

# Motorway Services User Survey (MSUS) 2026 — All MSAs

**September 2026**

transportfocus

Ipsos

# Contents


| | | | | | |
|---|---|---|---|---|---|
| 3 | Background and methodology | 29 | **Part 2 – Detailed experience** | 68 | Mood on arrival and exit |
| 6 | Key findings | 30 | MSAs' experience for users with impairment | 73 | Improvements |
| 10 | **Part 1 – Key metrics** | 34 | Reasons for stopping at an MSA | 78 | Opinions on MSA staff |
| 11 | Overall satisfaction | 38 | Arrival at MSA | 81 | Respondent profile |
| 16 | Likelihood to recommend | 42 | What visitors did at MSA | 84 | Additional demographic data |
| 21 | Satisfaction with toilets at MSAs | 44 | Experience with MSA and its facilities | 98 | Your Ipsos team |
| 27 | EV charging satisfaction | 53 | Experience with food & drink | | |

# Background and methodology



# Background

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

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

Transport Focus engaged Ipsos 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 defining what makes exceptional experiences

# Methodology

## A two-stage approach

Overall, MSUS 2026 covered 123 MSAs across England, Wales and Scotland.

Fieldwork ran between 13th May to 5th July 2026.

Individual MSAs equally weighted within the data, meaning each site counts equally towards overall results.

## Number of MSAs covered in this report per operator

| | | | |
|---|---|---|---|
| moto | 51 | EXTRA | 7 |
| roadchef | 28 | Welcome Break | 36 |
| GETLINK CUSTOMS SERVICES | 1 | | |

## A two-stage method as introduced in 2022 and replicated through 2023 and this year

The survey was split into two elements, one conducted face to face at the MSA (key metrics) and the other done either online at a later stage or on site with the interviewer.

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

**1**

### Key metrics interview

The key metrics were collected by fieldworkers using tablets to interview visitors upon exit, to achieve in-the-moment recollections of their experience. This short survey asked about three key metrics and some context to their visit.
At least 5 x 6.5 hour interview shifts were completed at each individual MSA in 2026.

Across the 123 MSAs and 3 non-MSAs we collected 33,742 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 in an email survey, or by taking another 10 minutes with the interviewer on the tablet.

Across the 123 MSAs and 3 non-MSAs we collected 5,619 detailed experience surveys.

# Key findings



# Key findings from the key metrics

## Overall Satisfaction

- **95% of MSA visitors were satisfied** with their overall experience, with 67% "very satisfied" — the highest level across the three waves, up from 94% in 2023 and 93% in 2022.
- **Extra and Moto achieved the highest satisfaction** at 96%, with Welcome Break just behind on 95%. Welcome Break showed the largest improvement (+4 pts vs 2022) and Moto rose +3 pts, while **Roadchef is the only operator to marginal dip,** slipping to 93%.
- **Satisfaction was broadly even by journey purpose** — Leisure and Business visitors sat at 95% and EV drivers at 94%, with Commuters marginally the highest (96%). The clear exception is Professional and HGV drivers, both at 90% and consistently the lowest group across all three waves — the standout gap in the overall picture.
- **Satisfaction also rose the longer visitors stayed**, from 93% for stops of five minutes or less to 96% for those staying 35–60 minutes.

## Net Promoter Score (NPS*)

- **52% of visitors were Promoter**s and only 13% Detractors, giving an **overall NPS of +38** — up 3 points on 2022 (+35) and stable versus 2023.
- Moto records NPS at +42, with Welcome Break close behind (+40); both improved strongly since 2022 (+10 and +11 pts). Extra and Roadchef both fell 15 points versus 2022, to +37 and +29 (Roadchef the lowest). Extra is the notable case — joint-highest on overall satisfaction (96%), yet its NPS dropped furthest, from +54 in 2023 to +37, a reminder that high satisfaction doesn't always convert into active advocacy.
- **Commuters gave the highest NPS** (+41) and Leisure visitors the next (+39), while Professional (+33) and HGV drivers (+31) again trailed the field — the same two groups that sit lowest on overall satisfaction. HGV drivers have improved most of any group, though (+7 pts vs 2022).
- There is a clear **correlation between time spent at the MSA and NPS: scores rise steadily** from +32 for stops of five minutes or less to +49 for visitors staying more than an hour.

*Net Promoter®, NPS®, NPS Prism®, and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld. Net Promoter ScoreSM and Net Promoter SystemSM are service marks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld.

# Key findings from the key metrics

## Satisfaction with Toilets

- **92% of visitors were satisfied with the toilets**, with 67% "very satisfied" — a notable improvement of +4 pts on 2022 (88%) and level with 2023.
- **Moto rated highest among the operators** (94%), followed by Welcome Break (93%). Welcome Break and Moto drove the overall improvement (+8 and +6 pts vs 2022). Extra slipped to 91% and **Roadchef was lowest at 89%.**
- **Commuters were the most satisfied (93%);** HGV drivers (90%) and Professional drivers (91%) the least. Disabled visitors' satisfaction improved most of any group (+7 pts vs 2022), reaching 92% — now in line with the all-MSA average.
- **Cleanliness remains the biggest driver of toilet satisfaction** and the clearest differentiator between the best and weakest-performing sites.

## Satisfaction with EV charging

- **84% of EV drivers were satisfied with charging facilities overall** — a strong result for a fast-growing user group, measured as a key metric for the first time this wave.
- **Moto led on EV charging satisfaction (87%),** with Extra and Welcome Break level on 83% and Roadchef lowest at 78%.
- Within the detailed ratings, the practical basics score well — **the wait for a charge point (92%), ease of use (90%) and payment options (91%) — while the speed of charging has improved to 89%.**
- **Value for money is the clear weak spot:** just 58% satisfied, down from 68% in 2022. The information available online about charging (77%) also lags the rest of the experience.

# Other key findings

## Detailed satisfaction with MSAs

- **Visitors were broadly positive about arrival and the approach** — clarity of approach signs (87%), getting from the slip road (84%) and the layout of the parking area (79%) — with safety/security and the walk to the building rated higher than in 2022.
- **Site cleanliness (91%), range of facilities (85%) and outdoor seating (78%) all improved by 2–3 pts on 2022.**
- **Provision for visitors with an impairment improved markedly**: 75% said the MSA catered for them well, up from 66% in 2023 and 62% in 2022 (+13 pts).
- **HGV facilities remain the weakest area by some distance** — HGV parking spaces (54%, down from 66% in 2022), showers (51%) and the value of the parking package (42%). Professional and HGV drivers consistently report lower satisfaction across road surfaces, parking layout and vehicle security.

## Food & Drink

- **The core experience rates highly** — quality of food/drink (91%), speed of service and time to get food/drink (both ~94%) and availability of seating (94%).
- **Ordering continues to shift to self-service:** 39% of eat-in orders used a touchscreen or app in 2026, up from 28% in 2022, and most visitors rated ordering this way as "the same" or "better" than at the counter.
- **Costa Coffee is the most-used outlet,** followed by WHSmith, Greggs, Starbucks and M&S Simply Food.
- **Value for money is consistently the lowest-rated aspect** across every food-and-drink category (59–74%), for both eating in and buying to take away.

## Overall – areas for improvement

- **Value for money is the single biggest opportunity**, weak across food & drink (59–74%) and EV charging (58%) alike. With cost-of-living pressures front of mind, added-value offers are the clearest route to lifting satisfaction and loyalty.
- **HGV facilities need the most attention of any facility area** — parking capacity, showers and the value of the parking package — and Professional/HGV drivers trail other groups on almost every measure.
- As the vehicle fleet electrifies**, EV drivers' experience is largely positive** but price-sensitive; acting on charging value for money and clearer online information now will help meet fast-growing demand.
- Recurring themes in what visitors would change: **car-park lighting and pedestrian safety at night, clearer wayfinding, wider retail/food choice, and better provision for children and families**. Encouragingly, the mood uplift during a visit is strong (+31 pts more happy/relaxed on exit; -22 pts less tired/stressed/frustrated), staff are rated 93% good, and awareness of environmental efforts is rising (24%, up from 16% in 2022).

# Key metrics: Overall satisfaction with MSAs

transportfocus

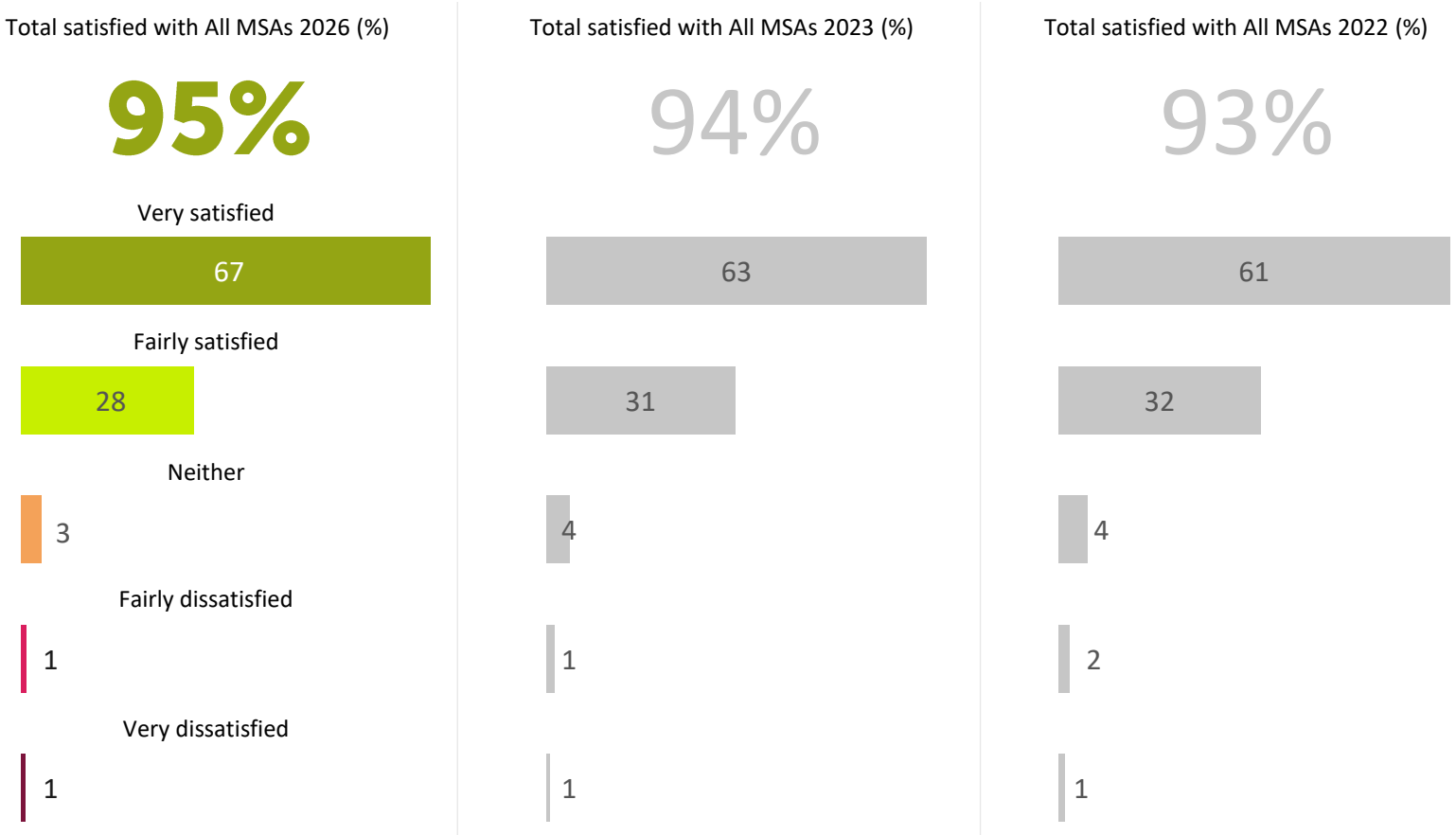
Ipsos



# Overall satisfaction

Summary (%)

Visitor satisfaction at All MSAs




R3. Overall, how satisfied are you with your experience at [name of services] services today?
Base: (2022/2023/2026): All MSAs: (31,204/30,740/32,707)

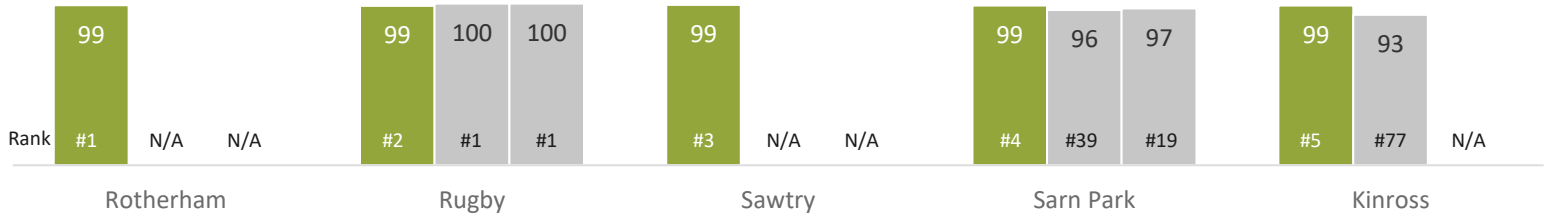
# Overall satisfaction

Summary (%)

Total satisfied with All MSA sites 2026 (%)

| 2026 | 2023 | 2022 |
|---|---|---|
| 95 | 94 | 93 |

## Highest rated MSAs




## Lowest rated MSAs

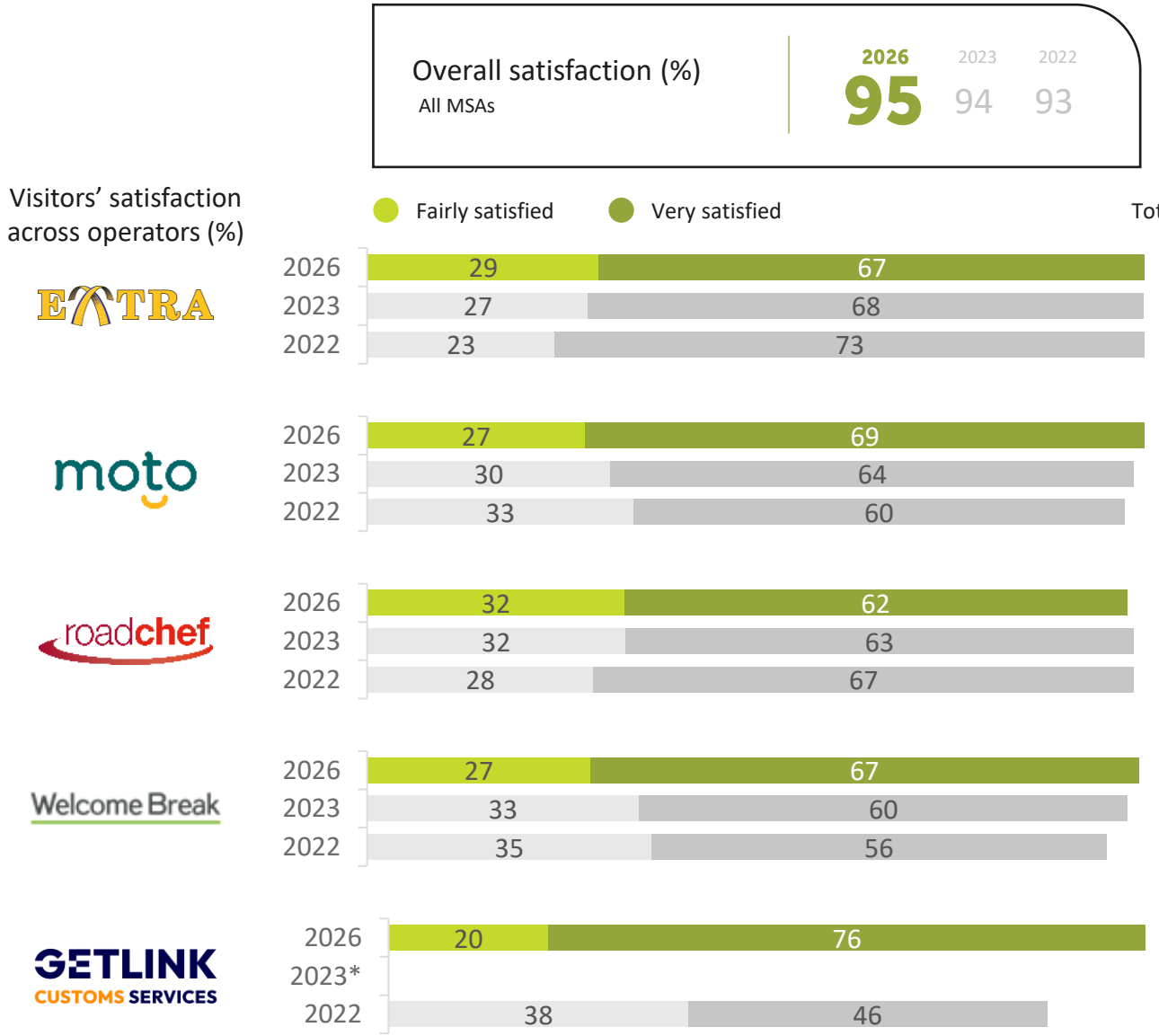



*Ranks show top 5 and bottom 5 individual sites compared to their rank in 2023 and 2022

R3 Overall, how satisfied are you with your experience at [name of services] services today?
Base: (2022/2023/2026) All MSAs: (31,204/30,740/32,707)

# Overall satisfaction

Operator comparison




R3 Overall, how satisfied are you with your experience at [name of services] services today?
Base: (2022/2023/2026) Extra: (1,891/1,715/1,745); Roadchef: (7,588 /7,042/7,735); Moto: (11,862/12,736/13,405); Welcome Break: (9,177/9,247/9,610), GETLINK (prev. Stop 24): (239/*/212) * *GETLINK Customs Services didn't participate in 2023. Also, 2026 data for GetLink reflects only one site's results*

# Overall satisfaction (1/2)

All MSAs across GB

| Overall satisfaction (%) | All MSAs 2026 | All MSAs 2023 | All MSAs 2022 |
|---|---|---|---|
| | 95 | 94 | 93 |

Total satisfied (%)

| | | 2026 | 2023 | 2022 |
|---|---|---|---|---|
| 1 | Rotherham | 99 | - | - |
| 2 | Rugby | 99 | 100 | 100 |
| 3 | Sawtry services | 99 | - | - |
| 4 | Sarn Park | 99 | 96 | 97 |
| 5 | Kinross | 99 | 93 | - |
| 6 | Pease Pottage | 99 | 94 | 94 |
| 7 | Donington Park | 99 | 98 | 99 |
| 8 | Norton Canes | 99 | 93 | 93 |
| 9 | Stirling | 98 | 96 | - |
| 10 | Tamworth | 98 | 96 | 88 |
| 11 | Gretna Green | 98 | 95 | 88 |
| 12 | Trowell Southbound | 98 | 94 | 95 |
| 13 | Woolley Edge Southbound | 98 | 96 | 95 |
| 14 | Hopwood Park | 98 | 96 | 95 |
| 15 | Burtonwood | 98 | 95 | 94 |
| 16 | Winchester Southbound | 98 | 93 | 96 |
| 17 | Leeds Skelton Lake | 98 | 98 | 96 |
| 18 | Swansea | 98 | 92 | - |
| 19 | Medway Eastbound | 98 | 94 | 99 |
| 20 | Heston Eastbound | 97 | 96 | 96 |
| 21 | Heston Westbound | 97 | 96 | 94 |
| 22 | Tibshelf Southbound | 97 | 96 | 97 |
| 23 | Trowell Northbound | 97 | 97 | 95 |
| 24 | Blyth | 97 | 92 | 93 |
| 25 | Tibshelf Northbound | 97 | 94 | 96 |
| 26 | Chieveley | 97 | 94 | 97 |
| 27 | Birch Westbound | 97 | 97 | 97 |
| 28 | Washington Southbound | 97 | 95 | 98 |
| 29 | Frankley Northbound | 97 | 97 | 92 |
| 30 | Burton-in-Kendal | 97 | 98 | 98 |
| 31 | Winchester Northbound | 97 | 94 | 89 |
| 32 | Corley Northbound | 97 | 96 | 97 |
| 33 | Hartshead Moor Eastbound | 97 | 84 | 80 |
| 34 | Birch Eastbound | 97 | 95 | 94 |
| 35 | Fleet Southbound | 96 | 93 | 95 |
| 36 | Reading Eastbound | 96 | 99 | 93 |
| 36 | Thurrock | 96 | 93 | 93 |
| 38 | Folkestone | 96 | - | 84 |
| 39 | Cobham | 96 | 94 | 93 |
| 40 | Newport Pagnell Northbound | 96 | 95 | 90 |
| 41 | Cardiff West | 96 | 91 | - |
| 42 | Michaelwood Southbound | 96 | 93 | 95 |
| 43 | Woodall Northbound | 96 | 90 | 87 |
| 44 | Baldock | 96 | 95 | 96 |
| 45 | Warwick Northbound | 96 | 94 | 87 |
| 46 | Woodall Southbound | 96 | 97 | 85 |
| 47 | Killington Lake | 96 | 99 | 97 |
| 48 | Clacket Lane Westbound | 96 | 92 | 95 |
| 49 | Stafford Northbound | 96 | 94 | 97 |
| 50 | Annandale Water | 96 | 99 | 93 |
| 51 | Blackburn with Darwen | 96 | 95 | 99 |
| 52 | Cardiff Gate | 96 | 89 | 92 |
| 52 | Exeter | 96 | 93 | 96 |
| 54 | Leigh Delamere Westbound | 96 | 93 | 93 |
| 55 | Wetherby | 96 | 99 | 98 |
| 56 | Strensham Northbound | 96 | 95 | 99 |
| 57 | Chester | 96 | 99 | 96 |
| 58 | Lancaster Southbound | 96 | 88 | 83 |
| 59 | Woolley Edge Northbound | 96 | 95 | 84 |
| 60 | Magor | 96 | 93 | 94 |
| 61 | Michaelwood Northbound | 96 | 95 | 91 |
| 62 | Doncaster North | 95 | 96 | 95 |
| 63 | Oxford | 95 | 95 | 97 |
| 64 | Cherwell Valley | 95 | 93 | 96 |

R3. Overall, how satisfied are you with your experience at [name of services] services today?
Base: (2022/2023/2026) All MSAs (31,204/30,740/32,707)

# Overall satisfaction (2/2)

All MSAs across GB

| Overall satisfaction (%) | All MSAs 2026 | 2023 | 2022 |
|---|---|---|---|
| | 95 | 94 | 93 |

Total satisfied (%)

| | | 2026 | 2023 | 2022 |
|---|---|---|---|---|
| 65 | Sandbach Northbound | 95 | 93 | 94 |
| 65 | Warwick Southbound | 95 | 95 | 84 |
| 67 | Corley Southbound | 95 | 99 | 97 |
| 68 | Ferrybridge | 95 | 98 | 88 |
| 69 | Birchanger Green | 95 | 96 | 83 |
| 70 | Durham | 95 | 95 | 95 |
| 71 | Cullompton | 95 | 94 | 95 |
| 72 | Beaconsfield | 95 | 96 | 94 |
| 73 | Pont Abraham | 95 | 94 | 93 |
| 74 | Southwaite Southbound | 95 | 96 | 91 |
| 75 | Hilton Park Northbound | 95 | 95 | 92 |
| 75 | Knutsford Northbound | 95 | 91 | 98 |
| 77 | Charnock Richard Northbound | 95 | 95 | 93 |
| 78 | Strensham Southbound | 95 | 94 | 95 |
| 79 | Southwaite Northbound | 95 | 93 | 90 |
| 80 | Rownhams Westbound | 95 | 95 | 94 |
| 81 | Fleet Northbound | 94 | 96 | 97 |
| 82 | London Gateway | 94 | 91 | 93 |
| 83 | South Mimms | 94 | 96 | 95 |
| 84 | Reading Westbound | 94 | 97 | 97 |
| 85 | Hartshead Moor Westbound | 94 | 88 | 87 |
| 86 | Keele Northbound | 94 | 93 | 97 |
| 87 | Washington Northbound | 94 | 96 | 92 |
| 88 | Leicester Forest East Northbound | 94 | 95 | 95 |
| 89 | Leigh Delamere Eastbound | 94 | 93 | 94 |
| 89 | Sedgemoor Southbound | 94 | 91 | 91 |
| 91 | Northampton Southbound | 94 | 93 | 97 |
| 92 | Hamilton | 94 | 96 | 94 |
| 93 | Lancaster Northbound | 94 | 92 | 92 |
| 94 | Northampton Northbound | 94 | 98 | 97 |
| 95 | Peterborough | 94 | 96 | 98 |
| 96 | Membury Eastbound | 94 | 89 | 89 |
| 97 | Gordano | 94 | 93 | 86 |
| 98 | Newport Pagnell Southbound | 93 | 90 | 89 |
| 99 | Stafford Southbound | 93 | 99 | 98 |
| 100 | Leicester Forest East Southbound | 93 | 95 | 94 |
| 101 | Keele Southbound | 93 | 92 | 95 |
| 102 | Telford | 93 | 95 | 90 |
| 103 | Abington | 93 | 97 | 91 |
| 104 | Clacket Lane Eastbound | 93 | 92 | 95 |
| 105 | Sandbach Southbound | 93 | 89 | 89 |
| 106 | Hilton Park Southbound | 93 | 94 | 92 |
| 107 | Maidstone | 92 | 98 | 97 |
| 108 | Charnock Richard Southbound | 92 | 95 | 83 |
| 109 | Medway Westbound | 92 | 97 | 97 |
| 110 | Knutsford Southbound | 92 | 92 | 89 |
| 111 | Membury Westbound | 92 | 92 | 88 |
| 112 | Frankley Southbound | 91 | 93 | 85 |
| 113 | Toddington Northbound | 91 | 88 | 89 |
| 114 | Bridgwater | 90 | 88 | 86 |
| 115 | Toddington Southbound | 90 | 88 | 88 |
| 116 | Taunton Deane Northbound | 90 | 90 | 94 |
| 117 | Rownhams Eastbound | 90 | 90 | 92 |
| 118 | Severn View | 90 | 94 | 89 |
| 119 | Watford Gap Southbound | 89 | 94 | 95 |
| 120 | Sedgemoor Northbound | 88 | 89 | 90 |
| 121 | Taunton Deane Southbound | 87 | 91 | 92 |
| 122 | Bothwell | 87 | 94 | 87 |
| 123 | Watford Gap Northbound | 86 | 95 | 92 |

R3. Overall, how satisfied are you with your experience at [name of services] services today?
Base: (2022/2023/2026) All MSAs (31,204/30,740/32,707)

# Key metrics: Likelihood to recommend



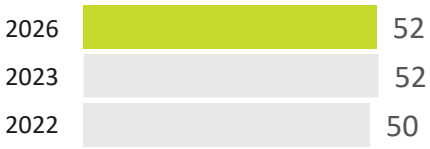
# Likelihood to recommend MSA

Summary

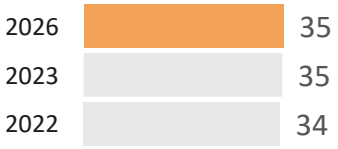
Recommendation:
Net Promoter Score all MSA sites 2026 (promoters minus detractors)

| Overall NPS® | 2026 | 2023 | 2022 |
|---|---|---|---|
| | 38 | 38 | 35 |

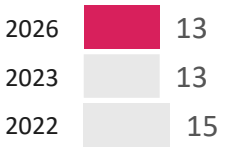
Promoters (9-10)




Passive (7-8)

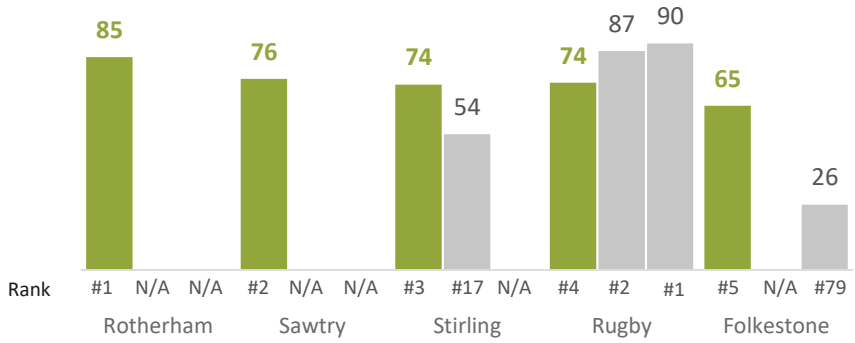



Detractors (0-6)



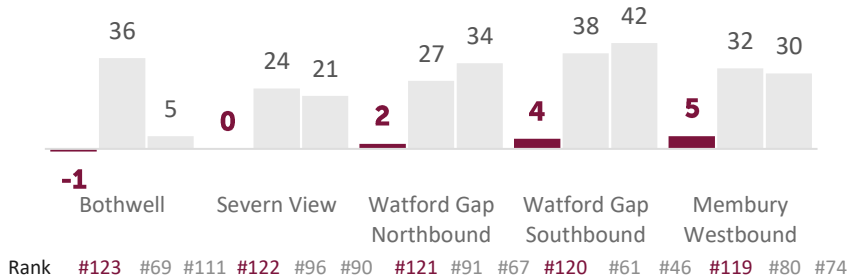

## Highest rated MSAs

Net Promoter Score (2026 vs 2023 vs 2022)




## Lowest rated MSAs

Net Promoter Score (2026 vs 2023 vs 2022)



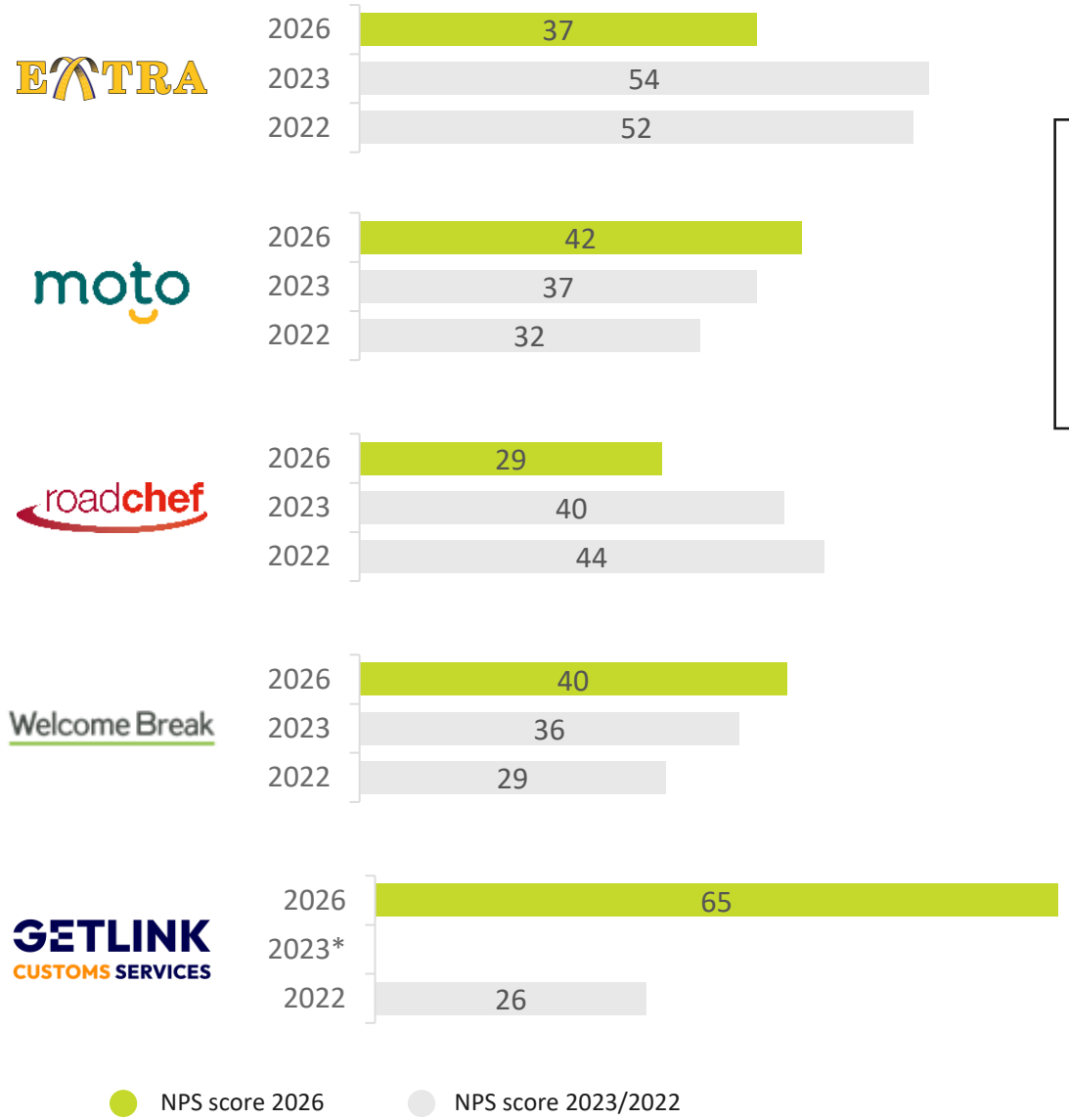

*Ranks show top 5 and bottom 5 individual sites compared to their rank vs previous waves

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: (2022/2023/2026) All MSAs (31,252/30,774/32,954)
Net Promoter®, NPS®, NPS Prism®, and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld. Net Promoter ScoreSM and Net Promoter SystemSM are service marks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld.

