



# HS2 Passenger panel

## November Tasks

20<sup>th</sup> January, 2017

# Discussion: Food Diary

We'd like you to keep a food diary for the next 7 days.

What we're most interested in is what kinds of food you're eating and why. Don't worry about telling us about recipes and ingredients, we're more interested in the reason you choose certain foods to eat.

Within your diary, we want to know when you're eating by occasion;

- Breakfast/brunch
- Snacks
- Lunch
- Snacks
- Dinner

Examples of diary entries might be...

- This morning I grabbed a coffee from Costa. I know it's expensive, but I can't start my day without it. It's my must-have!
- I bought a bagel at the train station to eat on my commute. I would have preferred something healthier, but there was a limited selection.
- In the afternoon I had a Kit Kat from the work vending machine. I just really needed a treat to get me through the day.
- I had a roast dinner on Sunday as it's a family tradition, so we always do it

With each entry, please title the post with the date so we can keep track of which days each post belongs to. Please do also add lots of photos to bring this all to life!

Task 90, posted 11/11/2016

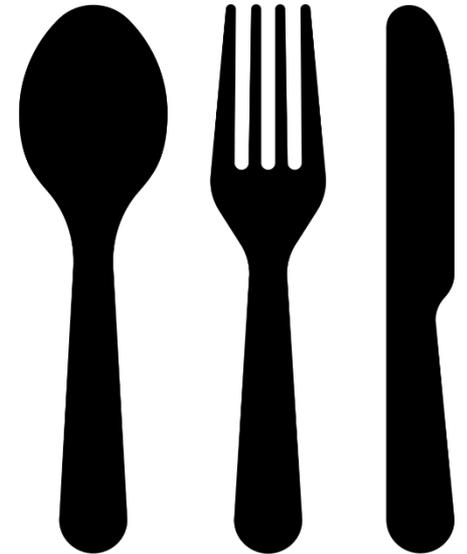
# Eating trends seen within the panel's food diary are consistent with previous food and drinks research

As context we have revisited food and drinks studies we have undertaken and looked at **current themes in this market**

In looking at the diaries the panel completed, we can see that **the themes are in line with those we have seen before**

It is clear that lifestyles and **eating habits are changing** and the market is not keeping up with the pace of evolving consumer needs

We will go on **explore needs, those which are unmet and how they differ by eating occasions**



# The Zeitgeist

*"For health reasons I joined Slimming World in October 2014 and lost four stone by following the eating plan. I now eat even more fruit and vegetables lots of protein and fewer biscuits cakes sauces etc"*  
(Leisure, London, 61-70)

Cosmopolitan and well-travelled

Health & fitness awareness

Busy lives and work / life balance

Zeitgeist

Joy of food, cooking and baking

*"I just needed something quick and simple in order to fit in with my busy day"*  
(Business, Birmingham, 31-40)

