

EXPLORATION OF BEEF
USAGE AND ATTITUDES AMONG
THE WHITE TABLECLOTH AND
COLLEGE/UNIVERSITY FOODSERVICE
MARKET SEGMENTS

(Texas)

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- Screening Questionnaires
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- Restaurant List
- College/University List

INTRODUCTION

INTRODUCTION

This report summarizes the results of a qualitative research project conducted on behalf of the Texas Cattle Feeders Association by The Research Alliance during November/December, 1982. The objective of this study was to explore two specific foodservice segments -- white tablecloth restaurants and university/college feeding -- with regard to attitudes toward and usage of beef. Analysis of the information generated by this study is to be used for the development of marketing programs aimed at these specific segments which will enhance the acceptability and image of beef, and lay the groundwork for maintaining and, hopefully, increasing the proportion to which beef figures in the menu planning of these specific segments. Additionally, the analysis of this study includes comparison with a similar study done in California in June, 1982.

Research Design

While the emphasis of the project was to understand foodservice management issues among specific segments, the project design included some end-user feedback in order to gain perspective on the consistency of foodservice management attitudes with actual usage situations, and was split between two Texas locations in order to hypothesize about possible regional differences. Originally designed as a project with six sessions, eight group sessions were actually conducted as follows. The number of participants in each is noted in parentheses.

Dallas

White Tablecloth Managers

December 9, 1982 (7)

December 9, 1982 (8)

White Tablecloth Diners

November 1, 1982 (11)

University/College Foodservice Managers

November 1, 1982 (3)

December 9, 1982 (4)

Houston

White Tablecloth Managers
November 2, 1982 (6)

University/College Foodservice Managers
November 2, 1982 (9)

University/College Diners
November 2, 1982 (11)

White tablecloth restaurants were defined for the purposes of this research as restaurants whose average entree price for luncheon was \$7.00 or higher, and/or dinner of \$11.00 or higher. A copy of the questionnaires used to screen and recruit potential session participants are appended, as is a listing of the universities and restaurants represented in the study.

Each session lasted 90 to 120 minutes and was audiotaped. While the flow of the conversation was kept as open as possible to encourage candid expressions of attitudes and usage habits, the discussions usually covered the topics below in the sequence shown. Copies of the detailed discussion guide are included in the Appendix.

Professionals

- . General background/current foodservice environment (volume, scope, role).
- . Frequency and nature of menu change.
- . Perceived changes/reasons for change in consumer tastes.
- . Specific changes in role of beef.
- . Beef ordering.
- . End-user perceptions of/preferences for beef; projective exercises on beef users.
- . Expectations of Texas beef/beef industry generally; wants/needs for support; interest in pilot programs.

End-users (Diners)

- . General background and food preferences.
- . Exposure to meal consumption environment (white tablecloth restaurant or college facility).
- . Likes/dislikes about consumption environment.
- . Directed discussion on attitudes toward and usage of beef (including references to at-home usage).

Restaurateurs were also asked to bring a copy of their menus (or to send one), which were reviewed along with the tapes of the sessions for the preparation of this report.

Organization of Report

This report is organized in two sections and an Appendix, as follows:

Executive Summary outlines the hypotheses generated from the review of the discussions and comments on their implications.

Highlights of the Discussions review, in greater detail, the actual comments made by session participants, including relevant verbatims.

The Appendix includes copies of all survey and discussion materials, and detail regarding the demographic background of discussion participants.

Research Limitations

The qualitative methodology employed in this study is designed to be exploratory and directional in nature, utilizing a small nonrandom sample of foodservice professionals or consumers. Consequently, the results reported are hypotheses and should not be generalized to any population as a whole.

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

The following section summarizes the key hypotheses developed in the analysis of the group sessions and the comparison of them with similar research done in California. This section concludes with some summary comparative judgments and comments on the implications of these findings for special marketing programs directed to the segments studied.

