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ATTITUDINAL SURVEY:
DALLAS EATING ESTABLISHMENTS
TOWARD TEXAS FED BEEF

A Report to the
Texas Cattle Feeders Association

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From the
Texas Agricultural Market Research and Development Center
Department of Agricultural Economics and Sociology
Texas A&M University

Texas Agricultural
Extension Service

Texas Agricultural
Experiment Station

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ATTITUDINAL SURVEY: DALLAS EATING ESTABLISHMENTS TOWARD TEXAS FED BEEF

SUMMARY AND RECOMMENDATIONS

Objective

The objectives of this pilot research were 1) to determine attitudes and opinions of operators, chefs or meat buyers of high-quality, Dallas, Texas eating establishments toward Texas grain-fed beef and 2) to seek guidance information for the promotion of Texas grain-fed beef.

Survey Sample

Depth interviews were made in six eating establishments in October, 1969 and with the Dallas - Fort Worth chapter of the National Association of Chefs in November 1969. Personal interviews, using a questionnaire, were made in twenty-four additional high-quality eating establishments in December and January. Included were downtown private executive clubs, hotels, motels, country clubs, steak houses, restaurants and cafeterias.

Attitudes Toward Texas Fed Beef

About a third of the top-quality eating establishment operators or chefs could be classed as strong supporters of Midwest fed beef. Another third are favorable toward Midwest fed beef and the remaining third are inclined toward Texas fed beef.

Major criticisms of Texas fed beef were beliefs that it was fed too short a time, fed too fast, is not corn fed, is too fat, without enough interior marbling, and lacks the flavor of Midwest fed beef.

Ability to order appreciable quantities of Texas fed beef steaks from purveyors of Texas beef was a serious and major problem for hotels, motels and private clubs serving banquets or convention meals. The size of the steaks was far too variable and quality of the meat was not always felt to be dependable.

Another major concern was inability to get desired aging for beef. Most Dallas high-quality eating establishments needed a minimum of two to three weeks aging of beef. Correct aging was obtainable when Midwest beef was ordered according to those interviewed.

When asked whether Texas fed or Midwest beef would be bought if a) both were of equal quality and b) were priced the same, seven of the twenty-four interviewed still said that they would buy Midwest beef for major uses.

Promotion Suggestions Given for Texas Fed Beef

Possibilities for the promotion of Texas fed beef appear to be reasonably favorable among high-quality, Dallas eating establishments. It is felt that customers would like Texas fed beef, if it had proper quality and flavor. It was said that people coming to Texas expect to find good Texas beef.

Promotion suggestions offered included the following:

1. Advertise to restaurant operators in their trade media.
2. Television commercials regarding Texas grain-fed beef.
3. Billboards stressing Texas grain-fed beef.
4. Use of a slogan for Texas grain-fed beef.
5. Adoption of a trademark for Texas grain-fed beef.

6. Build a good image of Texas grain-fed beef in other states.
7. Advertise and give demonstrations at state fairs.
8. Have cooperative advertising and demonstrations with the gas and electric utility companies that features Texas grain-fed beef.

Recommendations

In view of the opinions and attitudes found among key personnel of high-quality, Dallas eating establishments, it is suggested that consideration be given to the following recommendations in a market development and promotion program. The Texas Cattle Feeders Association can be very effective in the implementation of these suggestions.

1. Advertising and educational literature should emphasize that Texas grain-fed beef is from full 120-day fed, beef steers.
2. Advertising of Texas grain-fed beef in trade magazines and related publications of the hotel, motel, and restaurant business.
3. Sponsoring of a Texas restaurant association meeting in Amarillo, with a tour of cattle-feeding yards in the area.
4. Possible development of a slide, or film, presentation providing information about Texas grain-fed beef that could be used at meetings of the national hotel, motel and restaurant association meetings.
5. Development of educational aid material for television and newspaper food editors, as well as for home economists with gas and electric utility companies.
6. Assist, where possible, in providing information as to dependable suppliers that can provide the heavier weight, sufficiently aged beef

for hotel-motel and restaurant use.

7. Disseminate, through various media, information as to the growth and importance of Texas as a cattle feeding state.
8. Explore the possibility of adopting an appropriate, controlled use, trademark for top-quality Texas grain-fed beef.
9. Work with beef packing plants and the purveyors to hotels, restaurants and the institutional trade in identifying and segregating the proper weight, grade and aged Texas fed beef that meets the buying specifications of the H.R.I. trade.