# Likelihood to recommend MSA

Operator comparison

Visitors' NPS score across operators




NPS® Scores

All MSAs

| 2026 | 2023 | 2022 |
|---|---|---|
| 38 | 38 | 35 |

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: (2022/2023/2026): Extra: (1,893/1,718/1,750); Roadchef: (7,696/7,048/7,781); Moto: (11,874/12,749/13,505); Welcome Break: (9,202/9,259/9,705); GETLINK (prev. Stop 24): (239/*/213)
**GETLINK Customs Services didn't participate in 2023. Also, 2026 data for GetLink reflects only one site's results*
Net Promoter®, NPS®, NPS Prism®, and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld. Net Promoter ScoreSM and Net Promoter SystemSM are service marks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld.

# Likelihood to recommend MSA (1/2)

All MSAs across GB

| All MSAs | 2026 | 2023 | 2022 |
|---|---|---|---|
| NPS® Scores | 38 | 38 | 35 |

Net Promoter Score®

| | | 2026 | 2023 | 2022 |
|---|---|---|---|---|
| 1 | Rotherham | 85 | - | - |
| 2 | Sawtry services | 76 | - | - |
| 3 | Stirling | 74 | 54 | - |
| 4 | Rugby | 74 | 87 | 90 |
| 5 | Folkestone | 65 | - | 26 |
| 6 | Kinross | 63 | 52 | - |
| 7 | Norton Canes | 62 | 40 | 39 |
| 8 | Doncaster North | 62 | 49 | 50 |
| 9 | Cherwell Valley | 61 | 36 | 27 |
| 10 | Hartshead Moor Westbound | 58 | 16 | 24 |
| 11 | Leeds Skelton Lake | 56 | 73 | 74 |
| 12 | Thurrock | 55 | 25 | 30 |
| 13 | Wetherby | 55 | 56 | 60 |
| 14 | Oxford | 55 | 51 | 45 |
| 15 | Gretna Green | 55 | 49 | 55 |
| 16 | Sarn Park | 55 | 28 | 47 |
| 17 | Washington Southbound | 53 | 60 | 58 |
| 18 | Cardiff West | 53 | 21 | - |
| 19 | Exeter | 52 | 46 | 57 |
| 20 | Warwick Northbound | 52 | 59 | 1 |
| 21 | Blyth | 52 | 18 | 30 |
| 22 | Ferrybridge | 51 | 53 | 25 |
| 23 | Stafford Northbound | 50 | 52 | 53 |
| 24 | Tamworth | 50 | 37 | 23 |
| 25 | Swansea | 50 | 27 | - |
| 26 | Hartshead Moor Eastbound | 50 | -2 | -1 |
| 27 | Chieveley | 49 | 36 | 55 |
| 28 | Maidstone | 49 | 41 | 18 |
| 29 | Reading Eastbound | 49 | 53 | 21 |
| 30 | Birchanger Green | 49 | 58 | 11 |
| 31 | Baldock | 49 | 54 | 50 |
| 32 | Annandale Water | 48 | 88 | 74 |
| 32 | Medway Eastbound | 48 | 19 | 41 |
| 34 | Woolley Edge Southbound | 48 | 48 | 35 |
| 35 | Pease Pottage | 48 | 30 | 46 |
| 36 | Michaelwood Southbound | 47 | 37 | 25 |
| 37 | Hopwood Park | 47 | 53 | 40 |
| 38 | Chester | 47 | 51 | 45 |
| 39 | Winchester Southbound | 47 | 13 | 45 |
| 40 | Newport Pagnell Northbound | 46 | 40 | 18 |
| 41 | Birch Westbound | 46 | 39 | 38 |
| 42 | Winchester Northbound | 46 | 45 | 34 |
| 43 | Charnock Richard Southbound | 45 | 43 | 9 |
| 44 | Corley Southbound | 45 | 64 | 60 |
| 45 | Washington Northbound | 44 | 35 | 38 |
| 46 | Cardiff Gate | 44 | 16 | 21 |
| 47 | Peterborough | 44 | 50 | 63 |
| 48 | Strensham Southbound | 43 | 39 | 47 |
| 49 | Durham | 43 | 47 | 46 |
| 49 | Warwick Southbound | 43 | 58 | 20 |
| 51 | South Mimms | 43 | 43 | 38 |
| 52 | Heston Westbound | 43 | 52 | 8 |
| 53 | Fleet Southbound | 43 | 36 | 48 |
| 54 | Killington Lake | 43 | 74 | 58 |
| 55 | Woodall Northbound | 43 | 21 | 4 |
| 56 | Newport Pagnell Southbound | 42 | 24 | 9 |
| 57 | Medway Westbound | 42 | 37 | 37 |
| 57 | Leigh Delamere Westbound | 42 | 30 | 40 |
| 59 | Keele Southbound | 42 | 21 | 50 |
| 60 | Woodall Southbound | 41 | 45 | 7 |
| 61 | Frankley Northbound | 41 | 42 | 12 |
| 62 | Leigh Delamere Eastbound | 41 | 39 | 42 |
| 63 | Southwaite Southbound | 41 | 52 | 25 |
| 64 | Fleet Northbound | 40 | 31 | 54 |

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: (2022/2023/2026) All MSAs (31,252/30,774/32,954)

Net Promoter®, NPS®, NPS Prism®, and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld. Net Promoter ScoreSM and Net Promoter SystemSM are service marks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld.

# Likelihood to recommend MSA (2/2)

All MSAs across GB

| All MSAs | 2026 | 2023 | 2022 |
|---|---|---|---|
| NPS® Scores | 38 | 38 | 35 |

Net Promoter Score®

| | | 2026 | 2023 | 2022 |
|---|---|---|---|---|
| 65 | Donington Park | 40 | 50 | 71 |
| 66 | London Gateway | 39 | 14 | 5 |
| 67 | Abington | 39 | 49 | 8 |
| 68 | Corley Northbound | 39 | 53 | 64 |
| 69 | Sedgemoor Southbound | 38 | 26 | 25 |
| 70 | Telford | 38 | 45 | 22 |
| 71 | Burtonwood | 37 | 34 | 61 |
| 72 | Heston Eastbound | 37 | 57 | 24 |
| 73 | Strensham Northbound | 36 | 39 | 58 |
| 74 | Hamilton | 35 | 62 | 63 |
| 75 | Cobham | 35 | 44 | 32 |
| 76 | Southwaite Northbound | 34 | 45 | 13 |
| 77 | Lancaster Southbound | 34 | 37 | -12 |
| 78 | Cullompton | 33 | 40 | 36 |
| 78 | Charnock Richard Northbound | 33 | 26 | 23 |

| | | 2026 | 2023 | 2022 |
|---|---|---|---|---|
| 80 | Birch Eastbound | 33 | 30 | 43 |
| 81 | Knutsford Northbound | 32 | 6 | 27 |
| 82 | Keele Northbound | 32 | 31 | 52 |
| 82 | Frankley Southbound | 32 | 30 | -16 |
| 84 | Burton-in-Kendal | 32 | 45 | 50 |
| 85 | Reading Westbound | 32 | 54 | 40 |
| 86 | Trowell Southbound | 32 | 9 | 36 |
| 87 | Stafford Southbound | 31 | 78 | 68 |
| 88 | Tibshelf Northbound | 31 | 30 | 45 |
| 89 | Clacket Lane Eastbound | 30 | 22 | 35 |
| 90 | Leicester Forest East Southbound | 30 | 36 | 50 |
| 91 | Tibshelf Southbound | 30 | 44 | 51 |
| 92 | Taunton Deane Northbound | 29 | 32 | 44 |
| 93 | Leicester Forest East Northbound | 29 | 38 | 19 |
| 94 | Rownhams Westbound | 29 | 45 | 52 |

| | | 2026 | 2023 | 2022 |
|---|---|---|---|---|
| 95 | Sandbach Northbound | 28 | 18 | 35 |
| 96 | Woolley Edge Northbound | 28 | 35 | 9 |
| 97 | Blackburn with Darwen | 27 | 56 | 52 |
| 98 | Gordano | 24 | 35 | 8 |
| 98 | Taunton Deane Southbound | 24 | 29 | 49 |
| 100 | Trowell Northbound | 24 | 29 | 53 |
| 101 | Toddington Northbound | 23 | 12 | 10 |
| 102 | Pont Abraham | 23 | 37 | 33 |
| 103 | Toddington Southbound | 22 | 7 | 13 |
| 104 | Magor | 22 | 38 | 38 |
| 105 | Michaelwood Northbound | 21 | 38 | 37 |
| 106 | Clacket Lane Westbound | 20 | 10 | 30 |
| 107 | Northampton Southbound | 19 | 40 | 67 |
| 108 | Hilton Park Northbound | 18 | 55 | 12 |
| 109 | Beaconsfield | 18 | 58 | 59 |

| | | 2026 | 2023 | 2022 |
|---|---|---|---|---|
| 110 | Bridgwater | 17 | 10 | -2 |
| 111 | Knutsford Southbound | 16 | 11 | -2 |
| 112 | Northampton Northbound | 15 | 52 | 46 |
| 113 | Hilton Park Southbound | 14 | 47 | 35 |
| 114 | Lancaster Northbound | 13 | 36 | 29 |
| 115 | Sandbach Southbound | 10 | 16 | 27 |
| 116 | Membury Eastbound | 9 | 17 | 26 |
| 117 | Rownhams Eastbound | 9 | 19 | 48 |
| 118 | Sedgemoor Northbound | 6 | 14 | 18 |
| 119 | Membury Westbound | 5 | 32 | 30 |
| 120 | Watford Gap Southbound | 4 | 38 | 42 |
| 121 | Watford Gap Northbound | 2 | 27 | 34 |
| 122 | Severn View | 0 | 24 | 21 |
| 123 | Bothwell | -1 | 36 | 5 |

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: (2022/2023/2026) All MSAs (31,252/30,774/32,954)

Net Promoter®, NPS®, NPS Prism®, and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld. Net Promoter ScoreSM and Net Promoter SystemSM are service marks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld.

# Key metrics: Satisfaction with toilets at MSAs

transportfocus

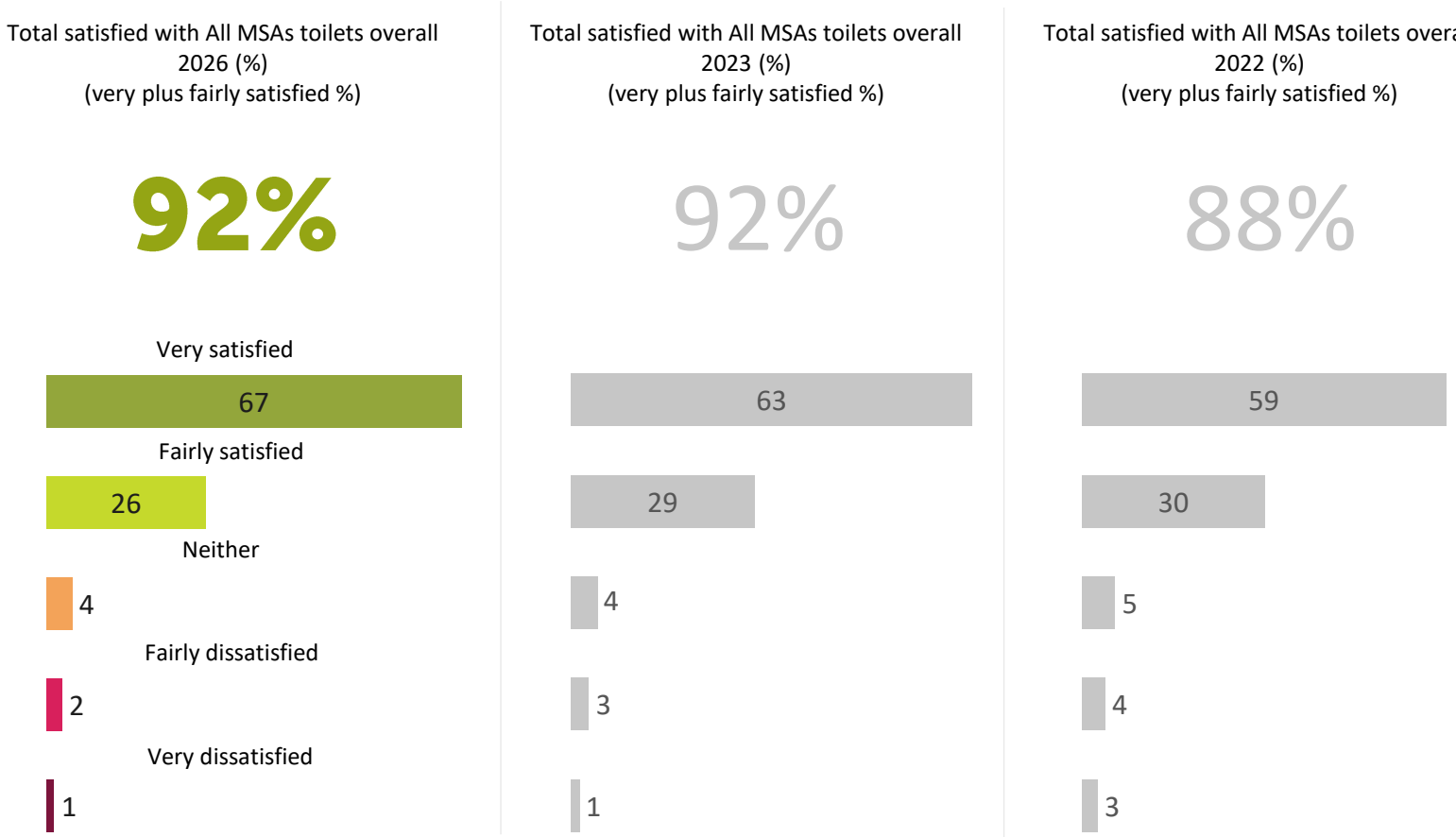
Ipsos



# Satisfaction with the toilets

Summary (%)

Visitor satisfaction at All MSAs




R14. And using the same scale, how satisfied were you with the toilets here today? Base: (2022/2023/2026) All MSA visitors using the Toilets: (25,908/25,749/27,649)

# Satisfaction with the toilets

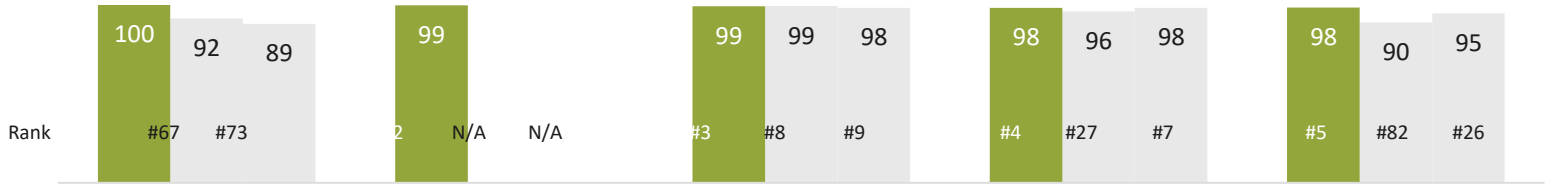
Summary (%)

Total satisfied with all MSAs toilets 2026 (%)

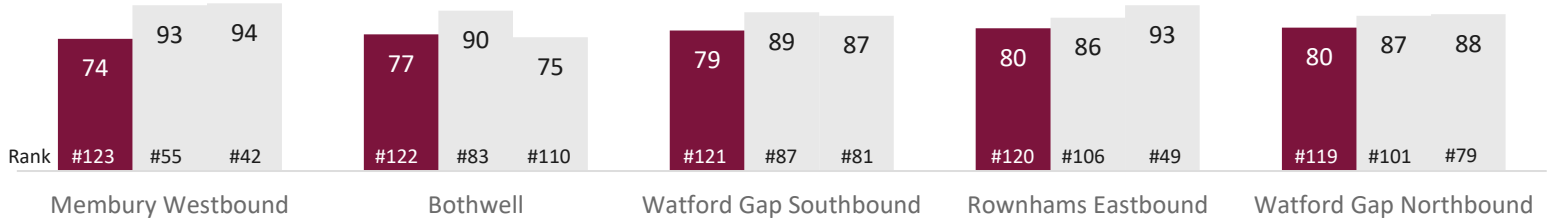


| 2026 | 2023 | 2022 |
|---|---|---|
| 92 | 92 | 88 |

Highest rated MSAs




Lowest rated MSAs

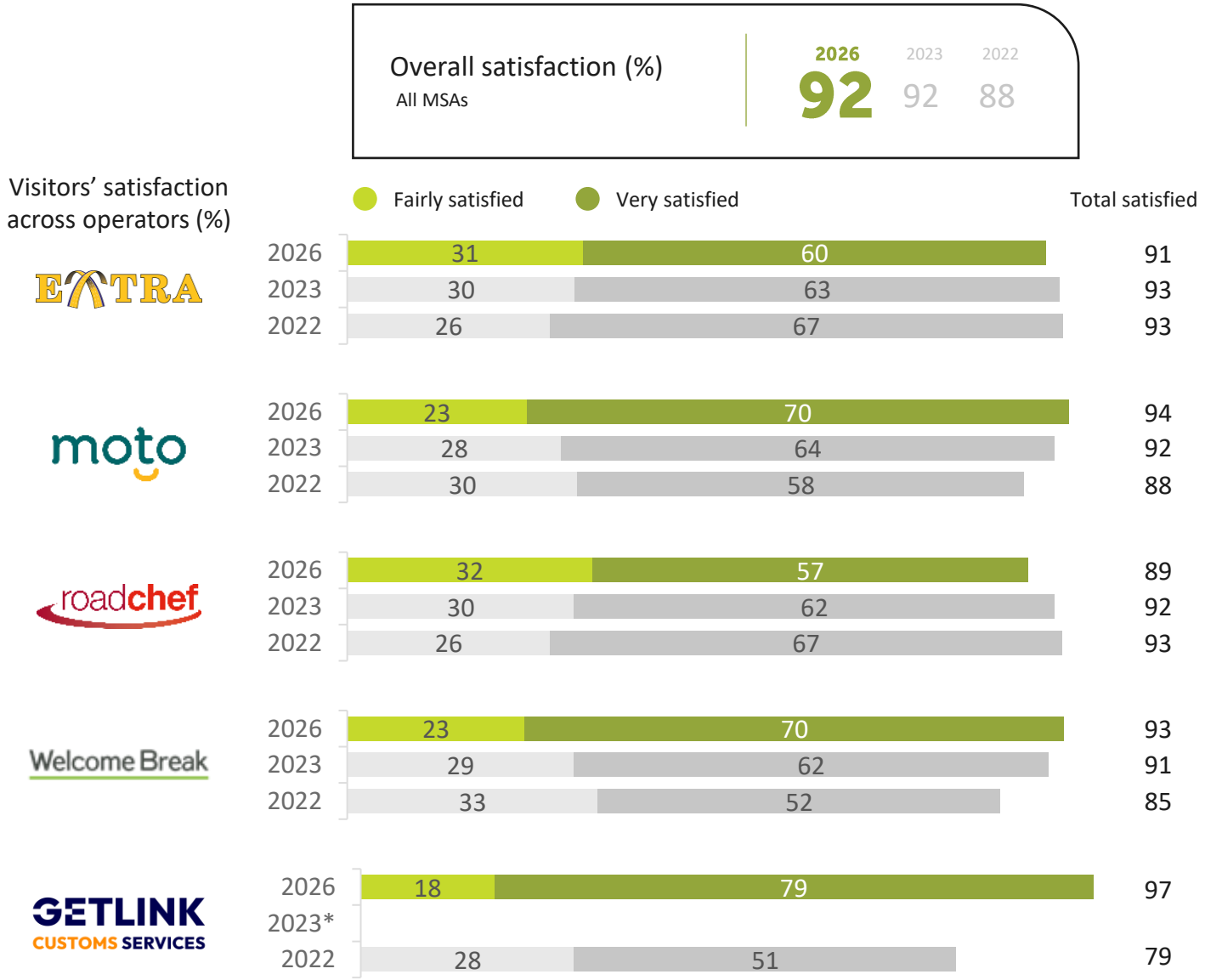



*Ranks show top 5 and bottom 5 individual sites compared to their rank in 2023 and 2022

R14. And using the same scale, how satisfied were you with the toilets here today? Base: (2022/2023/2026) All MSA visitors using the Toilets: (25,908/25,749/27,649)

# Satisfaction with the toilets

Operator comparison




R3 Overall, how satisfied are you with your experience at [name of services] services today?
Base: (2022/2023/2026) Extra: (1,407/1,259/1,392); Roadchef: (6,488/6,035/6,550); Moto: (9,759/10,668/11,334); Welcome Break: (7,764/7,787/8,209), GETLINK (prev. Stop 24): (184/*/164) * *GETLINK Customs Services didn't participate in 2023. Also, 2026 data for GetLink reflects only one site's results*

# Satisfation with the toilets (1/2)

All MSAs across GB

| Overall satisfaction with toilets (%) | All MSAs 2026 | 2023 | 2022 |
|---|---|---|---|
| | 92 | 92 | 88 |

Total satisfied (%)

| | | 2026 | 2023 | 2022 |
|---|---|---|---|---|
| 1 | Michaelwood Southbound | 100 | 92 | 89 |
| 2 | Sawtry Services | 99 | - | - |
| 3 | Sarn Park | 99 | 99 | 98 |
| 4 | Leicester Forest East Southbound | 98 | 96 | 98 |
| 5 | Fleet Northbound | 98 | 90 | 95 |
| 6 | Washington Northbound | 98 | 93 | 90 |
| 7 | Abington | 98 | 95 | 85 |
| 8 | Hartshead Moor Westbound | 98 | 79 | 89 |
| 9 | Cardiff West | 98 | 84 | - |
| 10 | Tibshelf Northbound | 98 | 93 | 95 |
| 11 | Birch Westbound | 98 | 91 | 95 |
| 12 | Rugby | 97 | 97 | 99 |
| 13 | Swansea | 97 | 89 | - |
| 14 | South Mimms | 97 | 96 | 95 |
| 15 | Folkestone | 97 | - | 79 |
| 16 | Heston Eastbound | 97 | 95 | 92 |
| 17 | Trowell Northbound | 97 | 94 | 96 |
| 18 | Warwick Northbound | 97 | 99 | 52 |
| 19 | Tibshelf Southbound | 97 | 98 | 96 |
| 20 | Keele Southbound | 97 | 91 | 95 |
| 21 | Cullompton | 97 | 94 | 87 |
| 22 | Stirling | 96 | 86 | - |
| 23 | Kinross | 96 | 95 | - |
| 24 | Gretna Green | 96 | 93 | 92 |
| 25 | Washington Southbound | 96 | 92 | 95 |
| 25 | Pease Pottage | 96 | 87 | 86 |
| 27 | Donington Park | 96 | 96 | 98 |
| 28 | Charnock Richard Southbound | 96 | 97 | 83 |
| 29 | Heston Westbound | 96 | 96 | 92 |
| 30 | Stafford Northbound | 96 | 90 | 96 |
| 31 | Medway Eastbound | 96 | 95 | 99 |
| 32 | Reading Eastbound | 96 | 96 | 71 |
| 33 | Charnock Richard Northbound | 96 | 90 | 93 |
| 34 | Lancaster Southbound | 96 | 92 | 65 |
| 35 | Peterborough | 96 | 95 | 96 |
| 36 | Thurrock | 95 | 91 | 92 |
| 37 | Trowell Southbound | 95 | 83 | 83 |
| 38 | Cardiff Gate | 95 | 89 | 77 |
| 39 | Baldock | 95 | 92 | 91 |
| 39 | Cherwell Valley | 95 | 85 | 89 |
| 41 | Fleet Southbound | 95 | 84 | 94 |
| 42 | Hopwood Park | 95 | 99 | 84 |
| 42 | Leicester Forest East Northbound | 95 | 92 | 92 |
| 44 | Corley Northbound | 95 | 95 | 95 |
| 45 | Chieveley | 95 | 93 | 93 |
| 46 | Leigh Delamere Westbound | 95 | 92 | 93 |
| 47 | Winchester Southbound | 95 | 93 | 93 |
| 48 | Birch Eastbound | 95 | 89 | 84 |
| 49 | Burton-in-Kendal | 95 | 94 | 95 |
| 50 | Knutsford Southbound | 95 | 85 | 77 |
| 51 | Keele Northbound | 94 | 92 | 94 |
| 52 | Woodall Southbound | 94 | 88 | 76 |
| 53 | Bridgwater | 94 | 98 | 89 |
| 54 | Toddington Northbound | 94 | 87 | 84 |
| 55 | Tamworth | 94 | 90 | 88 |
| 56 | Oxford | 94 | 97 | 98 |
| 57 | Norton Canes | 94 | 95 | 95 |
| 58 | Hilton Park Southbound | 94 | 95 | 90 |
| 59 | Lancaster Northbound | 94 | 92 | 81 |
| 60 | Chester | 94 | 92 | 93 |
| 61 | Hartshead Moor Eastbound | 94 | 66 | 75 |
| 62 | Corley Southbound | 93 | 99 | 95 |
| 63 | Newport Pagnell Northbound | 93 | 94 | 89 |
| 64 | Frankley Northbound | 93 | 93 | 79 |

R14. And using the same scale, how satisfied were you with the toilets here today?
Base: (2022/2023/2026) All MSAs (25,908/25,749/27,649)

# Satisfation with the toilets (2/2)

All MSAs across GB

| Overall satisfaction with toilets (%) | All MSAs 2026 | 2023 | 2022 |
|---|---|---|---|
| | 92 | 92 | 88 |