Haves and have nots

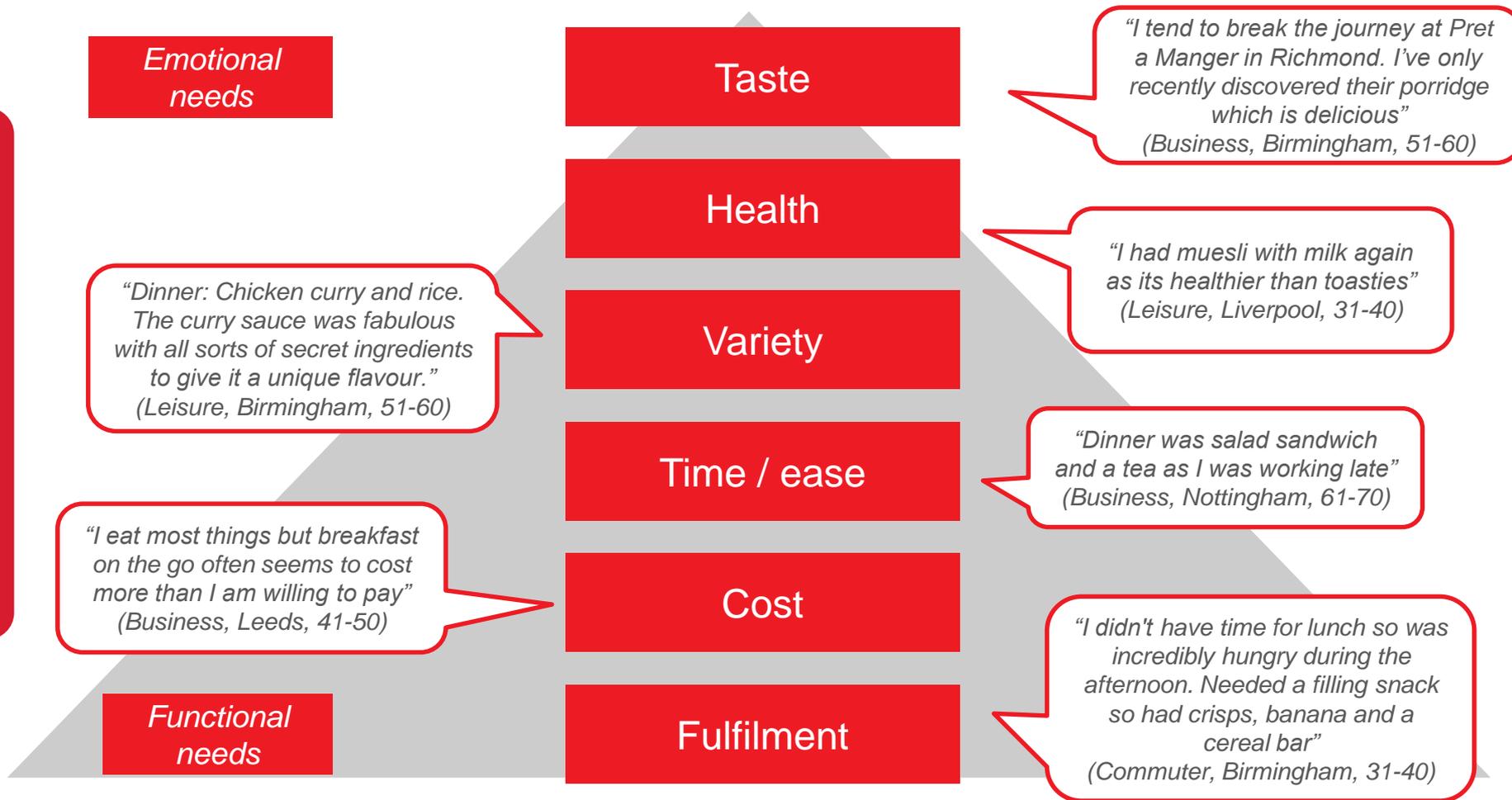
Everything is Digital

*"Trying not to spend too much money and instead planning meals"*  
(Commuter, Sheffield, 18-30)

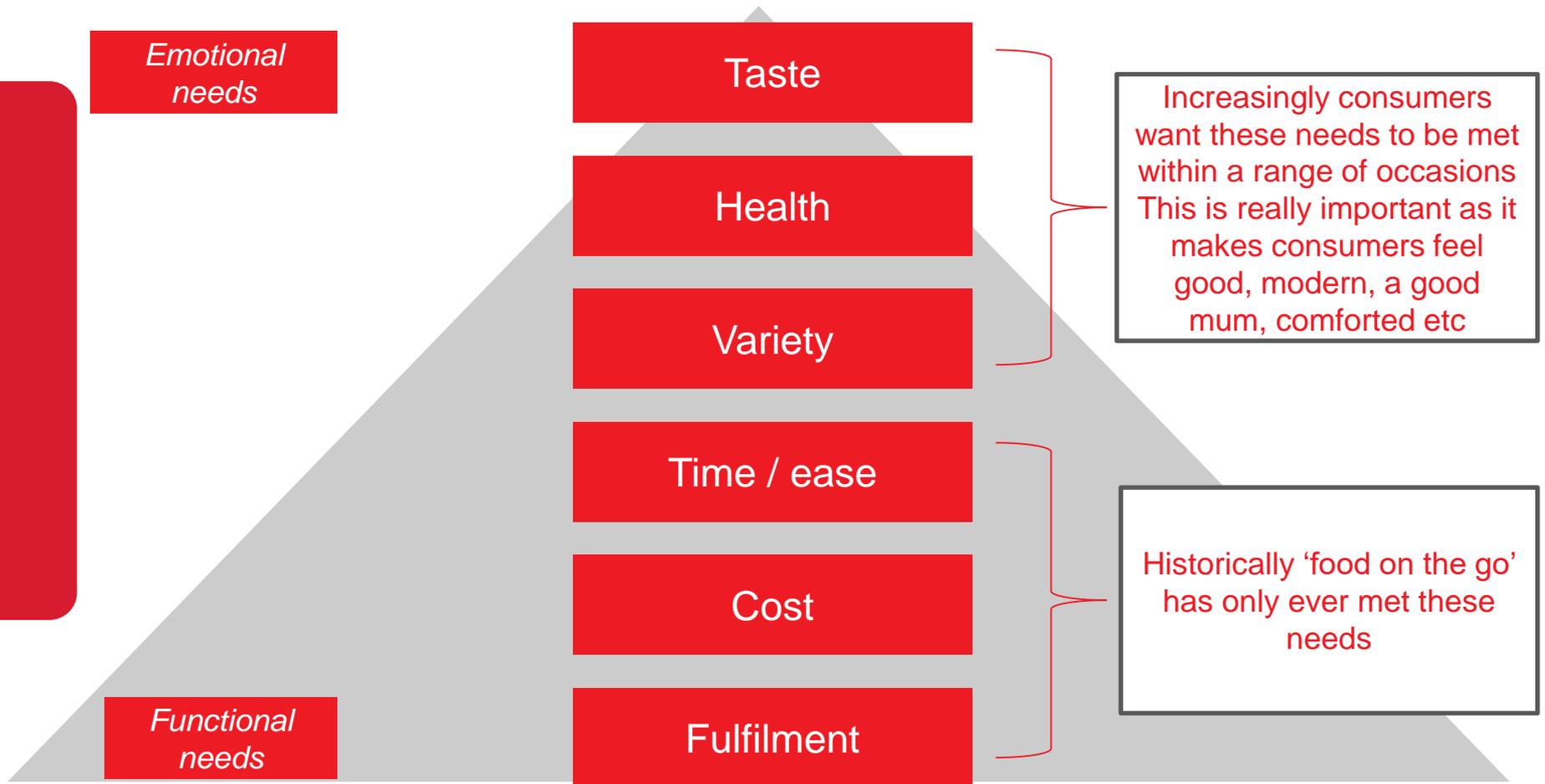
*"As I get older, I try to think about healthy eating and life style"*  
(Commuter, London, 41-50)