ATTITUDINAL SURVEY: DALLAS EATING
ESTABLISHMENTS TOWARD TEXAS FED BEEF

Robert E. Branson and Zerle Carpenter *

PART I. PURPOSE AND PLAN OF THE RESEARCH

INTRODUCTION

Texas has a long history of cattle ranches and cattle production, but only in the 1960's has the state become a significant area for finished cattle feeding. Extremely rapid growth has been experienced from 1965 to date, moving the state from near 10th rank in the number of cattle on feed to that of second or third nationally. As of January 1, 1970, the number of cattle on feed for the top five states were as follows: Iowa 2,213,000; Nebraska 1,477,000; Texas 1,417,000; California 1,031,000; and Kansas 892,000.

Several factors have stimulated interest in the rapid development and expansion of Texas feed lots. A major factor is the state's production of large supplies of grain sorghum. For some time resistance has prevailed to the acceptability of grain sorghum for cattle feeding. The traditional use of corn--the major grain in the Midwestern states--has been preferred. Resistance however has not been without reason. The beef cattle industry is a major component of the total agricultural economy. It has an annual output of approximately 21 billion pounds of beef, valued at about \$10 billion per year. Used are production and processing system resources amounting to billions of dollars. Therefore, too much is at stake to gamble on unproven business methods.

* Robert E. Branson, marketing economist, Department of Agricultural Economics and Zerle Carpenter, meats food technologist, Department of Animal Science, Texas A&M University.

It has been observed that acceptance of new production methods by beef producers can and often does precede concurrence in them by processors and the beef carcass trade. This has been somewhat the situation for cross-bred cattle as well as for grain sorghum fed Texas finished cattle. That acceptance of Texas grain fed cattle is increasing is evidenced by the fact that major beef packing houses are now building processing plants in the West Texas high plains and adjacent areas of the Southwest. Nonetheless the Texas Cattle Feeders Association recognizes that as their cattle feeding expands so must the market for the product.

In accordance with the need to expand market acceptance of Texas grain fed beef, the Texas Cattle Feeders Association accepted the cooperation of the Texas Department of Agriculture in a state-wide promotion of Texas grain fed beef during two consecutive months of 1969. Promotion of the grain fed beef is doubly necessary in order to erase the knowledge that, in much of Texas history, cattle were largely grass fed or fed on winter grain pasturage.

One major focal point of the prestige reputation established for corn fed, Mid West beef has been its feature position on menus among high quality eating establishments: steak houses, hotels, and top quality restaurants. Because of this, the Texas Cattle Feeders Association felt it desirable to conduct a pilot research study concerning the attitudes of operators and/or meat buyers of leading reputation eating establishments toward Texas grain fed beef. Dallas, a major metropolitan area

in Texas and a leading national and regional convention center, was selected for the study. Convention cities obviously must have first class restaurants if delegates needs are to be accommodated. Furthermore, convention delegates are, for the most part, well-traveled and knowledgeable about food quality. Thus, to cater to them, eating establishments must have superior foods.

THE RESEARCH PROCEDURE

Initially, a series of in-depth interviews were conducted during October 1969 with managers, food buyers or chefs of a few private clubs, hotels and top quality restaurants. A special group interview was held in mid-November with members of the Dallas - Fort Worth chapter of the National Association of Chefs. The membership present was estimated to represent approximately a one million dollar annual market for beef in the combined Dallas - Fort Worth metropolitan areas.

Attitudes and opinions obtained in the foregoing depth interviews were utilized in designing a questionnaire for use in the main phase of the pilot research study. The questionnaire was reviewed by the Executive Secretary of the Texas Cattle Feeders Association. Interviewing began thereafter.

THE SURVEY SAMPLE

Interviews were taken on a confidential basis. Therefore, specific names of the cooperating respondents are not cited. However,

effort was directed toward obtaining a representative cross-section of the major eating places. The specific mix obtained is indicated in Table 1.

TABLE 1. NUMBER OF EATING ESTABLISHMENTS
SURVEYED IN DALLAS, BY TYPE,
December 1969 - January 1970.

Type of Establishment	Number Surveyed	
	Depth Interviews	Questionnaire
Steak houses	2	4
Specialty steak houses <u>1/</u>	-	3
Restaurants	1	3
Cafeterias <u>2/</u>	-	4
Hotels	2	3
Major motels	-	3
Private downtown dinner clubs	1	3
Country clubs	-	3
Chef's association (group depth interview)	<u>1</u>	<u>-</u>
TOTAL	7	26 <u>3/</u>

1/ Limited price special steak houses of the Bonanza franchise type.

