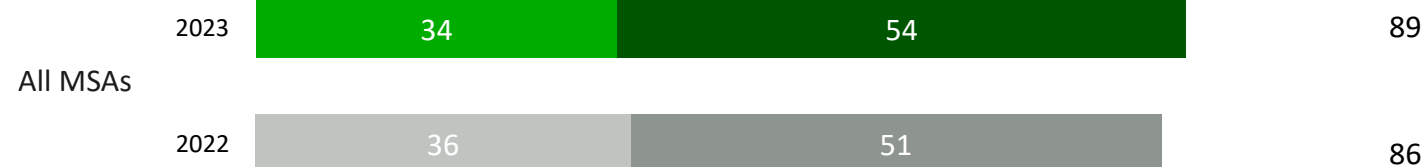
Findings from detailed experience survey (%)

Cleanliness

● Fairly good

● Very good

Total good (%)



Range of facilities



Outdoor seating



Cleanliness, outdoor seating and range of facilities (2/2)

Visitor type

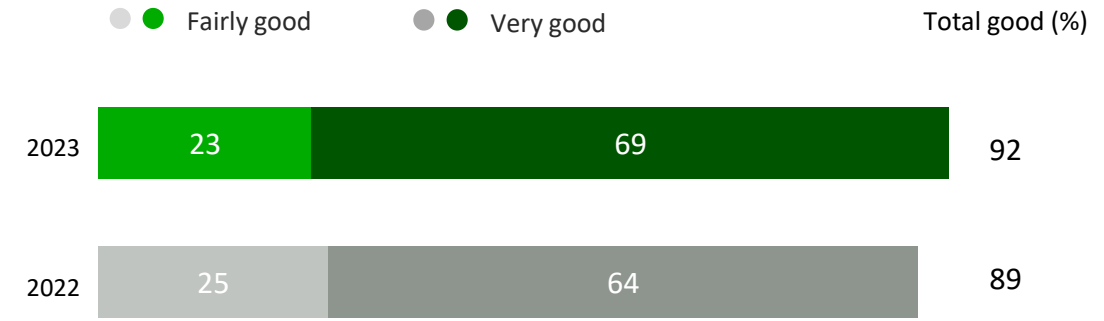
Total good (%)	All MSAs 2023	Leisure	Business	Commuter	Professional	HGV drivers	Disabled visitors
Cleanliness	89	89	86	86	90	89	89
Outdoor seating	78	78	74	79	79	79	77
Range of facilities	83	84	80	81	81	80	81

Toilets (1/2)

Findings from detailed experience survey (%)

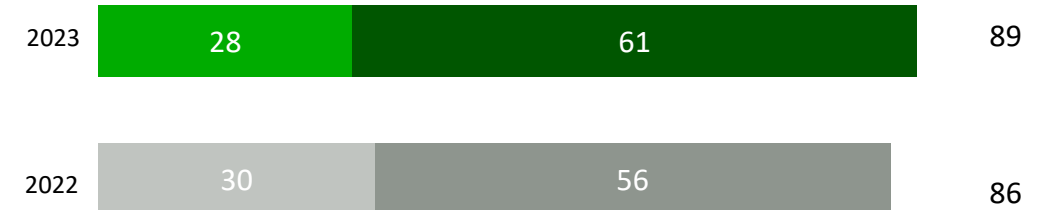
The number of
toilets available

All MSAs



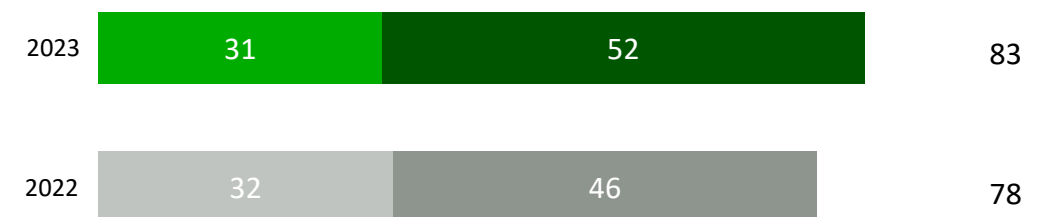
How clean the toilet
facilities were

All MSAs



The quality of the
fixtures/fittings/decor
in the toilet area

All MSAs



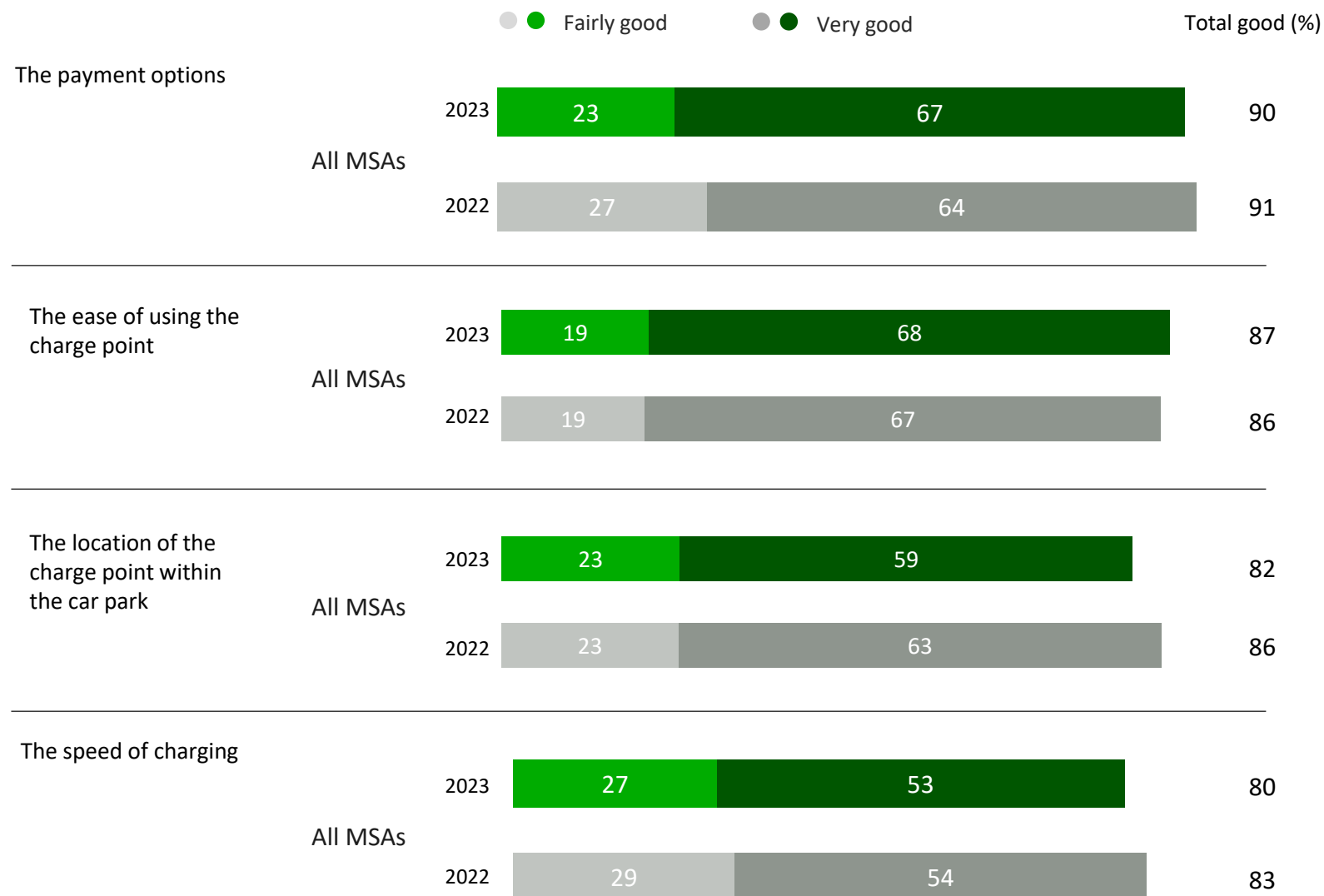
Toilets (2/2)

Visitor type

Total good (%)	All MSAs 2023	Leisure	Business	Commuter	Professional	HGV drivers	Disabled visitors
The number of toilets available	92	93	90	93	88	88	91
How clean the toilet facilities were	89	90	86	84	87	86	88
The quality of the fixtures/fittings/de cor in the toilet area	83	84	81	74	82	81	81

Electric vehicle charging facilities (1/2)

Findings from detailed experience survey (%)



Electric vehicle charging facilities (2/2)

Findings from detailed experience survey (%)

Charging your electric vehicle

● Fairly good

● Very good

Total good (%)

The wait for a charge point

All MSAs

2023



79

2022



78

The information available online about these charging facilities

All MSAs

2023



73

2022



73

The value for money

All MSAs

2023



55

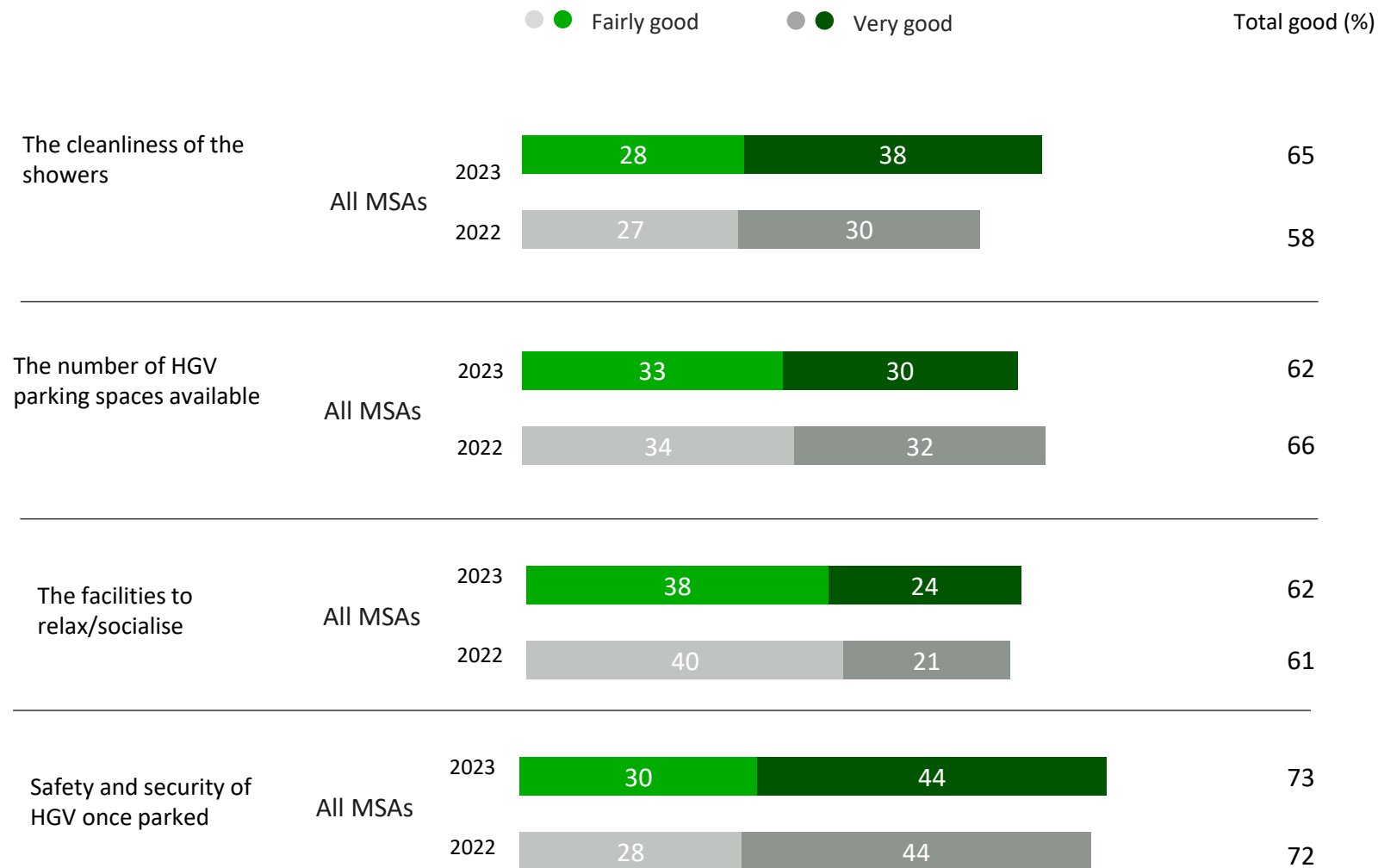
2022



68

HGV facilities (1/2)

Findings from detailed experience survey (%)



HGV facilities (2/2)

Findings from detailed experience survey (%)