These are driving the changes in the food market

# These needs appear within the panel diaries



# Emotional needs are currently not being well met by retailers



# Eating habits have changed a lot over the last 5 years, particularly with regards to healthy eating

- Many of the panel report major changes to their eating habits over the last 5+ years, with many of these revolving around healthier eating
- Poor health, weight gain, fear mongering within the media, changes to lifestyle and change in personal circumstances account for much of the motivation for change
- Whilst the necessity is there to make positive changes to diet, it can be difficult to put these into practice
- Working long hours, looking after family members and other commitments mean that time is often limited
- Healthy choices are particularly hard to find on the go

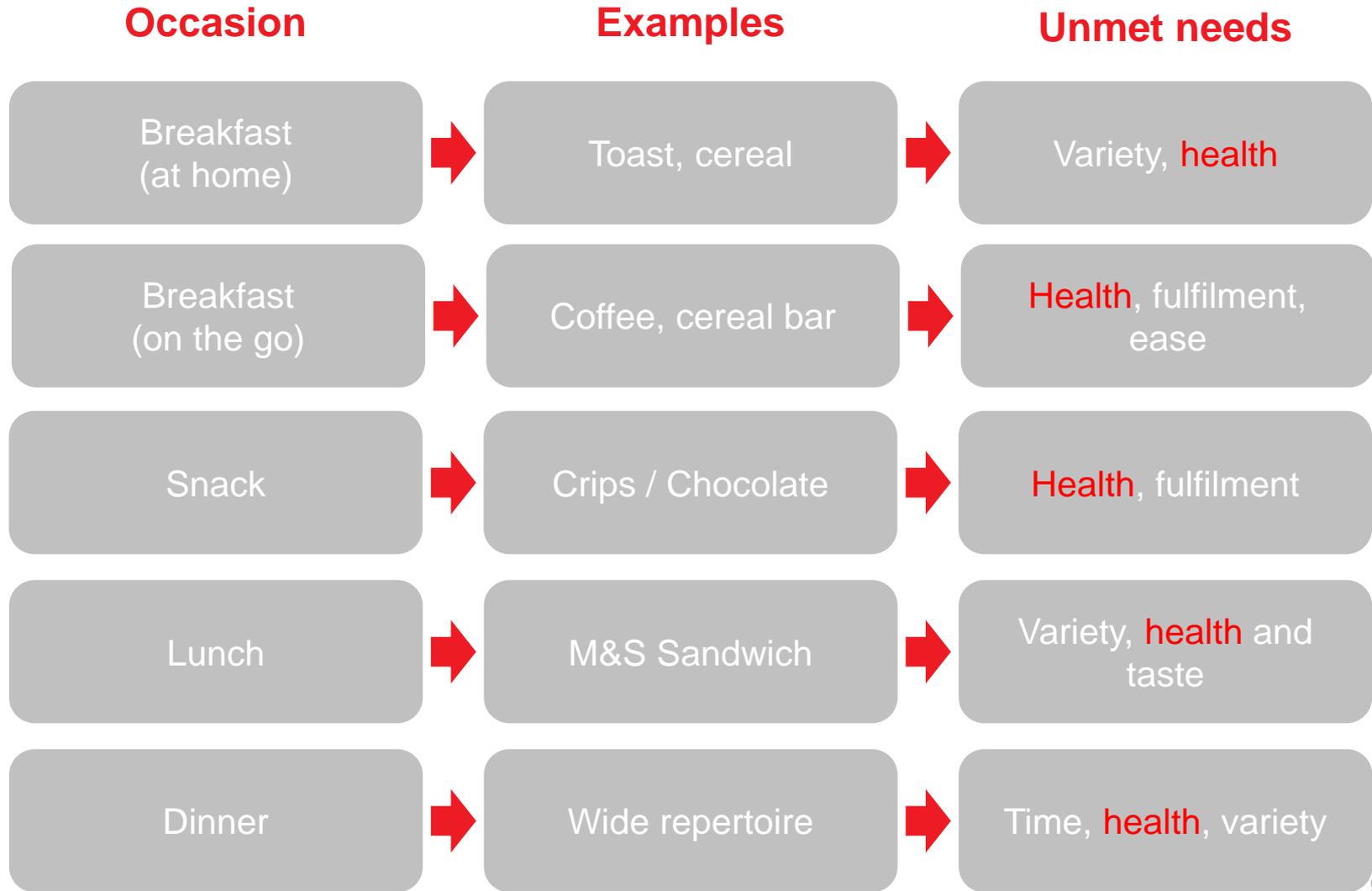
*"I used to pretty much eat a continuous healthy diet the majority of time. Now I eat less of a healthy diet and more of a tasty diet. I eat more ready meals and fast food now compared to home-made cooked simply because it's quicker and tastier!"*  
(Leisure, Leeds, 18-30)