Total satisfied (%)

| | | 2026 | 2023 | 2022 |
|---|---|---|---|---|
| 65 | Knutsford Northbound | 93 | 88 | 97 |
| 66 | Reading Westbound | 93 | 95 | 93 |
| 67 | Maidstone | 93 | 98 | 99 |
| 68 | Exeter | 93 | 88 | 90 |
| 69 | Birchanger Green | 93 | 97 | 49 |
| 70 | Winchester Northbound | 93 | 95 | 88 |
| 71 | Strensham Northbound | 93 | 92 | 97 |
| 72 | Leigh Delamere Eastbound | 93 | 96 | 92 |
| 73 | Gordano | 93 | 93 | 78 |
| 74 | Ferrybridge | 93 | 91 | 79 |
| 75 | Woodall Northbound | 92 | 72 | 66 |
| 76 | Killington Lake | 92 | 100 | 98 |
| 77 | Doncaster North | 91 | 90 | 91 |
| 78 | Newport Pagnell Southbound | 91 | 80 | 73 |
| 79 | Sandbach Northbound | 91 | 93 | 94 |
| 80 | Southwaite Northbound | 91 | 94 | 81 |
| 81 | Southwaite Southbound | 91 | 95 | 85 |
| 82 | Wetherby | 91 | 95 | 97 |
| 83 | Strensham Southbound | 91 | 84 | 88 |
| 84 | Leeds Skelton Lake | 91 | 97 | 95 |
| 85 | Rotherham | 90 | - | - |
| 86 | Medway Westbound | 90 | 99 | 98 |
| 87 | Toddington Southbound | 90 | 83 | 80 |
| 87 | Hilton Park Northbound | 90 | 99 | 80 |
| 89 | Annandale Water | 90 | 99 | 98 |
| 90 | Telford | 90 | 88 | 92 |
| 91 | Woolley Edge Southbound | 90 | 97 | 83 |
| 92 | Hamilton | 90 | 94 | 94 |
| 93 | Pont Abraham | 90 | 76 | 94 |
| 94 | Michaelwood Northbound | 90 | 96 | 90 |
| 95 | Warwick Southbound | 89 | 97 | 52 |
| 96 | Durham | 89 | 98 | 94 |
| 97 | London Gateway | 89 | 81 | 73 |
| 98 | Sandbach Southbound | 89 | 89 | 92 |
| 98 | Membury Eastbound | 89 | 88 | 85 |
| 100 | Blackburn with Darwen | 89 | 93 | 97 |
| 101 | Clacket Lane Eastbound | 89 | 90 | 93 |
| 102 | Magor | 89 | 94 | 96 |
| 103 | Burtonwood | 88 | 94 | 94 |
| 104 | Frankley Southbound | 88 | 94 | 73 |
| 105 | Clacket Lane Westbound | 88 | 89 | 96 |
| 106 | Northampton Southbound | 88 | 92 | 98 |
| 107 | Taunton Deane Southbound | 88 | 92 | 93 |
| 108 | Cobham | 88 | 88 | 93 |
| 109 | Severn View | 88 | 84 | 91 |
| 110 | Sedgemoor Southbound | 88 | 87 | 81 |
| 111 | Northampton Northbound | 87 | 93 | 94 |
| 112 | Sedgemoor Northbound | 87 | 88 | 86 |
| 112 | Woolley Edge Northbound | 87 | 96 | 80 |
| 114 | Taunton Deane Northbound | 86 | 90 | 93 |
| 115 | Stafford Southbound | 85 | 97 | 95 |
| 116 | Rownhams Westbound | 85 | 95 | 95 |
| 117 | Blyth | 84 | 87 | 83 |
| 118 | Beaconsfield | 81 | 89 | 91 |
| 119 | Watford Gap Northbound | 80 | 87 | 88 |
| 120 | Rownhams Eastbound | 80 | 86 | 93 |
| 121 | Watford Gap Southbound | 79 | 89 | 87 |
| 122 | Bothwell | 77 | 90 | 75 |
| 123 | Membury Westbound | 74 | 93 | 94 |

R14. And using the same scale, how satisfied were you with the toilets here today?
Base: (2022/2023/2026) All MSAs (25,908/25,749/27,649)

# Key metrics: EV charging satisfaction



transportfocus

Ipsos

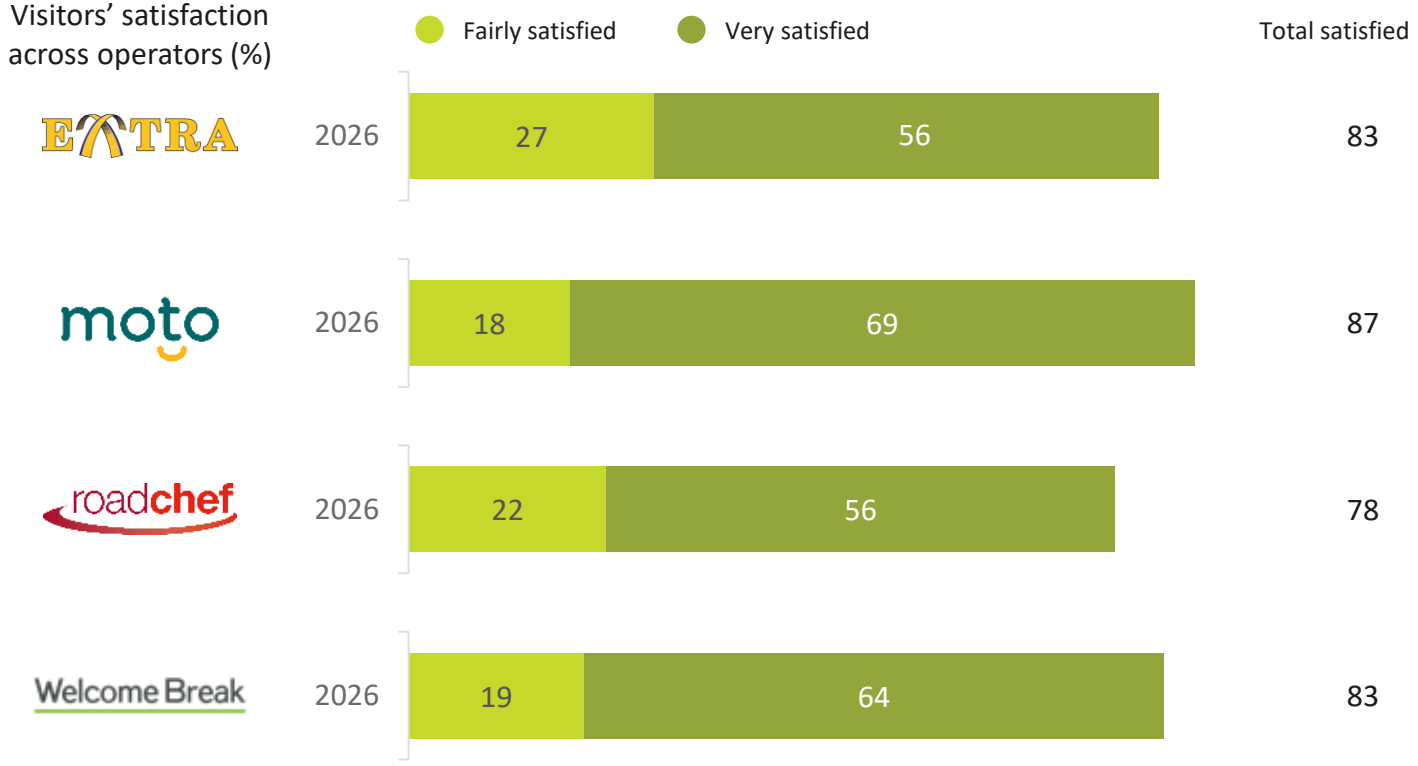
# EV charging satisfaction

Operator comparison

EV charging satisfaction (%)
All MSAs

2026
84

Visitors' satisfaction across operators (%)




R3 Overall, how satisfied are you with your experience at [name of services] services today?
Base: (2026) All MSAs: (1,962); Extra: (73); Roadchef: (276); Moto: (926); Welcome Break: (669). **GETLINK CustomS Services has a BASE SIZE TOO LOW TO SHOW*



# Detailed experience

## Findings from the detailed experience survey

transportfocus

Ipsos

# MSAs' experience for users with impairment



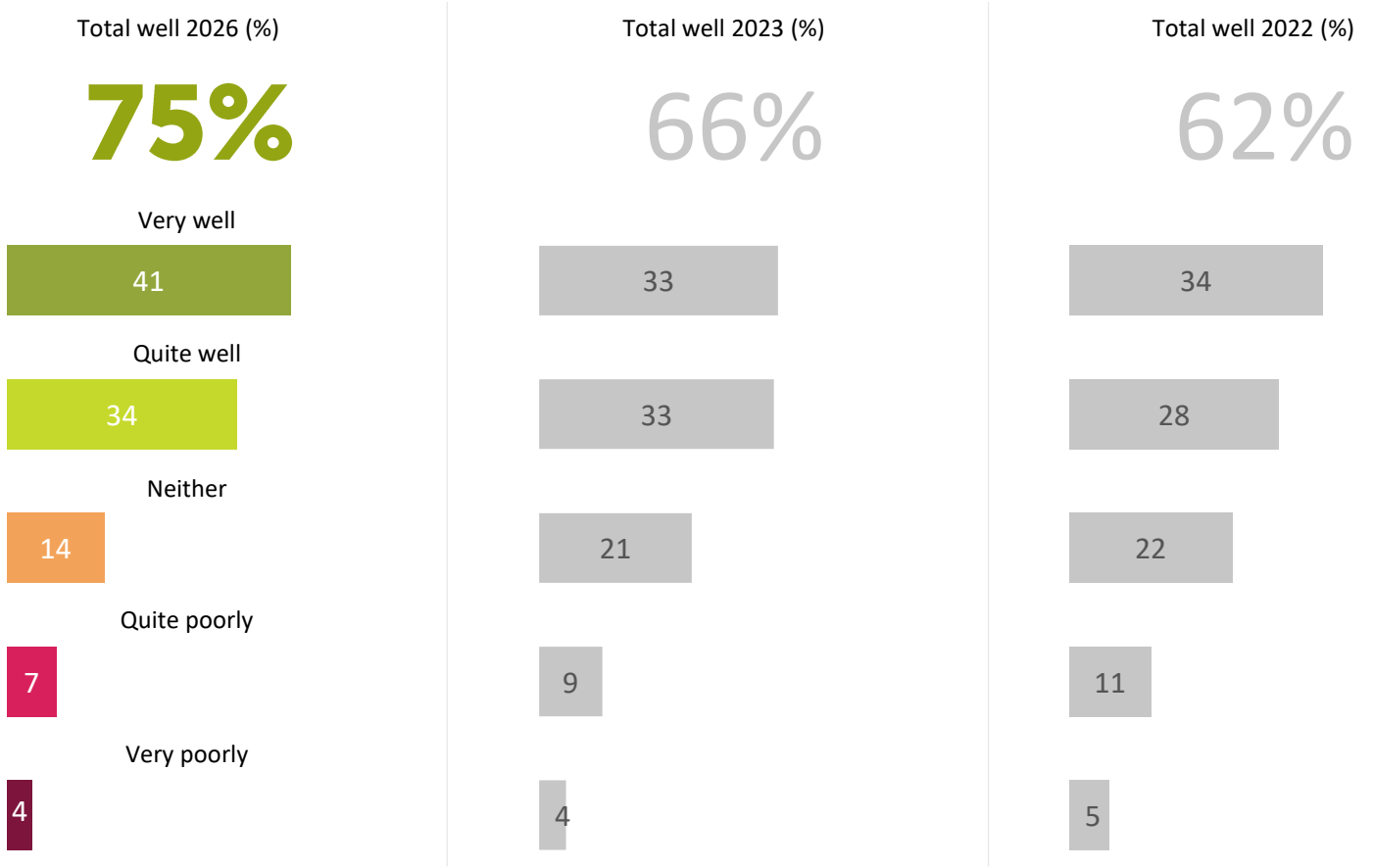
transportfocus

Ipsos

# Overall experience for disabled visitors at MSAs

Findings from detailed experience survey (%)

How well did the MSA cater for impairments?
All MSAs



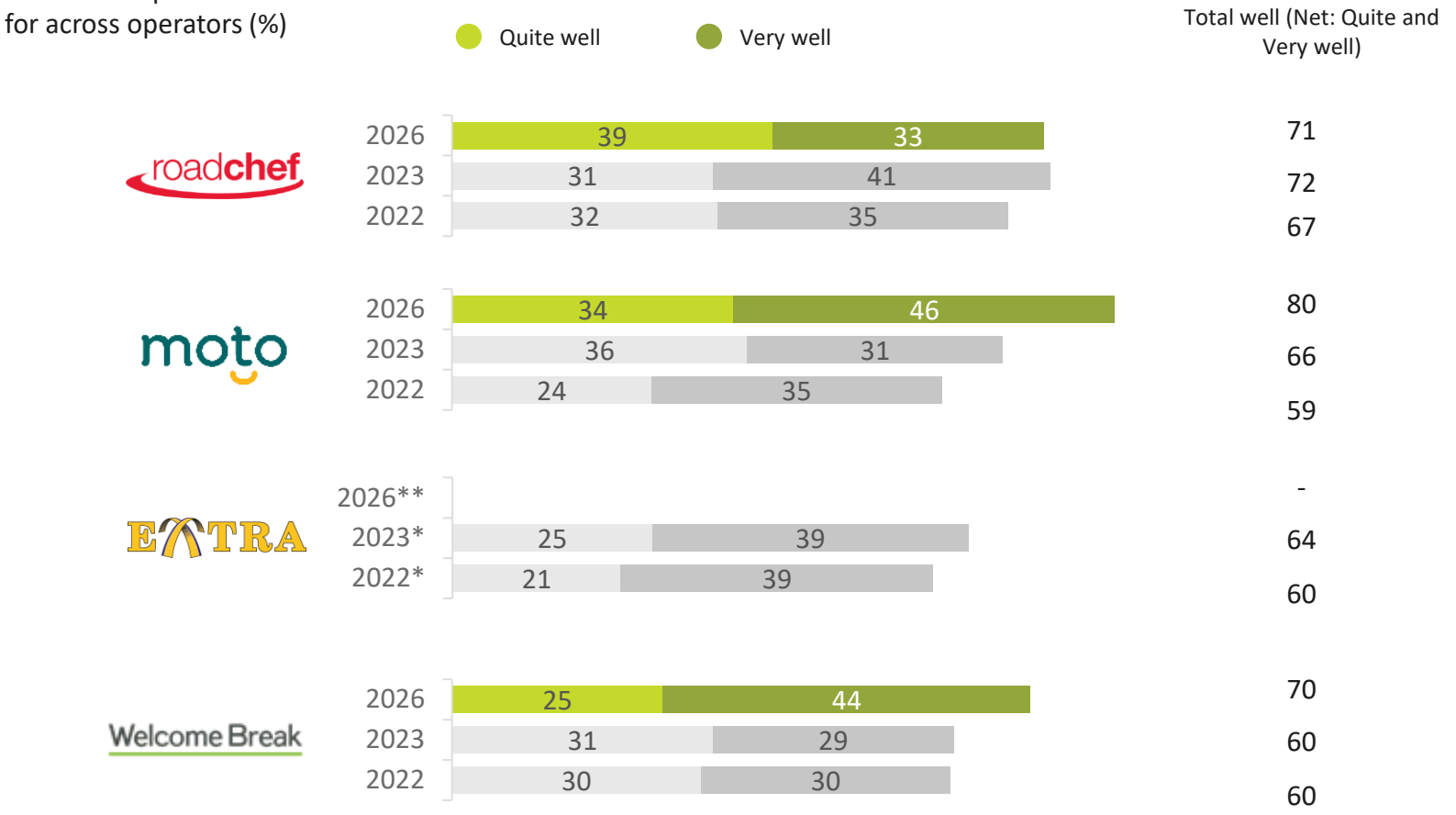

Q30. How well do you think [MSA] catered for your impairment(s) (or those of the person who was with you)?
Base: (2022/2023/2026) All MSAs - Disabled visitors: (582/556/637)

# Overall experience for disabled visitors at MSAs

Findings from detailed experience survey (%)

| Total well (net: Quite + Very well %) | 2026 | 2023 | 2022 |
|---|---|---|---|
| All MSAs | 75 | 66 | 62 |

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: (2022/2023/2026) Extra: (38*/31*/26**); Roadchef: (148/160/143); Moto: (201/233/283); Welcome Break: (106/158/181) *LOW BASE SIZE **BASE SIZE TOO LOW TO SHOW ***GETLINK Customs Services has a base size too low to show.

# Visitors' opinion on how the MSA catered for their impairment

It was the first time my mother couldn't get herself out of the car due to the heat. Staff were very friendly and helpful in quickly getting a wheelchair for me to use. I was very stressed and worried about her and the staff couldn't have been nicer, even though they were busy.
**Southwaite Northbound - Moto**

There was no sign for the lift, which was tucked away in a corner I wouldn't have found without help. It would have been impossible to use on my own as I couldn't open the door once inside the lift, as there was no space to turn my wheelchair around and the door was heavy.
**Leicester Forest East Northbound – Welcome Break**

Can get from disabled parking to a table and loo easily.
**Cullompton - Extra**

Too long a distance from caravan area to services and path felt unsafe with no raised kerb for part of it.
**Stafford Northbound - Moto**

The seating outdoors is all picnic tables which was hard to access ( sit on) because of having to climb in to the structure of the table. Much harder than sitting in a chair.
**Hamilton - Roadchef**

My entire family is hard of hearing so having the kiosks to order on really helps instead of saying 'what' all the time to staff but when we do order with staff, they're always really patient.
**Sarn Park – Welcome Break**

Q30b. Why would you say that?

# Reasons for stopping at MSA

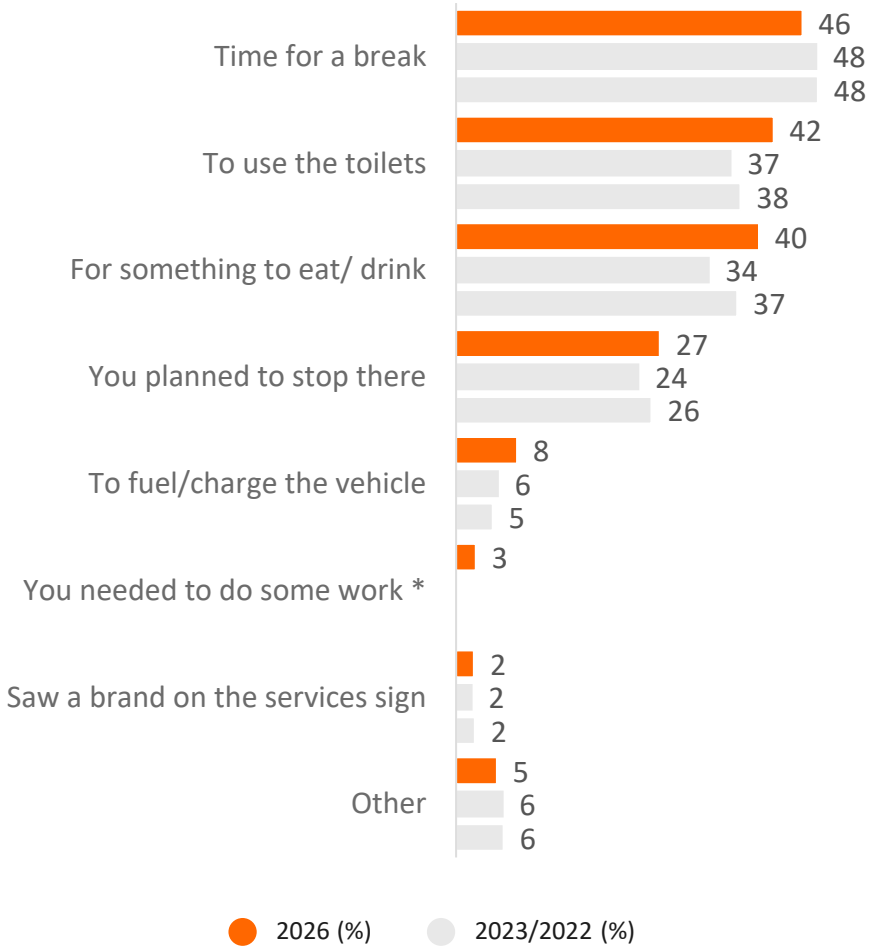
transportfocus

Ipsos



# Reasons for stopping at MSA services – All MSAs

Summary (%)

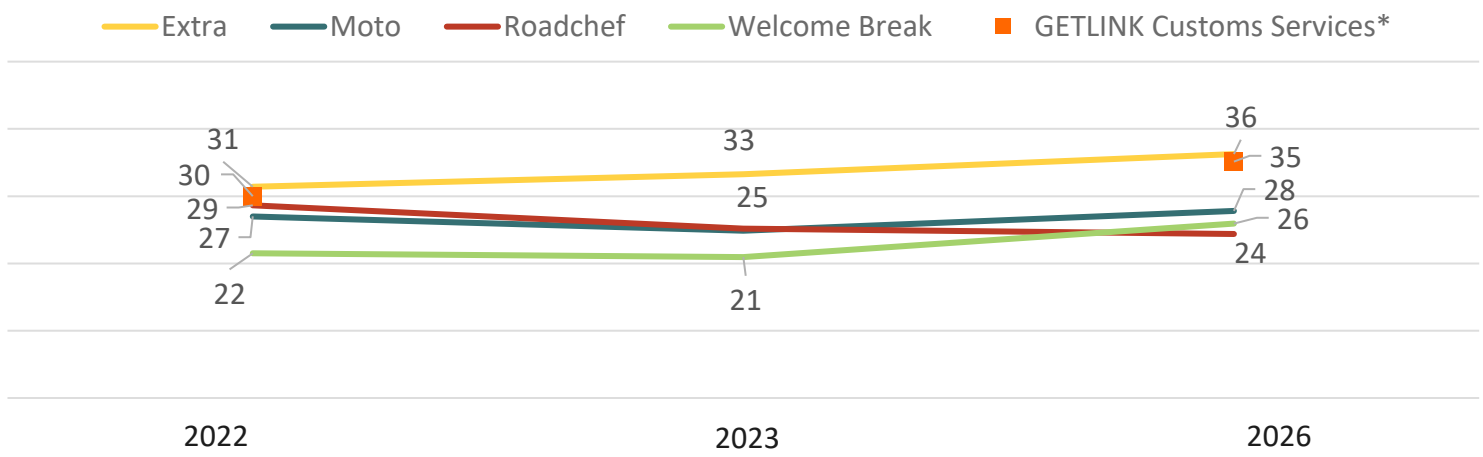



Q3. Tell us about the reason(s) you stopped at [MSA] today? Base: (2022/2023/2026) All MSAs (5,566/5,700/5,504)
*This statement was only added in 2026

# Reasons for stopping at MSAs

Planned to stop - operator comparison (%)

Yes – planned to stop at a specific MSA




Comments

"

It's a good station and has everything I need - Especially, outside seating and a nice calming environment.
**Oxford - Welcome Break**

I've stopped here before, I know it's good. It's a convenient place to break my journey.
**Rownhams Westbound - Roadchef**

Always stop here to refuel and refuel myself. Staff are lovely in all of the restaurants and I always feel welcomed here.
**Stirling - Moto**

It is on my regular commute to / from work, the familiar staff and site manager whenever I see them is always lovely and the service is fantastic, toilets always clean. always my go-to.
**Lancaster Southbound - Moto**

Looked up in an app first to check that they had a hoist in disabled toilet.
**Baldock - Extra**

I was aware of EV chargers available and had stopped off there many times.
**Warwick Southbound – Welcome Break**

Q3. Tell us about the reason(s) you stopped at [MSA] today? In a few words 'what was the reason you decided beforehand to stop at [MSA] services. Base: (2022/2023/2026) Extra: (343/311/276); Roadchef: (1,399/1,436/1,183); Moto: (2,060/2,304/2,525); Welcome Break: (1,644/1,649/1,483); GETLINK Customs Services (40*/**/37*) *LOW BASE SIZE** *GETLINK Customs Services didn't participate in 2023 Also, 2026 data for GetLink reflects only one site's results*

# Reasons for stopping at MSA - Brands

All MSAs average

**2%** stopped at the MSA because of a specific brand

(2% 2023)
(3% 2022)

| Top 5 brands mentioned (in order of highest mentions) | 2026(%) | 2023 (%) | 2022 (%) |
|---|---|---|---|
| Costa Coffee | 22 | 29 | 33 |
| M&S | 19 | 19 | 8 |
| McDonald's | 14 | 16 | 18 |
| Starbucks | 12 | 8 | 16 |
| Greggs | 10 | 13 | 12 |

This is not a direct comparison between brands

Q3. Tell us about the reason(s) you stopped at [MSA] today? Base: (2022/2023/2026) All MSAs (141/125/128)
PLEASE NOTE: not all brands are equally available for each Motorway service station and therefore not to be directly compared

# Arrival at MSA

transportfocus

Ipsos

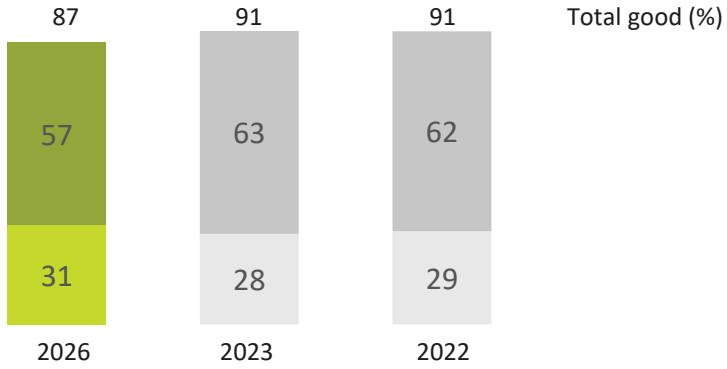


# Ratings for approach to MSA (1/3)

Findings from detailed experience survey (%)

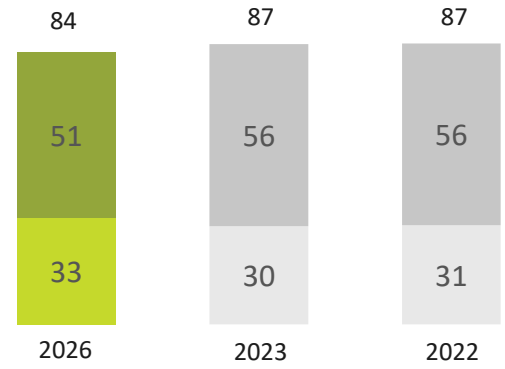



The clarity of the approach signs



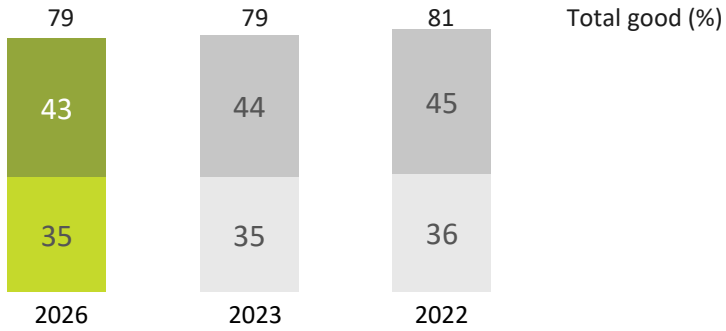

All MSAs

Getting from the slip road to car park



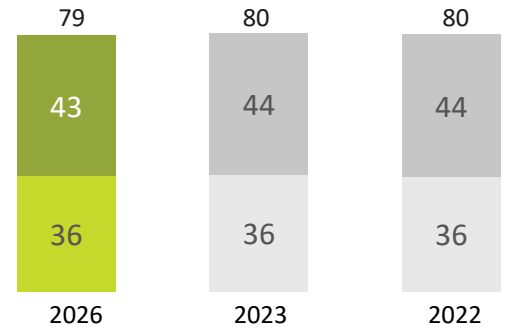

All MSAs

The quality of the road surfaces in the services




All MSAs

The layout of the parking area

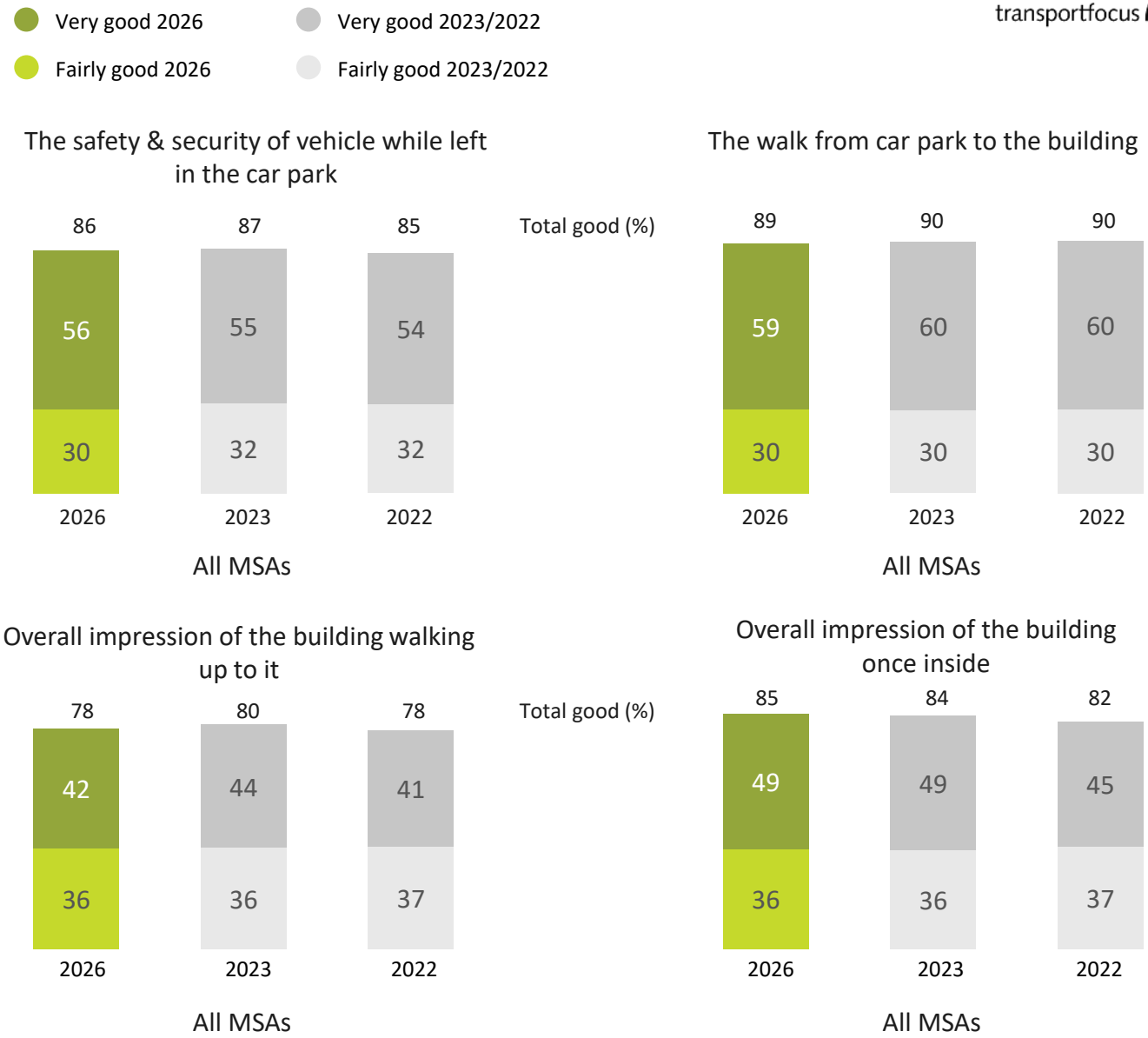



All MSAs

Q5. Please could you rate the following…. Base: (2022/2023/2026) All MSAs (5,460–5,516/5,586-5,636/5,426-5,463)