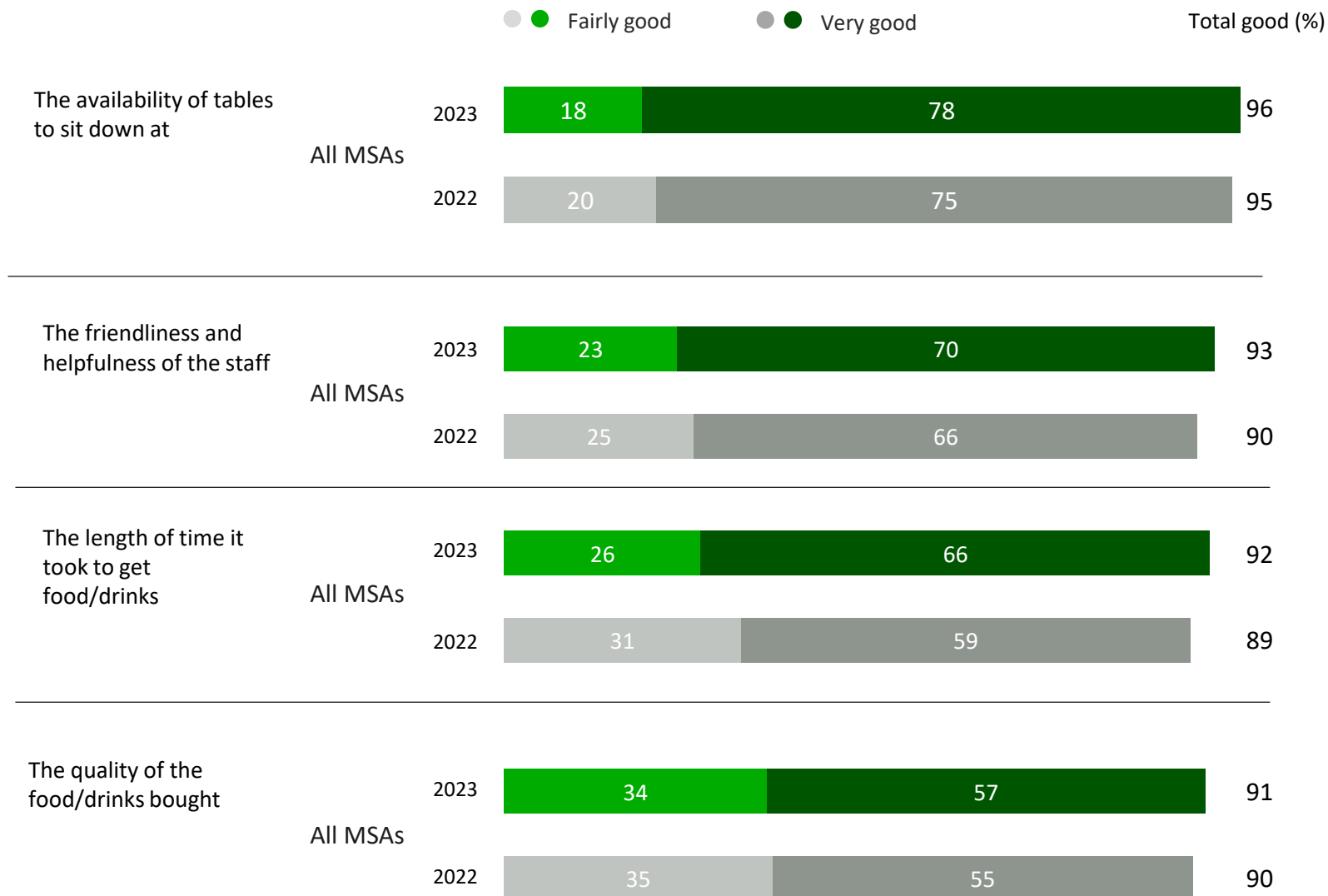


Experience with food and drink facilities at MSA



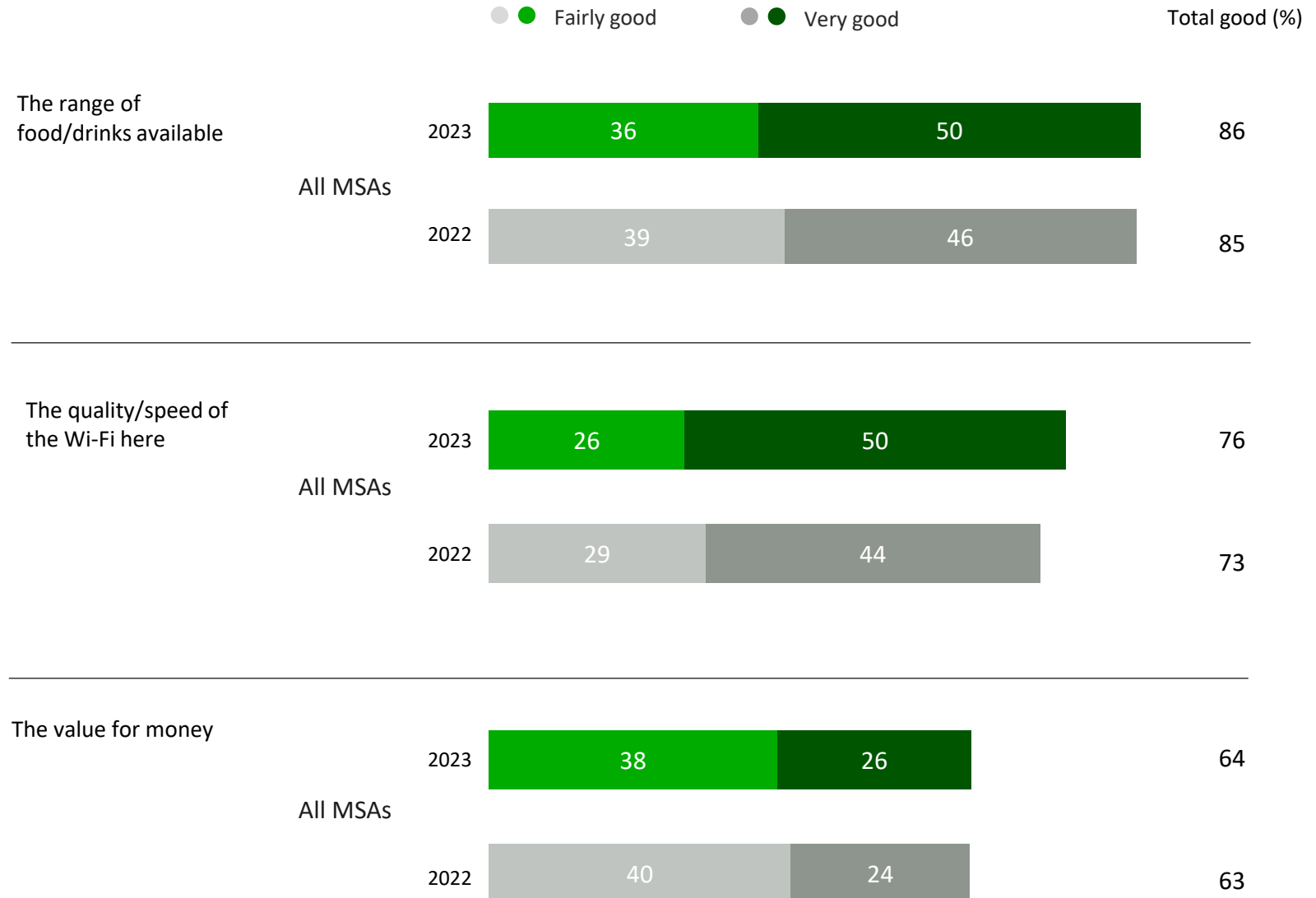
Food and drink bought to have in MSA (1/3)

Findings from detailed experience survey (%)



Food and drink bought to have in MSA (2/3)

Findings from detailed experience survey (%)



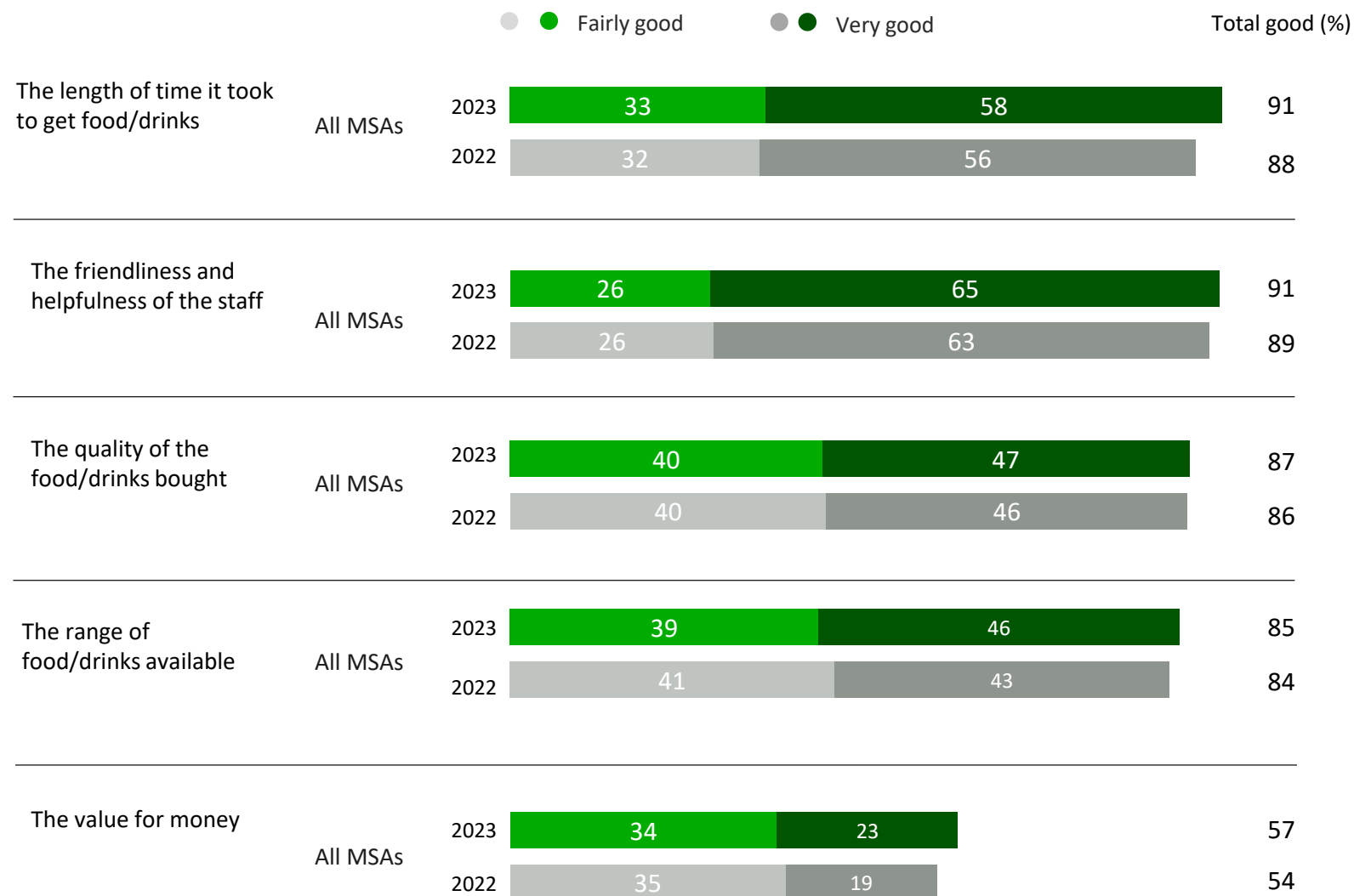
Food and drink bought to have in MSA (3/3)

Visitor type

Total good (%)	All MSAs 2023	Leisure	Business	Commuter	Professional	HGV drivers	Disabled visitors
The range of food/drinks available	86	87	83	88	83	81	86
The quality of the food/drinks bought	91	92	90	93	89	89	92
The length of time it took to get food/drinks	92	92	91	94	94	93	93
The friendliness and helpfulness of the staff	93	92	94	90	95	94	92
The availability of tables to sit down at	96	96	96	97	98	98	94
The value for money	64	65	59	67	59	58	63
The quality/speed of the Wi-Fi here	76	78	72	72	75	75	76

Food and drink to have in the vehicle (1/2)

Findings from detailed experience survey (%)



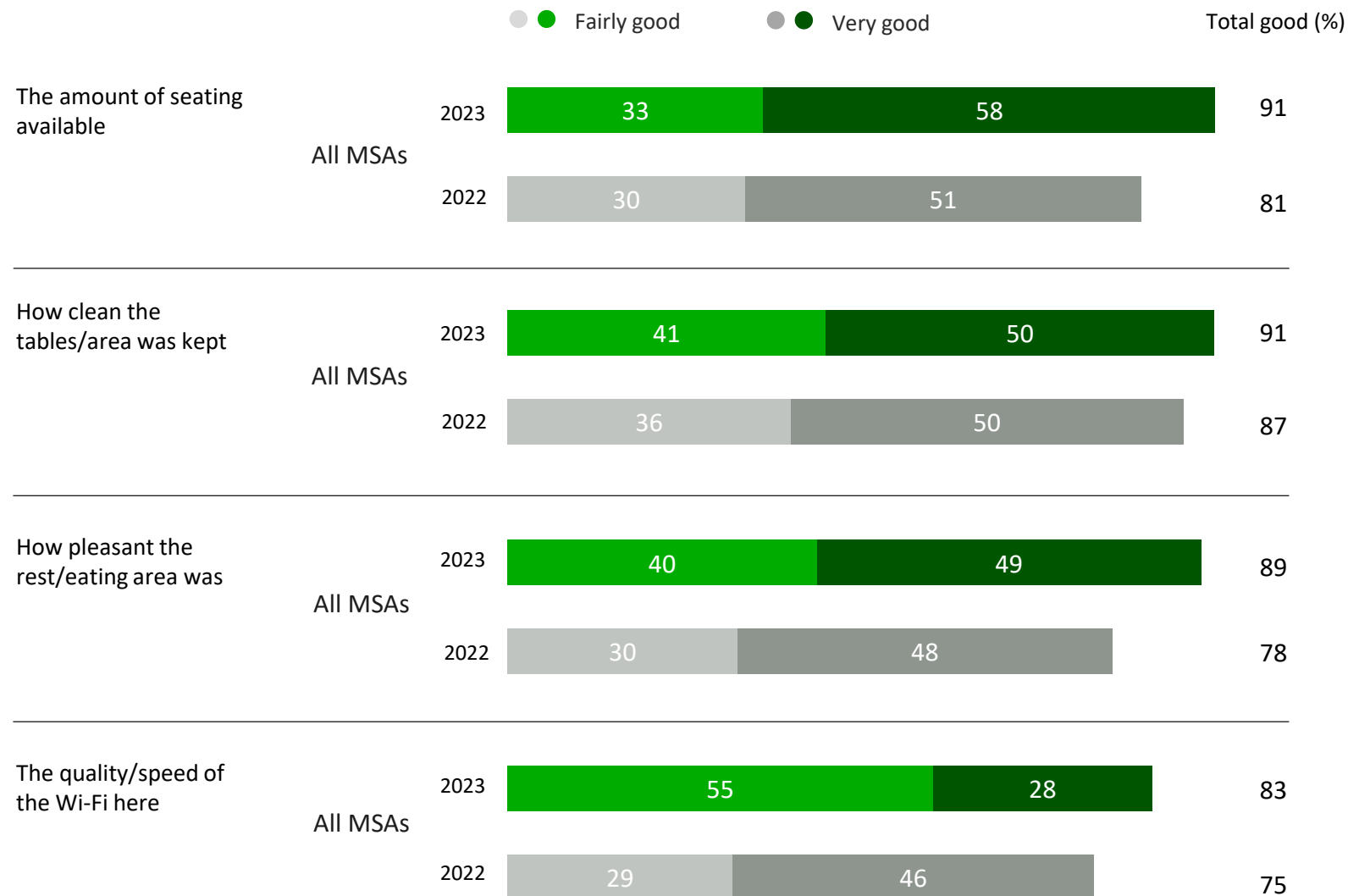
Food and drink to have in the vehicle (2/2)

Visitor type

Total good (%)	All MSAs 2023	Leisure	Business	Commuter	Professional	HGV drivers	Disabled visitors
The range of food/drinks available	85	88	81	78	83	83	86
The length of time it took to get food/drinks	91	91	93	89	90	89	88
The quality of the food/drinks bought	87	88	88		80	77	87
The friendliness and helpfulness of the staff	91	91	89	91	92	92	88
The value for money	57	59	59		48	47	48