*"I usually DIY it to bring with me, or, try to find an M&S Simply Food, which will at least allow me to get fruit, a wholemeal sandwich and some water. Not ideal, but the least harmful solution"*  
(Leisure, Glasgow, 51-60)

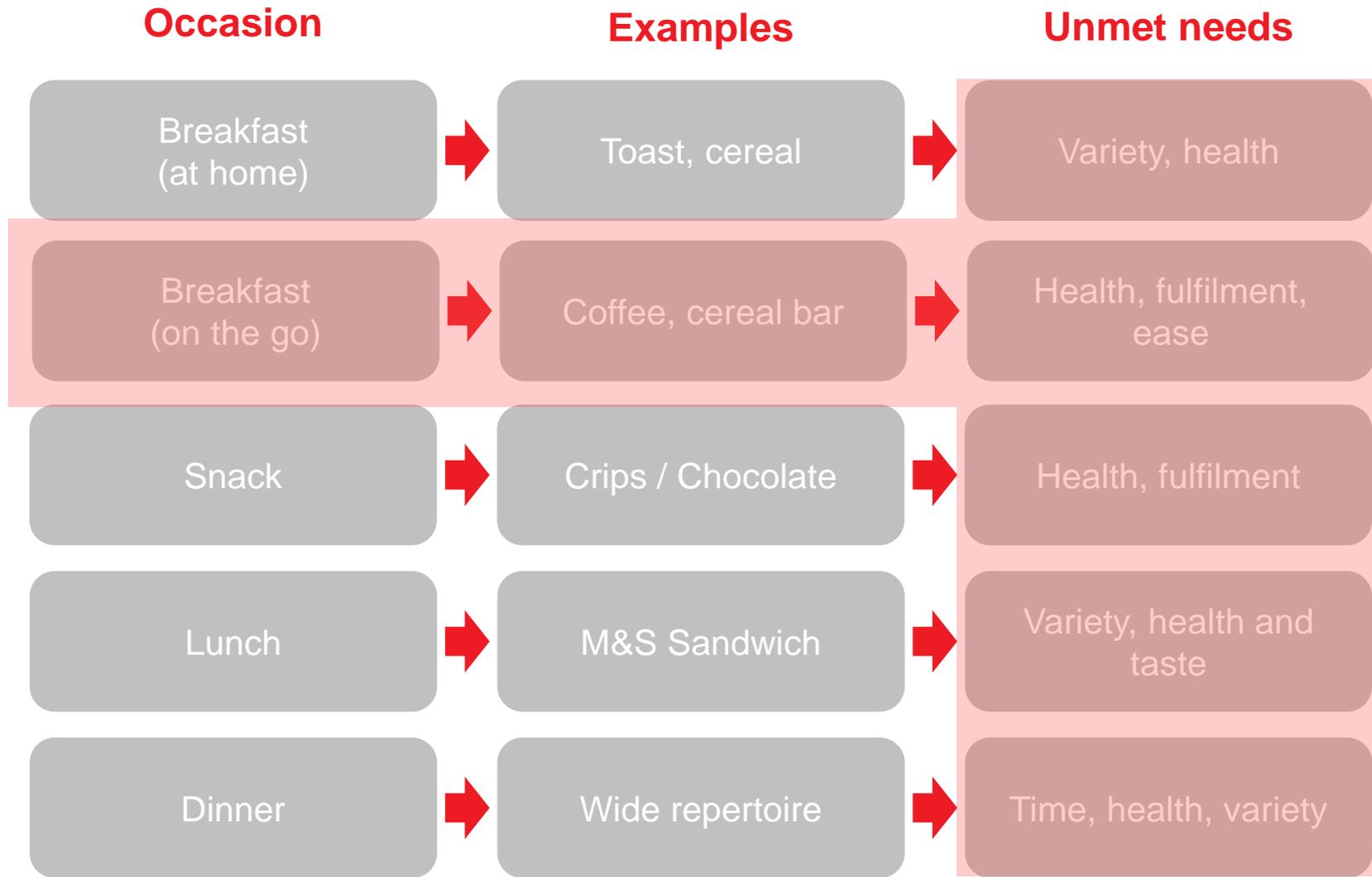
*"At work, my diet has got worse, mainly due to being more busy and having less time"*  
(Leisure, Newcastle, 18-30)