# Ratings for approach to MSA (2/3)

Findings from detailed experience survey (%)




Q5. Please could you rate the following…. Base: (2022/2023/2026) All MSAs (5,391-5,547/5,526-5,684/5,370-5,489)

# Ratings for approach to MSA (3/3)

Findings from detailed experience survey (%)

| | All MSAs 2026 | Leisure | Business | Commuter | Professional | EV drivers | HGV drivers | Disabled visitors |
|---|---|---|---|---|---|---|---|---|
| Clarity of the approach signs | 87 | 87 | 86 | 91 | 95 | 85 | 95 | 83 |
| Getting from the slip road to car park | 84 | 84 | 84 | 88 | 84 | 83 | 83 | 82 |
| Quality of the road surfaces in the services | 79 | 80 | 75 | 81 | 59 | 76 | 58 | 76 |
| Layout of the parking area | 79 | 80 | 77 | 84 | 67 | 80 | 65 | 77 |
| Safety & security of your vehicle in the car park | 86 | 88 | 85 | 89 | 70 | 88 | 68 | 88 |
| The walk from car park to the building | 89 | 89 | 87 | 93 | 78 | 87 | 76 | 87 |
| Overall impression of the building from the outside | 78 | 79 | 75 | 81 | 73 | 72 | 71 | 78 |
| Overall impression of the building once inside it | 85 | 86 | 82 | 87 | 85 | 79 | 83 | 85 |

Q5. Please could you rate the following…. Base: (2026) All MSAs: 5,370 – 5,684; Leisure: 4,143 – 4039; Business: 868 - 857; Commuter: 264 - 256; Professional: 218 - 216; EV drivers: 752 – 739; HGV drivers: 187 - 185; Disabled visitors: 670 - 645

# What visitors did at MSA

transportfocus

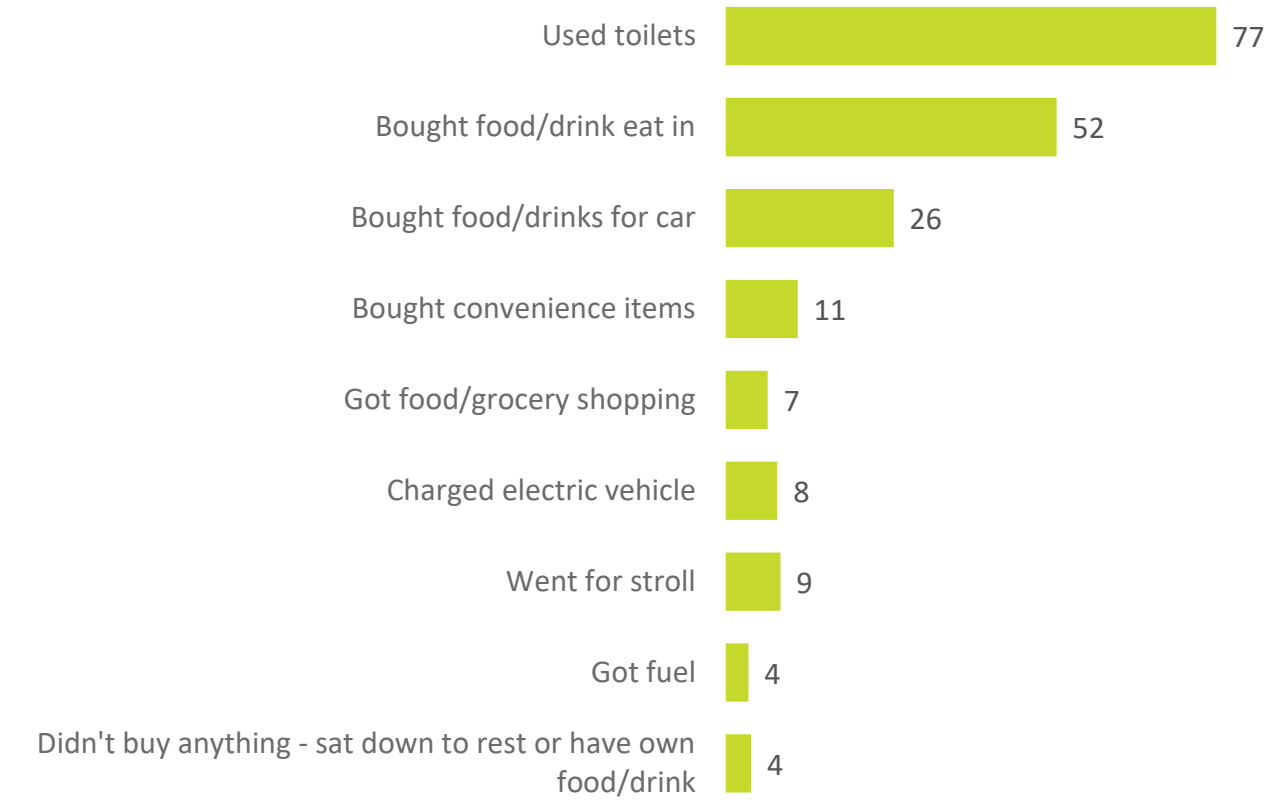
Ipsos



# MSA visitor type

What visitors did at MSA (%)

All MSAs 2026 (%)




All MSAs 2026 (%)

| Leisure | Business | Commuter | Professional | EV drivers | HGV drivers | Disabled visitors |
|---|---|---|---|---|---|---|
| 78 | 72 | 65 | 78 | 79 | 79 | 82 |
| 53 | 48 | 47 | 39 | 52 | 37 | 54 |
| 25 | 28 | 34 | 29 | 29 | 28 | 26 |
| 12 | 8 | 12 | 10 | 10 | 11 | 14 |
| 7 | 5 | 6 | 6 | 6 | 6 | 8 |
| 8 | 13 | 7 | 0 | 58 | 0 | 6 |
| 10 | 2 | 3 | 4 | 10 | 4 | 11 |
| 3 | 3 | 4 | 7 | 1 | 7 | 4 |
| 3 | 5 | 5 | 7 | 4 | 7 | 3 |

Q6. Which of these did you do? Base: (2026) All MSAs: 5,379;; Leisure: 4,157; Business: 868; Commuter: 261; Professional: 218; EV drivers: 750; HGV drivers: 179; Disabled visitors: 664.

# Experience with MSA and its facilities

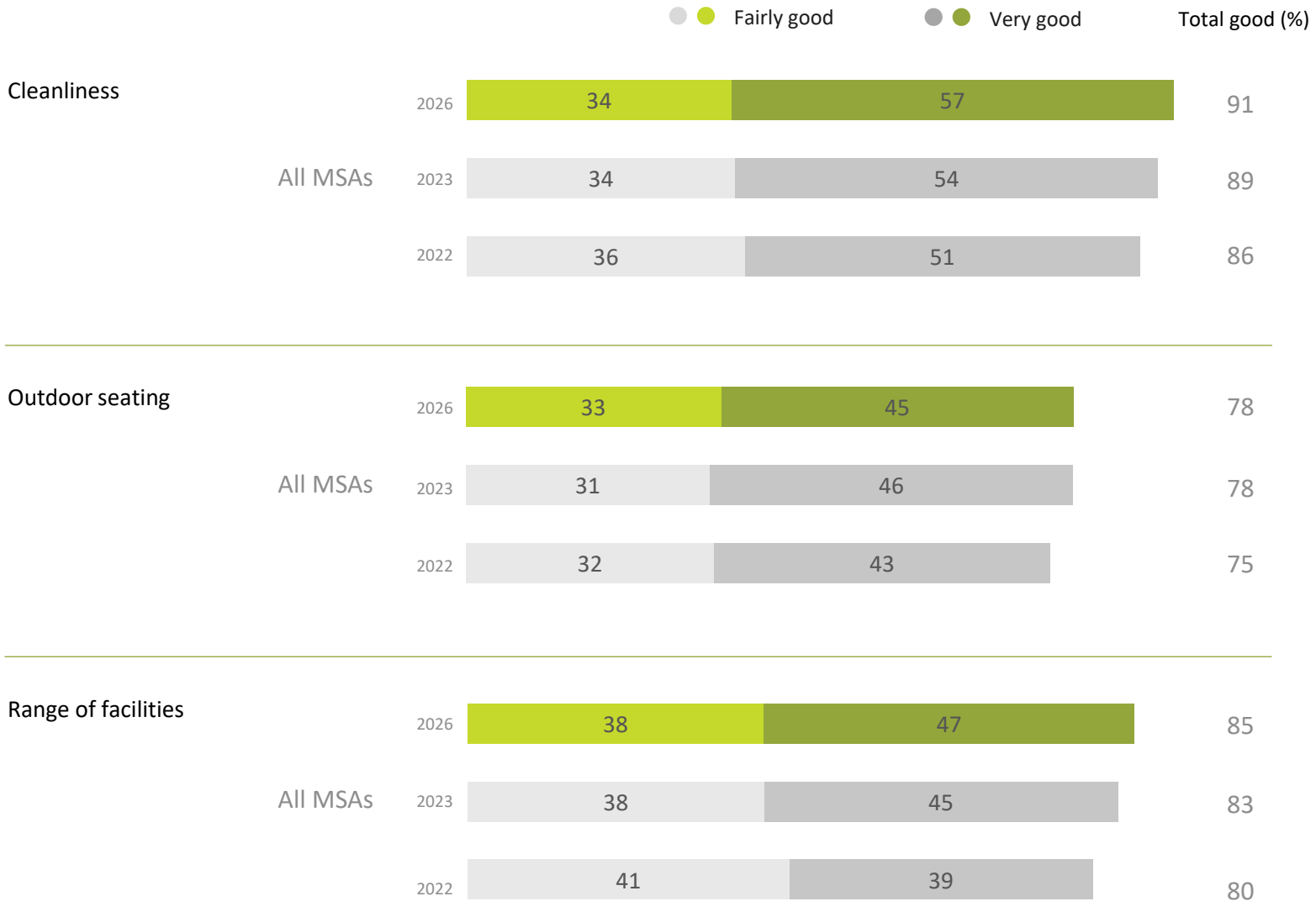


transportfocus

Ipsos

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

Findings from detailed experience survey (%)




Q20. And what was your opinion of the MSA on…. Base: (2022/2023/2026) All MSAs (4,230–5,524/4,497-5,648/4,174-5,478)

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

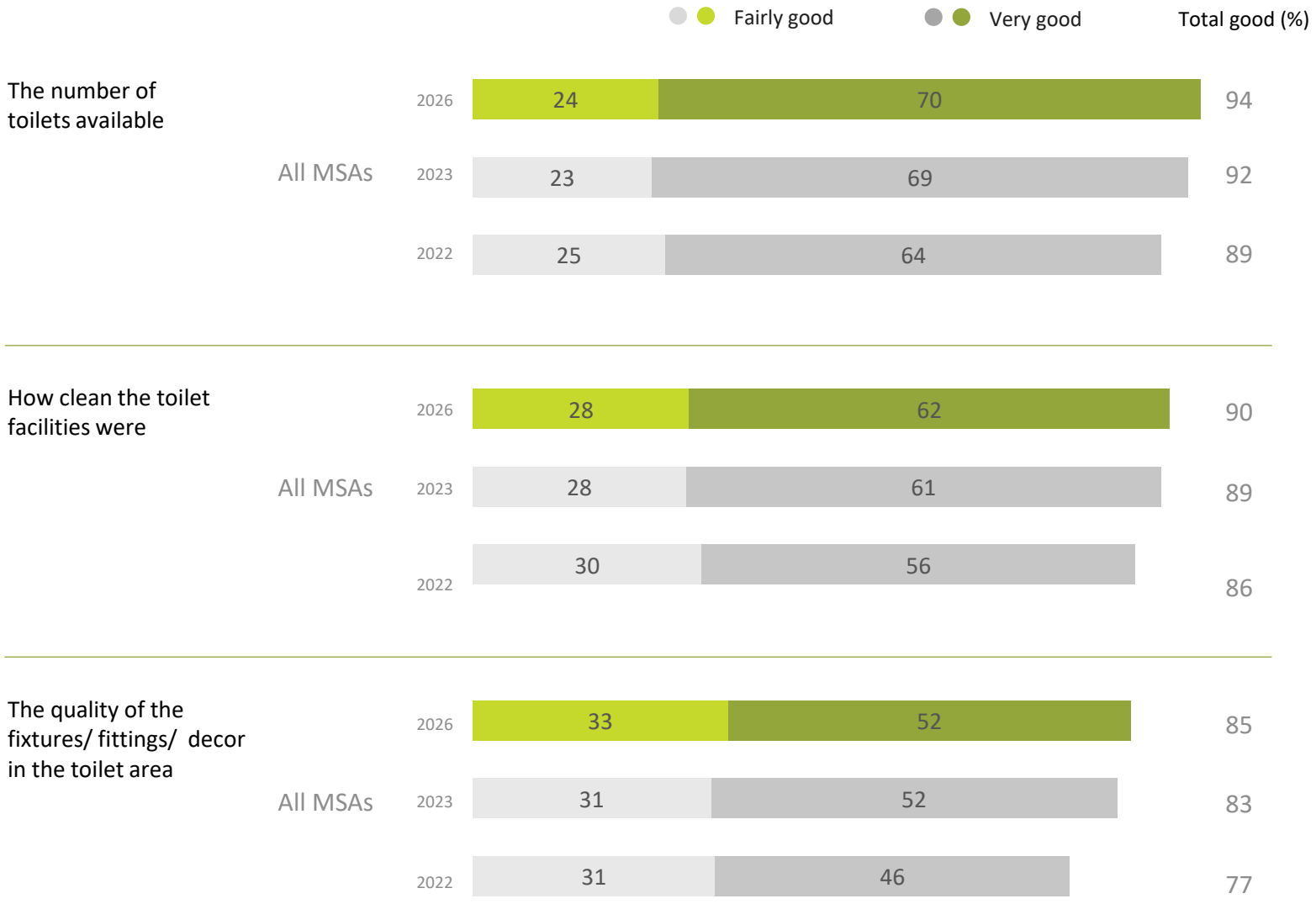
Findings from detailed experience survey (%)

| Total Good (%) | All MSAs 2026 | Leisure | Business | Commuter | Professional | EV drivers | HGV drivers | Disabled visitors |
|---|---|---|---|---|---|---|---|---|
| Cleanliness | 91 | 91 | 89 | 90 | 88 | 89 | 87 | 89 |
| Outdoor seating | 78 | 79 | 74 | 80 | 75 | 73 | 74 | 78 |
| Range of facilities | 85 | 86 | 83 | 89 | 76 | 82 | 75 | 86 |

Q20. And what was your opinion of the MSA on…. Base: (2026) All MSAs: 5,478 – 4,174; Leisure: 4,139 – 3,121; Business: 865 - 658; Commuter: 264 - 211; Professional: 218 - 184; EV drivers: 747 – 531; HGV drivers: 187 - 159; Disabled visitors: 666 - 519

# Toilets (1/2)

Findings from detailed experience survey (%)




Q7. Can we ask your opinion on how you would rate…. Base: (2022/2023/2026) All MSAs (4,321-4,335/4,449-4,469/3,908-3,931)

# Toilets (2/2)

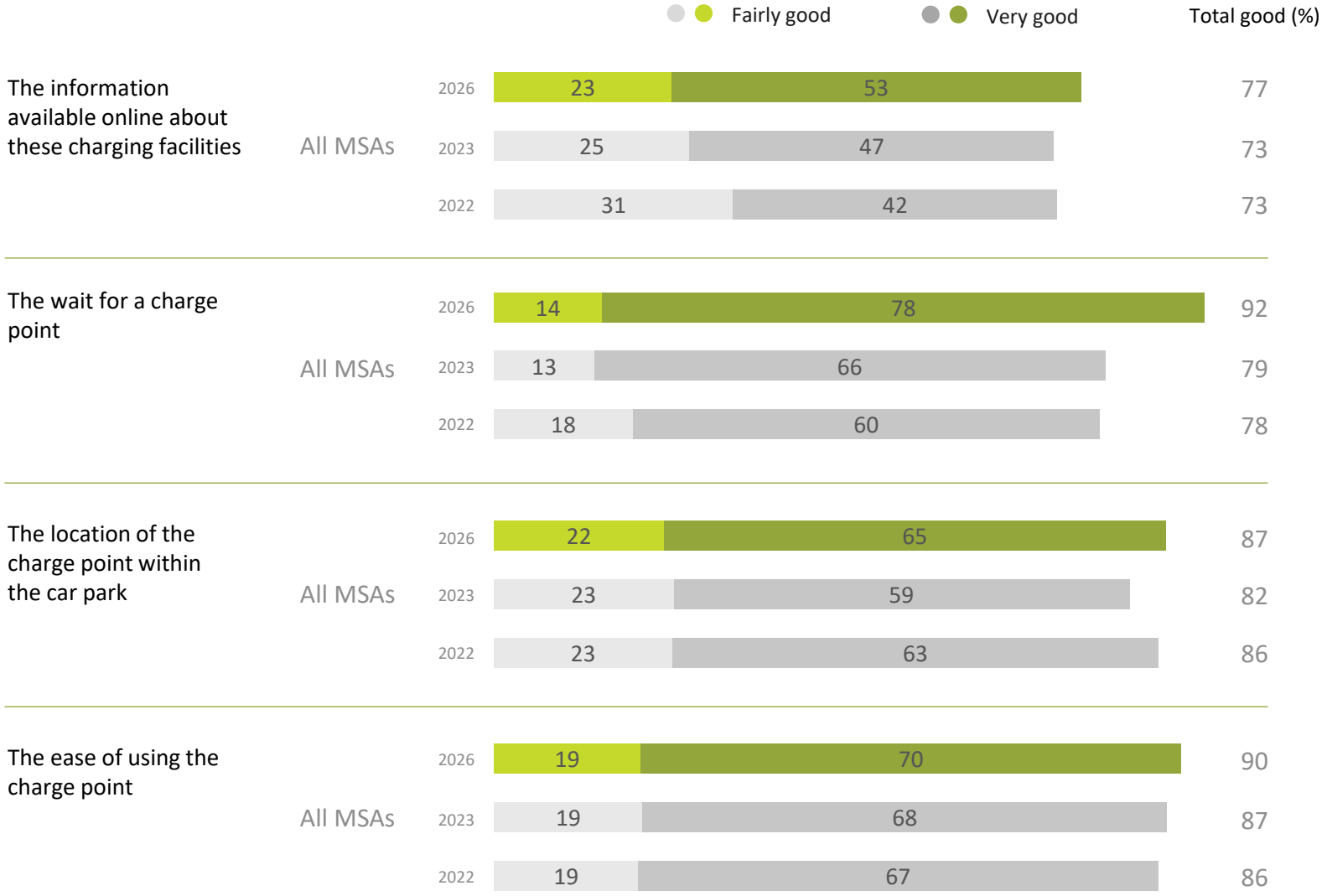
Findings from detailed experience survey (%)

| Total Good (%) | All MSAs 2026 | Leisure | Business | Commuter | Professional | EV drivers | HGV drivers | Disabled visitors |
|---|---|---|---|---|---|---|---|---|
| The number of toilets available | 94 | 95 | 90 | 94 | 88 | 92 | 88 | 94 |
| How clean the toilet facilities were | 90 | 90 | 86 | 88 | 88 | 90 | 89 | 88 |
| The quality of the fixtures/ fittings/ decor in the toilet area | 85 | 86 | 81 | 86 | 81 | 83 | 82 | 85 |

Q7. Can we ask your opinion on how you would rate… Base: (2026) All MSAs: 3,984 – 3,959; Leisure: 3,084 – 3,064; Business: 596 - 593; Commuter: 157 - 155; Professional: 147 - 145; EV drivers: 526 – 522; HGV drivers: 187 - 159; Disabled visitors: 503 - 499

# Electric vehicle charging facilities (1/2)

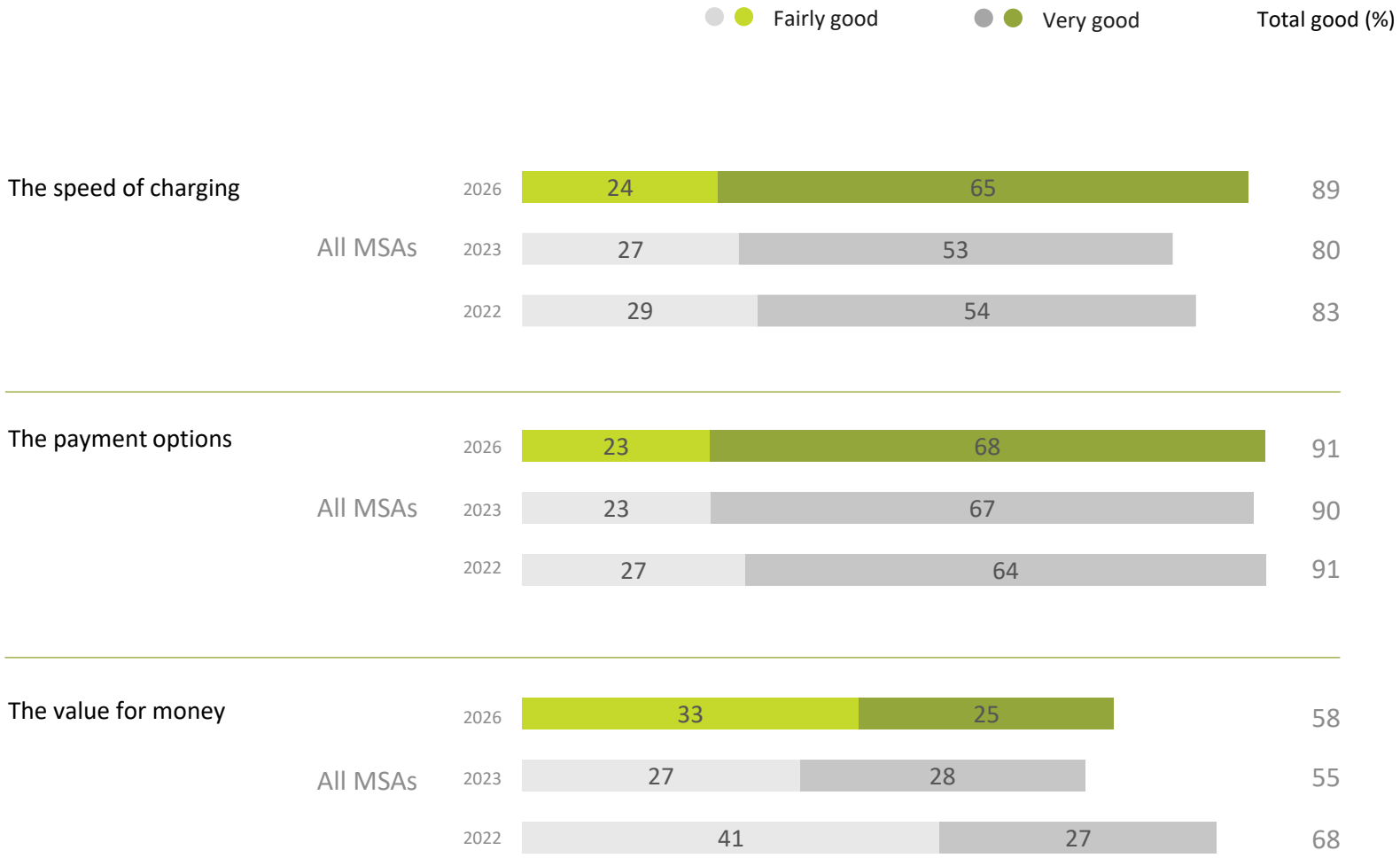
Findings from detailed experience survey (%)




Q14. Can we ask your opinion on how you would rate.... Base: (2022/2023/2026) All MSAs (197 - 236/214-269/292-413)

# Electric vehicle charging facilities (2/2)

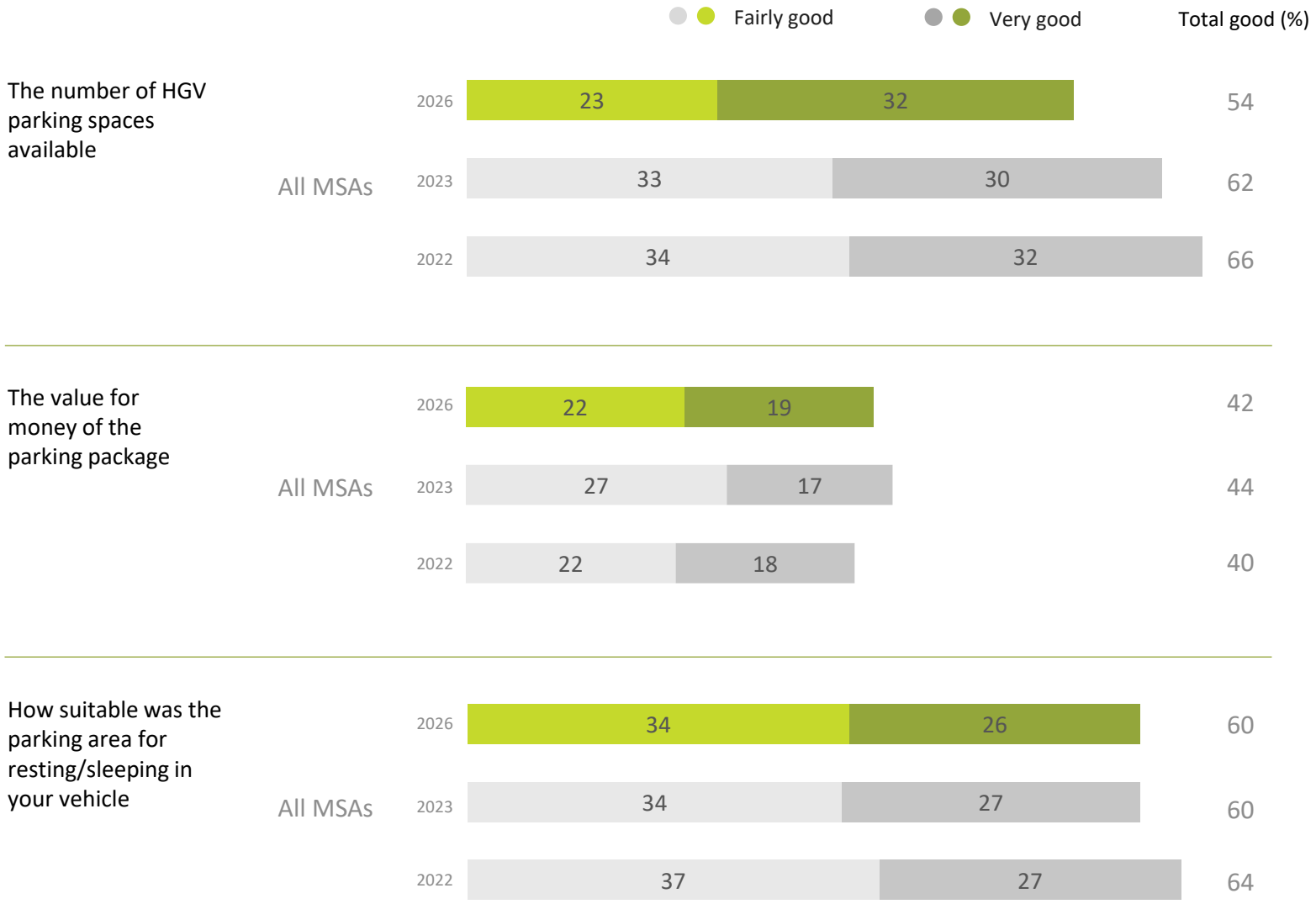
Findings from detailed experience survey (%)




Q14. Can we ask your opinion on how you would rate…. Base: (2022/2023)/2026 All MSAs (197-236/214-269/395-413)