2/ Includes main office of a major chain.

3/ Twenty-four questionnaire interviews were made but one covered a hotel, major private club and a major restaurant.

INTERVIEWING PROCEDURE

Face-to-face interviews were conducted in all cases. In order to condition against the possibility of an inadvertent bias by using a single interviewer, the survey sample of firms were divided among a team of three interviewers. All interviewers were members of the Texas Agricultural Market Research and Development Center staff. A copy of the questionnaire is in the Appendix of this report.

The depth interviews preceding the design of the questionnaire did not involve a structured format. Rather, specific subject areas were explored in varying order and probes set up to elicit free expression of attitudes, likes, dislikes, operating methods, supplier problems and related matters of concern to those responsible for the operation of first-class food serving establishments. Those interviews were made by a senior member of the Center staff in cooperation with a meats technologist from the Meats Laboratory of the Texas A&M Animal Science Department.

PART II. OPERATING PRACTICES OF THE EATING
ESTABLISHMENTS REGARDING BEEF

KIND OF BEEF DISHES SERVED

Steaks, as would be expected, were the major beef items served by the Dallas eating establishments surveyed. Each was asked to name only the most important ones insofar as their business volume was concerned. Consequently, all of the beef menu items were not included. Variations in beef cut terminology among the establishments also has to be taken into consideration. In order of frequency in which the beef cuts were reported, they were rib-eye steaks, sirloin steaks, T-bone steaks, fillet steaks, roast beef (of rounds), chopped steaks, prime rib roasts, club steaks and bottom or top butt steaks. Others mentioned included cutlets, beef tips, strip steaks, beef tenders, meat loaf, chicken fried steaks and beef stew. Several of the latter were mentioned primarily by cafeterias and general menu restaurants.

FORM OF BEEF PURCHASED

Availability of pre-cut steaks has resulted in use of the product by eating establishments to reduce food preparation time. There also is a possibility of greater portion size control and thereby cost control, according to proponents of pre-cut beef items. Therefore, it was of particular interest to ascertain the form of beef purchased by the top quality establishments represented in this survey.

Of the thirty establishments interviewed--pre-test plus final interviews--two-thirds were using pre-cut beef items. About a fourth of the total number surveyed were using it exclusively. Two-fifths were buying both pre-cut and primal wholesale beef cuts. A third used only primal wholesale cuts. This is not considered to be representative of the total Dallas area eating establishment market, of course. It must be kept in mind that only very select quality establishments were included in this pilot survey.

Pre-cut beef items purchased were primarily steak cuts. Sirloin and T-bones were reported most, followed closely by fillets and ribeye steaks. Other beef cuts were included but were mentioned less frequently by those interviewed.

Primal wholesale cuts were used by those cutting their own steaks or roasts. Generally used primal or sub-primals included beef ribs, short ribs, beef rounds, hind quarters, inside rounds, sirloin strips, chucks and top butts.

USE OF BUYING SPECIFICATIONS

Generally speaking, three buying methods prevail among eating establishments insofar as beef buying specifications are concerned. Large business firms, especially those operating a chain of establishments, often prepare written specifications to be followed for beef as well as other foods. Copies are provided to regular suppliers for their reference when orders

are being prepared. Thus, the individual order states only the items and quantities wanted. It is understood that the supplies delivered must meet the buyer's printed specifications or else they will be returned.

The second ordering system reported used specific individual instructions with each order. A third, and infrequently mentioned, system was to depend primarily on the supplier to provide products of suitable quality and size to meet the buyer's needs.

A specific question as to buying specifications was asked in the final twenty-four interviews. Among these, about 70 percent reported that the requirements were stated each time, or else they had a list of specifications on file with the supplier. Only 20 percent relied partly on the supplier by not stating specifications each time. The remaining 10 percent depended on the supplier most of the time. Obtaining the proper quality and amount of beef items is a matter of concern which was further reinforced by the preliminary depth interviews with the chefs at major establishments. Those referred to are primarily chefs at leading country clubs, downtown private dinner clubs and hotels.

Four items were of major concern in giving specifications. Aside from identifying the primal wholesale or retail cut was the 1) grade, 2) weight, 3) trim or waste fat within grade from whatever source, and 4) aging.