*"On the go, I'd like to eat healthily but end up eating crisps or chocolate because there's no other choice. It's tough to get natural or wholesome food when on the go."*  
(Business, Birmingham, 31 - 40)

# Needs differ by occasion and many are unmet



# Significant unmet needs are for 'on the go' and 'health'



# Passengers have had many bad experiences, and often make something to take on the train

*"I've never really had a great experience getting food on public transport in any form as its usually way over priced (even more so on trains) so I try to plan ahead and get something before hand"*

*(Leisure, London, 31 – 40)*

*"I think the food served on transport services is not very good and is certainly not worth the expensive price you have to pay"*

*(Leisure, London, 61-70)*

*"As to bad experiences, railway food has to be the worst I've experienced, certainly in recent years. Unappetising and stale sandwiches, tasteless beverages, only the bottled water is at all palatable, and that's usually warm.*

*Options on-board have been totally unpalatable and unsuitable, so almost anything would be an improvement"*

*(Leisure, Glasgow, 51-60)*

*"I confess that on most rail journeys it's not easy to find healthy food. When travelling, on the outward journey I take sandwiches on wholemeal bread, and maybe a home-made flapjack or something healthy. But on my return journey there's no opportunity to make my own sandwiches, so I usually buy something on the train or on the stations."*

*(Leisure, Birmingham, 70+)*

# Some suppliers are getting better at meeting the range of consumer needs but there is much room for improvement

MARKS &  
SPENCER



Healthy salads; variety

LEON



Naturally fast food



**EAT.**  
THE REAL FOOD COMPANY



High quality, tasty food

*“Pret = Pret a Manger? Not something we have in the boonies, and although I've seen some of their shops when passing through England, I've never had the chance to sample any of their food. Same with Nando's, heard about it but never experienced it”  
(Leisure, Glasgow, 51 – 60)*

- Providers need to cater for the evolving and unmet consumer needs
  - Whilst this is starting to happen, options such as those shown above are more available in London and other big cities
  - Provincial / local/rural / stations are not as well served

## So what?

In order to satisfy consumers, TOCs need to meet the full range of needs – both those met met and the ones which are evolving and currently not well met,

# Discussion: Your Eating Habits

Last week we asked you what you were eating and why. This week we'd like you to tell us about your eating habits

Have your eating habits changed over the last five years? How and why? Do you eat more or less of anything in particular? Why?

What are your must-haves?

What do you eat when you're on the go? Can you find what you'd like to eat, or do you have to make do with something which is not ideal? Give us some examples?

Do you eat at restaurants? Where? Why?

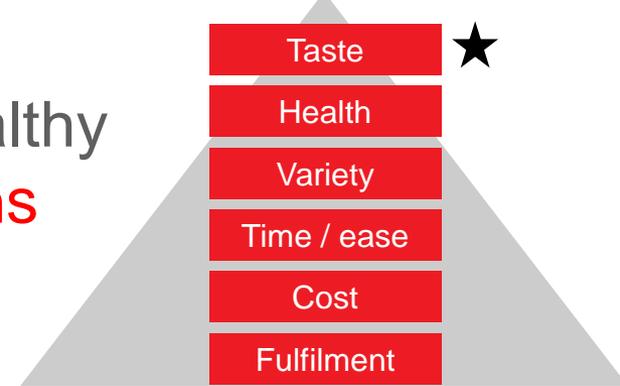
How important or not are brands / retailers you are familiar with when buying food, whether it's a takeaway, or a supermarket, or a café?

Do you ever get takeaway? Where from? Why?

Do you use Deliveroo? UberEATS? Other similar services? Why?

Task 91, posted 18/11/2016

# 'Must-haves' are currently coffee and unhealthy treats, but the panel seek healthier options



- One of the most popular 'must-haves' was coffee with everyone having different preferences in terms of retailer and type
- Food, 'must-haves' currently revolve around treats, for example chocolate, sweets and fast food
- People did however frequently refer to knowing they shouldn't have these and show a strong sense of guilt and naughtiness
  - Many excused such treats due to lack of healthier options, especially when on the move
- The panel seek tasty, healthy options

*"I must have my five a day, whether this is just fruit or a combination of fruit/salad/veg"*  
(Commuter, Birmingham, 31-40)

*"On the go I'd like to eat healthy but end up eating crisps or a chocolate because there's no other choice"*  
(Business, Birmingham, 31-40)