# HGV facilities (1/2)

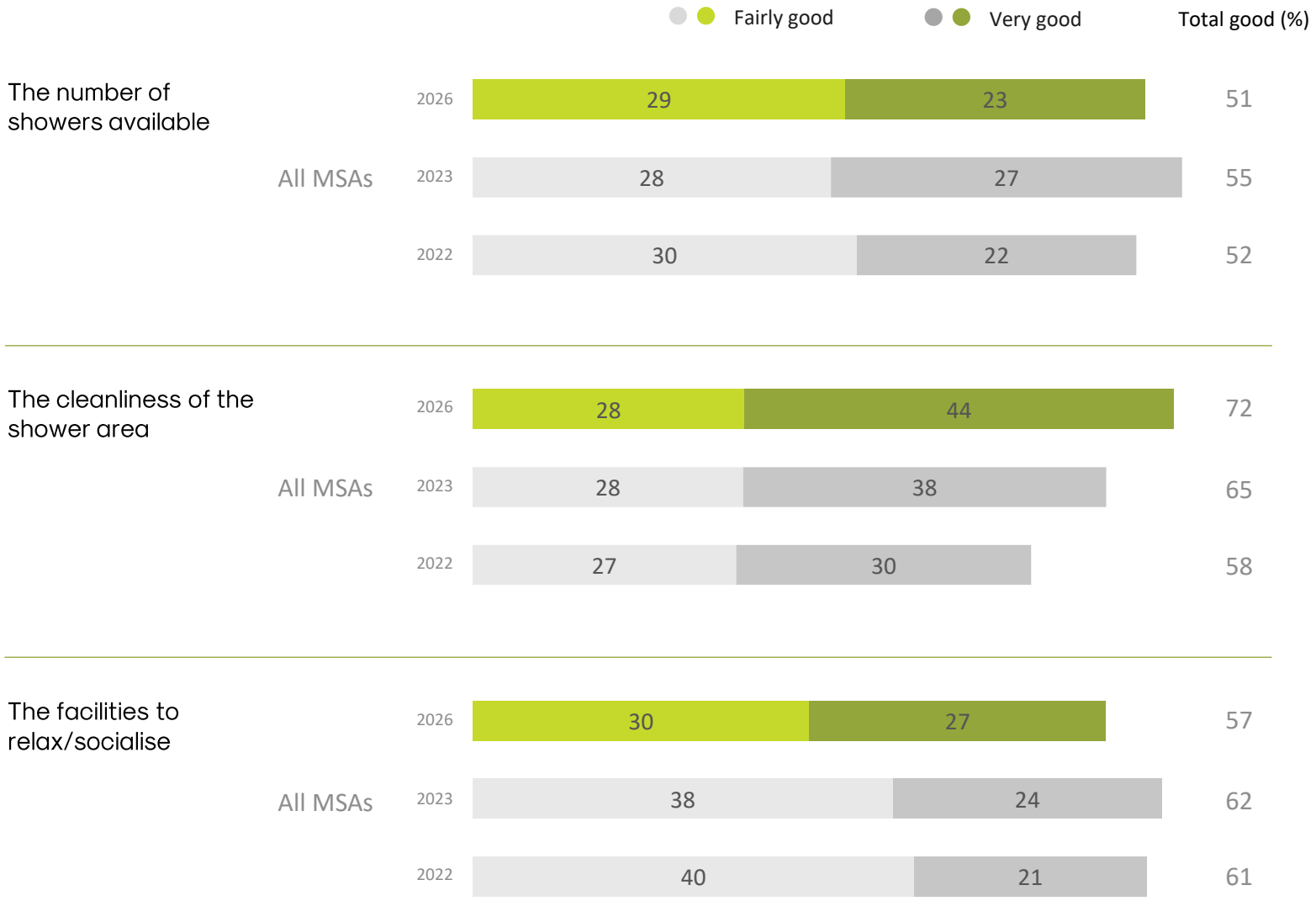
Findings from detailed experience survey (%)




Q13. Can we ask your opinion on how you would rate…. Base: (2022/2023/2026) All MSAs (465 - 702/387-651/108 - 183)

# HGV facilities (2/2)

Findings from detailed experience survey (%)




Q13. Can we ask your opinion on how you would rate.... Base: (2022/2023/2026) All MSAs (465 - 702/387-651/108 - 183)

# Experience with Food & drink

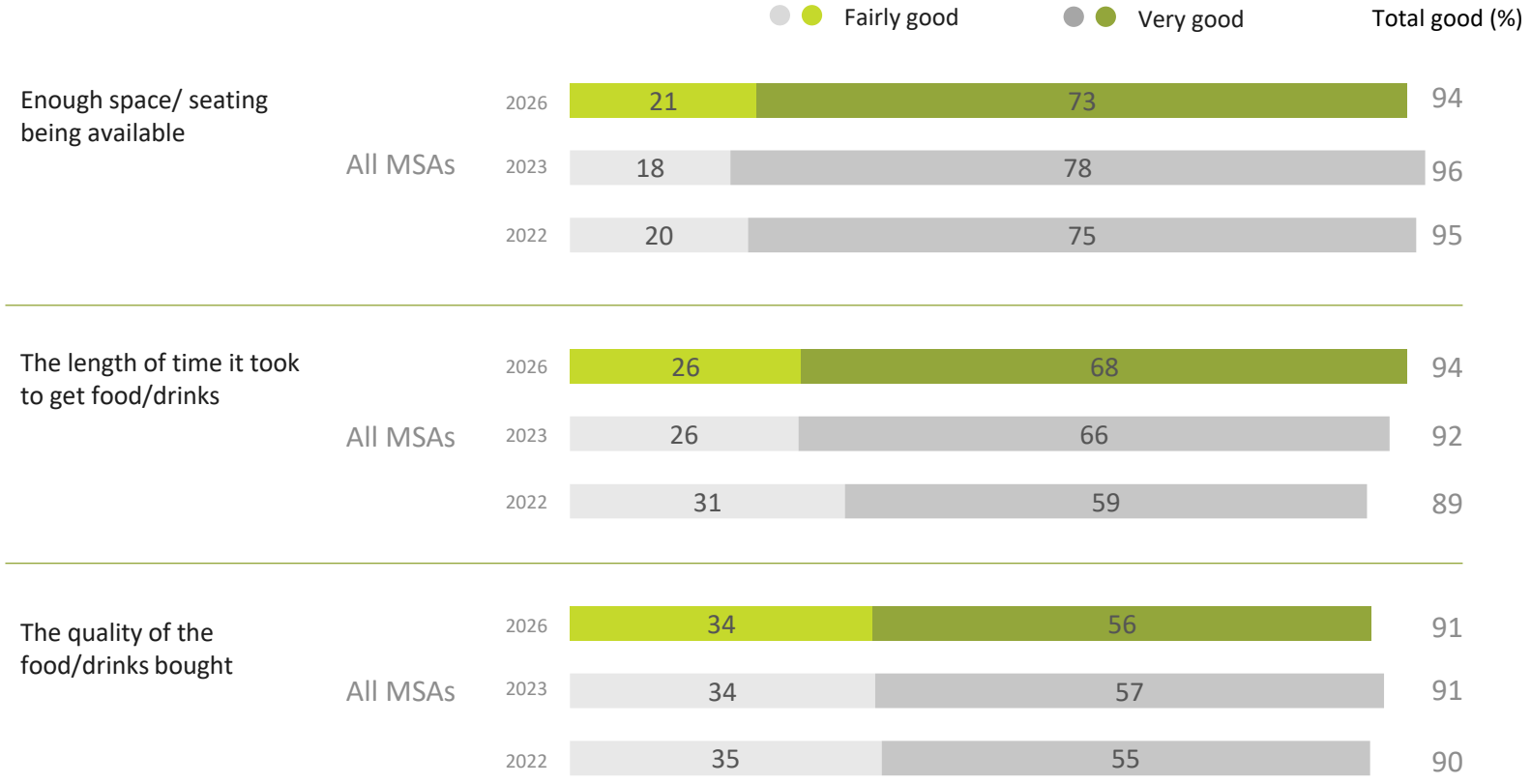


transportfocus

Ipsos

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

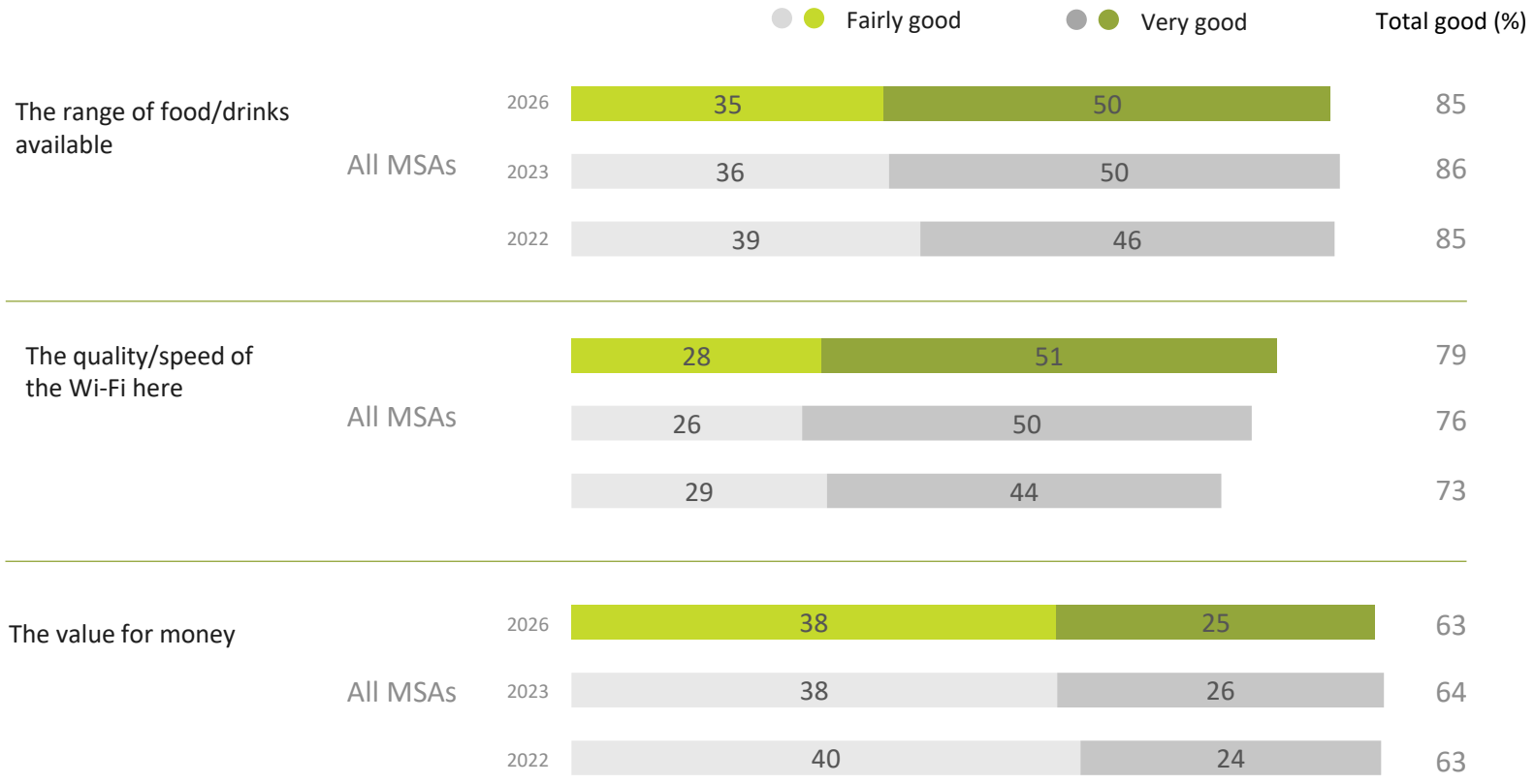
Findings from detailed experience survey (%)




Q8. Can we ask your opinion on how you would rate the food/drinks you bought to eat before getting back in your vehicle....
Base: (2022/2023/2026) All MSAs (893-3,239/1,193-3,443/975-2,808

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

Findings from detailed experience survey (%)




Q8. Can we ask your opinion on how you would rate the food/drinks you bought to eat before getting back in your vehicle....
Base: (2022/2023/2026) All MSAs (893-3,239/1,193-3,443/975-2,808

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

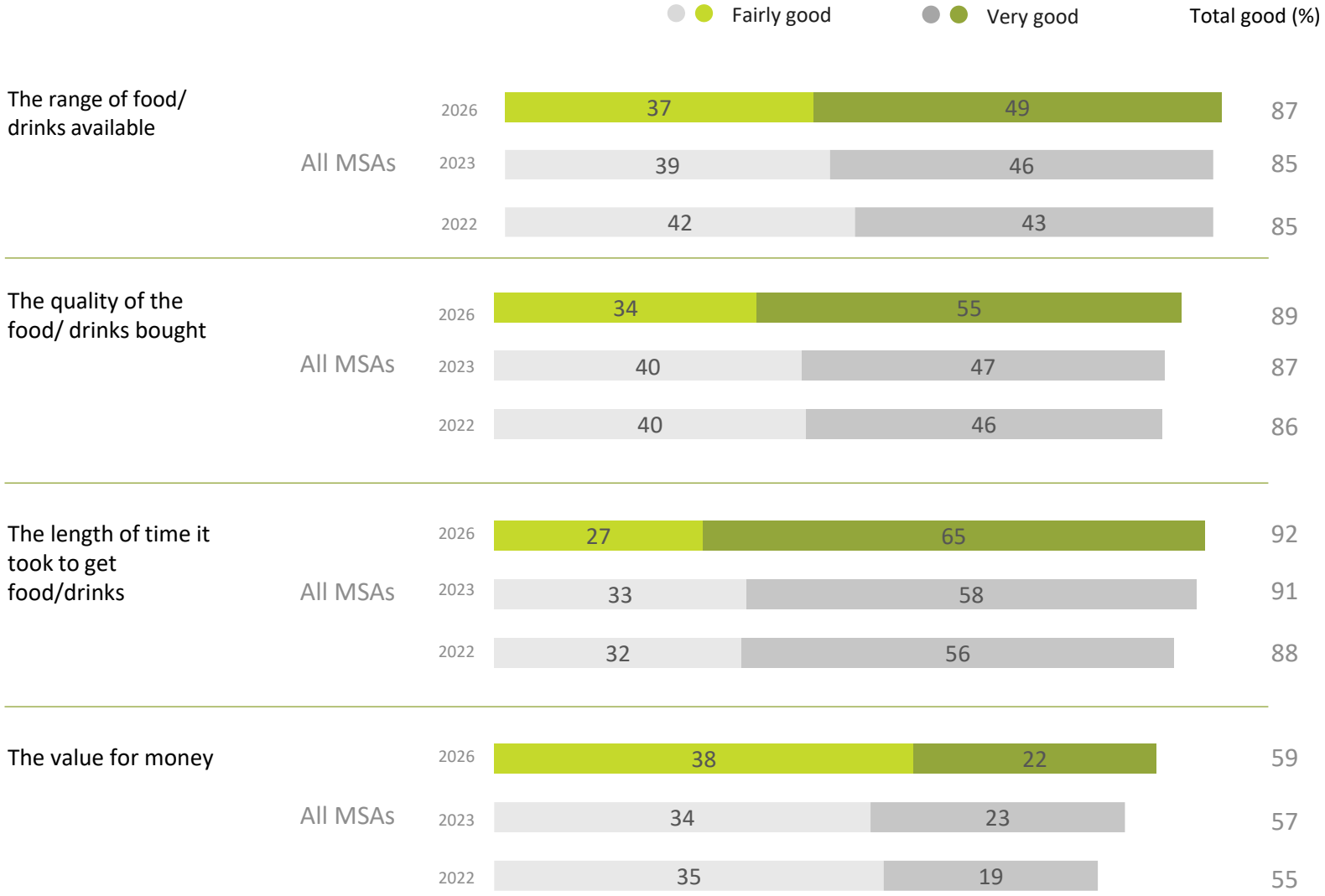
Findings from detailed experience survey (%)

| | All MSAs 2026 | Leisure | Business | Commuter | Professional | EV drivers | HGV drivers | Disabled visitors |
|---|---|---|---|---|---|---|---|---|
| The availability of tables to sit down at | 94 | 94 | 93 | 99 | 94 | 92 | 94 | 93 |
| The length of time it took to get food/ drinks | 94 | 93 | 96 | 97 | 92 | 94 | 93 | 91 |
| The quality of the food/drinks bought | 91 | 91 | 88 | 95 | 83 | 90 | 81 | 89 |
| The range of food/drinks available | 85 | 85 | 85 | 89 | 77 | 79 | 76 | 85 |
| The quality/speed of the Wi-Fi | 79 | 78 | 85 | 78 | ** | 69 | ** | 81 |
| The value for money | 63 | 63 | 63 | 71 | 49 | 61 | 47 | 58 |

Q8. Can we ask your opinion on how you would rate the food/drinks you bought to eat before getting back in your vehicle….
Base: All MSAs (975-2,808); Leisure: 720 – 2,196; Business: 170 - 405; Commuter: 57 - 123; Professional: 28** - 86; EV drivers 143 – 381; HGV drivers: 22** - 71; Disabled visitors: 112 - 351 **BASE SIZE TOO LOW TO SHOW

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

Findings from detailed experience survey (%)




Q9. Can we ask your opinion on how you would rate.... Base: (2022/2023/2026) All MSAs (647–1,279/701-1,152/1,392-1,401)

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

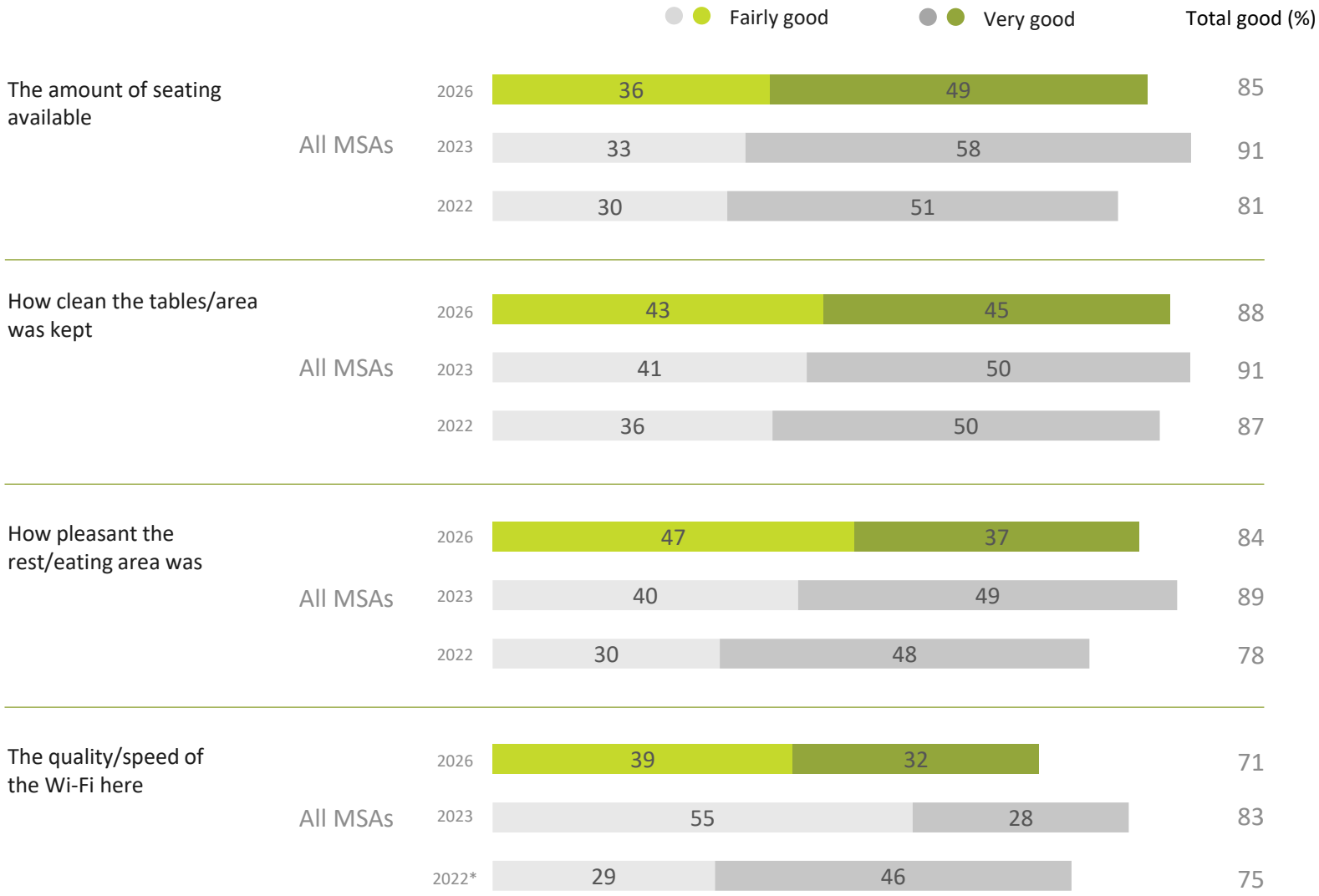
Findings from detailed experience survey (%)

| Total Good (%) | All MSAs 2026 | Leisure | Business | Commuter | Professional | EV drivers | HGV drivers* | Disabled visitors |
|---|---|---|---|---|---|---|---|---|
| The range of food/ drinks available | 87 | 87 | 86 | 90 | 80 | 83 | 77 | 89 |
| The quality of the food/ drinks bought | 89 | 90 | 85 | 96 | 89 | 87 | 90 | 91 |
| The length of time it took to get food/drinks | 92 | 92 | 89 | 100 | 93 | 91 | 92 | 94 |
| The value for money | 59 | 60 | 55 | 68 | 55 | 53 | 48 | 56 |

Q9. Can we ask your opinion on how you would rate....
Base: All MSAs (1,392 – 1,401); Leisure: 1,012 – 1,019; Business: 242 - 244; Commuter: 83; Professional: 54 - 55; EV drivers 211 – 213; HGV drivers: 45* - 46*; Disabled visitors: 170 - 172 *LOW BASE SIZE **BASE SIZE TOO LOW TO SHOW

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

Findings from detailed experience survey (%)

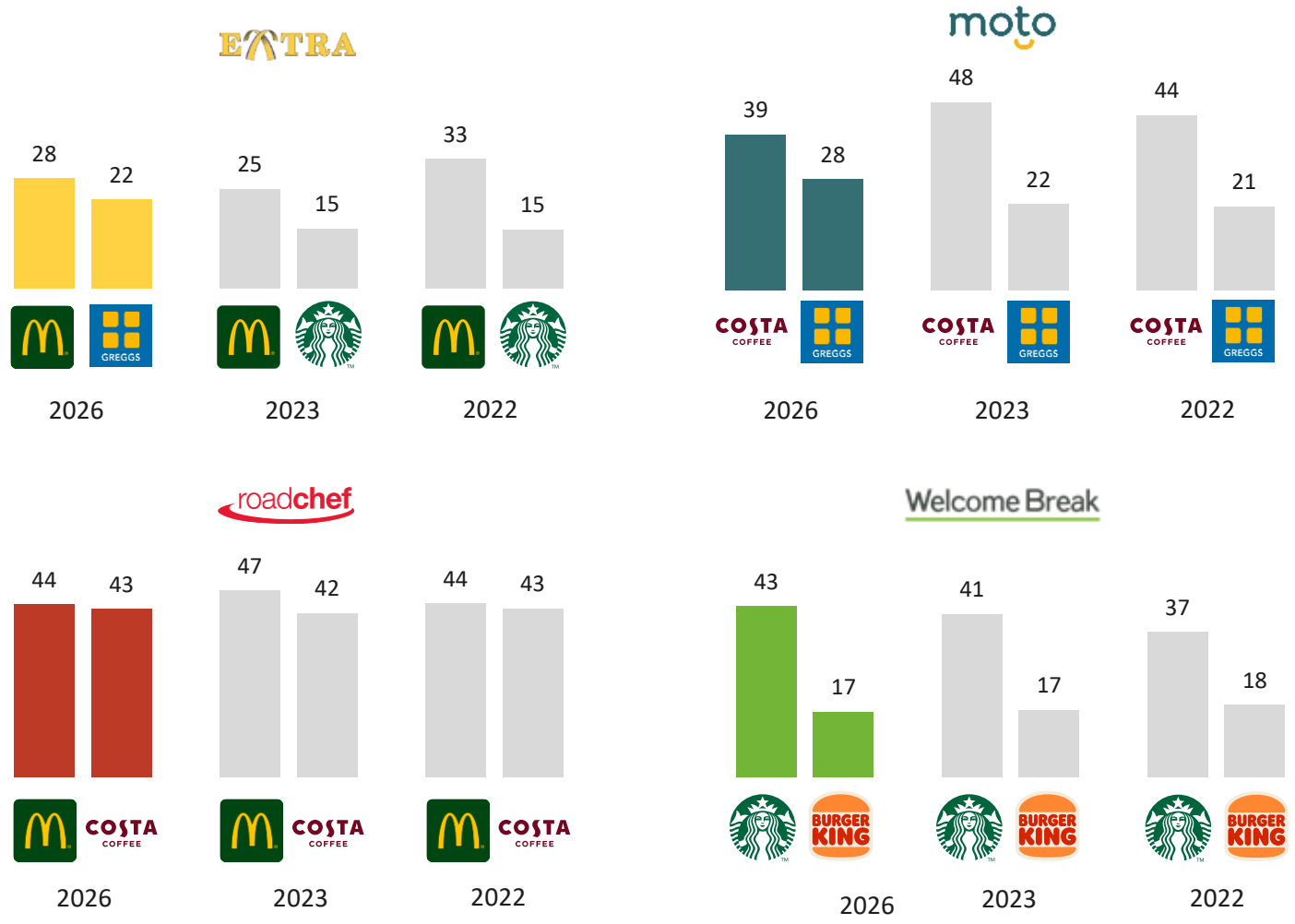



Q10. Can we ask your opinion on how you would rate sitting down for a rest or to have your own food/drinks ….
Base: (2022/2023/2026) All MSAs (36*– 137/81-166/70 – 172) *LOW BASE SIZE

# 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

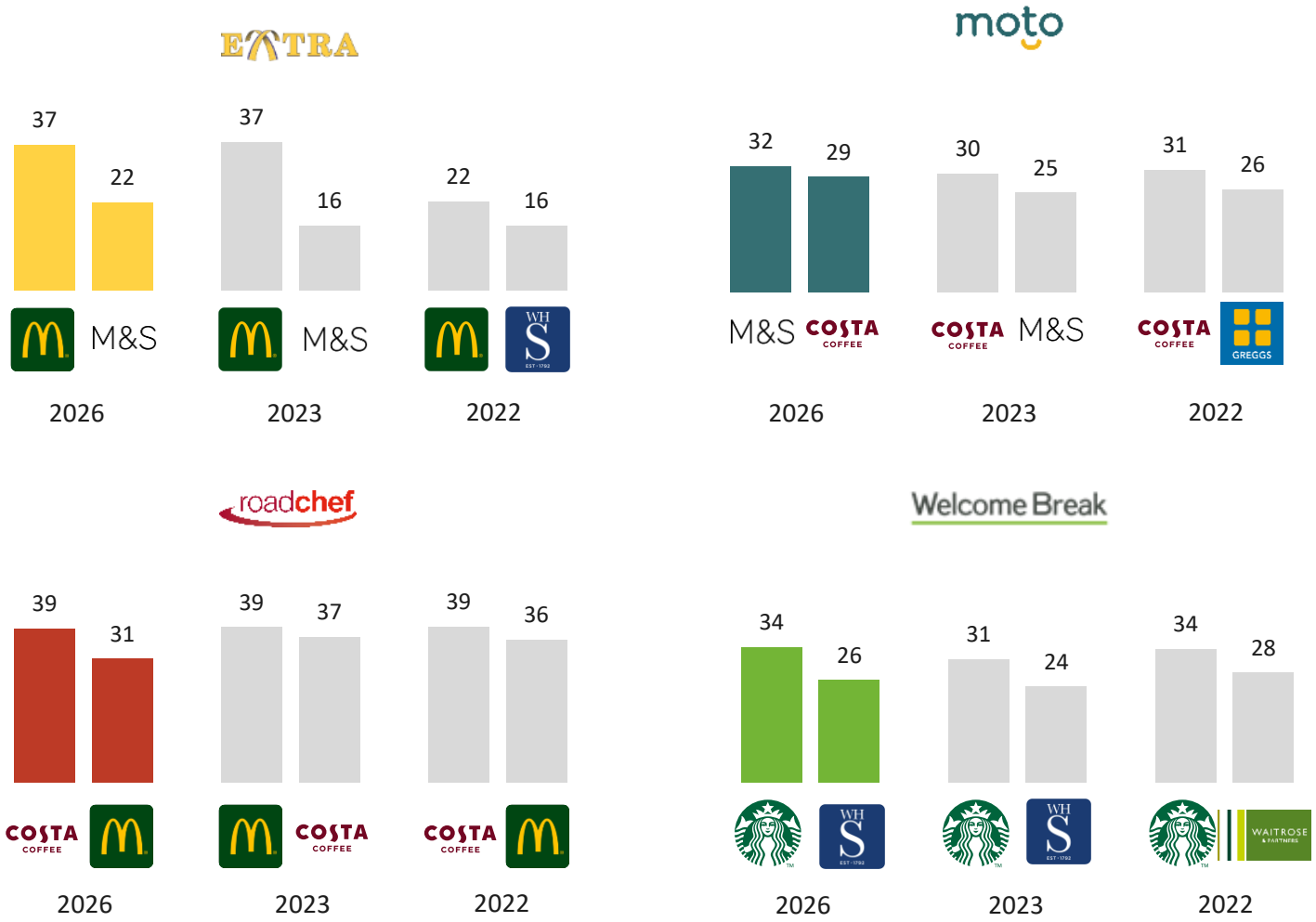



Q8a. Where did you buy your food/ drinks from that you had before getting back in your vehicle? Base: (2022/2023/2026) Extra: (221/203/167); Roadchef: (842/906/606); Moto: (1,261/1,393/1,289); Welcome Break: (855/950/742)
PLEASE NOTE: not all brands are equally available for each Motorway service station and therefore not to be directly compared

# Brands bought food and drink from - to take away

Top two brands across operators (%)