Sitting down for a rest, having own food/drinks and Wi-Fi

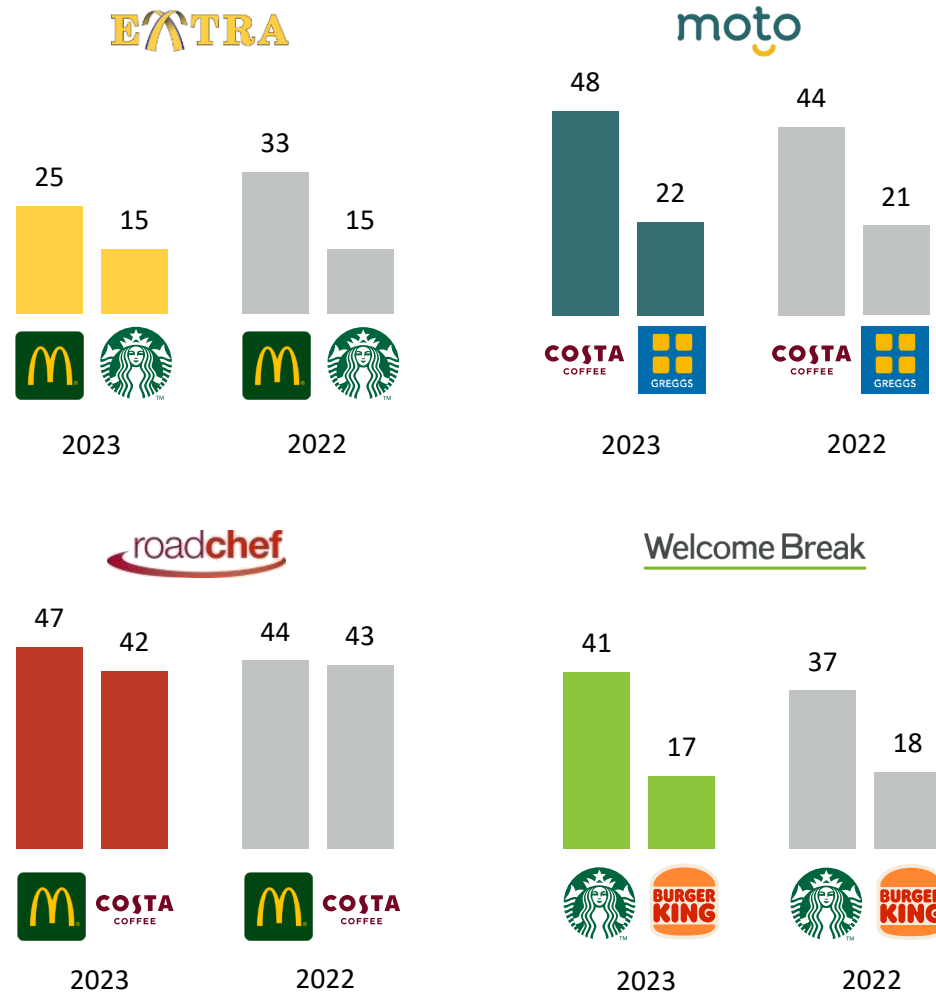
Findings from detailed experience survey (%)



Brands bought food and drink from - to eat in MSA

Top two brands across operators (%)

Top two brands used for buying food and drink to eat at MSA (%) by operator



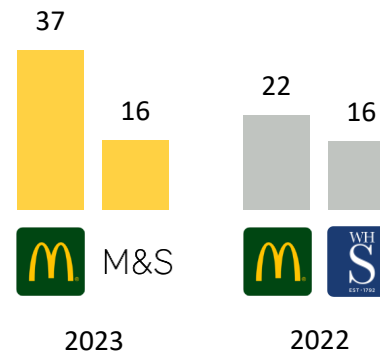
I. Where did you buy your food/ drinks from that you had before getting back in your vehicle? Base: (2022/2023) Extra: (221/203); Roadchef: (842/906); Moto: (1,261/1,393); Welcome Break: (855/950)
PLEASE NOTE: not all brands are equally available for each Motorway service station and therefore not to be directly compared

Brands bought food and drink from - to take away

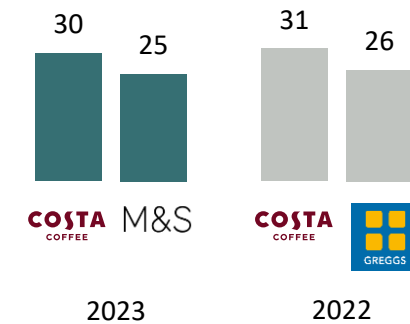
Top two brands across operators (%)

Top two brands used to buy food and drink to have in the vehicle (%) by operator

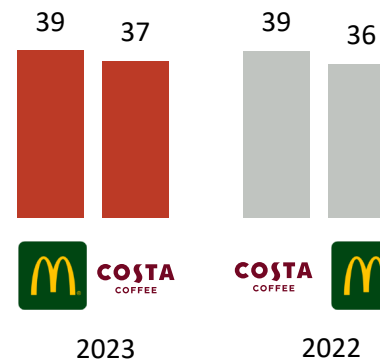
EXTRA



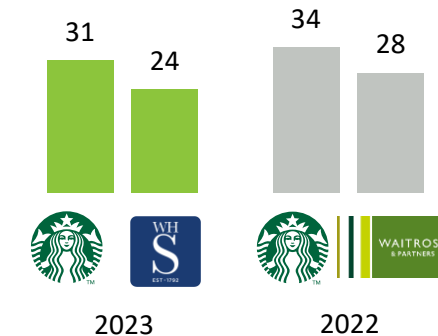
moto



roadchef



Welcome Break



IV. Where did you buy your food/ drinks from to have in your vehicle? Base: (2022/2023) Extra: (74/65); Roadchef: (320/256); Moto: (471/522); Welcome Break: (380/312)

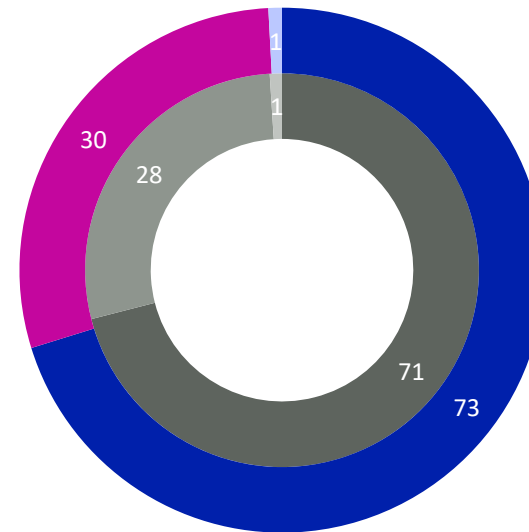
PLEASE NOTE: not all brands are equally available for each Motorway service station and therefore not to be directly compared

Food/drink order method

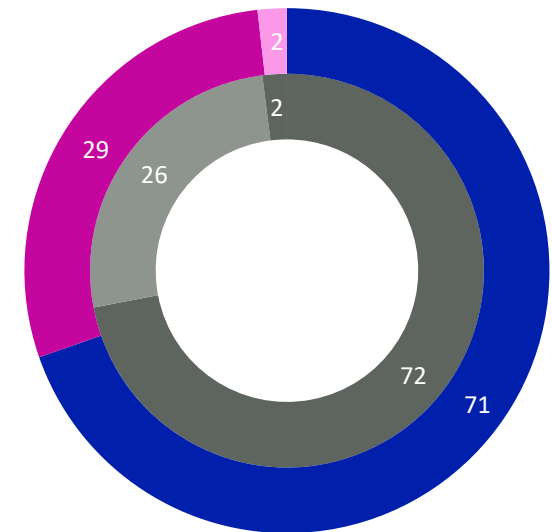
Findings from detailed experience survey (%)







Food/drink to eat in MSA





Food/drink to take away



  The counter/ at a till
2023 v 2022

  A self-serve touchscreen
machine 2023 v 2022

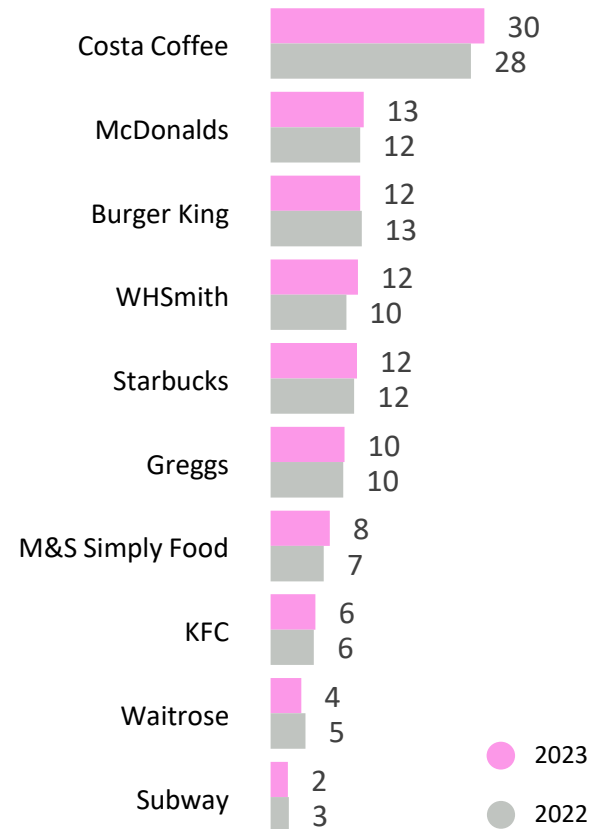
  Using an app
2023 v 2022

Food/drink purchase behaviour

Findings from detailed experience survey (%)



Top brands bought food and drink from...
All MSAs (%)



Proportion of users ordering with touchscreen
machine/app. All MSAs (%)



Ordering from self-serve touchscreen or app

Findings from detailed experience survey (%)



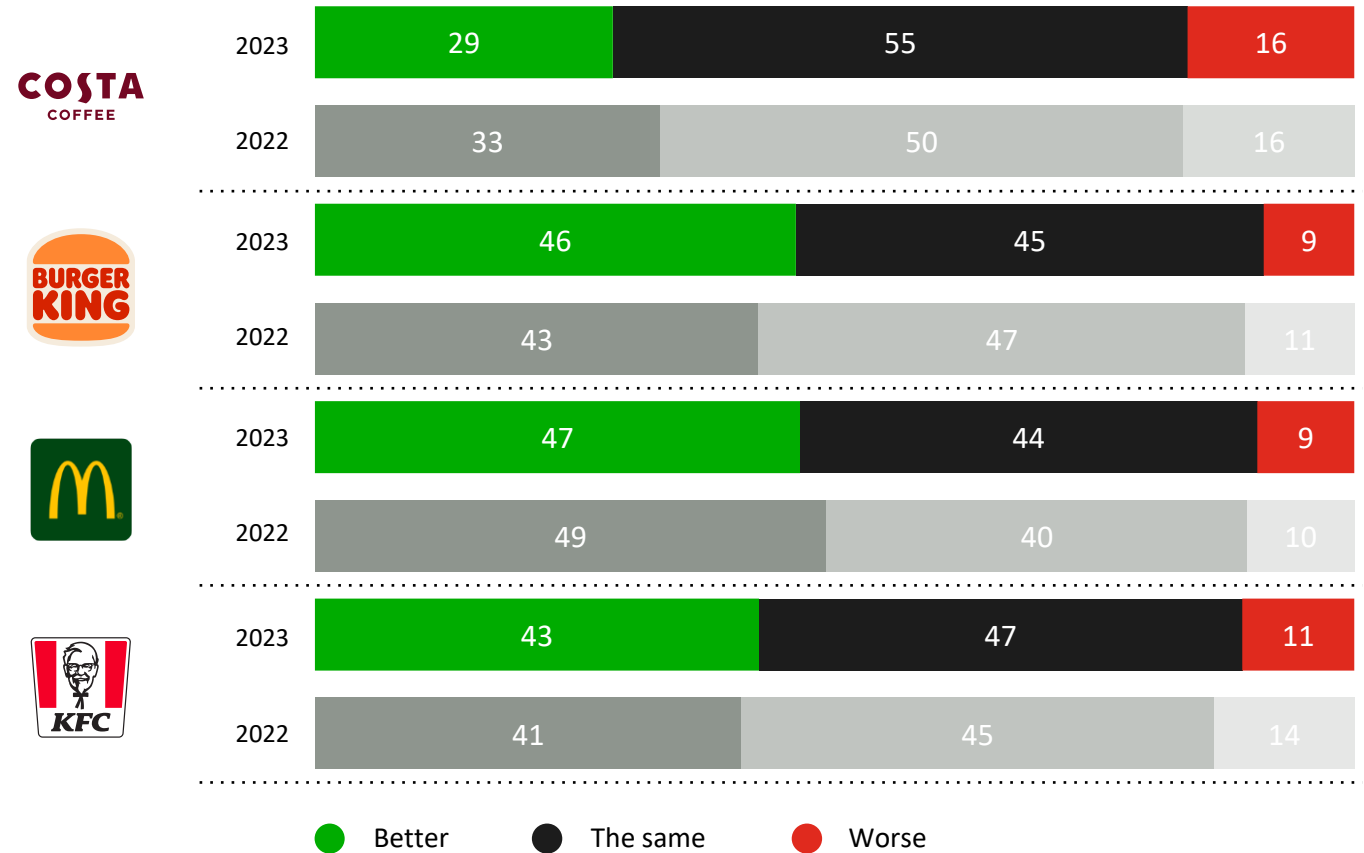
Better ratings
All MSAs (%)

All MSAs
2023 2022
44 45

transportfocus 

BVA BDRC

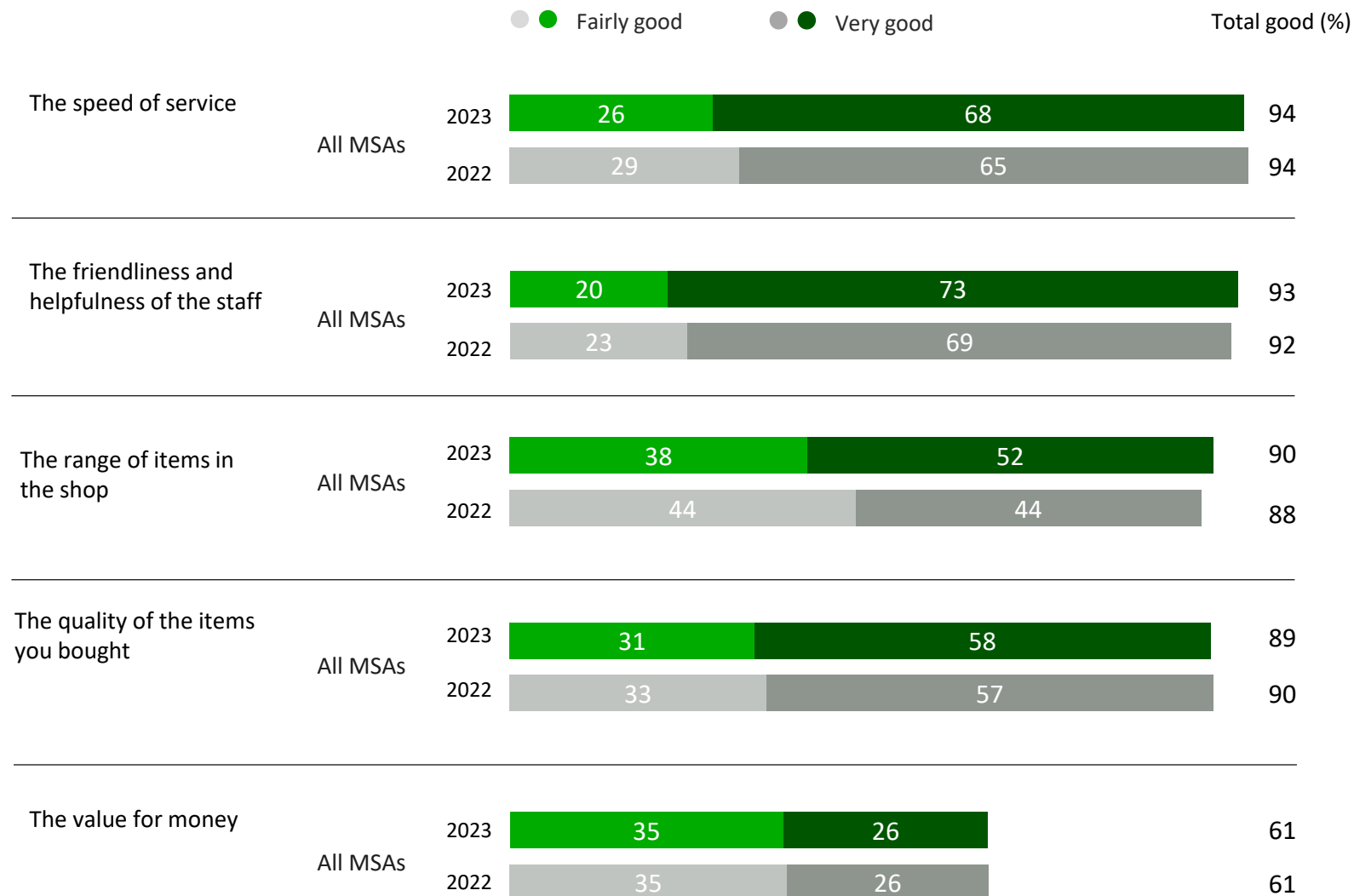
Experience ordering from a self-serve touchscreen machine/app on the premises