*"I loathe instant coffee and would rather go without a drink at all than let it pass my lips!"*  
(Business, Birmingham, 51 - 60)

*"Wouldn't go without my filter coffee every morning"*  
(Leisure, Birmingham, 70+)

*"6am coffee, has to be quality, single origin, single estate, fresh ground from whole bean using a commercial grinder"*  
(Business, Liverpool, 41-50)

# Consumers currently find eating out difficult as there is less control of what can be eaten



- Many of the panel spoke about eating out in terms of special occasions. For many, eating at restaurants and getting a take-away is expensive and restrictive in terms of sustaining a healthy diet
- The panel spoke about struggling to find food to meet their needs and many favoured cooking at home where they can eat in a more controlled environment
- The panel seek healthy and affordable food outlets

*“When I travel by Air, I always try to get there early enough to have a proper meal once I’ve checked in my bags. Maybe this is because I am going on holiday so I see the meal before departure as part of the journey – something to be enjoyed rather than other journeys which are more to be endured.”*  
(Leisure, Nottingham, 61-70)

*“I now avoid eating out, mainly because I am so disappointed when I do, I can cook better for a fraction of the cost and know what goes into my food, so partly for health reasons too”*  
(Leisure, London, 41-50)

*“I don’t go in for takeaways much because I can’t really afford to – but I’ve also been influenced by frequent news of health/hygiene scares due to restaurant kitchens not being clean enough, outbreaks of food poisoning due to improperly stored food in restaurants ”*  
(Leisure, Birmingham, 70+)

# In summary...

- Currently many restaurants, shops and cafes do not meet the evolving needs of travelling passengers.
- Nowadays, consumers seek healthy, flavoursome and affordable food, but currently struggle to get all three in combination.
- Health is an increasing consideration for the majority of the panel and something that is found hard to manage.
- Food provided at stations and by TOCs must take into consideration passenger's needs not just in terms of price, fulfilment and speed, but health and taste

# Discussion: Food on Transport

To complete this month's task on food, this week we're asking you about food on public transport.

When you're travelling, what are your must-have foods / drinks?

Have you had any great experiences with getting food / drink on public transport? Either here or overseas?

Think of planes, airports, trains, stations, boats.... Tell us what was so good

Have you had any bad experiences with public transport? Tell us about it

Do you think it's necessary to have hot food catering on-board trains? -Short distance (up to 30 minutes) Long distance (30 minutes to 2 hours)

What would you think about an on-board take away service? E.g. ordering a bacon sandwich as you board and staff being able to collect it at the next station the train stops at, and bring it to your seat

Recently BA signed a deal with Marks and Spencer so passengers can order M&S food on board short haul flights <https://www.theguardian.com/business/2016/sep/29/british-airways-marks-and-spencer-sandwiches-economy-short-haul-flights>

Do you like this idea?

Whilst answering these questions, please think about what brands of food you would prefer to see.

Would you prefer brands or locally sourced products?

Which brands would you like to buy food / drink from

Do your food preferences change between long and short distance journeys?

Task 93, posted 25/11/2016

# Food quality and good customer service are key factors in creating a memorable catering experience



"I think the best was Air New Zealand long haul to NZ. Overall the quality of food was really good- still airline food but there were 3 **choices** - all nicely prepared served with cloth napkins and proper cutlery so it felt better. It also didn't **taste** like it had been hanging around in a warmer for hours"  
*(Business, London, 51-60)*

"Best surprise I ever had and why I totally love Virgin is the snacks on a flight to L.A I went on about 19 years ago, chocolate coated pretzels, a disgusting thought but totally **delicious**, and in the middle of the night when all was quiet and still a hostess offered Aero Mint Chocolate Choc Ices. I was so amazed"  
*(Leisure, London, 41-50)*

"We recently travelled to Dubai on Emirates (first class) and we only flew first class as it was a special trip so we just wanted the whole experience to be memorable.  
We were treated like royalty, plenty of drink, wide selection and all brought to us with a smile. Similarly the food was equally exquisite, plenty of it and beautifully presented.  
We were looked after throughout the duration of the flight and the great food, drink and service just added to the whole experience"  
*(Business, Birmingham, 31-40)*



"The journey was Oviedo to Madrid, a v long journey and cold tortilla was served. It was absolutely **delicious**. The train actually caught fire and we were evacuated from our carriage but it's the tortilla which is the stronger memory not the chaos which ensued"  
*(Leisure, London, 61-70)*

"The first time I travelled First class with Virgin Trains - a very small thing that made a difference for me. They were giving passengers one of those small snack boxes - mostly terrible and unhealthy stuff, but I loved the design"  
*(Business, London, 18-30)*