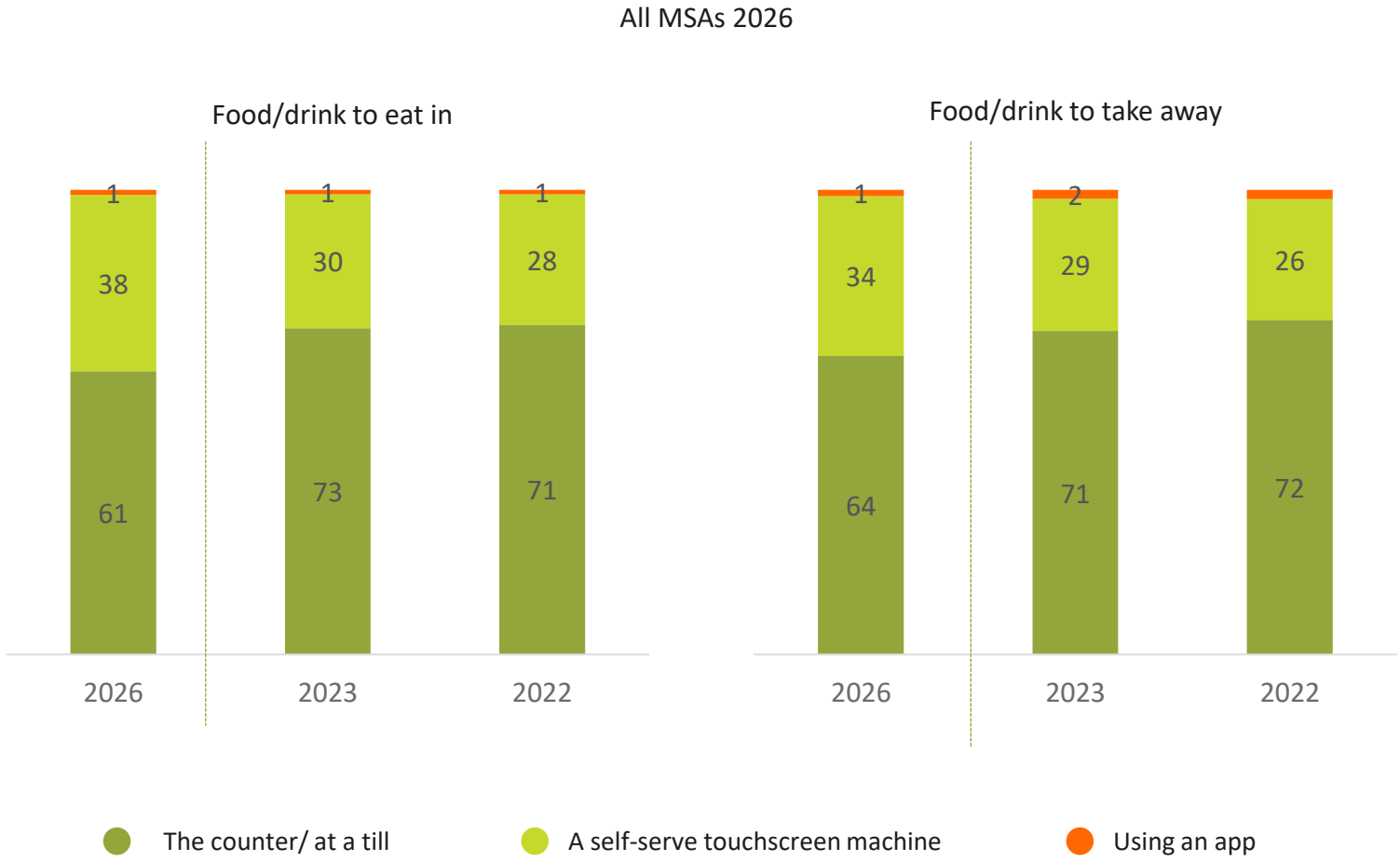
Top two brands used for buying food and drink to have in the vehicle (%) by operator




Q8a. Where did you buy your food/ drinks from that you had before getting back in your vehicle? Base: (2022/2023/2026) ) Extra: (74/65/65); Roadchef: (320/256/295) Moto: (471/522/656); Welcome Break: (380/312/388)
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 (%)

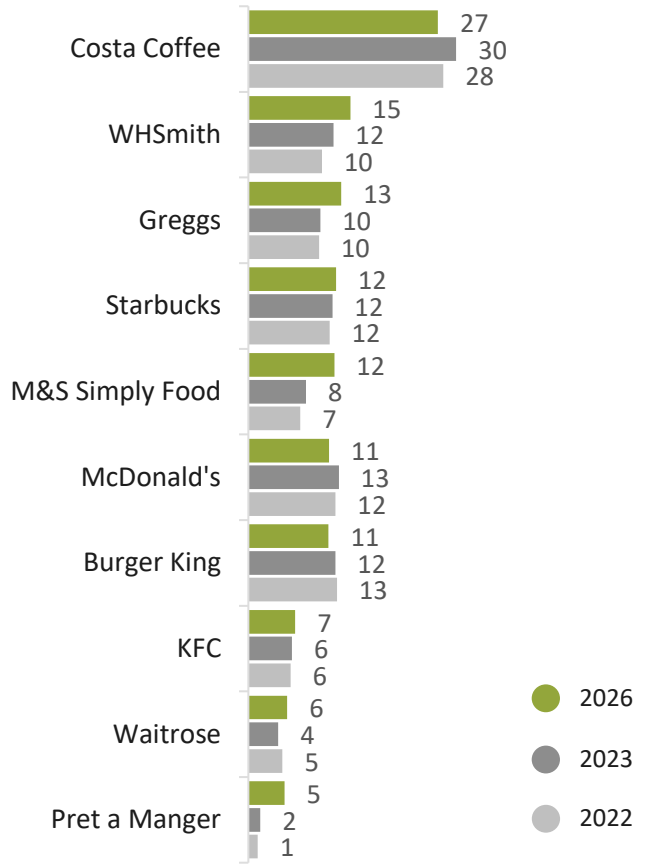



Q8c / Q9c. Can we ask, how did you order your food/drinks? Base: (2022/2023/2026) Eat in, All MSAs: (2,344/2,649/1,808); Take away, All MSAs: (694/626/716)

# 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 (%)

| | | 2026 | 2023 | 2022 |
|---|---|---|---|---|
| | Costa Coffee | 14 | 10 | 2 |
| | McDonalds | 75 | 70 | 71 |
| | Burger King | 66 | 62 | 58 |
| | Starbucks | 13 | 8 | 5 |
| | KFC | 74 | 61 | 60 |
| | Subway | 60 | 7 | 2 |

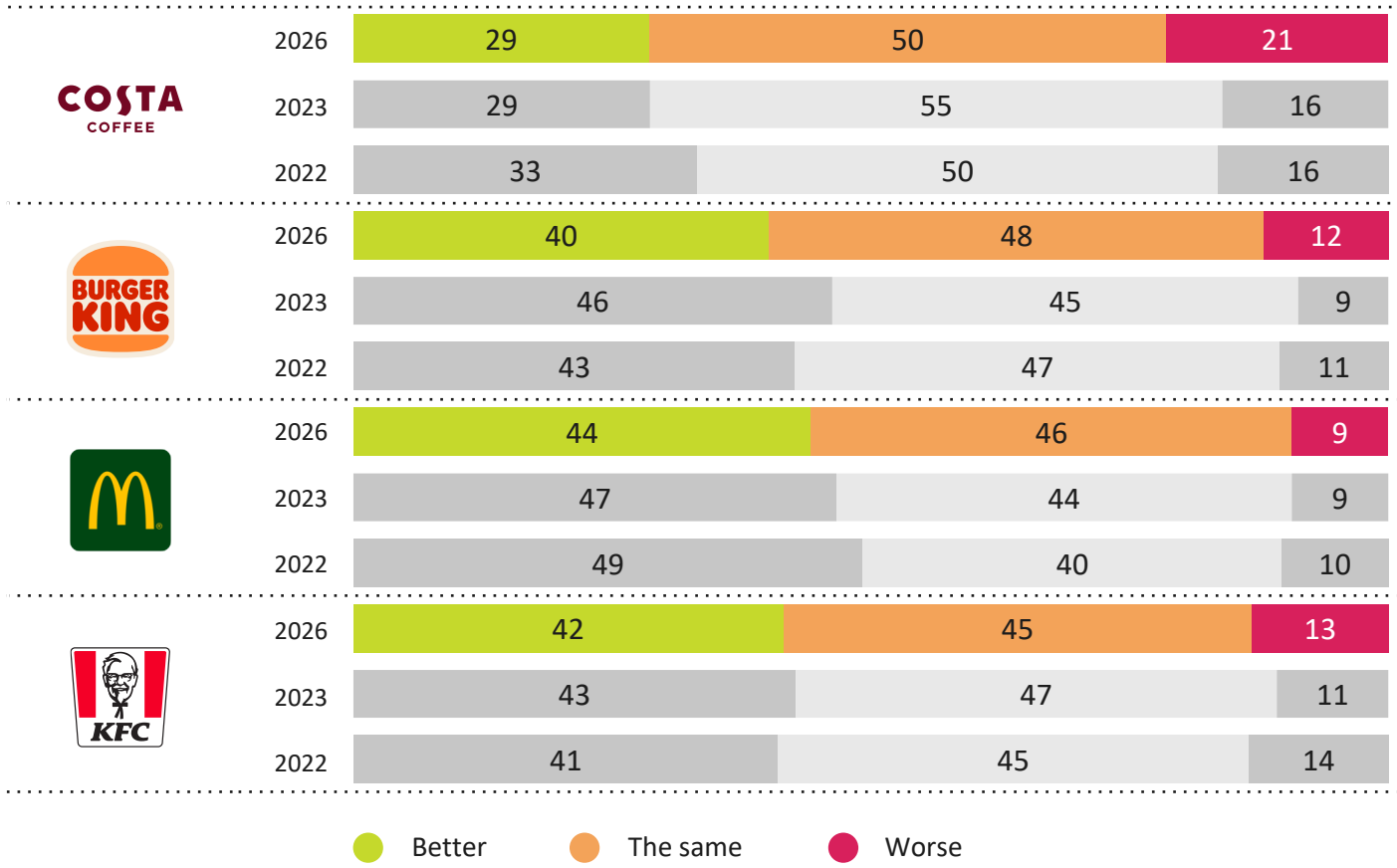
Where did you buy your food/ drinks from? Q8c / Q9c. Can we ask, how did you order your food/drinks? Base: (2022/2023/2026) All MSAs: (4,351/4,411/4,046); Order method by brand: (107-1,207/102-1,306/74-1,019)

# Ordering from self-serve touchscreen or app

Findings from detailed experience survey (%)

| Rated better All MSAs (%) | All MSAs | | |
|---|---|---|---|
| | 2026 | 2023 | 2022 |
| | 40 | 44 | 45 |

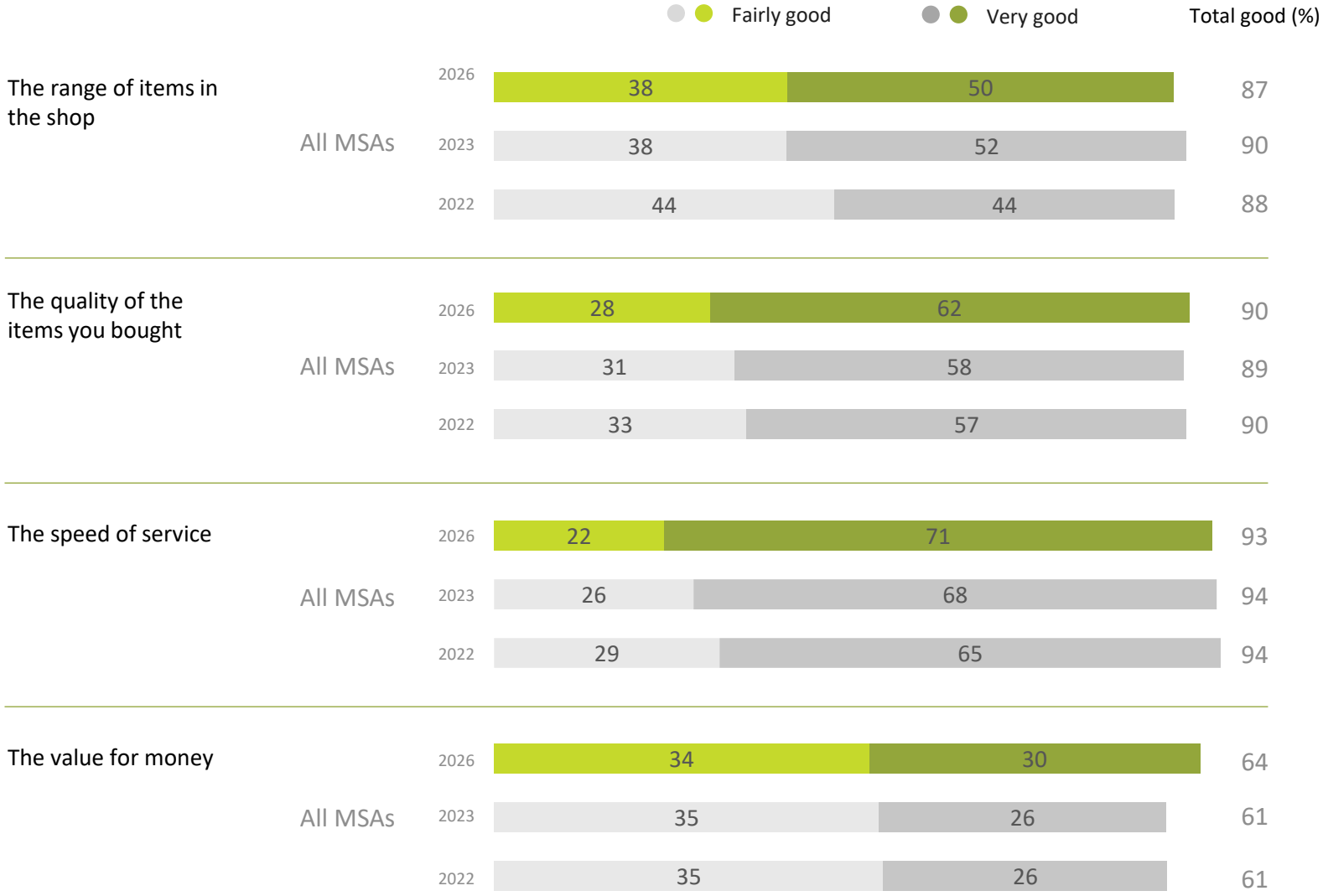
Experience ordering from a self-serve touchscreen machine/app on the premises. All MSAs (%)




Q8b / Q9b. 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: (2022/2023/2026) McDonald's: (435/431/290), Burger King: (327/327/275), KFC: (166/171/164), Costa Coffee: (32*/65/79) *LOW BASE SIZE

# Buying convenience items

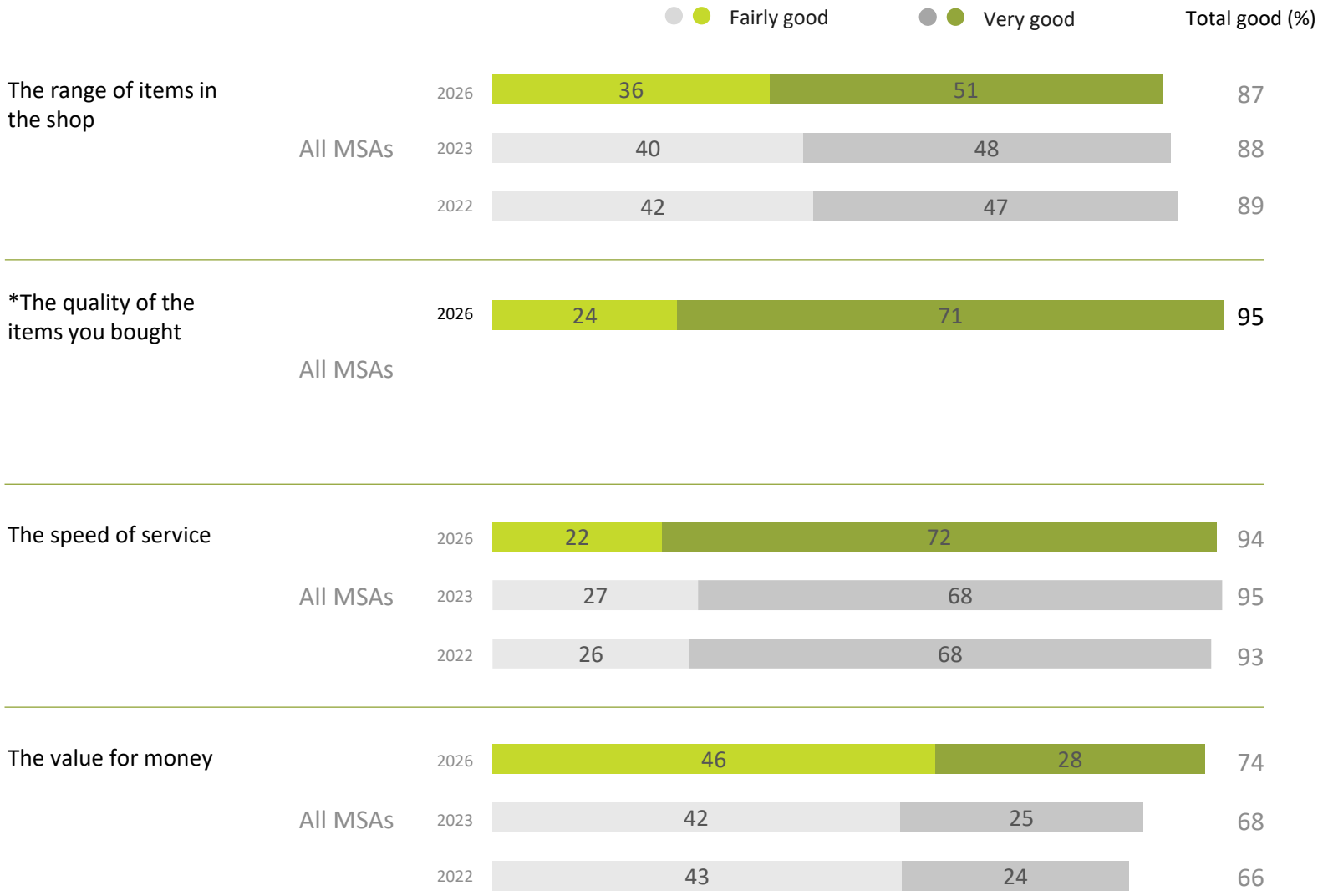
Findings from detailed experience survey (%)




Q11. Can we ask your opinion on how you would rate.... Base: (2022/2023/2026) All MSAs (617 - 634/538-564/565 – 574)

# Buying food/groceries

Findings from detailed experience survey (%)

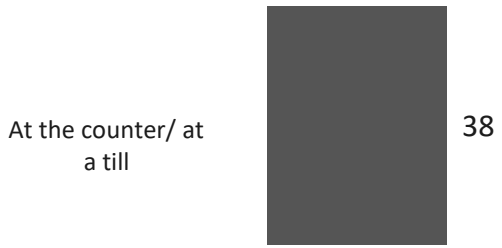


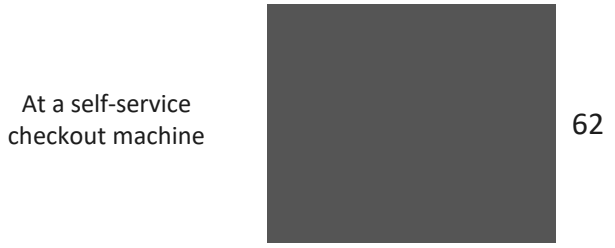

Q12. Can we ask your opinion on how you would rate.... Base: (2022/2023/2026) All MSAs (196 - 216/219-235/351 - 360)
** This statement was added in the 2026 questionnaire.*

# Grocery shopping experience

Findings from detailed experience survey (%)

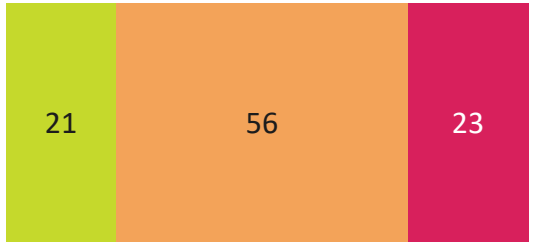
How items were paid.
All MSAs (%)

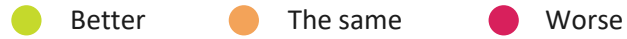



Experience by method of payment. All MSAs (%)




Q12c. Can we ask, how did you pay for your items at …? Base 2026: All responses: 296; Q12d. How did you think paying someone at the counter compared to paying at a self-service checkout? Base 2026: All responses: 122; Q12e. How do you think paying at a self-service checkout compared to paying someone at the counter? Base 2026: All responses: 175
*Note: Figures are based on responses rather than respondents, as those visiting more than one shop answered for each.*

# Mood on arrival and exit

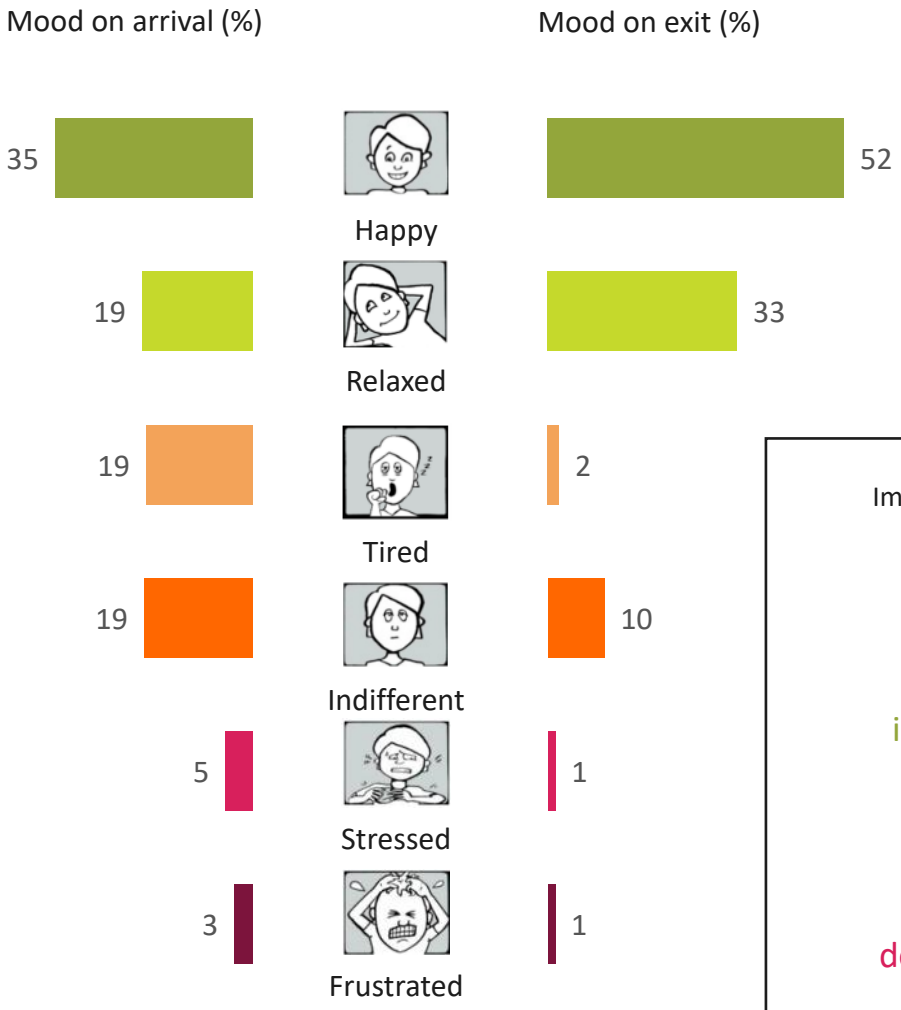
transportfocus

Ipsos



# Changes in mood (1/2)

Mood on arrival and exit (%)




Improvements in mood (percentage points, 2026)

**31** 37 (2023) 30 (2022)

increase in happy/relaxed

**22** 26 (2023) 25 (2022)

decrease in tired/ stressed/ frustrated

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? Base (2022/2023/2026)

# Changes in mood (2/2)

With operator comparisons (%)

(%) Increase in happy/relaxed upon leaving MSA

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

EXTRA

| 2026 | 2023 | 2022 |
|---|---|---|
| 28 | 29 | 30 |
| 17 | 20 | 21 |

moto

| 2026 | 2023 | 2022 |
|---|---|---|
| 31 | 41 | 30 |
| 23 | 26 | 25 |

roadchef

| 2026 | 2023 | 2022 |
|---|---|---|
| 30 | 37 | 29 |
| 21 | 25 | 23 |

Welcome Break

| 2026 | 2023 | 2022 |
|---|---|---|
| 33 | 35 | 30 |
| 23 | 26 | 27 |

GETLINK CUSTOMS SERVICES

| 2026* | 2023^ | 2022* |
|---|---|---|
| 22 | N/A | 2 |
| -2 | N/A | 8 |

ALL MSAs
Improvements in mood (percentage points, 2026)

**31** 37 (2023) 30 (2022)

increase in happy/relaxed

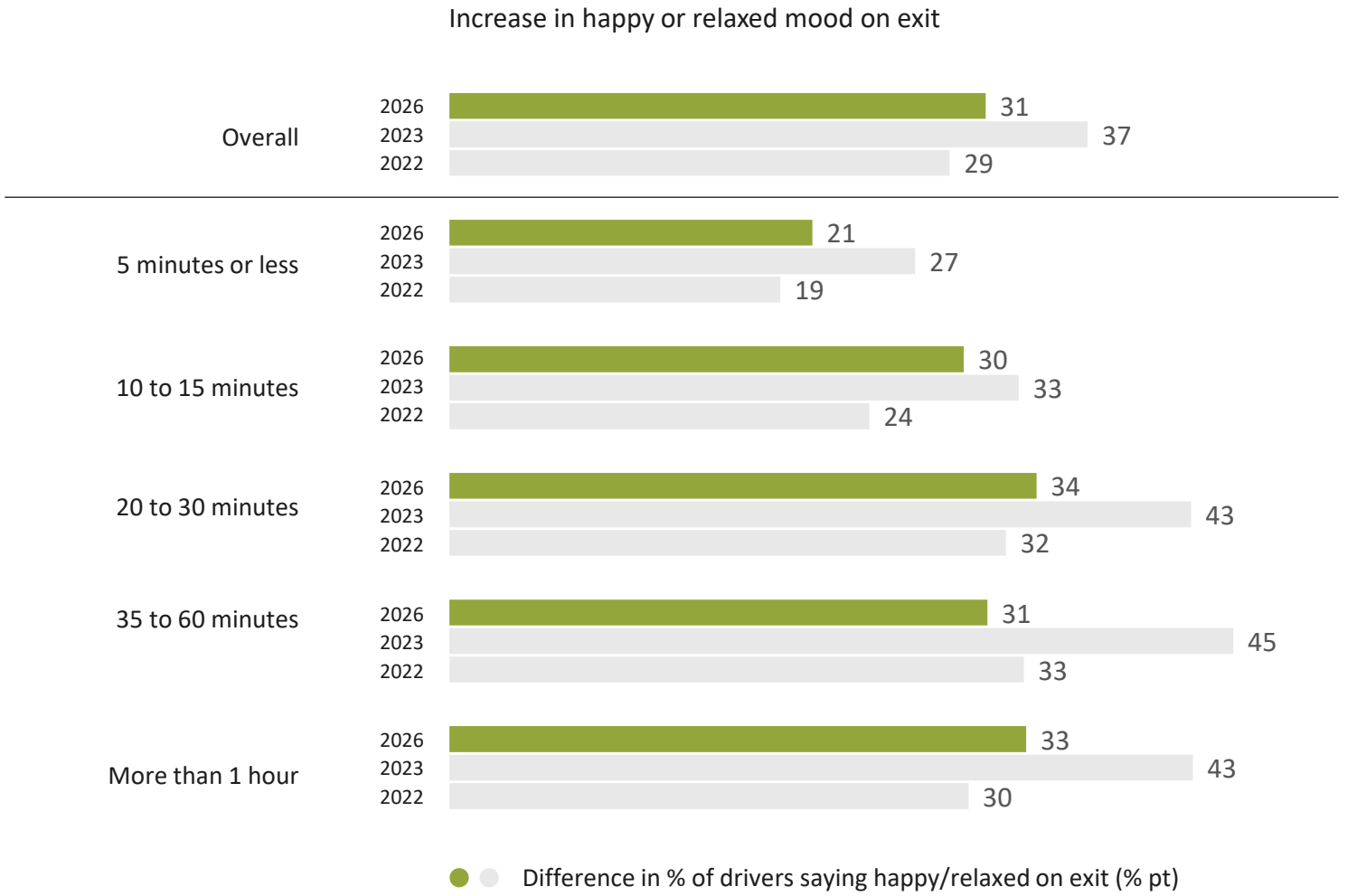
**22** 26 (2023) 25 (2022)

decrease in tired/ stressed/ frustrated

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: (2022/2023/2026) Extra: (343/311/276); Roadchef: (1,399/1,436/1,183); Moto: (2,068/2,304/2,525) Welcome Break: (1,644/1,649/1,483); GETLINK Customs Services (40*/-/ 37*) *LOW BASE SIZE ^GetLink didn't participate in 2023 *Also, 2026 data for GetLink reflects only one site's results*