White Tablecloth Dining

1. The role of beef in the white tablecloth segment is changing in Texas, although not at the rate or with the intensity that was observed in California. In Texas, beef's popularity is linked with its association with the identity of Texas as well as with its appetite appeal. It remains a strong meal favorite among Texas residents and visitors alike.
2. However, the Texas diner is changing in the same direction and for many of the same reasons as the Californian. The resident population is more mobile; there has also been a major influx of new residents, both from other parts of the United States and other countries. As a result, the Texas diner has had exposure to other cuisines and other cooking techniques. Texas diners have become more curious and experimental about food generally.
3. The sensory qualities of beef -- it is a juicy, tasty, satisfying food -- are as widely acknowledged in Texas as in California. It is still considered to be "fine food" (depending of course on its preparation) by professionals and diners alike. The volume it enjoys (or may expect to enjoy) is, however, likely to be declining because of concerns about health risks, which are apparent to both diners and operators. While not as intense as that expressed in California, the fear about the

connection between beef and heart disease is apparent and is likely to affect the volume of beef consumption in the future.

4. Texas diners reflect the trends observed in California to lighter dining and personal fitness attractiveness. However, it appears that Texas diners are slower to adopt new fads, are perhaps more conservative, and may be more resistant to change than West Coast diners. For example, it seemed that the issue of seeking "lighter" meals was as often resolved by ordering a smaller steak or by eating a greater portion of vegetables as by ordering something other than beef.
5. As in California, the dining public first thinks of steaks and roasts when considering beef dishes and associates beef with very large meals. Also, Texans frequently enjoy cooking and entertaining with beef at home, and thus often find the prospect of steak in a restaurant unexciting. Very little new is being offered to them in restaurant beef entrees that capitalizes on an increasing willingness to try new dishes or on the interest in lighter fare.
6. While beef's generally high cost is a consideration for restaurateurs and diners in selecting it, certain seafood items are increasing at equal or greater rates. It is not so much the only "bad-guy" in controlling food costs since Texas restaurateurs, unlike those in California, have little difficulty selling it and have relatively little waste with beef. As a result, they do not feel pressure to overprice it as was indicated in California to protect themselves financially.
7. Unlike those in California, Texas restaurateurs are proud of their handling of beef dishes, steaks or roasts and find beef to be an important element in their continued success. They do, however, acknowledge that working with beef requires a unusually sure and experienced hand for optimum success.

8. Texas restaurateurs recognize that purveyors and industry leaders are not actively trying to reverse the trends that are negative to the acceptability of beef to the dining public at large. They feel that greater assistance from either or both sectors will be necessary to maintain the demand for beef. New ideas that are consistent with changes in consumer preferences, and occasional pricing breaks that allow beef's continued presence as a "special" or "specialty" were indicated by restaurateurs as a needed long-range strategy.
9. As in California, restaurateurs would welcome beef support or promotion that is consistent with their belief in beef as a good food. Except for limited-menu ethnic-specialty restaurants, enthusiasm for greater overall marketing support for beef was relatively high.

College/University Dining

1. As in California, the pressures on this segment, both from the professional and end-user perspectives, are much different than those on white tablecloth managers. Expectations among college diners are not for a dining "experience," but for down-to-earth basic food of a variety and nature that fills the needs formerly met by "home cooking."
2. While student populations are aware of the health and nutrition concerns expressed by white tablecloth diners, many are reluctant to give such fears full credibility and very few have reacted with changes in personal eating habits. Rather, any complaints they have with beef in their college diet are addressed to the poor quality and preparation techniques that they felt typified college food.

3. Trends in student preference appear to lag behind those in California. For example in Texas, the popularity of quiche is growing, whereas in California it appears to have peaked and to be on the decline. Students are (in both states), however, exhibiting more interest in food preparation techniques -- e.g., less fried food, more steamed vegetables, more appetizing and natural shape and appearance (e.g., preferring to be served from a whole turkey than a turkey roll), and ethnic foods (Mexican, Oriental, et al.). College foodservice professionals are aware of these changes in preferences and feel they are responding adequately but acknowledge needing some assistance.
4. College foodservice professionals share restaurateurs' views that meat purveyors are indifferent to their needs. Recipe and promotional support for the college segment would be enthusiastically received. Educational assistance (in beef preparation and selection) is a great need among this group.

Implications Of The Findings

Beef's food appeal is universally acknowledged in Texas. Its future is perhaps brighter there than in California for a number of reasons:

- . It has a strong association with the regional and cultural identity of Texas. Rejection of it by Texans to the degree suggested by many in California would be tantamount to Swedes giving up smorgasbord.
- . The regional identity influences and supports future interest in beef among those who visit Texas, a group on which many operations are very dependent for continued success.
- . Beef is widely and enthusiastically accepted by the youth of Texas, who seem less susceptible to food fads and of a more conservative nature than those in California.