The grade of beef desired by high quality establishments was

usually U.S. choice at the high end of the grade and, by some, U.S. prime. Concern was also mentioned by chefs regarding firmness of meat, adequate interior marbling, and avoidance of gristle.

Size and weight of beef cuts was important in two respects. Provision of the right weight in a steak cut is essential to conform to menu requirements. Uniformity in the physical size of steak cuts is desired so that noticeable variations do not occur. For banquets this is of particular concern. Uniformity also means serving cost control.

Beyond size and weight uniformity is size adequacy, especially for those buying wholesale primals. Complaints were expressed that adequate supplies of sufficiently large primals often could not be purchased from suppliers or processors of Texas beef to consistently meet banquet or convention needs.

Trim and waste fat are direct cost factors to the eating establishment operator. Consequently this aspect is watched closely. None of those interviewed made mention of the recent yield grades of beef. Educational work is likely needed in this respect.

Lack of proper aging of Texas beef was perhaps the point of most consistent complaint noted in the survey, though it was expressed in several ways. Two to three weeks aging was considered a minimum by most buyers, and a few wanted four to six weeks. This factor alone was cited as an important reason for ordering supplies from firms handling out-of-state beef.

Comments as to problems in ordering beef are summarized, for convenience of review, in Table 2.

TABLE 2. PROBLEMS IN ORDERING BEEF,
SURVEY OF DALLAS EATING ESTABLISHMENTS,
December 1969-January 1970.

Problems in Ordering beef	Number Mentioning
Yes	18
No	6
Items mentioned: ^{1/}	
Orders not filled to specifications	10
Too much fat	9
Over-weight deliveries	6
Not aged enough	3
Weight specifications not met	3
Beef fast fed	2
Insufficient marbling	1
Heifer used	1
Never have enough	2
Inconsistent quality from local suppliers	1
Pricing inconsistent	1

^{1/} Total exceeds number of interviews because of multiple answers.

RETURN OF ORDERS

Reflecting the problem of obtaining beef in volume to meet the specifications of their eating establishments, two-thirds of those interviewed reported the necessity of returning all or part of some deliveries. Only five of the twenty-four interviewed by questionnaire did not find returns necessary. A further three said it occurred very seldom, Table 3.

TABLE 3. RETURN OF BEEF ORDERS AND
CAUSE OF RETURNS, SURVEY OF
SELECTED DALLAS EATING ESTABLISHMENTS
December-January 1969-70.

Item	Number Reporting
Return all or part of orders	16
Seldom make returns	3
No returns necessary	5
Cause of returns: ^{1/}	
Not size ordered	10
Overweight	8
Excess waste	7
Variable quality (overaged, underaged, bone sour, freshness)	6

^{1/} Total exceeds number of interviews because of multiple answers.

Only a few eating establishments reported delivery problems on orders. Masked, however, is inadequate service by some Dallas area suppliers. Local firms that could not deliver as needed were simply passed by to those that could. In some cases, this meant movement of orders to out-of-state supply houses, Table 4.

TABLE 4. LOCATION OF SUPPLY HOUSES
USED BY SAMPLE OF DALLAS
QUALITY EATING ESTABLISHMENTS,
December-January 1969-70,

City Location of Supplier	Number Using
Dallas	14
Ft. Worth	2
Houston	1
Kansas City	1
Denver	1
Chicago	4
Minnesota	1

Use of a Dallas supplier, of course, does not necessarily mean that Texas beef is being delivered. Several Dallas supply sources were reported to be providing beef from out-of-state packers. Similarly, in some cases, out-of-state packers could be processing some Texas fed beef. Except for some Kansas City suppliers, however,

the latter is doubtful.

USE AND OPINION OF FROZEN BEEF

Frozen beef had been tried by about 60 percent of the Dallas eating establishments surveyed. Various steak cuts predominated, especially sirloins, T-bones and ribeyes.

Of the frozen beef users, almost two-thirds had encountered problems with this form of beef. Factors, mentioned included: steaks not frozen quickly enough, lacked flavor, not aged properly, quality difficult to judge, and inconsistent quality. Bleeding problems during thawings were also mentioned as well as inclusion of overweight cuts in orders.

A system of slow thawing under refrigeration temperatures was adopted by most of the successful users of frozen steaks. Thawing was generally thought necessary in order to achieve proper cooking of interior meat portions of steaks.