# Change in mood during visit to MSA

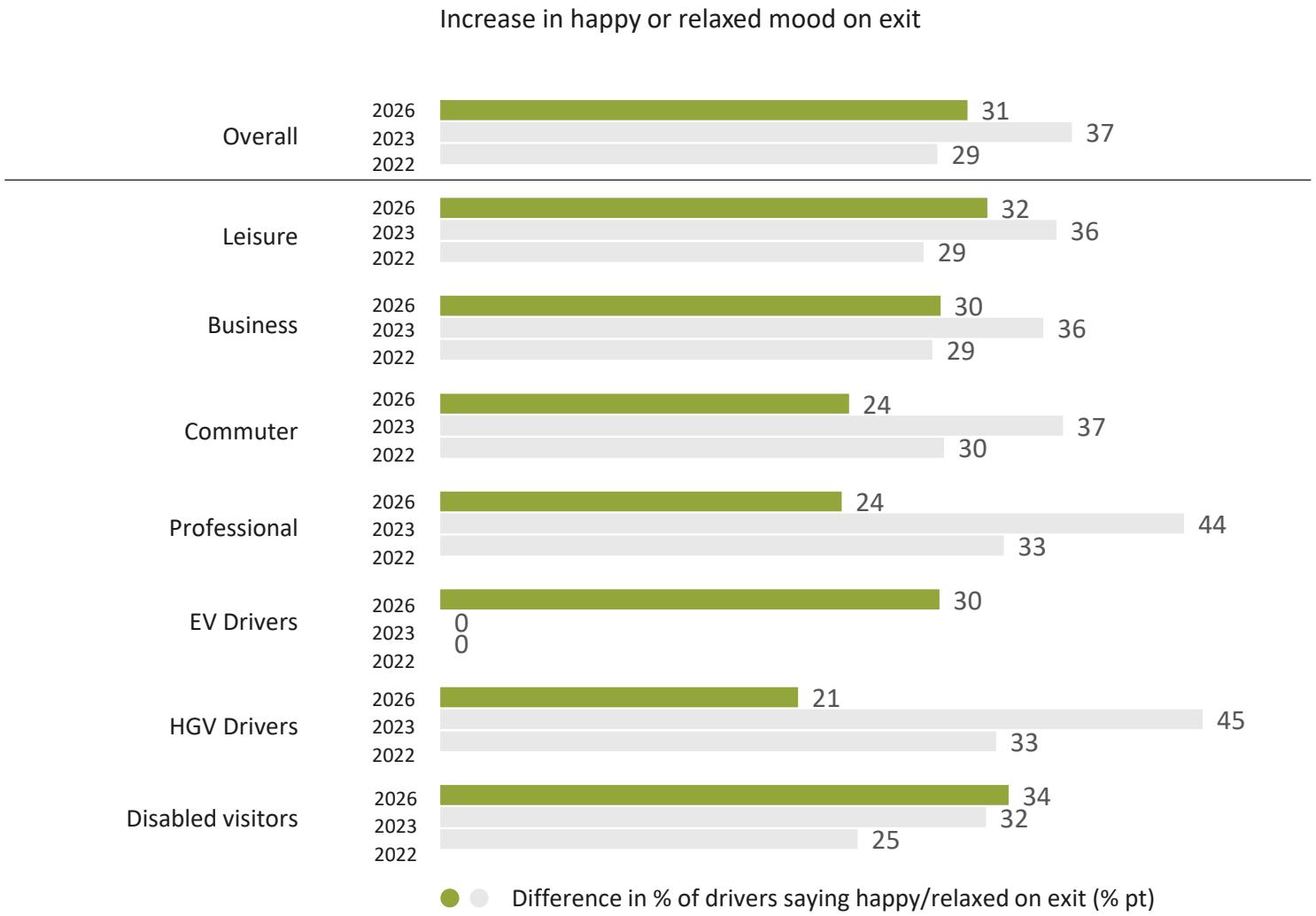
By time spent at MSA (%)




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: All MSAs (2022/2023/2026) All MSA visitors: (5,566/5,700/5,504); 5 minutes or less: (456/342/444); 10-15 mins: (1,292/1,192/1,617); 20 to 30 minutes: (2,295/2,480/2,036); 35 to 60 minutes: (1,183/1,249/1,017); More than 1 hour: (340/437/390)

# Change in mood during visit to MSA

By Type of Driver (%)




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: All MSAs (2022/2023/2026) 5,566 /5,700/5,504; Leisure: 3,829/3,986/4157; Business: 695/745/868; Commuter: 233/215/261; Professional: 809/754/218; EV drivers 753; HGV drivers: 708/660/187; Disabled visitors: 602/620/671

# Improvements

transportfocus

Ipsos



# What surprised or stood out as particularly good during the visit

The lovely section they had for children to play with the toys.
**Hartshead Moor Westbound, Welcome Break**

Toilets were so clean and so many of them! The Aircon in the entrance was brilliant as it was super hot.
**Cullompton, Extra**

Fabulous quality of the farm shop goods. On previous visit great value and service at the breakfast club. All tables, had a bit of ware, but were clean to the touch and not sticky.
**Sedgemoor Southbound, Roadchef**

I like that you allow dogs. Also I saw a gentleman have an accident in the services and the staff were brilliant and very kind.
**Northampton Northbound, Roadchef**

I am very happy with the customer service. Their staff is very efficient. They are also very friendly. You will feel like stopping the vehicle again and again.
**Heston Westbound, Moto**

The amount of dog water stations available and full with water and plenty of bins available.
**Charnock Richard Northbound, Welcome Break**

Every time I visit this service station I am impressed on its continued improvements. The site is clean and quite inviting to visit.
**Leigh Delamere Eastbound, Moto**

Light in the ceiling good to have natural light.
**Baldock, Extra**

The cleanliness of the ladies toilets. They were spotless. I actually looked around for the cleaner to tell her so but she had vanished. I did see her there going into the toilets. From the toilet cubicles, to the floor, to the sink area, spotless.
**Ferrybridge, Moto**

Q18. What, if anything, pleasantly surprised you or stood out as particularly good during your visit today?

# What users would change about the MSA

Number of accessible toilets with radar key access.

***AI PROMPT Please tell us more about how the number of accessible toilets with RADAR key access impacted your visit and what changes would improve your experience.***

Not enough.
**Beaconsfield, Extra**

Choice of foods to take away no Waitrose or M and S.

***AI PROMPT Please tell us more about how having a Waitrose or M&S would improve your visit to the service area?***

More choice of snacks. Option to buy flowers and alcohol as gifts.
**Sandbach Northbound, Roadchef**

Lighting in the car park (night)

***AI PROMPT:*** *Please tell us more about the lighting in the car park and how this change would improve your visit.*

Very poor lighting making women feel vulnerable getting from car to building at night, makes an otherwise good service station feel unsafe.
**Medway Eastbound,** Moto

I just feel like children are left out but that's everywhere across Britain. I just think when people have been on a long drive with their family the adults need a break as well as the kids so if there was a park with benches where they can watch the kids have fun and have a good run around it won't just be a quick stop and people would stay longer.
**Thurrock, Moto**

Quite hard to walk to the door in terms of traffic. Mainly the fault of other customers/drivers.

***AI PROMPT Please tell us more about the traffic issues you encountered and what changes could be made to improve pedestrian safety when walking to the entrance?***

More crossings/spaces to be walking along the cars.
**Tibshelf Northbound, Roadchef**

Clear exit signs clear road marking signs.

***AI PROMPT Please tell us how clearer exit signs and road markings would improve your visit to the service area?***

It would make easy to exit and not to get confused.

**Charnock Richard Southbound, Welcome Break**

Q19. Please tell us anything you didn't like or would have changed at [MSA] services?

# MSA reducing environmental impact

Noticed something to reduce MSA's impact on environment

**24%** noticed efforts to reduce environmental impact at any MSA

18% 2023

16% 2022

## What action(s) noticed

"Selected recycling instead of all put in together, good grounds outside with plenty of bins, plants and flowering trees everywhere." - **Doncaster North, Moto**

"Water saving sensors on the taps in washroom. LED lighting, etc." – **Rotherham, Welcome Break**

"A lot of greenery rather than just a bunch of concrete like in most service stations. RSPB viewing area, beautiful scenery outside with plenty of outdoor seating to encourage you to be in nature." – **Leeds Skelton Lake, Extra**

"Lavender and plants outside bee friendly, good waste separation for recycling." – **Newport Pagnell Northbound, Welcome Break**

"Lots of bins empty around the car park plus litter pickers I also noticed the solar panels on the roof of the services. " – **Cherwell Valley, Moto**

"Rainwater collection" – **Stafford Southbound, Roadchef**

"Recycling cups. Also noticed that litter was being picked up quickly, reducing risk of it blowing into the wider environment and keeping everywhere looking tidy."- **Sedgemoor Southbound, Roadchef**

"Low carbon building." – **Leeds Skelton Lake, Extra**

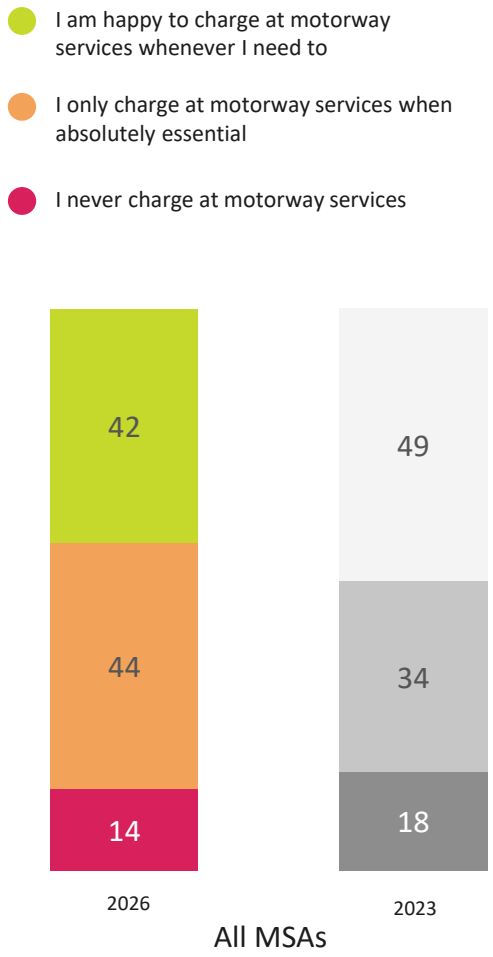
"Have visible rubbish and recycling bins." – **Fleet Southbound, Welcome Break**

Q15. Did you notice [MSA] services doing anything to reduce its impact on the environment? Q15a. If yes: what was that?
Base: (2022/2023/2026) All MSAs (5,566/5,700/5,504);

# Electric vehicle charging facilities at MSAs

Findings from detailed experience survey (%)

Frequency of using EV charge points (%)




## Reasons to avoid

Often not enough chargers so you have to wait. They are extremely expensive - literally in most cases 10 times the cost of home charging. **Hilton Park Southbound, Moto**

Too expensive. **Cullompton, Extra**

Ours is hybrid and only wins 20 miles when charged so not worth the time. **Warwick Northbound, Welcome Break**

It is a plug in hybrid it would take to long (8hrs).
**Clacket Lane Eastbound, Roadchef**

## What is done well and ways to improve

The 'pumps' generally work well and are not complicated. I was particularly impressed at one services where there were notices saying that the staff at WHSmith's were trained to help with charging if necessary. **Membury Westbound, Welcome Break**

Decent number and availability of chargers and good power output for speedy charging. **Cullompton, Extra**

Fast charging so you don't have to delay your journey too long.
**Sandbach Southbound, Roadchef**

Some protection from the elements especially if it is raining and you have issues like I had today with Grid serve.
**Exeter, Moto**

QV1. Which of these best describes your view on charging your EV at motorway services? Please tell us; why you avoid charging your EV at motorway services; your experience of charging your EV at motorway services, what do they do well and what could be improved? Base: (2023/2026) All MSAs: (517/752)

# Opinions on MSA staff



transportfocus

Ipsos

# Interactions with staff at MSAs

Did you speak to any staff while you were at [MSA]?
(%)




Q20a Did you speak to any staff while you were at [MSA]? Please tick all that apply. Base: All MSAs 2026: 5,5504

# Friendliness and helpfulness of staff

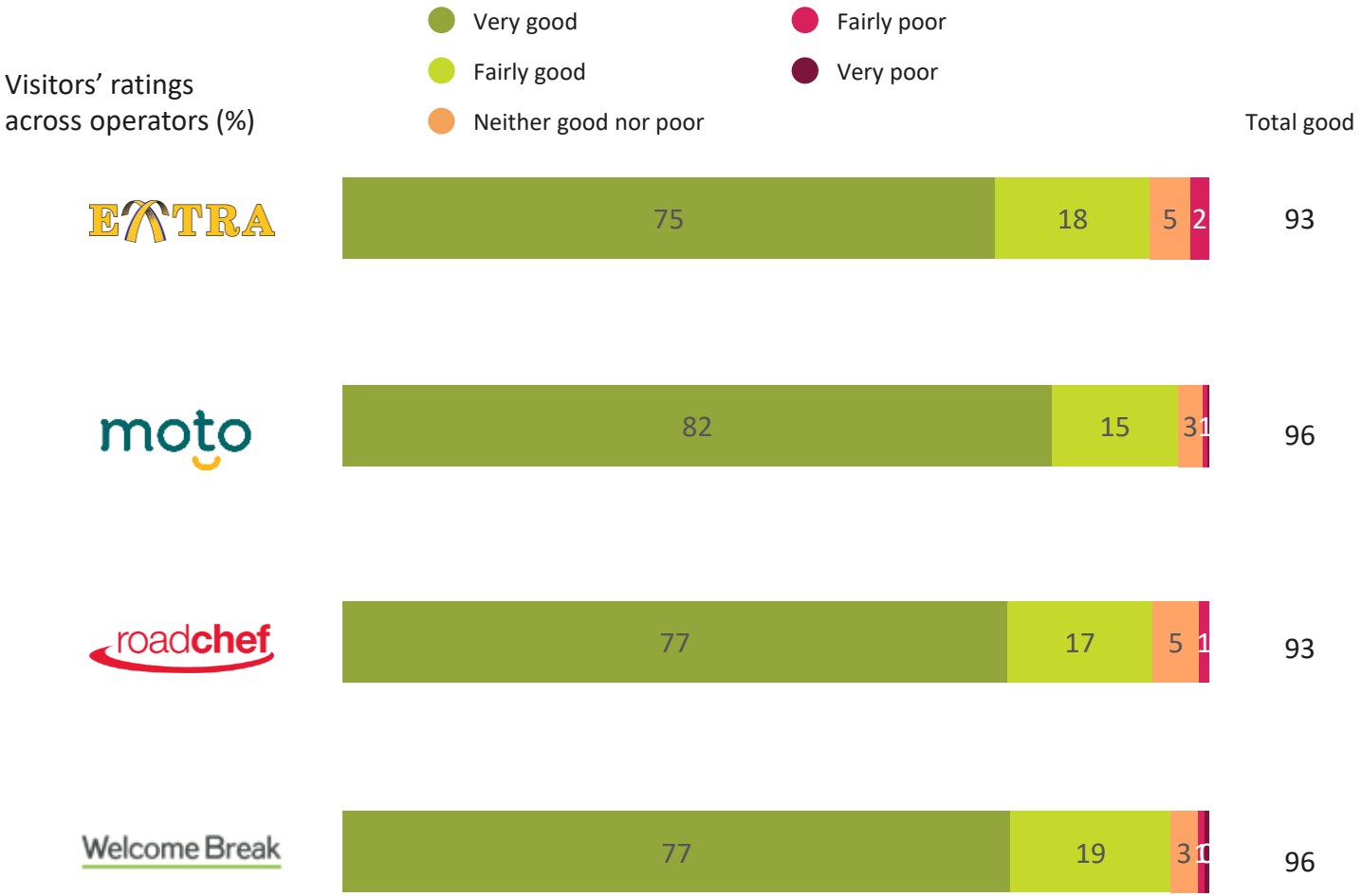
Operator comparison

Staff friendliness and helpfulness (%)

All MSAs

2026

95




Q20b How would you rate the friendliness and helpfulness of the staff? Base: 2026 Extra: 159; Moto: 1,527; Roadchef: 653; Welcome Break: 832.
*GETLINK Customs Services BASE SIZE TOO LOW TO SHOW*

# Respondent profile

transportfocus

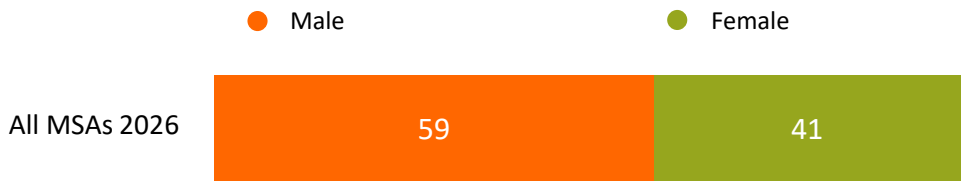
Ipsos



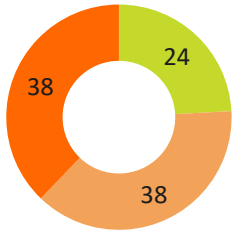
# Respondent profile (1/2)

For the key metrics survey

Gender (%)



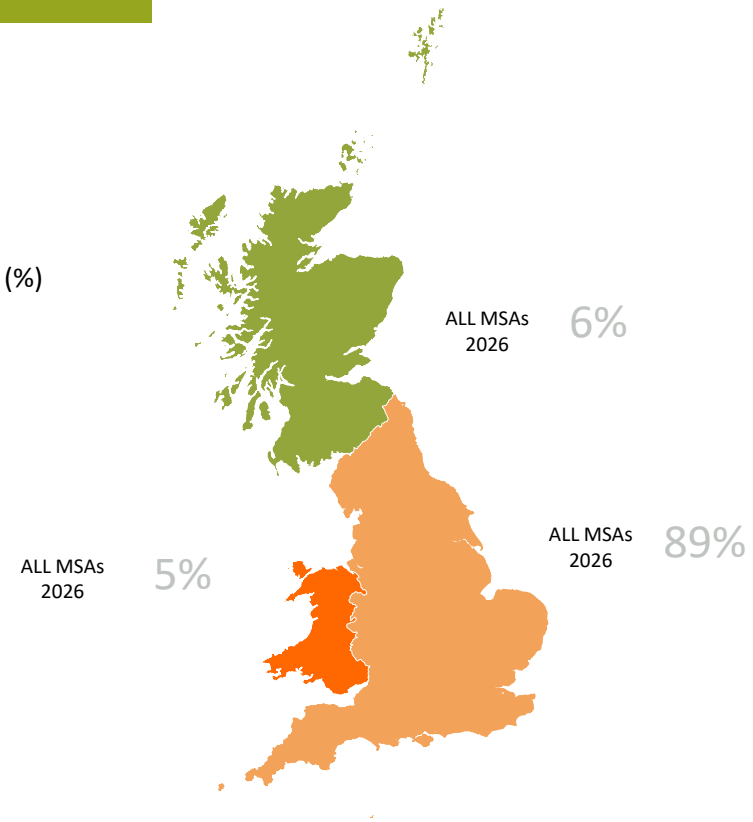

Age (%)




ALL MSAs 2026

16-34 35-54 55+

Region (%)




All MSAs 2026: 32,929

# Respondent profile (2/2)

For the key metrics survey

Visitor type (%)

| | All MSA average 2026 |
|---|---|
| Leisure | 74 |
| Business | 17 |
| Commuter | 5 |
| Professional | 4 |
| HGV drivers | 3 |

Fuel type (%)

| | All MSA average 2026 |
|---|---|
| Petrol | 41 |
| Diesel | 35 |
| Fully electric | 9 |
| Hybrid, self-charging | 7 |
| Hybrid, plug-in | 4 |
| Coach/tour party | 3 |
| Other | 1 |

All MSAs 2026: 32,954

# Additional demographic data

**Findings from detailed experience survey**

transportfocus

Ipsos



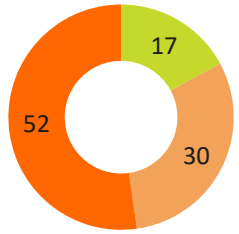
# Respondent profile of the detailed experience section (1/4)

Findings from detailed experience survey

Gender (%)



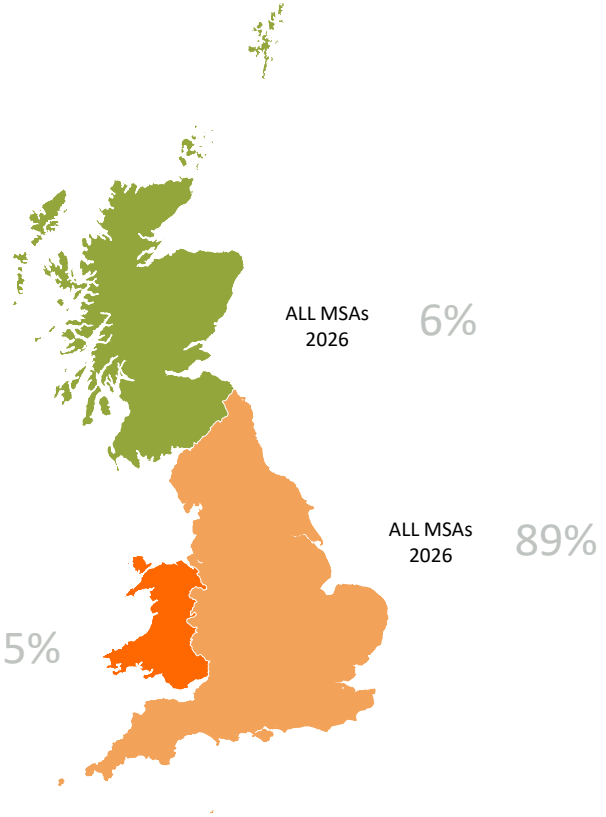

Age (%)




ALL MSAs 2026

16-34 35-54 55+

Region (%)




All MSAs 2026: 5,498-5,504

# Respondent profile of the detailed experience section (2/4)

Findings from detailed experience survey

Visitor type (%)

| | All MSAs average 2026 |
|---|---|
| Leisure | 75 |
| Business | 16 |
| Commuter | 5 |
| Professional | 4 |
| HGV drivers | 4 |

Fuel type (%)

| | All MSAs average 2026 |
|---|---|
| Petrol | 41 |
| Diesel | 33 |
| Hybrid, plug-in | 3 |
| Hybrid, self-charging | 8 |
| Fully electric | 10 |
| Other | 2 |
| Coach/tour party | 2 |

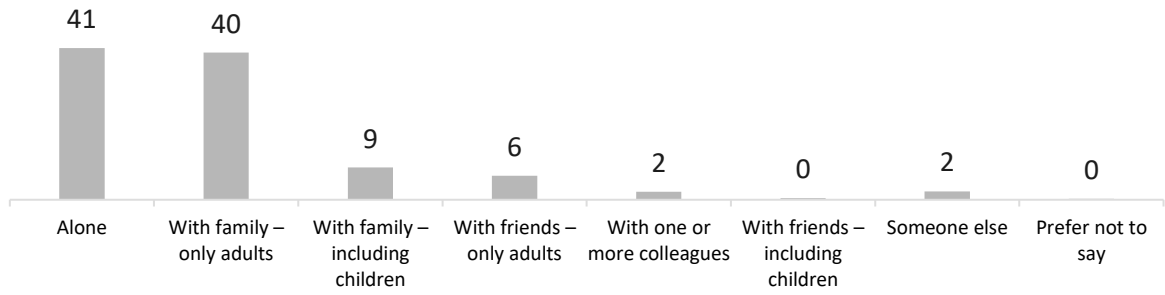
All MSAs 2026: 5,504

# Respondent profile of the detailed experience section (3/4)

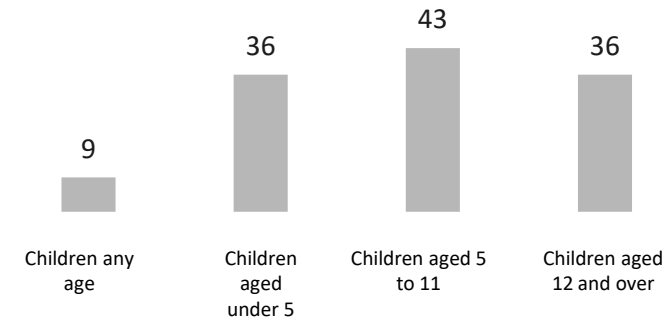
Findings from detailed experience survey

Who travelling with (%)

All MSAs 2026




Travelling with children (%)




Yes - Travelling with dog/s (%)

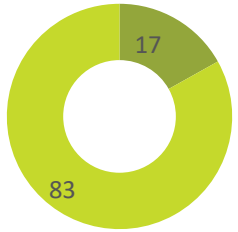



All MSAs 2026: 500-5,504

# Respondent profile of the detailed experience section (4/4)

Findings from detailed experience survey

Disabled (%)




ALL MSAs 2026

Yes No

Type of impairment (%)

| | All MSA 2026 |
|---|---|
| Mobility | 11 |
| Cognitive | 4 |
| Sensory | 2 |
| Other | 3 |

All MSAs 2026: 4,106; Type of impairment: 671

# Vehicle used when visiting the MSA

| | All MSA average 2026 |
|---|---|
| **Vehicle type (%)** | |
| Car | 82 |
| LCV/van | 5 |
| Coach/Minibus | 3 |
| HGV/lorry | 6 |
| Motorbike | 1 |
| All others | 3 |
| **Reason for stopping (%)** | |
| A break in an outward journey | 49 |
| A break in a return journey | 43 |
| The MSA was your destination | 5 |
| Something else | 3 |

All MSAs 2026: Q23. Which type of vehicle were you in? Q26. When you stopped at [MSA] services, was it… All MSA 2026: 5,504

# Length of Stay

Time spent at MSAs

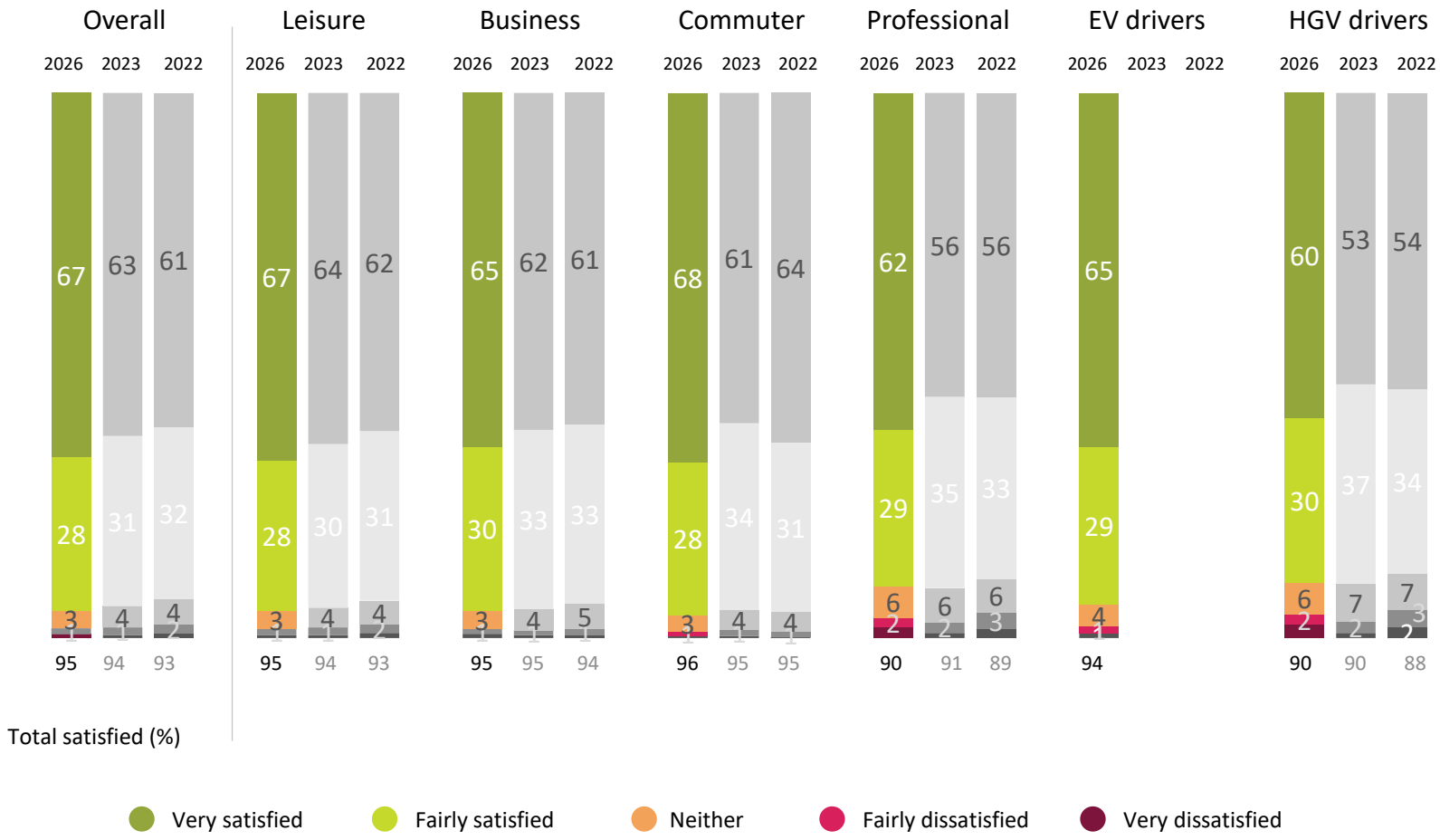
Average time spent at MSAs (minutes)

| | 5 minutes or less | | 6-15 mins | | 20-30 mins | | 35 to 60 mins | | More than 1 hour | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2026 | 2023 | 2026 | 2023 | 2026 | 2023 | 2026 | 2023 | 2026 | 2023 |
| All MSAs | 14 | 12 | 34 | 31 | 34 | 39 | 14 | 14 | 4 | 4 |
| Male | **14** | 12 | **35** | 30 | **35** | 37 | **15** | 15 | **5** | 6 |
| Female | **13** | 11 | **34** | 31 | **35** | 41 | **14** | 14 | **3** | 3 |
| 16-34 | **16** | 13 | **37** | 33 | **34** | 38 | **13** | 12 | **5** | 4 |
| 35-54 | **14** | 11 | **36** | 30 | **35** | 38 | **15** | 15 | **5** | 5 |
| 55+ | **13** | 12 | **35** | 29 | **36** | 40 | **15** | 14 | **3** | 4 |

How long have you spent at [MSA name] services, after parking? All MSAs 2026 (32,954). Male (18,375), Female (13,157), 16-34 (7,594), 35-54 (12,214), 55+ (11,723)