However, there are a number of negative factors operative that deserve attention if beef's position as a menu mainstay in Texas is to be maintained. Among them:

- . Texans are as concerned with good health and attractiveness as other trend-setting areas of the U.S. Beef is not consistent with current concerns for lighter diets and weight control.
- . The Texas market will likely continue to mature with increased varieties of new foods, food styles or preparation techniques. Very little in the thinking of today's Texas professionals with regard to beef appears to capitalize on this.

That support from the beef industry in general, and purveyors in particular, is needed was as evident in Texas as in California. (It would appear the losses have not yet been as great.) Certainly a more favorable environment exists. Professionals in both segments studied indicated that both the "user" and "provider" targets require attention. Both college and white tablecloth operators see themselves as providing service, the rough dimensions of which are dictated by the user. It is the professionals' role then to "interpret" existing and developing end-user wants and needs into acceptable end-products (or entrees).

A number of special marketing and support efforts appear to be worthy of consideration. The desirability of beef, and its appropriateness for today's taste, needs to be conveyed and reinforced to the end-user. The day-to-day involvement with those who provide the commodity that is beef (that is, purveyors) could be substantially improved in terms of understanding and alleviating the pressures of the foodservice professionals, both financial and operational. Finally, new ways to present beef, or ways to present established dishes that are consistent with consumer changes are needed.

As suggested by the California study, the following possibilities indicate promise.

- At least nominal support in establishing or maintaining end-user demand (both regionally and nationally) in terms of today's food ethic (relative to concerns about lightness, nutrition, weight control).
- Redirection of purveyor sales efforts to ensure that contacts are as much service-oriented and problem-solving as order-taking in nature.
- Training and recipe development for specific market segments consistent with their expressed financial and operational wants/needs and those of their consumers.

DETAILED HIGHLIGHTS

DETAILED HIGHLIGHTSWhite Tablecloth Segment
Participant CharacteristicsRestaurateurs

The characteristics of white tablecloth restaurants ranged widely, but were similar in mix to restaurateurs interviewed in California. There were fewer ethnic specialty restaurants represented in Texas and a somewhat greater emphasis on operations devoted primarily to beef entrees. The majority of restaurateurs were owner-operators or managers. Hotels (e.g., The Adolphus in Dallas and the Sheraton Town and Country in Houston) were well represented, as were major corporate-run chains such as Victoria Station. All participants were involved in menu planning and/or food preparation. Levels of experience in foodservice management ranged from five to thirty-five years.

Menus also varied widely, although not so much as in California. None were primarily seafood in orientation. Restaurant "positioning" was quite varied, ranging from the Minx in Dallas (young affluent singles also looking for a drinking-and-dancing evening) to family-style service (Southern Kitchen), elegant Continental environments (such as The Adolphus' French Room), and Western theme establishments (Texas Steak Ranch and Saloon). Beef entrees were well-represented in all the Dallas operations, whereas in Houston, several operations (Chez Orleans and Shanghai East) made only nominal use of it. Menu sizes ranged from as few as five to as many as twenty-five entrees with fifteen or so being typical. (A listing of the restaurants represented in each area, as well as a menu description, is appended. Actual menus for most are also available for review.)

With the exceptions already noted in Houston, beef was a major menu component, usually accounting for thirty to seventy-five percent (in steakhouses) of entrees. No restaurateur felt he could get by without a reasonable

selection of steaks or beef dishes. However, representation of beef dishes other than steak and/or prime rib was low. Even the Creole and Szechuan specialty restaurants represented in Houston indicated brisk movement of beef entrees. A number of restaurateurs volunteered the comment that their reliance on beef was in part due to their customer mix. That is, they served a fair number of business visitors or tourists (and to some degree, new residents) who looked for a steak dinner as a "Texas experience," and expected no further changes in that type of trade.

"People come here because they want a Texas steak dinner. That's what they think Texas is."

Feedback from steakhouse restaurants did not indicate as great an urgency to add fish and poultry entrees as had similar operations in California. The Victoria Station manager indicated, for example, that the inclination to do so was a corporate decision rather than a response to strong local pressures.