III. How did you think ordering from a self-service touchscreen machine on the premises compared to ordering at the counter? Ordered via a self-serve machine or app per brand: Base: (2022-2023) McDonald's: (435/431), Burger King: (327/327), KFC: (166/171), Costa Coffee: (32*/65) *LOW BASE SIZE

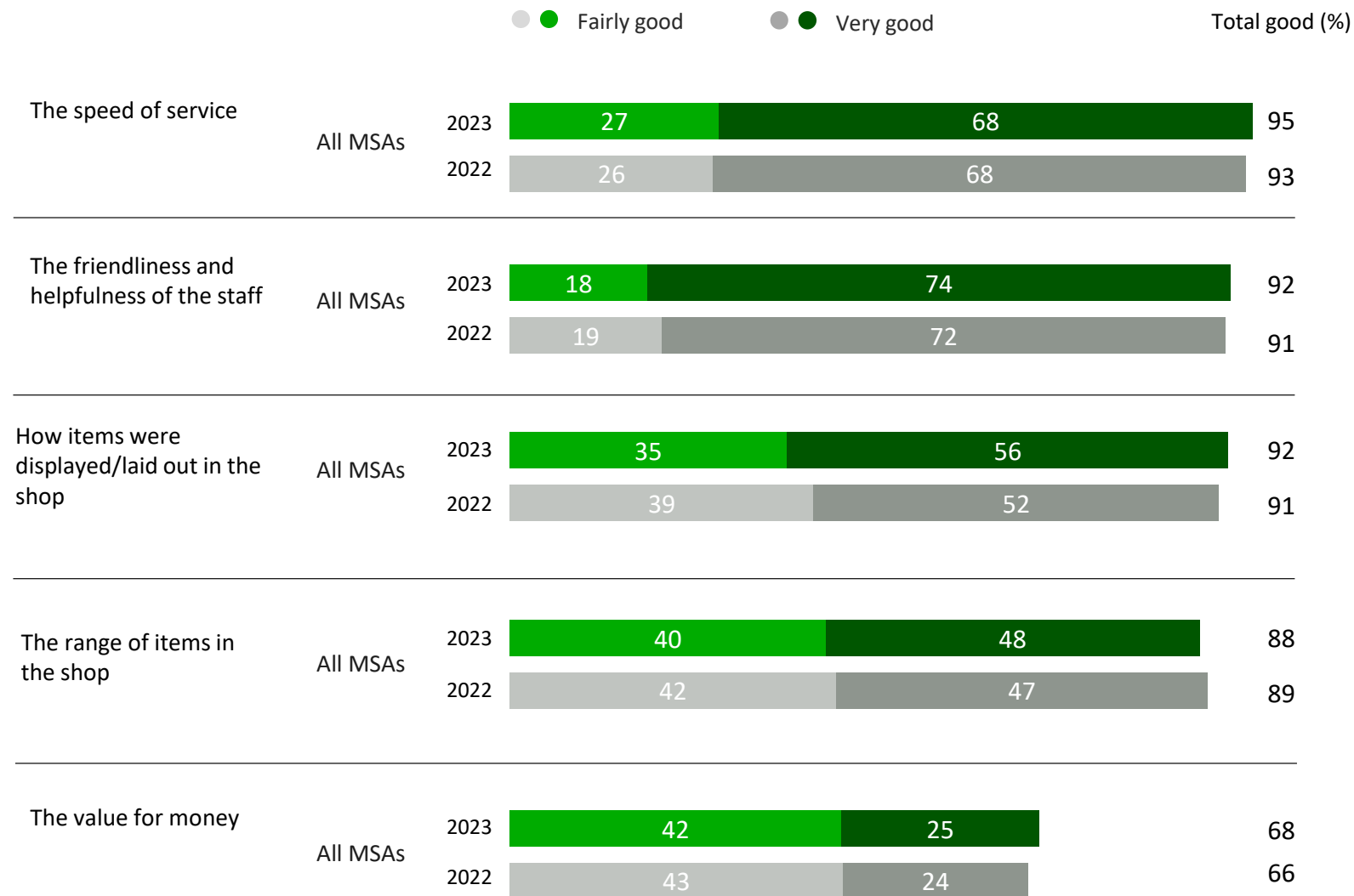
Buying convenience items

Findings from detailed experience survey (%)



Buying food/groceries

Findings from detailed experience survey (%)

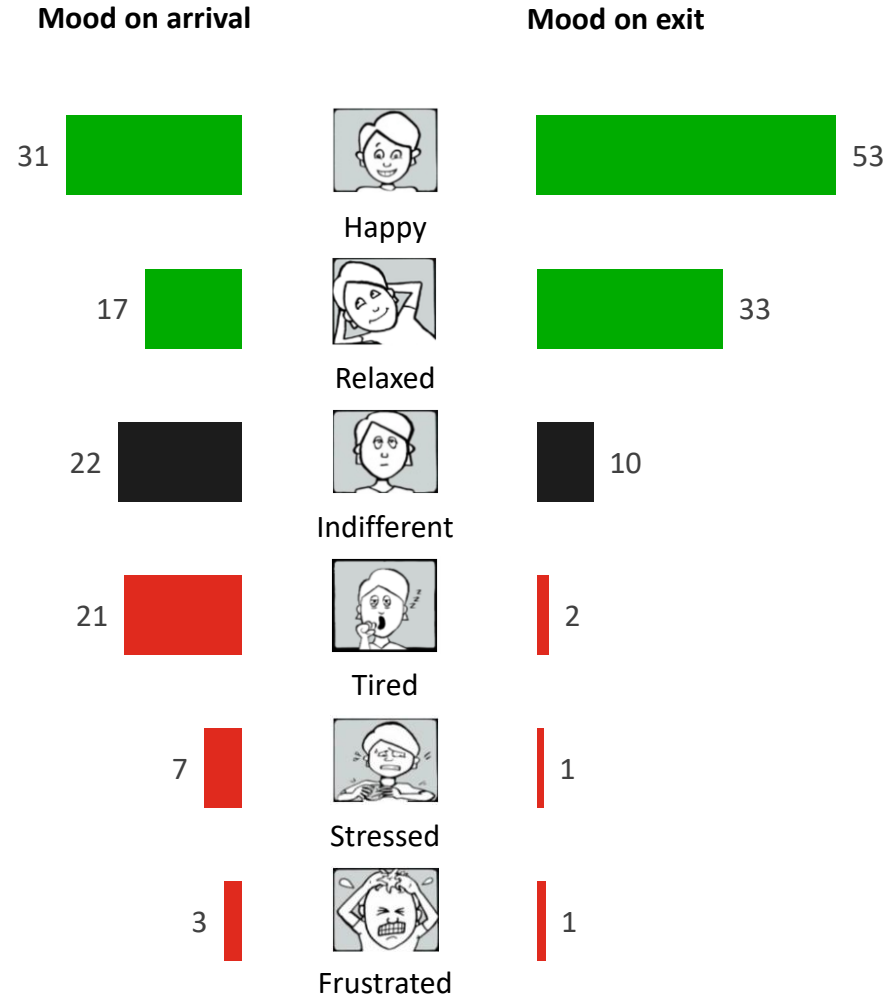


Mood on arrival and exit



Changes in mood (1/2)

Mood on arrival and exit (%)



2023 percentage points (ppt)

↑ 37 (30 2022)
increase in happy/content

↓ 26 (25 2022)
decrease in negative emotion

Changes in mood (2/2)

With operator comparisons (%)

ALL MSAs
2023 (%)

Happy/
Relaxed
37

Tired/
stressed
26

transportfocus



BVA BDRC

EXTRA

2023

29

20

2022

30

21

moto

2023

41

26

2022

30

25

roadchef

2023

37

25

2022

29

23

Welcome Break

2023

35

26

2022

30

27



(%) Increase in happy/relaxed upon leaving MSA

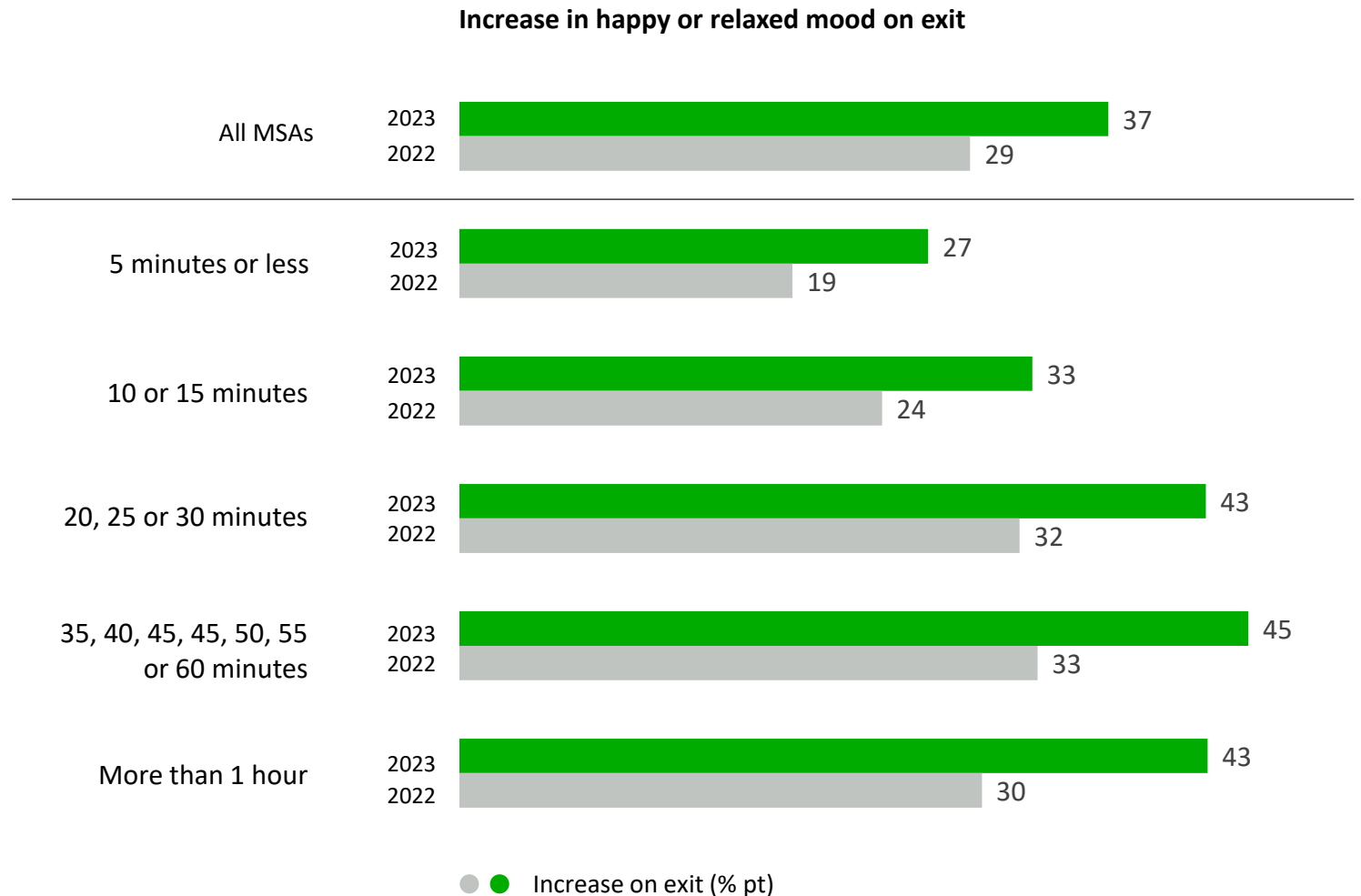


(%) Decrease in tired/stressed/ frustrated upon leaving MSA

Q2. Tell us, when you got to [MSA], which image below best described your mood? Q21. And, when you left [MSA] which image below best described your mood? Calculating the difference from arrival to exit. **Calculating the difference from arrival to exit** Base: (2022/2023) Extra: (343/311); Roadchef: (1,399/1,436); Moto: (2,068/2,304); Welcome Break: (1,644/1,649)

Change in mood during visit to MSA

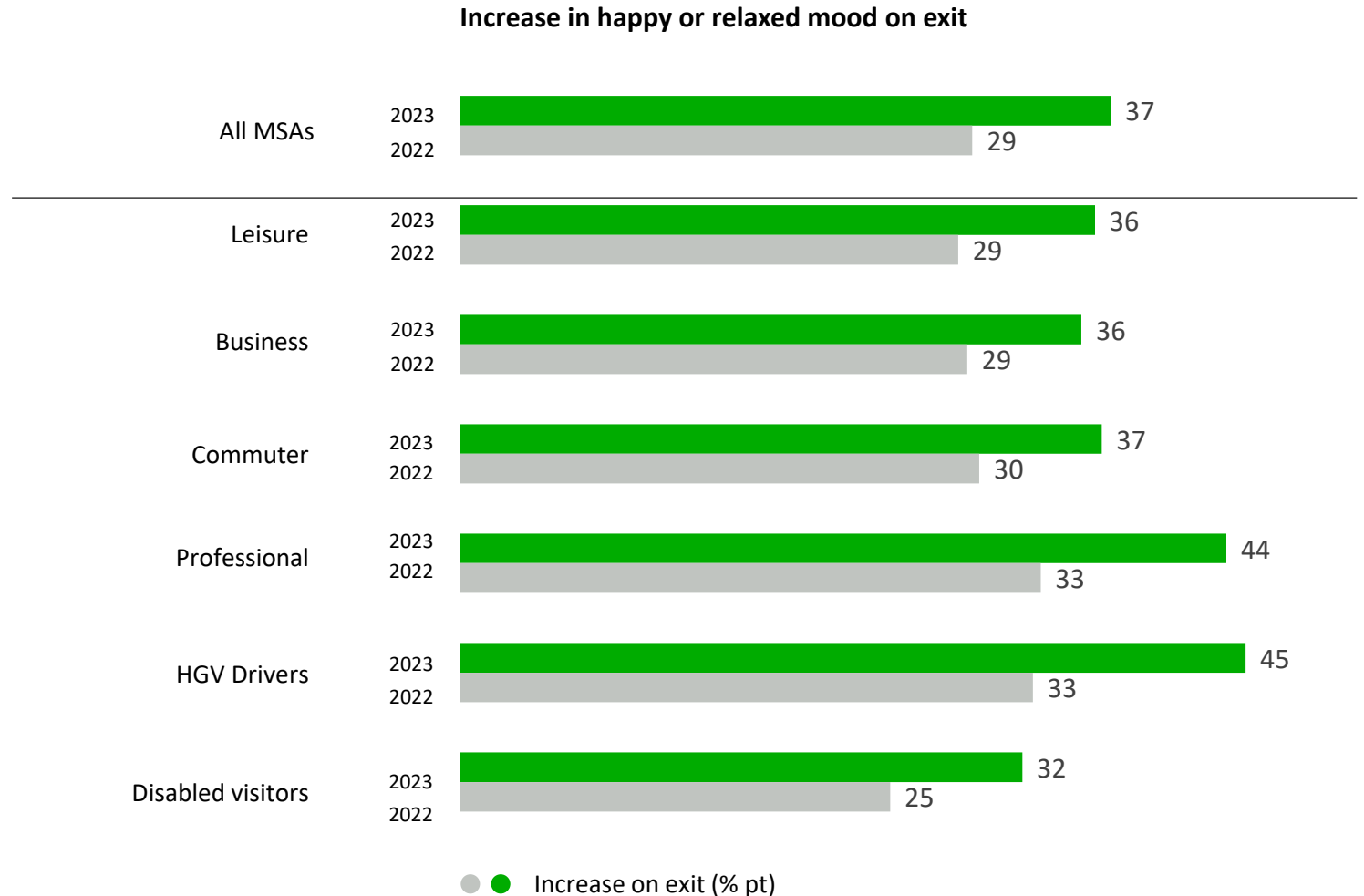
By time spent at MSA (%)