PART III. ATTITUDES TOWARD TEXAS FED BEEF

Whereas the preceding section of this report concerns beef buying practices among selected major Dallas eating establishments, this section focuses on the personal opinions, or attitudes, motivating such purchase behavior. Specific effort was made to present the question of Texas fed beef versus Midwest beef in various dimensions, or facets, of a choice. By doing so, it is believed that a better indication is obtained of the strength of conviction involved in the prevailing attitudes. Sources of the opinions held, however, were not obtained in this research. Concern was only with the existence of an opinion, and not the source or basis of its formation.

PREFERENCE FOR TEXAS OR MIDWEST BEEF

When asked the direct question of preference for Texas or Midwest beef, there was, on balance, a greater liking of the Midwest product. Those unequivocally replying in favor of Midwest beef outnumbered those favoring Texas beef by two to one, Table 5. In the preliminary depth interviewing, basically the same division of preferences was noted.

Some interpretation is necessary regarding the no preference opinions if the feeding methods in the areas are the same. Most of those concerned about feeding practices were inclined to think that Texas feeding was not as good--being either too short, too fast, or not using corn. There were several, nonetheless, who felt that Texas feeding should be as good as elsewhere, if

TABLE 5. PREFERENCE FOR TEXAS VERSUS
MIDWEST BEEF AMONG SELECTED
MAJOR DALLAS EATING ESTABLISHMENTS
December-January 1969-70.

Preference	Number
Texas	4
Midwest	8
No difference, if both fed the same	7
No preference	5

directed by an experienced person.

When asked about their own personal opinion of Texas fed beef, mixed views prevalent among Dallas eating establishment buyers and chefs emerged. Again, however, interpretive nuances are involved in their replies, Table 6. Also views held represent a combination of influences which were not identified as to source.

A separate question was asked regarding ability to see any visual difference between Texas and Midwest fed beef. Ten of the twenty-four felt that there were visual differences. Specific comments were "smoother grain" on Midwest, Texas product more fat, marbling not as good, and tended to fall apart when cooked.

Ten of the twenty-four interviewed felt that a flavor difference also was present between Texas fed and Midwest fed beef.

TABLE 6. VIEWS OF TEXAS FED BEEF
EXPRESSED BY BUYERS AND CHEFS
OF SELECTED DALLAS EATING ESTABLISHMENTS
December-January 1969-70.

Opinion	Number
Texas very good if graded and aged	6
Texas just as good or better	4
Prefer Texas, better flavor and quality	2
Would prefer Texas, if customer knew difference	1
Midwest flavor better	3
Midwest better	2
Too much fat and gristle in Texas	3
Texas marginal	1
Texas short fed	1
Use more corn in Midwest	1
Product from national packer in Texas, O.K.	1

WHICH BEEF WOULD BUY AT SAME PRICE AND SPECIFICATIONS

The degree of solid support for Midwest beef is indicated by the further question of which product, Texas or Midwest, would be purchased assuming both were fed beef, equal in price, and met their buying specifications. Seven of the twenty-four still held to Midwest beef, Table 7.

TABLE 7. WOULD YOU BUY TEXAS FED OR MIDWEST
BEEF IF BOTH MET YOUR BUYING SPECI-
FICATIONS AND WERE EQUAL PRICE

Would buy	Number
Texas	13
Midwest	7
No preference	4

Those continuing a preference for Midwest beef said that they did so because of quality, flavor and aging.

PART IV. POSSIBILITIES FOR
PROMOTION OF TEXAS FED BEEF

PRESENT USE OF TEXAS FED BEEF AS A BASE FOR A PROMOTION

Texas fed beef is used by enough quality eating establishments to provide a good base upon which to build a promotion program for a broader market. In the present pilot survey, twenty-one of the twenty-four eating establishments were using at least some Texas fed beef. A third of those replying, however, used Texas beef only for the less critical meat cuts. Even so, the approximately one-third who like Texas fed beef, and the additional one-third who are less adamant in supporting Midwest beef represent a sufficient base upon which to build a broader market preference for Texas fed beef. Whether the Dallas firms contacted are representative of the market position in other major metropolitan areas is not known. A similar market survey in two or three of the following cities would be desirable: Houston, San Antonio, Austin, Fort Worth, Corpus Christi, Waco, Lubbock, Amarillo, El Paso, Oklahoma City, Tulsa, Little Rock, Shreveport, Baton Rouge and New Orleans. Another and preferable approach would be a single area wide market survey with a few eating establishments in each of these cities represented.

OPINION OF CUSTOMER'S ATTITUDE TOWARD TEXAS FED BEEF

Answers were sought as to whether the eating establishments surveyed would do as well to advertise Texas fed beef as Midwest beef and what customer attitudes are felt to be, Table 8.