# Further information: overall satisfaction (1/2)

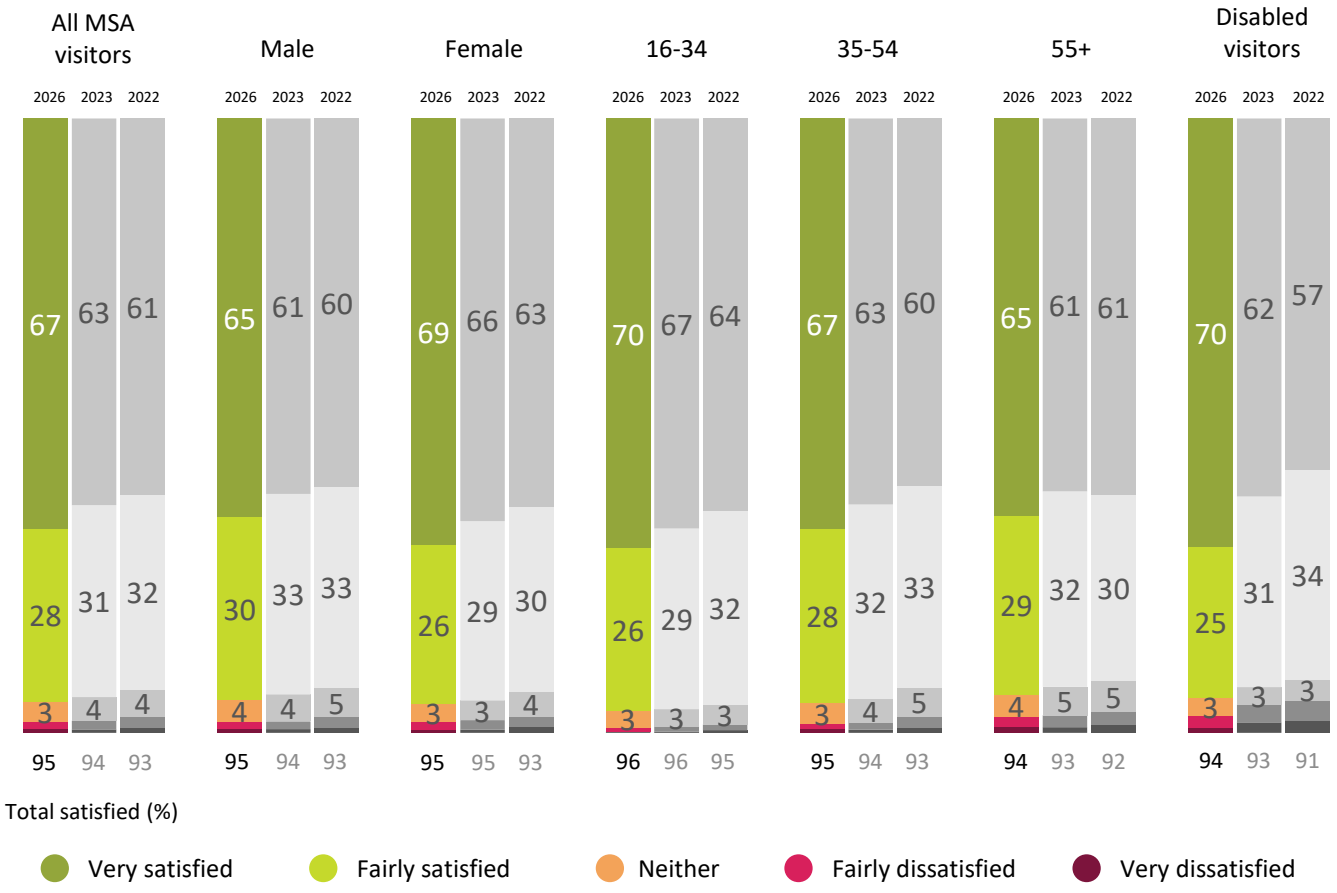
By visitor type



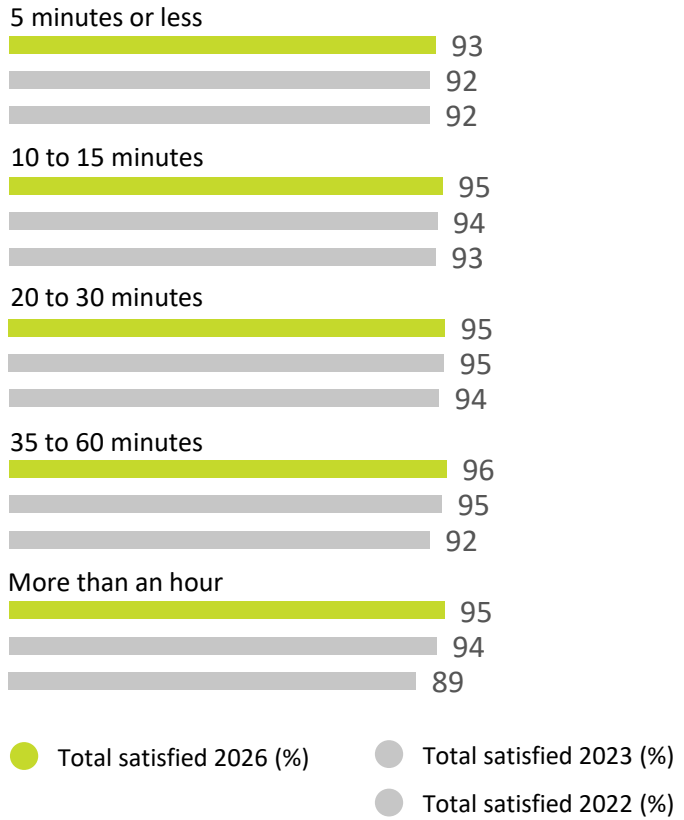

Overall (2022/2023/2026): 31,204/30,740/32,707; R6. What type of journey are you making today? Leisure: 21,336/21,244/24,193; Business: 4,795/4,844/5,572; Commuter: 1,616/1,633/1,732; Professional: 3,457/3,019/1,210; EV Drivers: 4,268; HGV drivers: 751; 2,852/2,510/979

# Further information: overall satisfaction (2/2)

By demographic (%)



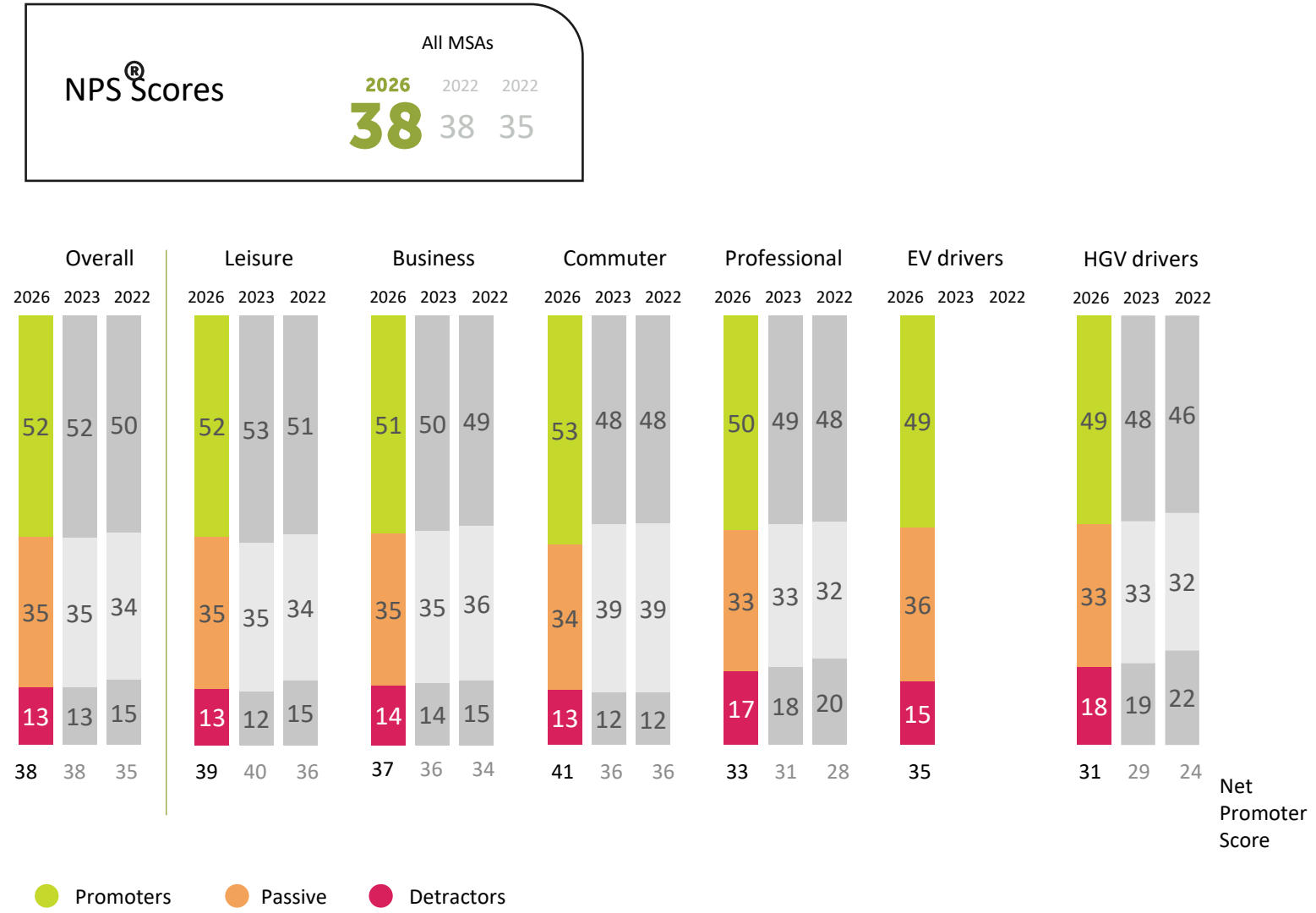

Overall satisfaction by time spent at MSA (%)




10 to 15 minutes Base (2022/2023/2026) - Overall: (31,204/30,740/32,707); Male: (18,751/18,079/19,186); Female: (12,402/12,592/13,497); Q27. In which age group are you? 16-34: (7,264/6,929/7,907); 35-54: (12,447/12,665/12,502); 55+: (11,473/11,135/12,250);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: (602/620/669); R13. How long have you spent at [MSA name] services after parking? 5 minutes or less: (5,176/3,745/4,398); 10 or 15 mins: (10,303/9,497/11,150); 20 to 30 minutes: (10,708/11,808/11,149); 35 to 60 minutes: (3,995/4,373/4,596); More than 1 hour: (1,022/1,317/1,391)

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

By visitor type




Base (2022/2023/2026 - All MSAs: (31,252/30,744/32,954); R6. What type of journey are you making today? Overall: Leisure: (21,365/21,262/24,358); Business: (4,802/4,854/5,610); Commuter: (1,617/1,635/1,750); Professional: (3,468/3,023/1,236); EV drivers (4,298); HGV drivers: (2,862/2,514/997). Net Promoter®, NPS®, NPS Prism®, and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld. Net Promoter ScoreSM and Net Promoter SystemSM are service marks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld.

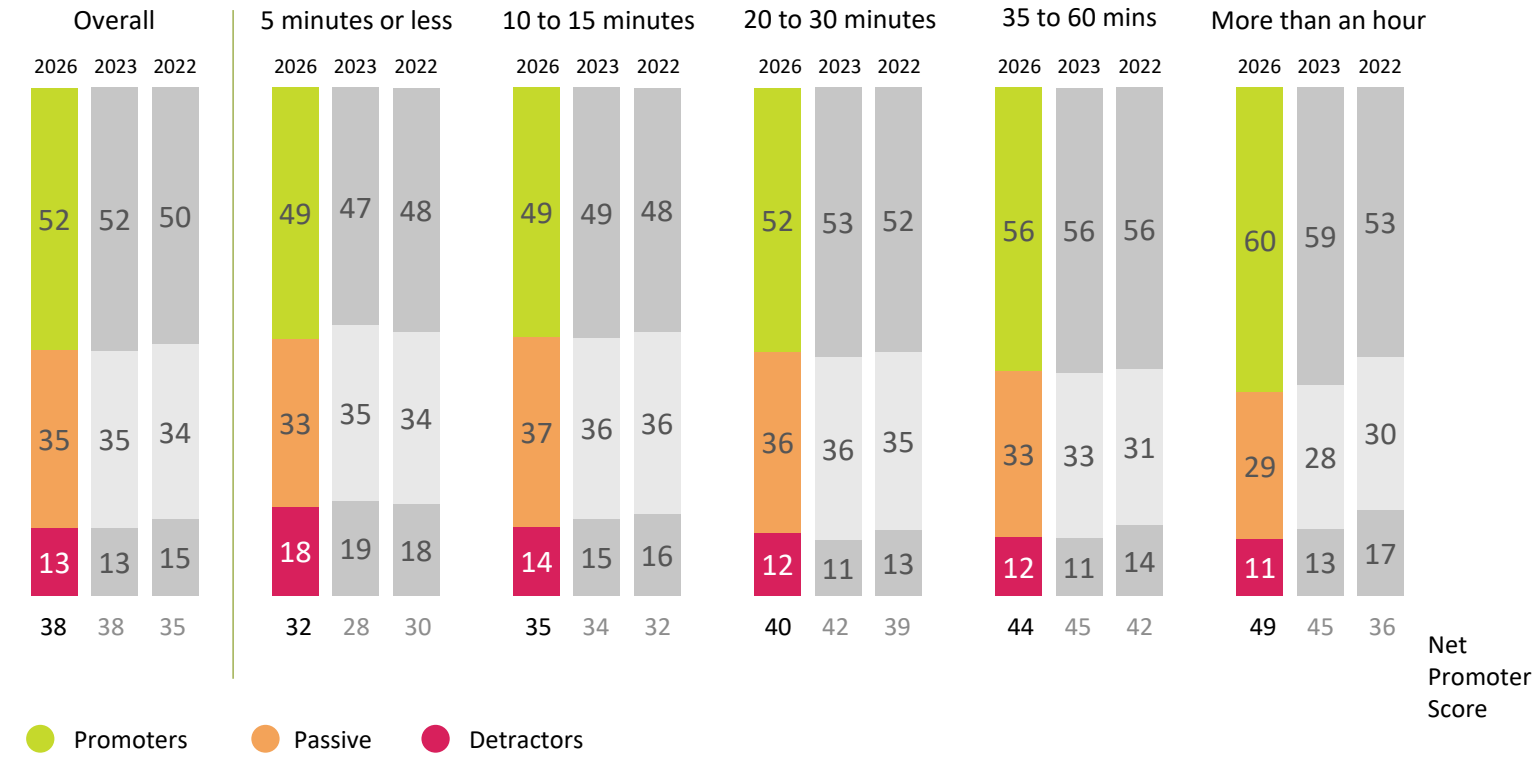
# Further information: likelihood to recommend MSA (2/3)

By time spent at MSA

NPS® Scores

All MSAs

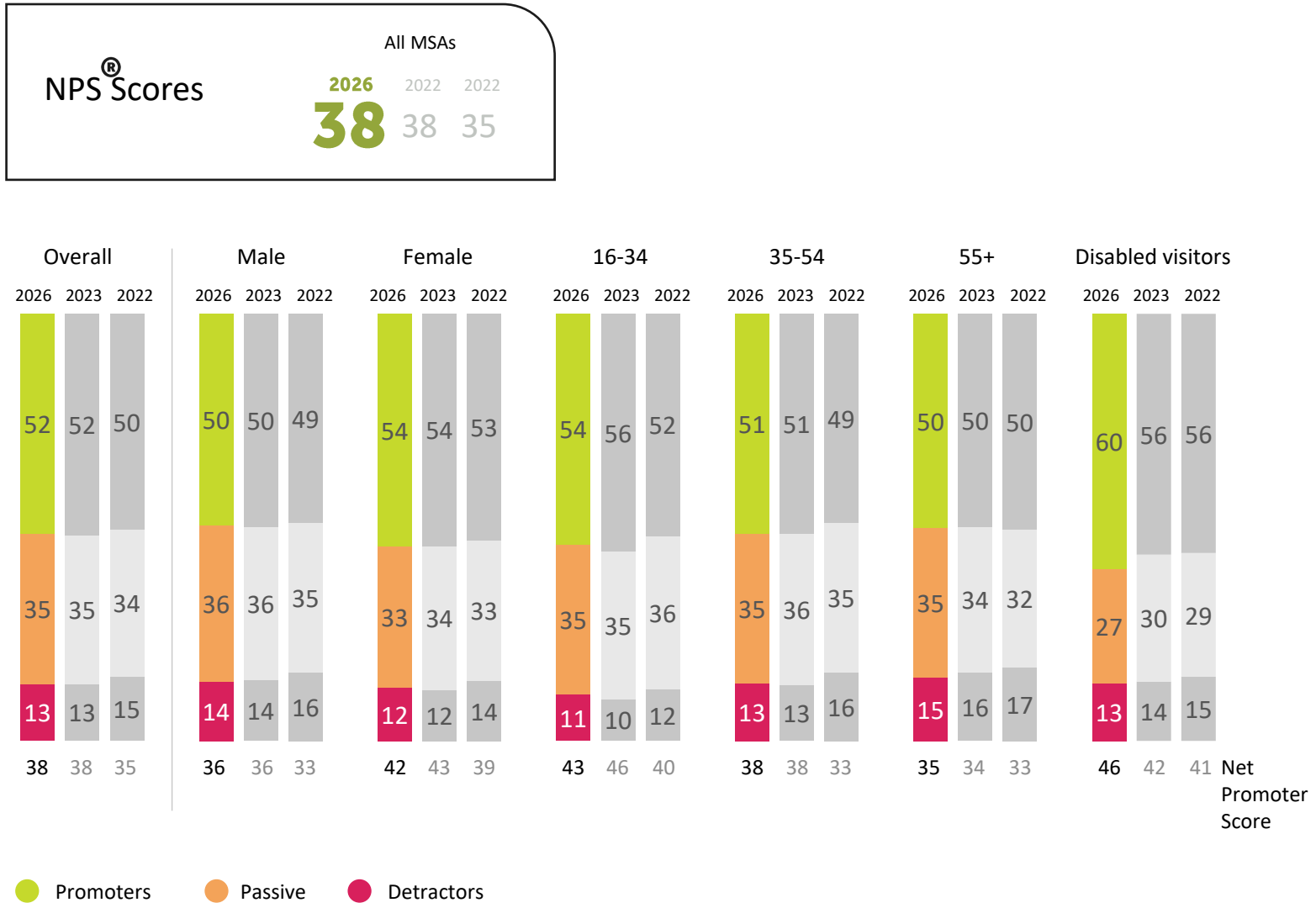
| 2026 | 2022 | 2022 |
|---|---|---|
| 38 | 38 | 35 |




Base (2022/2023/2026) - All MSAs: (31,252/30,774/32,954); R13. How long have you spent at [MSA name] services after parking?
5 minutes or less: (5,195/3,756/4,473); 10 to 15 mins: (10,313/9,508/11,245); 20 to 30 minutes: (10,719/11,816/11,202); 35-60 mins: (4,001/4,376/4,608); More than 1 hour: (1,024./1,318/1,399). Net Promoter®, NPS®, NPS Prism®, and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld. Net Promoter ScoreSM and Net Promoter SystemSM are service marks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld.

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

By demographic

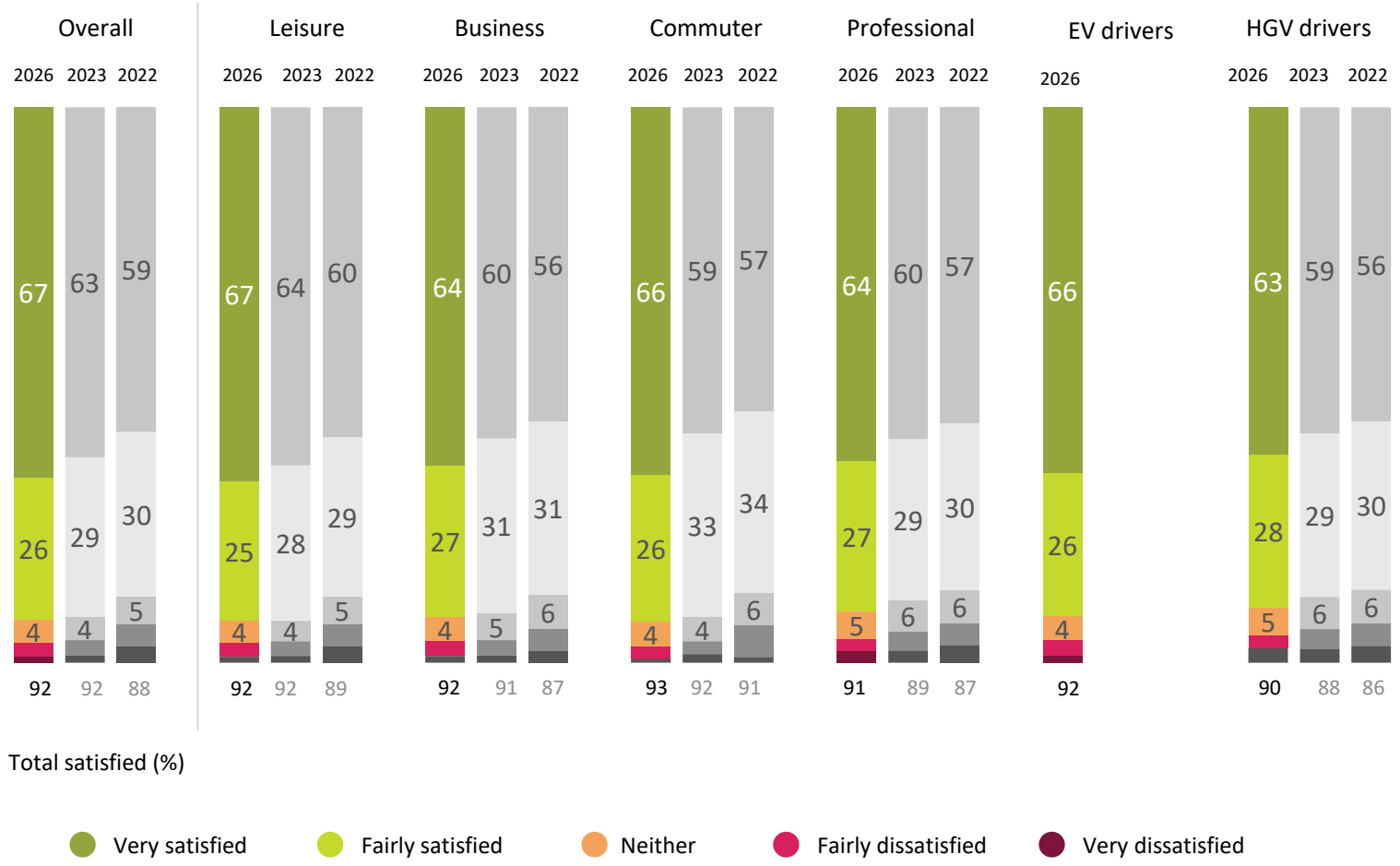



Base (2022/2023/2026) - All MSAs: (31,252/30,774/32,954); R11. Gender: Male: (18,785/18,103/19,346); Female: (12,416/12,602/13,583); Age: 16-34: (7,269/6,932/7,963); 35-54: (12,465/12,674/12,599); 55+: (11,498/11,153/12,342). Q28. Do you, or anyone that was with you have a long-term physical or mental health impairment limiting the daily activities or work you/they can do? Disabled visitors: (602/620/671).

Net Promoter®, NPS®, NPS Prism®, and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld. Net Promoter ScoreSM and Net Promoter SystemSM are service marks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld.

# Further information: Satisfaction with the toilets (1/2)

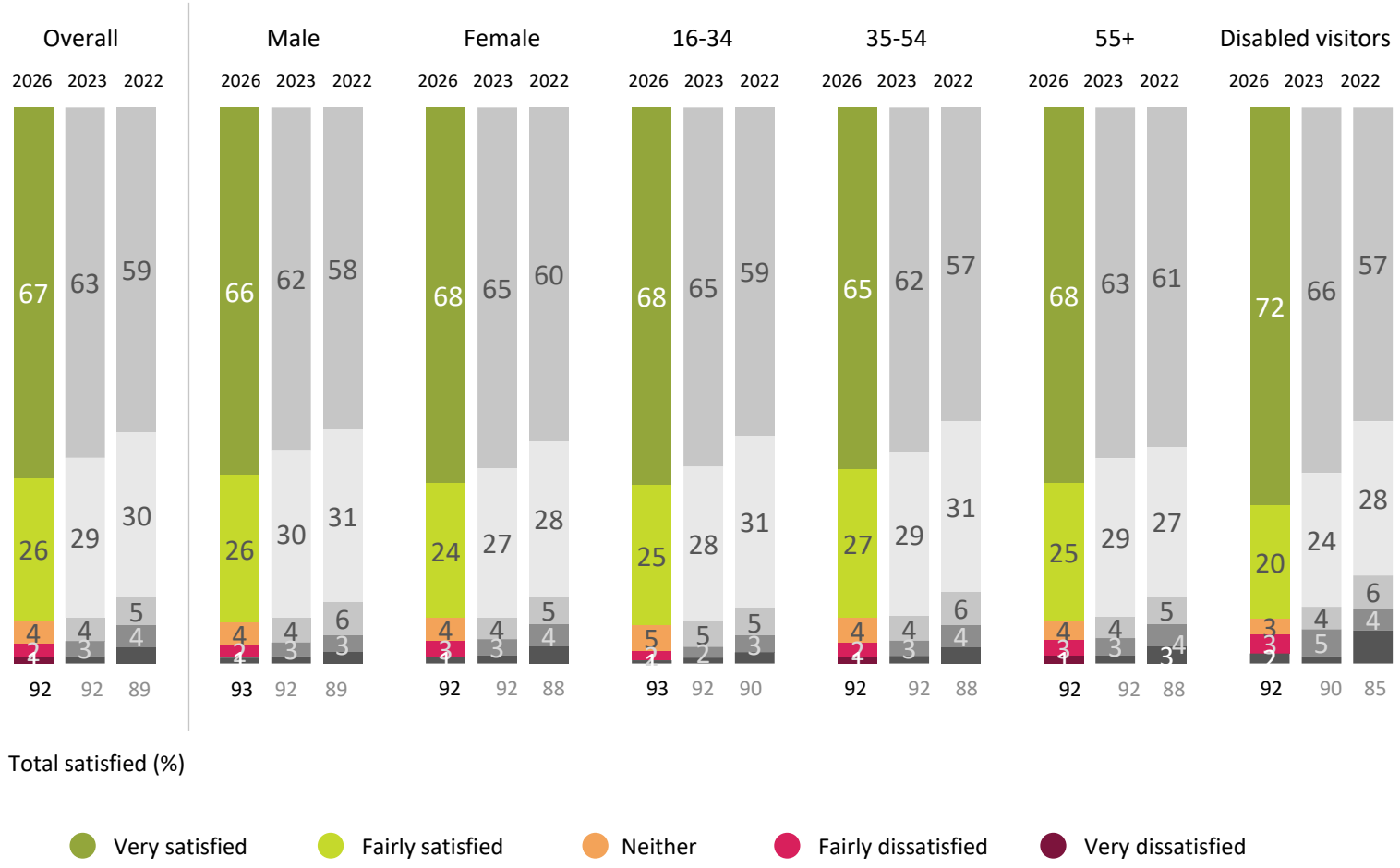
By visitor type




Base (2022/2023/2026): All MSAs (25,908/25,749/27,649); R14. And using the same scale, how satisfied were you with the toilets here today?
Leisure: (17,938/17,989/ 20,686); Business: (3,806/3,953/ 4,555); Commuter: (1,195/1,222/ 1,332); Professional: (2,969/2,585/ 1,076); EV (3,471); HGV drivers: (2,471/2,163/884)

# Further information: Satisfaction with the toilets (2/2)

By demographic




Base (2022/2023/2026): All MSAs (25,908/25,749/27,649); R14. And using the same scale, how satisfied were you with the toilets here today?
Gender: Male: (15,346/14,922/16,065); Female: (10,524/10,769/ 11,563); Age: 16-34: (5,705/5,453/ 6,371); 35-54: (10,413/10,743/ 10,534); 55+: (9,771/9,542/ 10,698). 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/ 577)


THANK YOU!
transportfocus
Ipsos

# Contacts




Tim Sander
Director

+44 (0) 7989 165658

tim.sander@ipsos.com





Thomas Folqué
Director

+34 662 138 039

thomas.folque@ipsos.com





Victoria Fay
Research Manager

+34 615 322 027

victoria.fay@ipsos.com





Giulia Bonesso
Research Manager

+44 (0) 7759 526603

giulia.bonesso@ipsos.com

# Ipsos Standards & Accreditations

**Ipsos's standards & accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Moreover, our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.**

**ISO 20252** – is the international specific standard for market, opinion and social research, including insights and data analytics. Ipsos in the UK was the first company in the world to gain this accreditation.

**MRS Company Partnership** – By being an MRS Company Partner, Ipsos UK endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation & we were the first company to sign our organisation up to the requirements & self-regulation of the MRS Code; more than 350 companies have followed our lead.

**ISO 9001** – International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.

**ISO 27001** – International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos UK was the first research company in the UK to be awarded this in August 2008.

**The UK General Data Protection Regulation (UK GDPR) & the UK Data Protection Act 2018 (DPA)** – Ipsos UK is required to comply with the UK General Data Protection Regulation and the UK Data Protection Act; it covers the processing of personal data and the protection of privacy.

**HMG Cyber Essentials** – A government backed and key deliverable of the UK's National Cyber Security Programme. Ipsos UK was assessment validated for certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet.

**Fair Data** – Ipsos UK is signed up as a 'Fair Data' Company by agreeing to adhere to twelve core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.

**This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252.**