Q2. Tell us, when you got to [MSA], which image below best described your mood? Q21. And, when you left [MSA] which image below best described your mood? Calculating the difference from arrival to exit. Base (2022/2023) All MSA visitors: (5,566/5,700); Less than 5 mins: (456/342); 5-15 mins: (1,292/1,192); 16-30 mins: (2,295/2,480); 31-60 mins: (1,183/1,249); More than 1 hour: (340/437)

Change in mood during visit to MSA

By time spent at MSA (%)



Q2. Tell us, when you got to [MSA], which image 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 (2022/2023) : (5,566 /5,700); Leisure: (3,829/3,986); Business: (695/745); Commuter: (233/215); Professional: (809/754); HGV drivers: (708 /660); Disabled visitors: (602/620)

EPIC experiences and improvements

Findings from the detailed experience survey



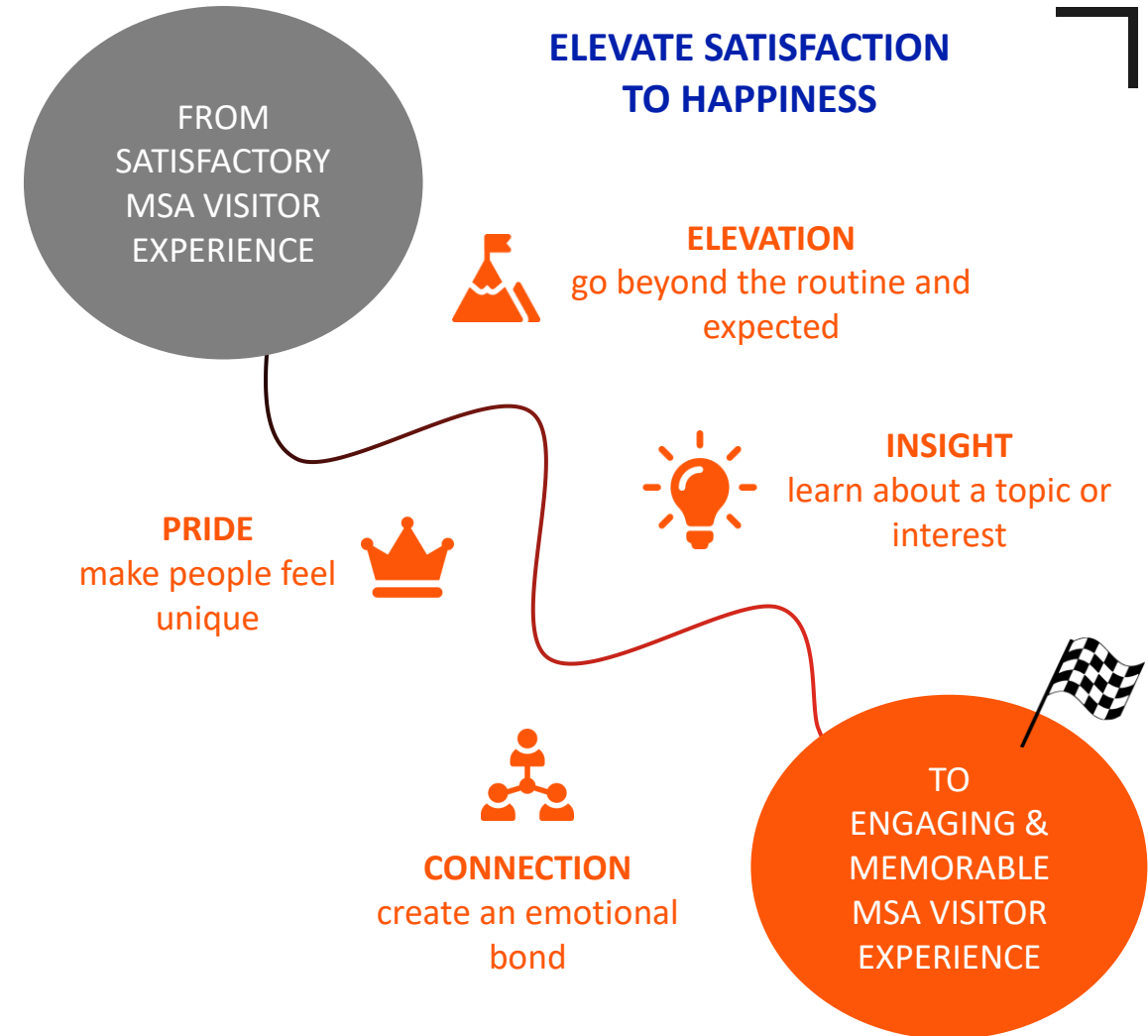
Introducing the EPIC framework

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)



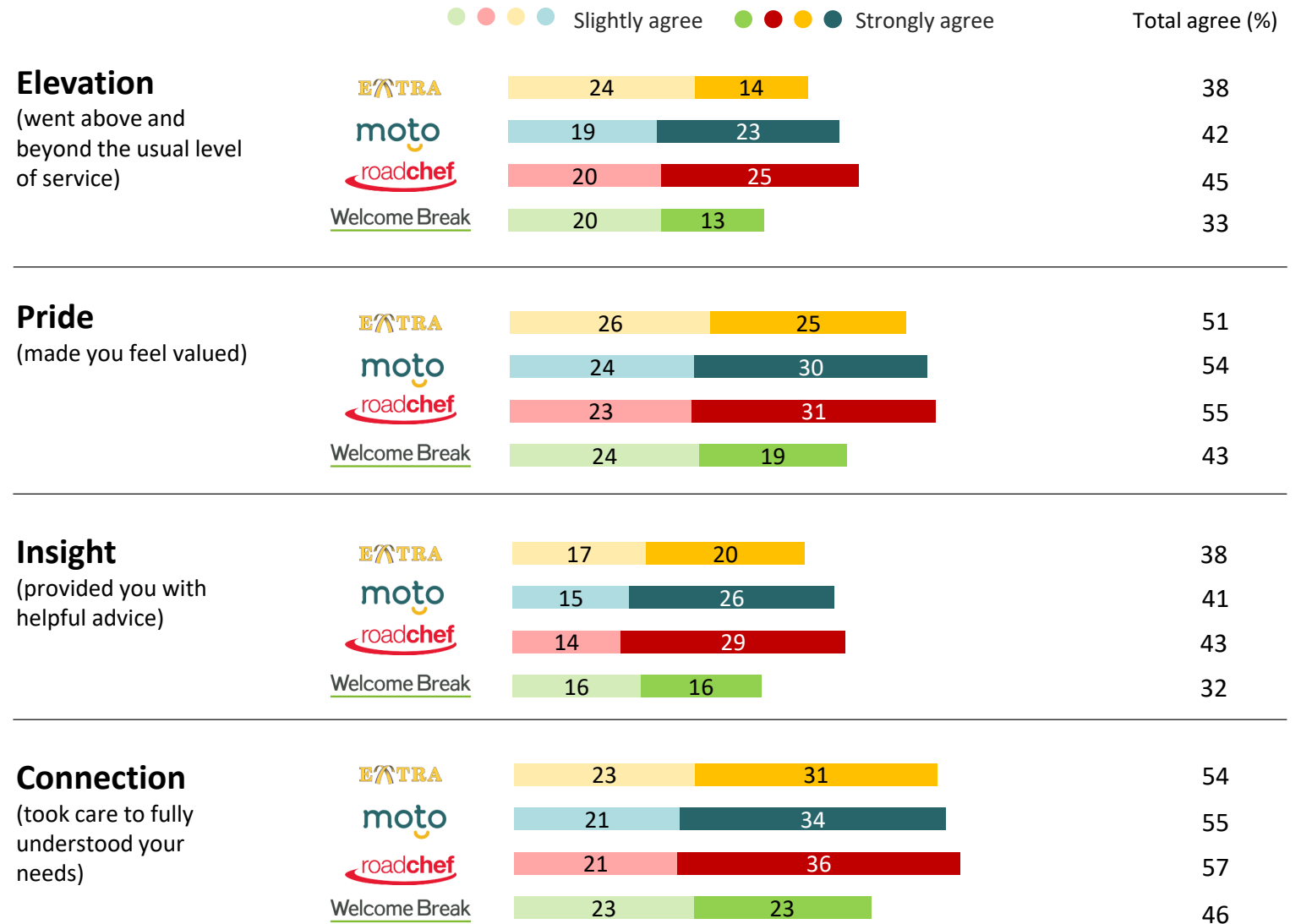
EPIC experiences in MSAs

All MSAs 2023 EPIC experiences (%)



EPIC experiences

EPIC experiences across operators 2023 (%)

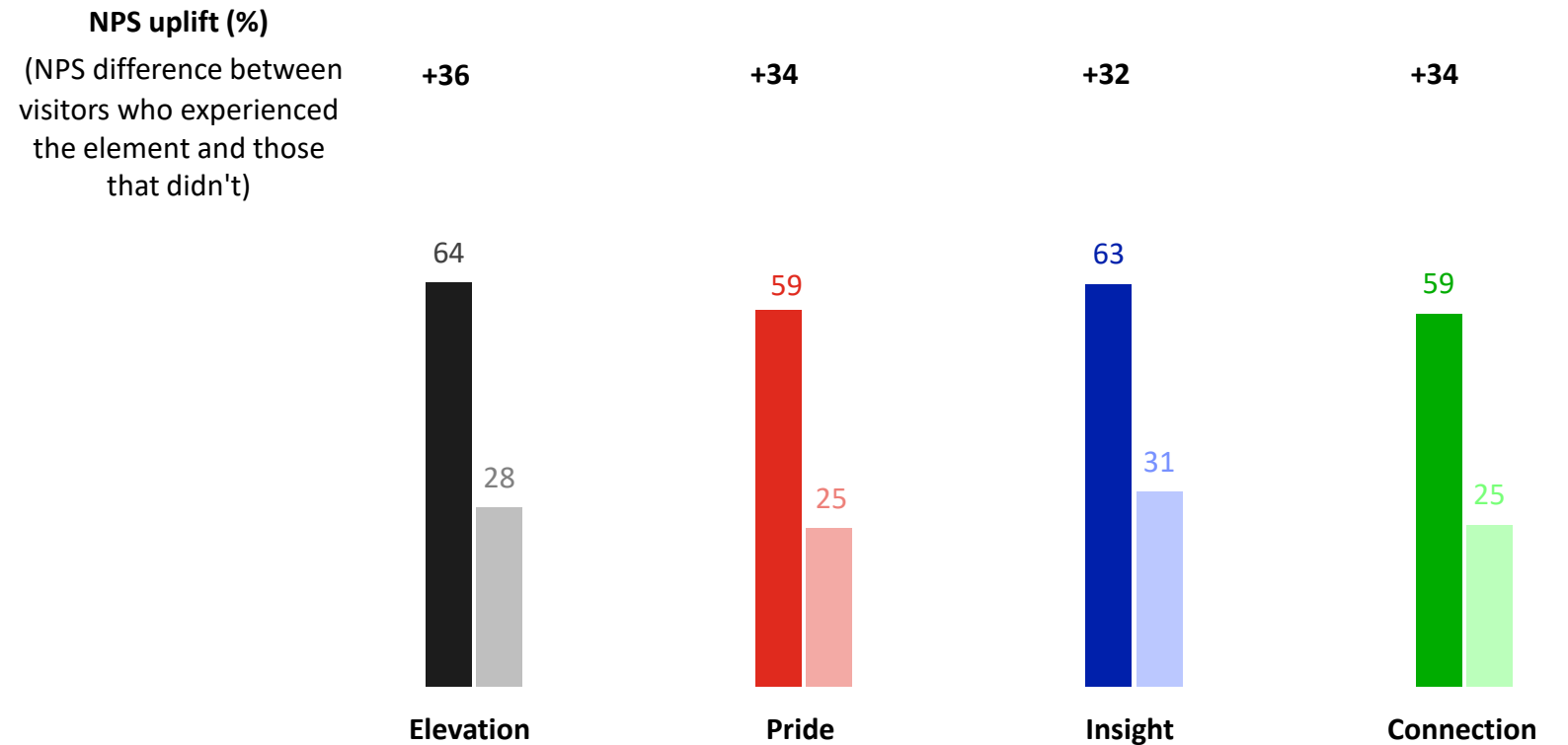


All MSA EPIC experiences

EPIC experiences and recommendation

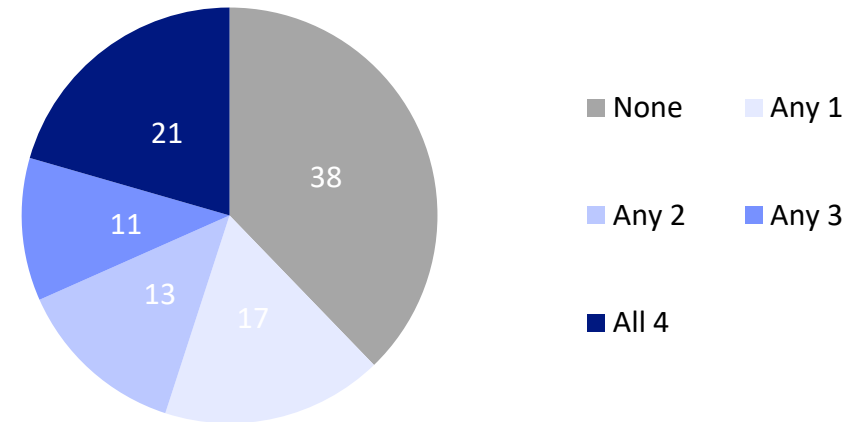
NPS score for those who experienced vs. those who didn't experience an EPIC moment 2023 - All MSAs