"A great experience of food on trains was Eurostar, I was travelling to Brussels about 2 years ago and opted to pay the difference myself for first class. It was a busy commuter train but cheap first class as the normal seats had all been sold. Think I only paid an **extra £100ish**, food and wine was excellent and included in the price of the ticket, 3 course meal with coffee, very good quality and polished off a bottle of wine, free paper and a an excellent dessert trolley. All in all the best meal I've ever had on public transport"  
*(Business, Sheffield, 18-30)*

# Best experiences with food on public transport

Many of the best experiences passengers describe were from flights. Positive feedback of an experience came from a mixture of factors;

- Quality food – *Fresh / Healthy*
- Good customer experience – *How it was served*
- Variety – *Options available*
- Taste – *Flavours*
- Timing – *Speed and timing of availability*
- Price – *Value for money*



“In the 80's there was a big shake up at BR as their sandwiches had become a national joke, suddenly they got fantastic- there was one sandwich I used to die for every Friday it was egg and ham with little bits of green olive in granary - it still makes me misty eyed, but then they privatised and it went”  
*(Business, Liverpool, 41-50)*

Passengers do care a lot about catering and take notice of changes in catering options and differences between operating companies.

However, it goes beyond merely fulfilling a need; HS2 is expected to be more than just a journey, but an experience. This should be seen through the whole trip within customer service, comfort, facilities AND food.

Passengers want at least the functional needs covered across all journeys (long and short)  
Secondary to that are the emotional needs of taste, health and variety

# Bad experiences came from the amount of effort operating companies don't put in

Whilst it is unlikely that on board catering will make or break a journey, **catering is important and can leave the passenger dissatisfied with the operating company.** This may ultimately lead them to choose another mode of transport or operator

People have had such poor experiences of public transport catering that it is more often assumed that it will be disappointing. Good experiences therefore become a delight rather than a norm

Passengers can live without the higher level needs such as taste, health and variety, but **the functional needs at the very least MUST be met**

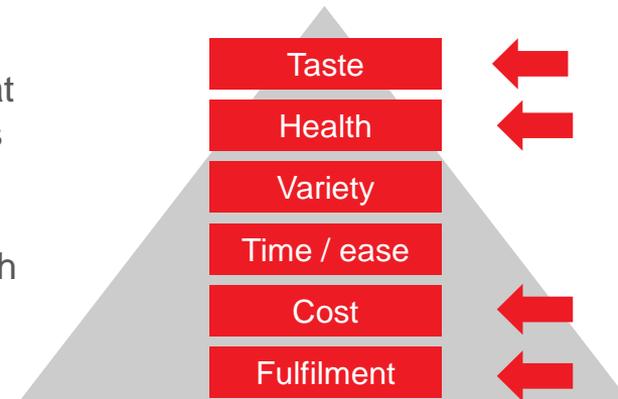
**The panel are expecting brilliant basics from HS2** and this covers all areas of the journey including catering

“On a train journey from London to Glasgow, after a particularly depressing encounter with a British Rail cheese sandwich on white bread plus a cold sausage roll (and I hardly dared even think about the ingredients of that sausage roll filling), I resolved that henceforth, every time I travelled on a long journey, I would make myself a nice picnic. And I have ”  
(Leisure, Birmingham, 70+)

“I have had awful food on planes where the only enjoyment was opening the dinky packs or lifting the lid off the foil tray to see what lurked beneath. Was that really chicken ? Hmm !”  
(Leisure, London, 61-70)

“Sadly, I have never had any good food experiences on public transport in recent years, nobody at all caters for the kind of diet I now have to stick to”  
(Leisure, Glasgow, 51-60)

Where is it going wrong?



# Catering beyond 'basic' food is not deemed necessary on shorter journeys (30 mins or less)

Given that stations are expected to have lots of shops, restaurant outlets, cafes etc, having catering on board as well is not seen as essential **for shorter journeys**

For shorter journeys, passengers are happy to either purchase food from the stations, bring it with them or **wait until the journey is over**

There was some discussion that **microwavable hot foods** could be provided for those who want heated food. E.g. soup, pasta, bacon rolls

*"On a short journey of less than 30 mins I can't see the need for a food service...I would only offer water"*  
(Leisure, London, 61-70)

*"I don't think it's vitally necessary to have hot food catering on board trains for the short journeys. By 'hot food' here, I mean actual meals prepared on the train, eg chicken & chips, curry & rice, or anything like that"*  
(Leisure, Birmingham, 70+)

*"My must have are drinks - water, and if I'm on a longer journey, tea"*  
(Commuter, Glasgow, 31-40)

*"Generally speaking, if it's a shorter journey, say less than two hours, then I just take bottled water with me which we buy in bulk from the supermarket and which I tend to have on me at all times."*  
(Business, Birmingham, 31-40)

# For longer journeys, hot and cold food is expected, but a concern is the smell food can produce

For long journeys, catering would be necessary

- But foods with strong smells should be avoided

With this in mind, passengers rarely mentioned hot food catering other than heated sandwiches/paninis/burgers

Examples of food mentioned include;