TABLE 8. OPINION ABOUT CUSTOMER ATTITUDE TOWARD,
AND ADVERTISING OF, TEXAS FED BEEF, SELECTED
DALLAS EATING ESTABLISHMENTS,
December-January 1969-70.

Item	Number
View of Customer Attitude Toward Texas fed Beef	
Customer does not know difference	13
Midwest preferred	8
Texas just as good or better	3
TOTAL	24
View of Advertising Texas fed Beef	
Would do just as well	12
Would do better	5
Would be all right in Texas	1
Would not do as good	2
If have product quality, do not need to advertise	1
Do not advertise anyway	1
Do not know	2
TOTAL	24

Results imply receptiveness to the advertising of Texas fed beef. Half, or twelve, of the eating establishments said they would do as well advertising Texas fed beef as Midwest beef. Five said they would do better. Restaurateurs also felt that persons coming to Texas from outside the state expected to get Texas steaks because of the area's reputation as a cattle land.

HOW BEST TO ADVERTISE TEXAS FED BEEF

A wide array of suggestions were given by eating establishment managers, chefs and meat buyers as to how best to advertise Texas fed beef. In a pilot survey, such as this, the objective is to explore ideas and concepts thoroughly more than that saying what proportion of the market holds a given opinion. For that reason, the full range of suggestion received is reported. Numbers given with each suggestion should be evaluated with some reservations. An idea mentioned by one person may be better than one suggested by twenty others.

Four areas of advertising emerge from the suggestions received. These are suggestions offered only, with no objective evaluation as to their relative usefulness. They are 1) advertising to restaurant operators, 2) advertising to the public through the mass media, (using television, newspapers, radio and billboards, among others), 3) use of demonstrations, such as utility company home economists programs, at state fairs and comparable public events and 4) the product is its own best advertising so make the product better. The question becomes which one or combination, within or among them, achieves the best impact for the dollar cost.

SALES AIDS FOR EATING ESTABLISHMENTS

For further depth into possible Texas fed beef promotion opportunities, a question was asked about possible on-the-premises sales aids. Results, again, provided an array of useful suggestions, Table 10.

TABLE 10. LIST OF SUGGESTIONS AS TO HOW BEST
TO ADVERTISE TEXAS FED BEEF,
SELECTED DALLAS EATING ESTABLISHMENTS,
December-January 1969-70.

Suggestion	Number
Advertise to restaurant operators in trade media	4
Television commercials	4
Billboards stressing Texas grain fed beef	5
Use slogan of "Texas-bred, Texas-fed, None better Anywhere"	1
Could use a trade mark for Texas fed beef	2
Build image of Texas beef out-of-state	1
Make all state fairs and have demonstrations	2
Use gas and electric company cooperation in advertising and demonstrations	1
Promote idea of in-state buying	1
Better aging of Texas beef	3
Start corn feeding	1
Bring Texas quality up to Midwest standards	2
Eliminate force feeding and extra fat	1
No suggestion	1

TABLE 10. List of Sales Aid Suggestions
from Selected Food Establishment
Operators

Suggestion	Number
Menu-of-day	11
Menu clip on	2
Table tents	1
Newspaper ads	2
Television spots	1
Verbal suggestions by waiters	1
Demonstrations, plant tours for hotel, motel and restaurant people.	1
None	6

The possibilities of the menu-of-the-day, table tents and clip-ons were mentioned to those interviewed in order to get their direct reactions. These suggestions generated the others mentioned by the respondents and reported in Table 10.

A menu-of-the-day would represent provision to restaurants of supplies of paper on which to list their menu for the day. The paper pages would carry advertising of Texas-fed beef in some appropriate manner. Table tents and menu clip-ons are believed to be familiar items and self explanatory.

MARKET REPRESENTED BY HIGH QUALITY
EATING ESTABLISHMENTS SURVEYED

There was no intention in this exploratory market research to measure the size of the eating establishment market represented by the high-quality establishments in Dallas. Yet the market among those firms contacted is a significant one. Therefore, to indicate the approximate size of the market provides some appreciation of its magnitude.

Firms interviewed, as a group, serve an average total of about 100,000 persons daily. Purchases of beef by these establishments amount to approximately \$3.5 million per year. It must be recognized that the firms interviewed in some cases had several establishments and consequently the figures relate to considerably more than twenty-four individual eating places.