● ● ● ● Have experienced
● ● ● ● Haven't experienced

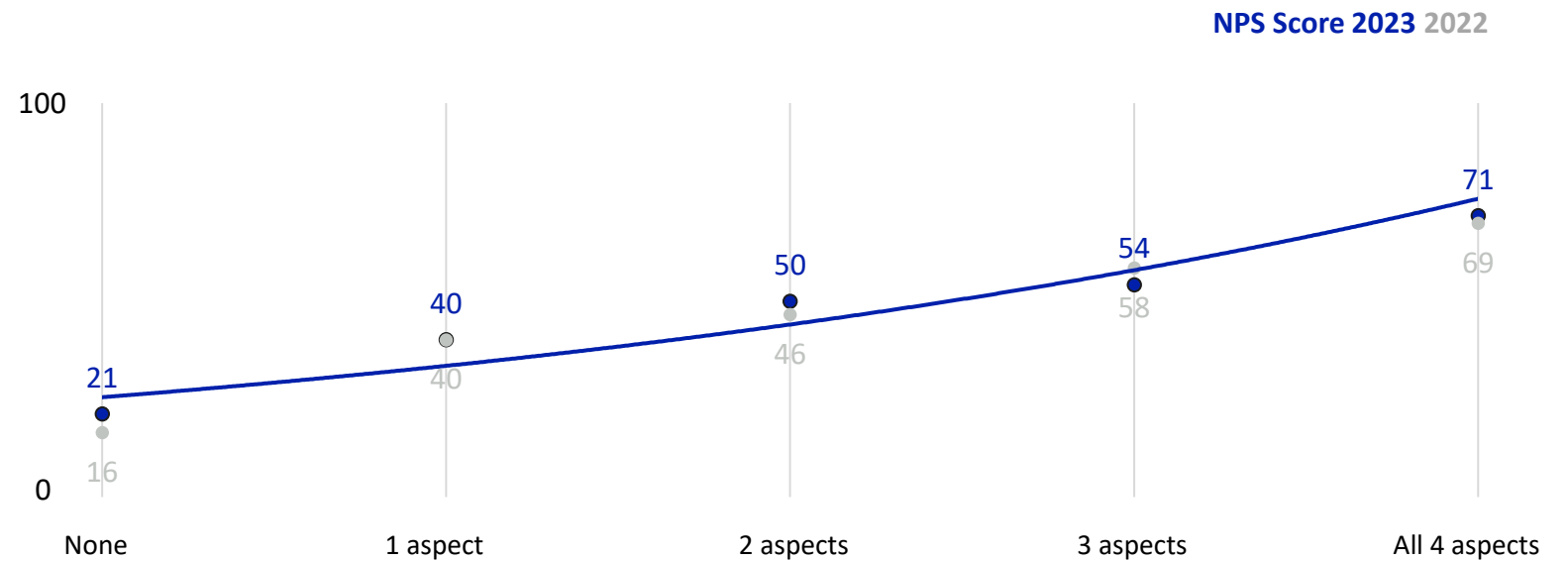


All MSA EPIC experiences

% of All MSA visitors who said they experienced each of the below number of EPIC aspects



Average NPS score for the number of EPIC aspects All MSA visitors said they 'agreed' they experienced



Q17. To what extent do you agree you had the following experiences when you were at MSA? MSA: 2022 (5,566) 2023 (5,059)

MSA EPIC experiences

EPIC experiences and recommendation

“

They called you by name and service was quick, it was clean and tidy.
Sarn Park

“

Showers are good, staff are friendly, good parking.
Severn View

“

The regular clearing up after customers finished with their food.
Rownhams Eastbound

“

Everyone happy and helpful.
Beaconsfield

“

Service I get here is brilliant, always friendly, nothing too much trouble.
Medway Eastbound

“

Gave me advice when I needed it, very helpful.
Corley Southbound

“

I always feel welcome when I come here, the staff are lovely.
Burton-in-Kendal

“

I found the environment was refreshing, clean and bright.
Sandbach Southbound

“

Clean place to be. Safe, dog friendly.
Clacket Lane Eastbound

“

It's convenient at lorry park, not far away from entrance as you come into building. Nice and wide and spread out, not cramped parking.
Warwick Southbound

“

The sandwich that I wanted wasn't available, so the team member made me a fresh sandwich. Very much appreciated.
Washington Southbound

“

It is easy to get to and easy layout.
Cullompton



Improvements



Improvements

What users would change about the MSA



Food Offer

Lack of healthy food options if you want to sit and eat. KFC, Burger King, Starbucks.

Keele Southbound

A healthy food meal place.

Annandale Water

Be nice to have a supermarket type shop. I am long distance HGV driver and sometimes you need to buy a razor, or some healthy food and fresh fruit.

Swansea

Option for using food vouchers.

Baldock



Facilities

Not enough dog walking areas.

Bridgwater

Cleanliness was not as good as it should have been, either generally or in the food service area. Crumbs and debris everywhere.

Leicester Forest East Northbound

The toilets are a disgrace, no loo paper, door won't close properly and dirty.

Bothwell

There should be child play facilities.

Thurrock



Car park

Carpark more safe walkways, especially with children.

Strensham Southbound

There is a big dip in the road by the garage. If you hit it you will damage the vehicle. I think the ground had sunk. I think the traffic lights when leaving should be permanent.

Pont Abraham

Signage to the carpark. Saw Travelodge or hotel sign but not service station as behind trees so didn't turn in. Ended up in coach park. Wheelchair accessibility from there poor as pavement and drive area uneven.

Stirling

Roadworks entering carpark made access difficult and time consuming.

Blackburn with Darwen

Additional things visitors would like

Was there anything else you would have liked to do or buy on your visit to [MSA] services? (%)

- No, I did everything I wanted
- I would have liked to buy something else
- I would have liked to do something else



All MSAs

What would you have liked to buy or do?

“

Would have loved to had a children's area.
Cardiff Gate

More healthy options for food.
Taunton Deane Northbound

“

More healthy food options. This is important for our health.
More evident environmental concern. More use of the
landscape including places to sit outside.
Winchester Southbound

“

Better range of magazines in the convenience store.
Leeds Skelton Lake

Would have liked proper meal like they used to have not just
fast food.
Fleet Northbound

Additional things visitors would like



Why did you not buy what you would have liked to today? (%)



MSA reducing environmental impact

Noticed something to reduce MSA's impact on environment

18%

(16% 2022)

noticed efforts to reduce environmental impact at **any MSA**



Visitors to Extra are those most likely to notice something (23%) where Moto is last (17%)

What action(s) noticed

"Lots of green areas."
South Mimms

" Very clean and outside is a great view. Plenty of cleaners around always cleaning up."
Killington Lake

"Definitely electric charging point, a lot of green around, saving water tabs in toilet."
Heston Westbound

"Solar panels on top of roof."
Clacket Lane Westbound

" Giving out paper straws and using less bags for packaging."
Toddington Southbound

"Electric car ports."
Birchanger Green

"Building more EV chargers."
Watford Gap Southbound

"Separate bins for rubbish."
Fleet Northbound

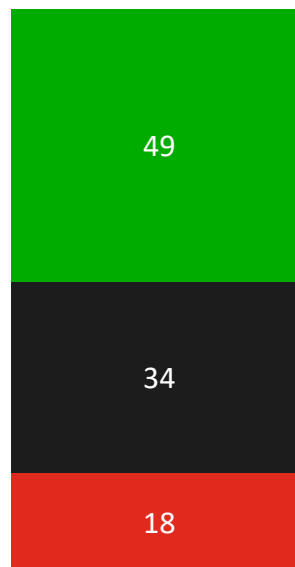
"Paper bags."
London Gateway

Electric vehicle charging facilities

Findings from detailed experience survey (%)

Frequency of using EV charge points (%)

- I am happy to charge at motorway services whenever I need to
- I only charge at motorway services when absolutely essential
- I never charge at motorway services



All MSAs

Reasons to avoid



Not enough non Tesla chargers not enough dual chargers. **Gordano**

Always people waiting and hate that. **Abington**

Not enough charging they are not the super quick ones. **Washington Southbound**

The electric points do not work and are very badly signposted can't see them to park close to them. **Rownhams Westbound**

What is done well and why



Very easy and simple, I have a Tesla so the charging points are easily accessible. **Exeter**

I'm happy with it here it's cheaper than my nearest charging point. **Ferrybridge**

Literally exactly what I expected easy to use contactless payments really great customer service. **Heston Westbound**

I have used motorway services for charging for over 5 years now especially Welcome break because they provided a network for Tesla's up and down the entire country. **Michaelwood Northbound**

Respondent profile



Respondent profile

For the key metrics survey

Type of journey (%)

	All MSA average 2023	
Leisure	69	
Business	16	
Commuter	5	
Drive for a living	10	<div> <div>HGV</div> <div>8</div> </div> <div> <div>Non-HGV</div> <div>2</div> </div>

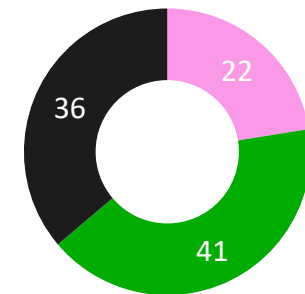
Gender (%)

All MSA 2023



● Male ● Female

Age (%)



All MSA 2023

■ 16-34 ■ 35-54 ■ 55+

Additional demographic data

Findings from the detailed experience survey



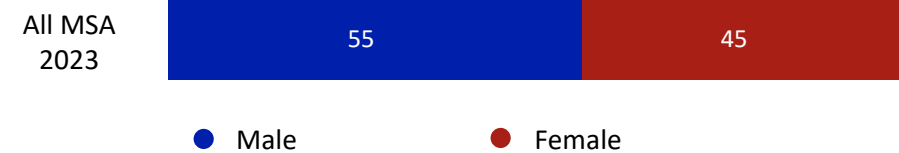
Respondent profile of the detailed experience section

Findings from detailed experience survey

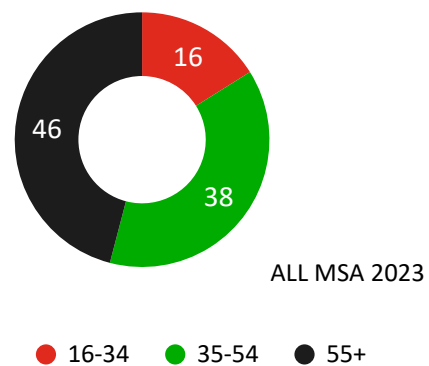
Type of journey (%)

	All MSA average 2023		
Leisure	70		
Business	13		
Commuter	4		
Drive for a living	13	→	HGV 11 Non-HGV 2

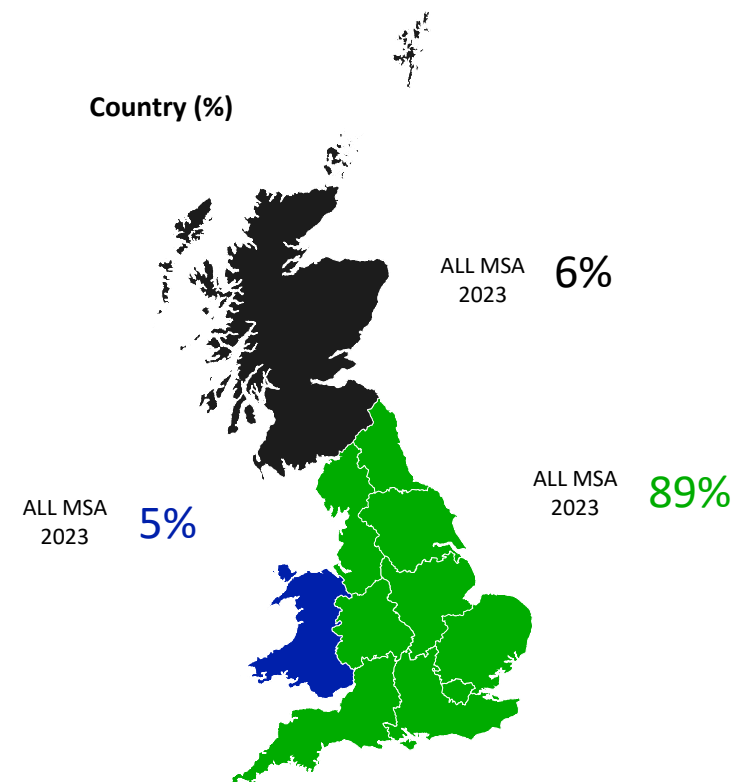
Gender (%)



Age (%)



Country (%)



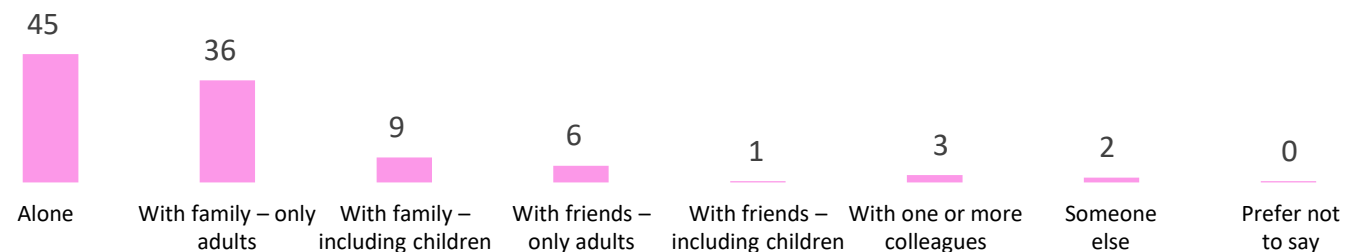
All MSA 2023: 5,700

Respondent profile of the detailed experience section

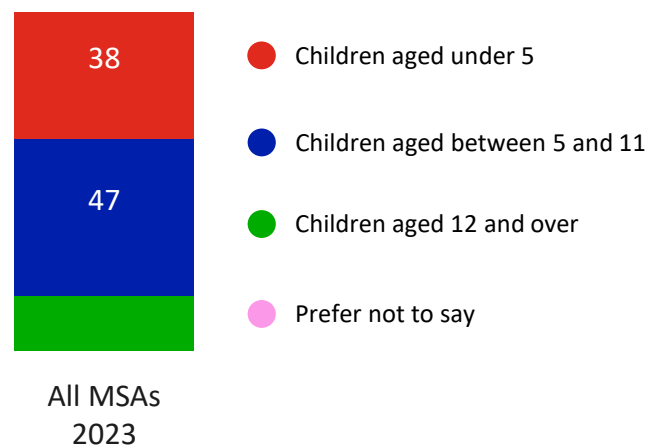
Findings from detailed experience survey

Who travelling with (%)

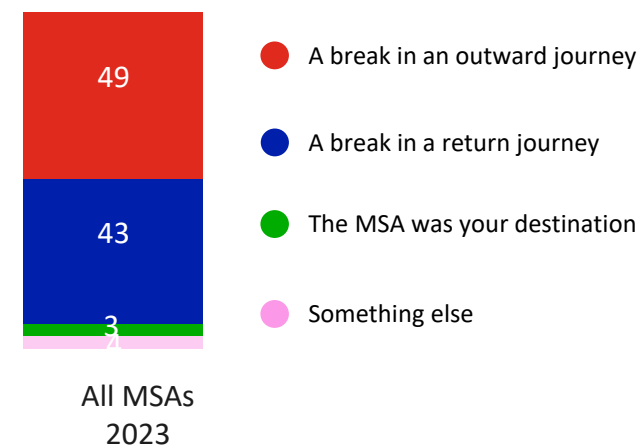
● All MSAs 2023



Age of children (%)



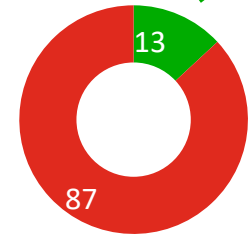
When was the stop at MSA (%)



Respondent profile of the detailed experience section

Findings from detailed experience survey

Any disability (%)