- Salad
- Sandwiches
- Wraps
- Panini

Whatever is offered for passengers, the most important thing is that they are told in advance of boarding the train so they could organise taking food on board if necessary

*“Any takeaway service would need to avoid pungent foods to avoid offending other passengers - simple sandwiches, rolls, pies etc would suffice. I would only expect such catering on journeys in excess of 90 minutes”*

*(Business, Birmingham, 51-60)*



*“When it comes to hot food catering on trains, I feel it’s really only necessary on journeys longer than two or three hours, as long as there are in-station options for before/after your journey, and at least the option for hot and cold drinks on-board”*

*(Leisure, Glasgow, 51-60)*

*“To be honest, I’m not so concerned about having hot food, even on a longer journey but good quality sandwiches/wraps/paninis, ideally with some plain options”*

*(Leisure, Glasgow, 51-60)*

*“On a journey of 90 – 120 mins I am more likely to want substantial cold or a full hot option. Full on-board, take away or supermarket ordering would all be appreciated”*

*(Business, Leeds, 41-50)*

# Delivery services for longer journeys does not have widespread understanding or appeal

The prospect of a delivery service was met with some apprehension. For many, they simply cannot imagine that such a service would work flawlessly. Worries include:

- Causing delays
- Not receiving food
- Using up staff time
- Timing errors

This apprehension from the panel may also derive from the fact that those outside of London/big cities were unfamiliar with services like Deliveroo and UberEats.

However, whilst some did find the idea for a takeaway service somewhat worrying and gimmicky, others were intrigued by the idea, but only if the prices are fair



"I haven't heard of Deliveroo or uberEATS and suspect these may be a London or City thing."  
*(Leisure, Nottingham, 61-70)*

"The Take Away service is an interesting idea. I think that might tempt me if the cost was reasonable...If it caused any sort of delay that would negate any positive interest!"  
*(Business, Leeds, 41-50)*

# Brands are reliable and consistent but prices are high and selections are often unappealing

For the panel, having brands guarantees a certain level of quality of the food. It indicates that ingredients used are of a known quality – a reassuring prospect for passengers

However branded food products are often of a higher price and selections are seen to be more limiting than locally sourced foods may be. The idea of having locally sourced products was favoured among the panel

From the brands mentioned Pret and M&S were the most popular



*“Personally, I'd prefer to see quality locally sourced food instead of branded, as I might actually have a chance of finding something I could eat that way, instead of being stuck with mass-produced”  
(Leisure, Glasgow, 51-60)*

*“I love locally sourced food and Hs2 has an opportunity to show case local specialities as we travel up and down the country, or at least source good ingredients”  
(Leisure, London, 41-50)*

*“I'm not typically a brand person but when it comes to food I prefer to know I am eating decent, well prepared food which is the healthiest I can source when out”  
(Business, Birmingham, 31-40)*

*“Brands help breed confidence so you know what you are getting but HS2 can become a brand for all round service including food quality (!) if you get it right.”  
(Business, Leeds, 41-50)*

*“I have a pathological dislike of being ripped off for coffee. I refuse to pay someone £3 for rubbish and Starbucks is one of the worst. Costa or Nero isn't too bad but when possible I'll look for an independent”  
(Business, London, 61-70)*

# The partnership between BA and M&S was well received by the panel

**BRITISH AIRWAYS**



**MARKS & SPENCER**

British Airways selling Marks and Spencer sandwiches on board their flights was seen to be a positive step forward

Whilst the panel understand that they may be paying a premium for this catering, it would at least guarantee quality and consistency on board all flights with this airline



Not all were entirely convinced that this principle should be adopted by HS2 however. Some felt that HS2 should not have to rely on another company to provide quality catering and should instead make them internally or source the food from smaller local companies

“I haven't experienced decent food on any journeys I've been on! The food doesn't appeal to me and most looks unhealthy!”

With this in mind I think the fact that BA have signed a deal with M&S so their passengers can order food for on board is a great idea. I think M&S will provide quality/healthy food!”  
*(Business, Manchester, 51-60)*

“Surely HS2 should be able to make quality sandwiches without having to obtain them from a third party company”  
*(Leisure, London, 61-70)*

# In summary, catering on board HS2 is expected to be good quality, reasonably priced and provide tasty, healthy options

Within public transport there **is currently a lot of variation** in the standard and variety of food options available to passengers

The panel are **expecting HS2 to be as much an experience as a journey**, so the food will need to be of a high standard in order to be in line with the high levels of service and comfort that are also expected. Even when just meeting functional needs, they are expecting **brilliant basics!**

Whilst there appears to be **little to no expectation of catering on shorter journeys** (at least beyond basics such as water and perhaps tea / coffee), there are some differences in opinion with regards to how catering is managed on longer journeys in terms of food brands, logistics and food types

The main concerns with having catering are **high prices, strong smelling food, litter, poor quality food and errors in timing**