● Yes ● No

ALL MSA 2023

Type of impairment %

ALL MSA 2023

Mobility	68
Sensory	14
Cognitive	23

Note more than one answer allowed so totals more than 100%

Proportion visiting by car and their vehicles' fuel type



All MSA average 2023

Proportion in a car (%)

2023 all MSA	77
2022 all MSA	76

Fuel type used by car visitors (%)

	All MSA 2023	All MSA 2022
Petrol	51	50
Diesel	34	36
Hybrid plug-in	3	3
Hybrid self-charging	4	4
Fully electric	8	7

Appendix (1/4)

Further Demographics



Length of Stay

All MSAs time spent at MSAs

Average time spent at MSA (minutes)

	Less than 5 mins	6-15 mins	16-30 mins	31-60 mins	More than 1 hour
All MSA 2023	12	31	39	14	4
Male	12	30	37	15	6
Female	11	31	41	14	3
16-34	13	33	38	12	4
35-54	11	30	38	15	5
55+	12	29	40	14	4

How long have you spent at [MSA name] services, after parking? All MSA 2023 (30,774). Male (18,103), Female (12,602), 16-34 (6,932), 35-54 (12,674), 55+ (11,153)

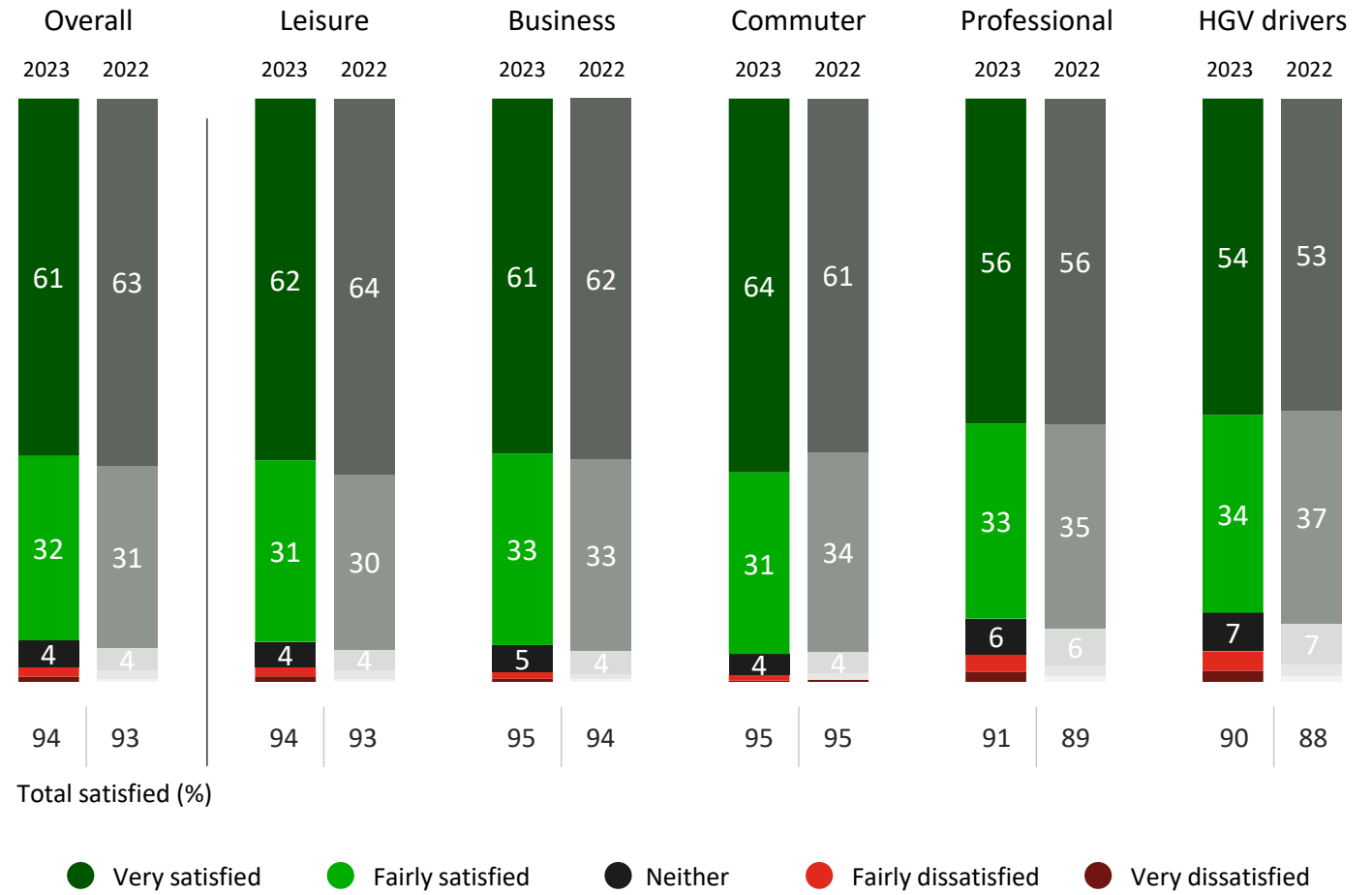
Appendix (2/4)

Further information: Satisfaction by visitor type



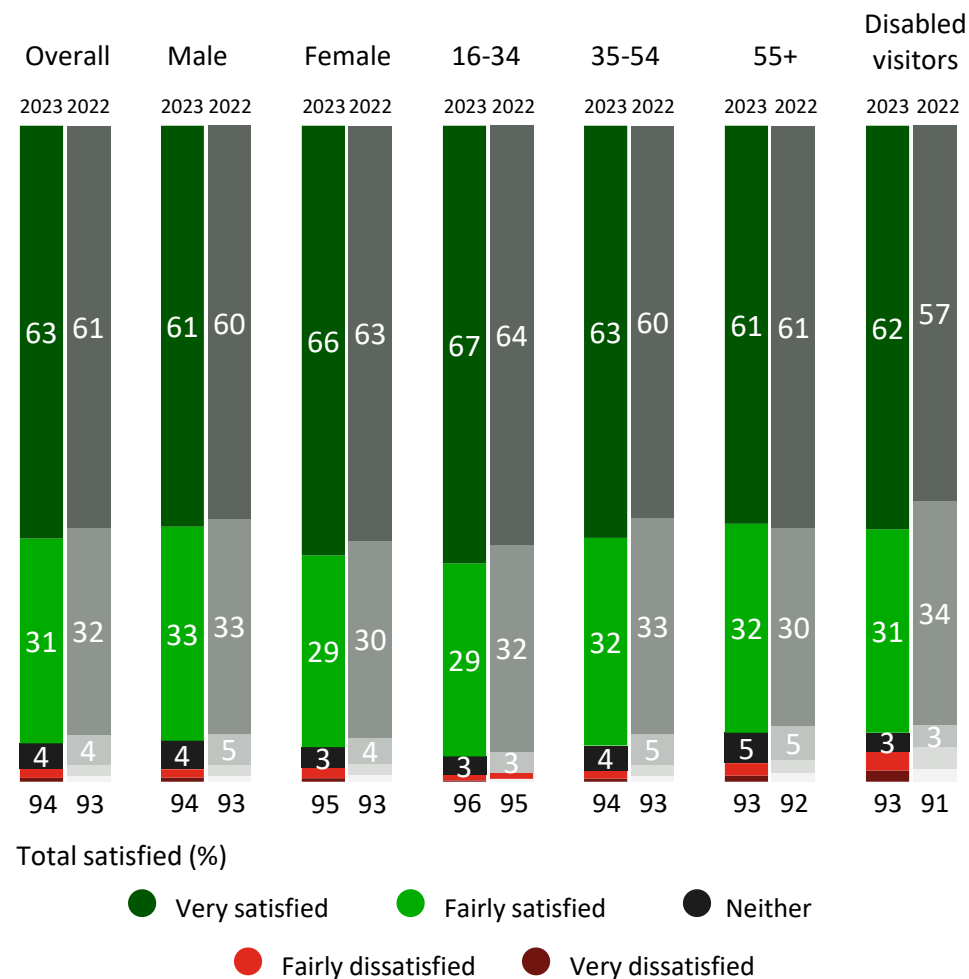
Further information: overall satisfaction (1/2)

By visitor type (%)

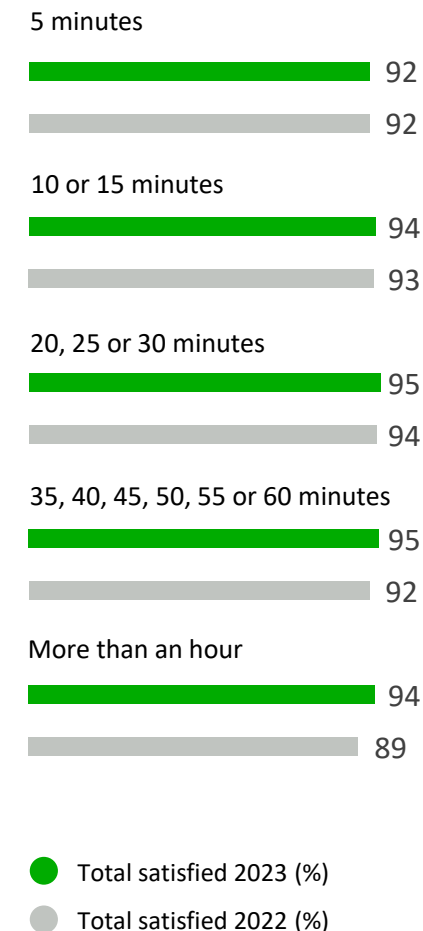


Further information: overall satisfaction (2/2)

By demographic (%)



Overall satisfaction by time spent at MSA (%)



All MSA visitors Base (2022/2023) - Overall: (31,204/30,740); Male: (18,751/18,079); Female: (12,402/12,592); Q27. In which age group are you? 16-34: (7,264/6,929); 35-54: (12,447/12,665); 55+: (11,473/11,135); Q28. Do you, or anyone that was with you have a long-term physical or mental health impairment limiting the daily activities or work you/they can do? Disabled visitors: (602/620); R13. How long have you spent at [MSA name] services after parking? 5 min: (5,176/3,745); 10 or 15 mins: (10,303/9,497); 20, 25 or 30 mins: (10,708/11,808); 35, 40, 45, 50, 55 or 60 min: (3,995/4,373); More than 1 hour: (1,022/1,317)

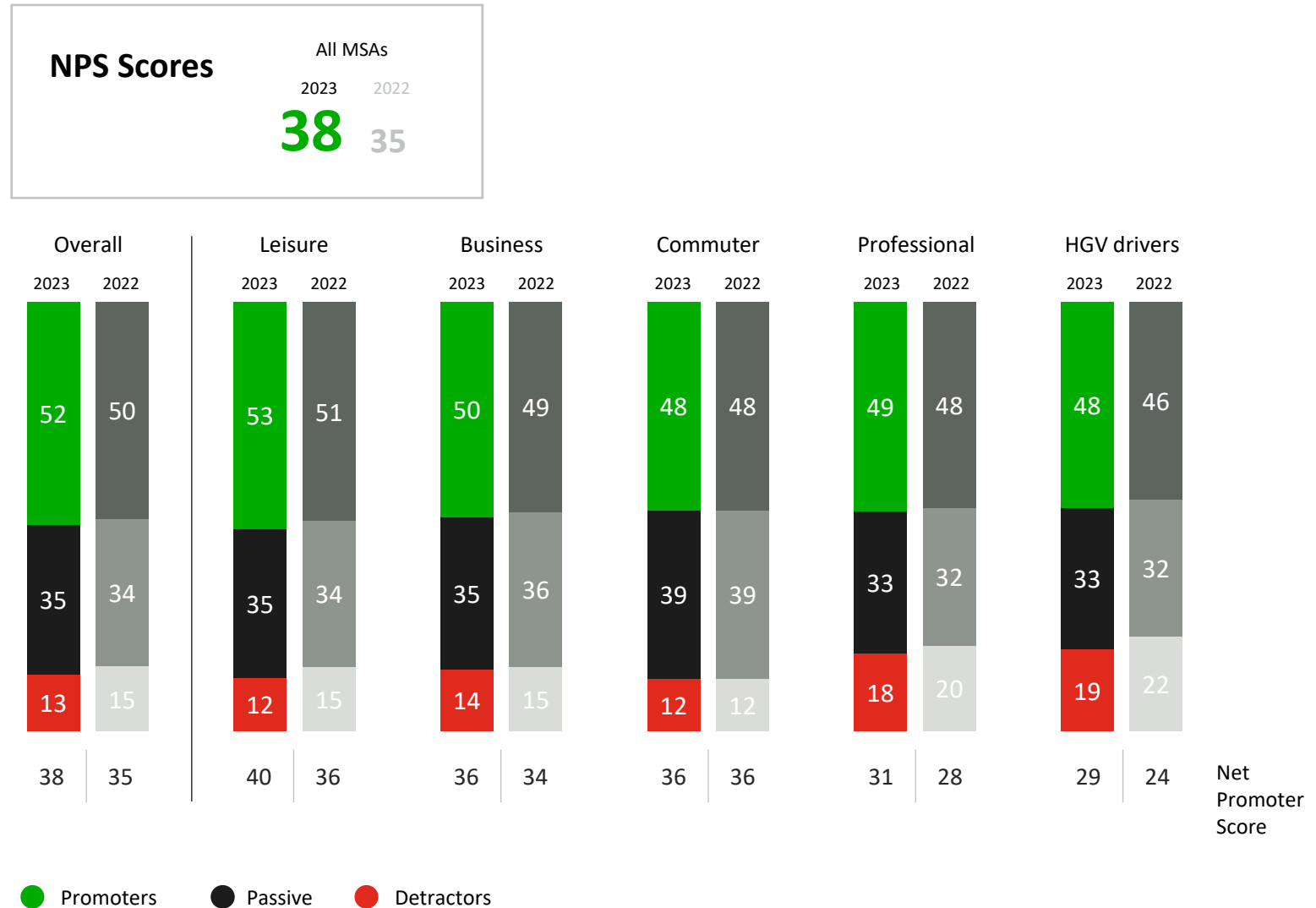
Appendix (3/4)

Further information: Recommendation and NPS by visitor type



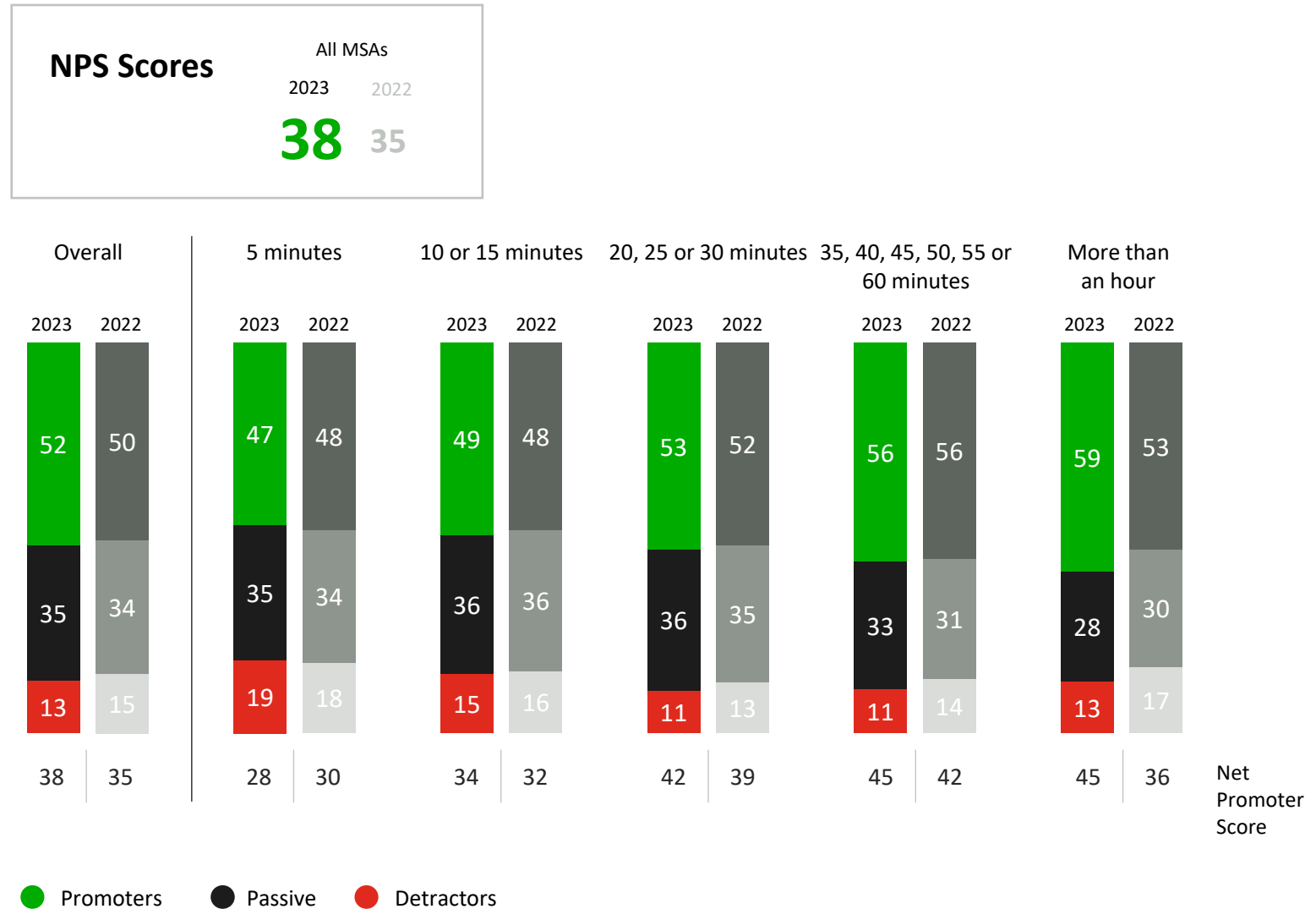
Further information: likelihood to recommend MSA (1/3)

By visitor type



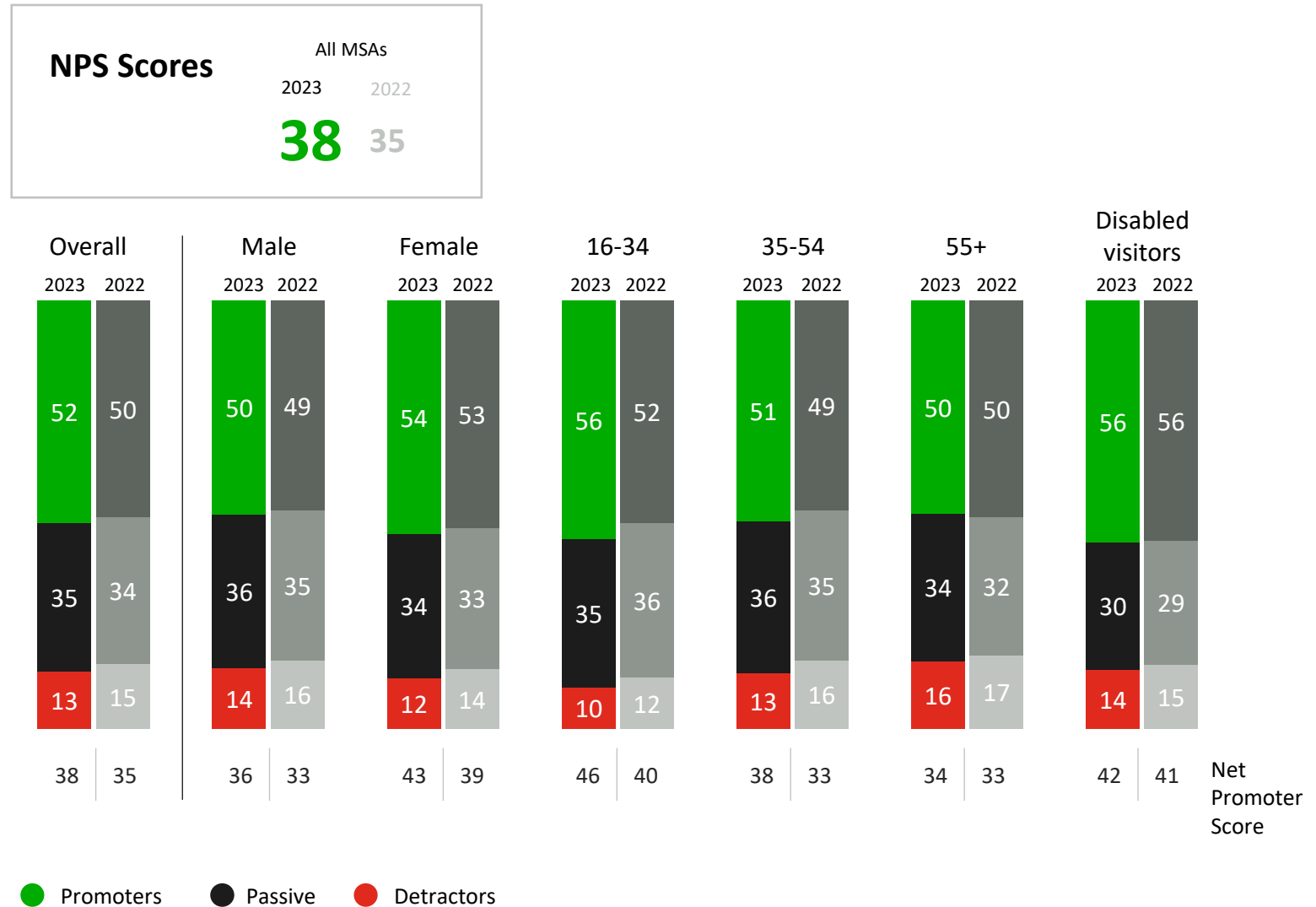
Further information: likelihood to recommend MSA (2/3)

By time spent at MSA



Further information: likelihood to recommend MSA (3/3)

By demographic



Base (2022/2023) - All MSAs: (31,252/30,774); R11. Gender: Male: (18,785/18,103); Female: (12,416/12,602); Age: 16-34: (7,269/6,932); 35-54: (12,465/12,674); 55+: (11,498/11,153). Q28. Do you, or anyone that was with you have a long-term physical or mental health impairment limiting the daily activities or work you/they can do? Disabled visitors: (602/620)

Appendix (4/4)

Further information: Toilet satisfaction by visitor type



Further information: satisfaction with the toilets (1/2)

By visitor type (%)

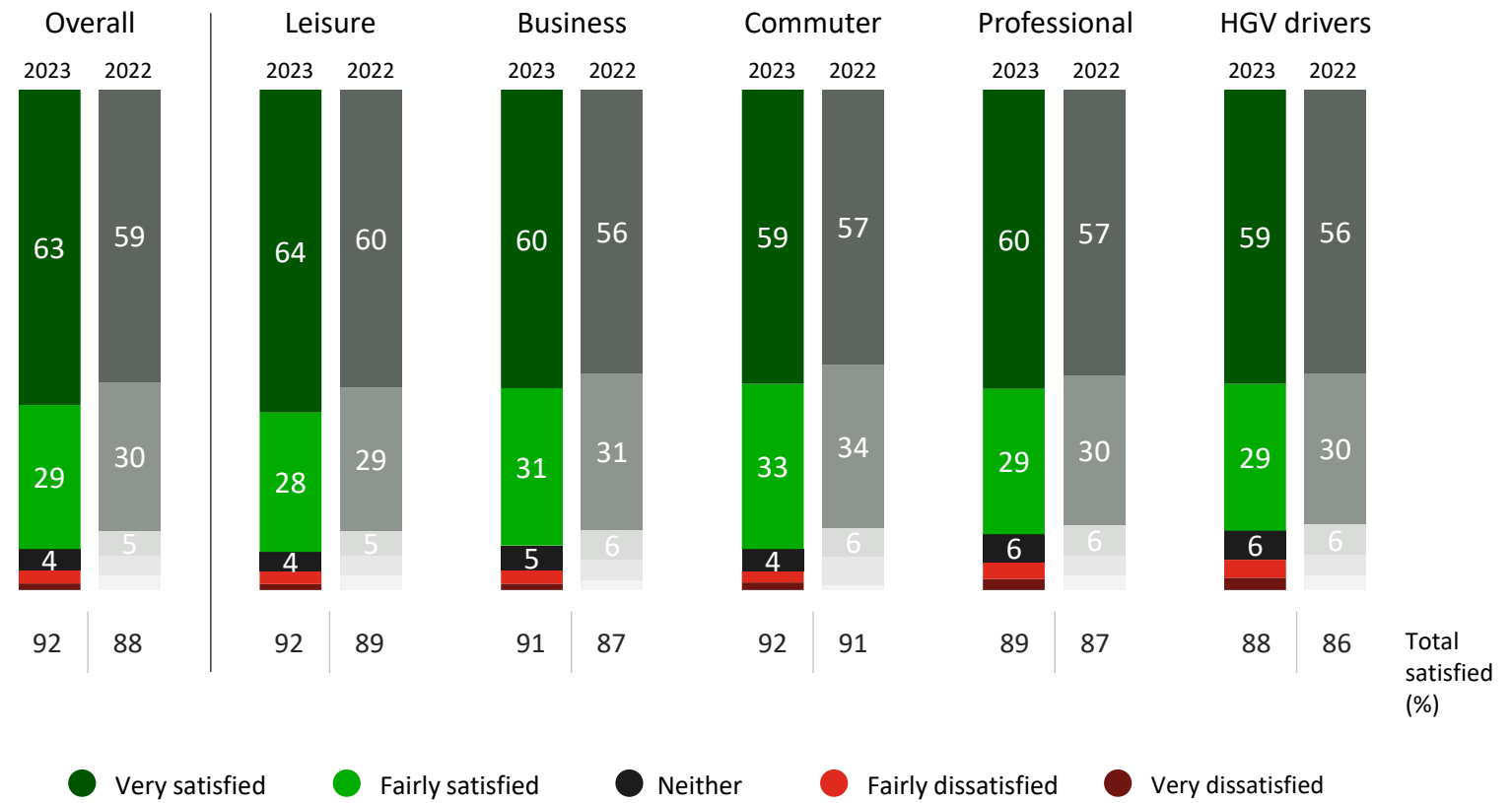


Overall satisfaction with
MSA toilets 2023 (%)



2023
92

2022
88



Further information: satisfaction with the toilets (2/2)

By demographic (%)

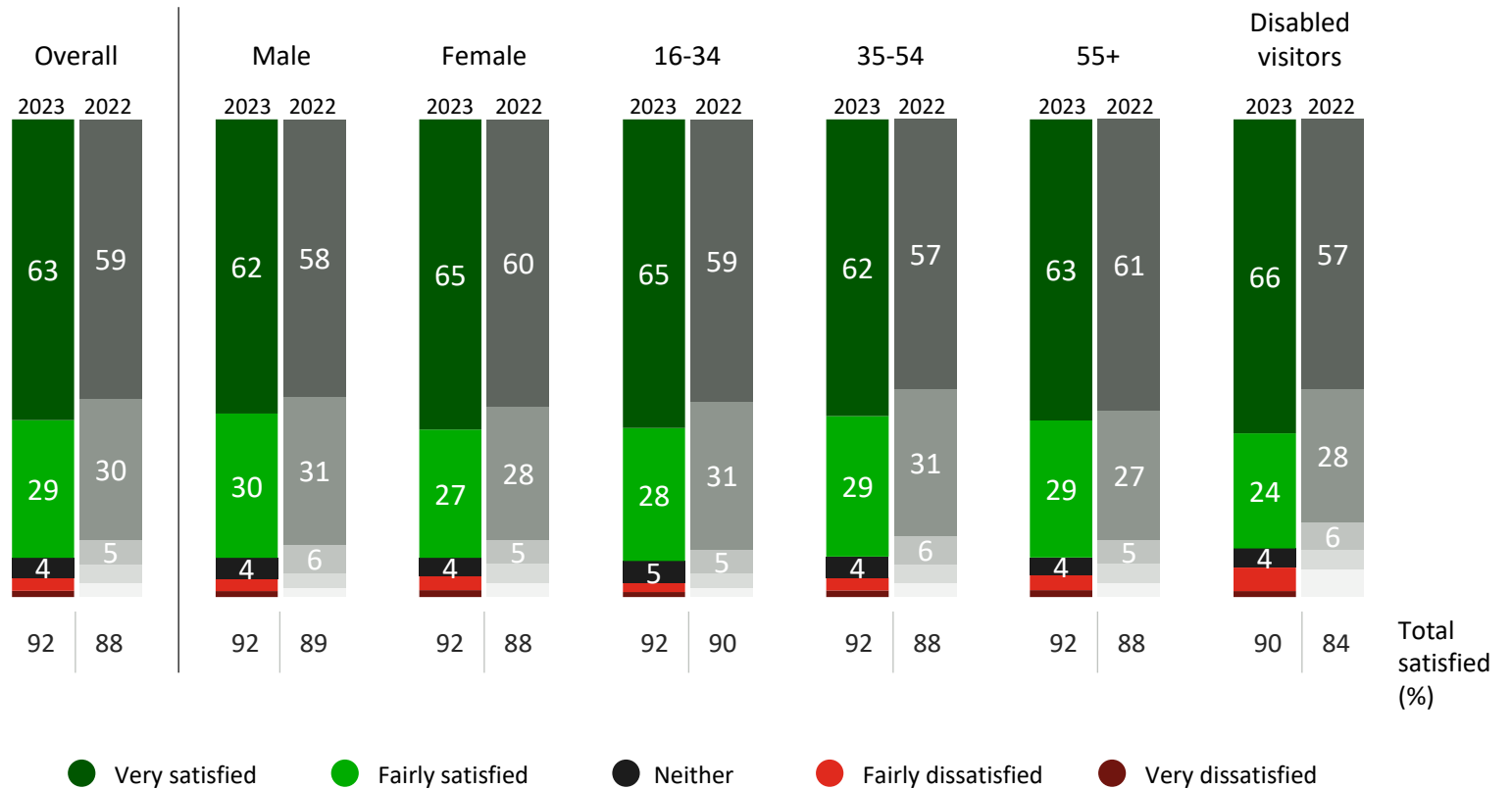


Overall satisfaction with
MSA toilets 2023 (%)



2023
92

2022
88



Base (2022/2023) - All MSAs (25,908/25,749); R11. Gender: Male: (15,346/14,922); Female: (10,524/10,769); Age: 16-34: (5,705/5,453); 35-54: (10,413/10,743); 55+: (9,771/9,542). Q28. Do you, or anyone that was with you have a long-term physical or mental health impairment limiting the daily activities or work you/they can do? Disabled visitors: (516/502)

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.