Except for those restaurants specializing in French or Continental food, the beef entrees offered were overwhelmingly steaks, and to a somewhat lesser degree, prime rib. There were almost no innovative beef entrees featured among the restaurateurs (tournedos, roladen, Bearnaise sauce finish being common in Continental restaurants), with the exception of a recent success with a steak Strittenburg (breaded with seasonings, served with a mustard sauce). Ground beef and chicken-fried steak offerings were common in those restaurants also offering lunch.

Reports of major cuts in the number of beef entrees included on regular menus were much less frequent in Texas than in California, and were addressed primarily to elimination of extremely large steaks (over one pound) which were sometimes counterbalanced by addition of smaller-sized steaks. There was, however, substantial comment about a drop in volume of beef sold (other than in steakhouses), which will be discussed in more detail in a later section.

Diners

With regard to the composition of the white tablecloth diner discussion group, men and women were equally represented. The overall orientation of the group was of well-educated, professional and upscale individuals, due largely to the requirement that participants ate in high-ticket (\$7-or-up lunch, or \$11-and-up average dinner) at least monthly. The majority had dinner in such restaurants weekly or more often; many business professionals ate in restaurants with such pricing several times a week or more.

Perceptions Of Current Consumer Food
 Preferences And Priorities/Their
Effect On Restaurant Menu Planning

Assessing perceived (among professionals) and real (among diners) consumer food preferences was approached in the sessions from a number of perspectives. Restaurateurs were queried about the frequency with which menus are changed as well as how the need for change is ascertained, which menu items or food types had been growing or declining, and other changes observed in customer behavior.

A number of issues emerged, chief among them being an increasing customer preference for lighter (or "less heavy") food. Interestingly, the way in which this topic was initially addressed varied between Texas and California (although the "bottom line" was essentially the same). In California, "red meat" or "beef" was quickly established as relatively undesirable; in Texas, this trend was identified less as a rejection of beef and was more often offered as a diner need for variety or growing awareness of other dishes or cuisines. (Specifics of consumer attitudes about beef alone are documented in the section that follows.) Often this movement to "lighter" restaurant fare was typified by a number of other changes in consumer preferences and priorities. The most major indication of the "lightness" movement was the growing interest in and consumption of fish/seafood (particularly seasonal offerings), veal, and chicken. Greater interest in fresh vegetables had also been observed.

Some of the "trendier" changes in consumer interests emphasized in California were largely absent in the observations of Texas diners and restaurateurs, particularly nouvelle cuisine, vegetarian/"natural food" alternatives, and pasta varieties. Neither was there as great a concern noted about changing preferences in preparation techniques (from fried to broiling, etc.) or elimination of sauces/gravies, although both points were noted by at least a few.

A number of the Texas restaurateurs did, however, comment that portion sizes, particularly for beef were diminishing somewhat. This was attributed to a number of factors -- a growth in a "quality, not quantity" ethic, greater consumption of salad and vegetable meal components, and weight

concerns. Another element related to beef alone was a growing sophistication in recognizing that a "fine" meal could be something other than an enormous steak and a baked potato.

"[Diners are] concerned about other things . . . our way with potatoes, our homemade dressings."

"Ten years ago you could put anything on a plate in Dallas without complaint. Dallas is now cosmopolitan. People have a lot and know what fine food is."

"People want something besides a big old steak hanging off the plate."

"Want more fresh vegetables, not the meat eaters they used to be. Years ago they wanted a one-pound steak, our biggest now is a ten-ounce."

Another observation supporting the reduction in portion sizes (that was much more often expressed in Texas than in California) was that consumers were dining out more often. As a result, their quantity expectations were somewhat lower, but their quality expectations, general food sophistication and desire for variety were much higher.

"Most people only ate out once a month . . . they'd want to order everything on the menu and left feeling stuffed. Now they eat once a week so they don't have to eat everything at one sitting. They can pick and choose."

"Now we try to feed 'em, not fatten 'em . . . they don't need as much food to be satisfied."

Both restaurateurs and diners acknowledged that a major component in the changes described had to do with increased concerns about red meat. References were made to red meat being a contributor to high cholesterol levels, to its being slower or more difficult to digest and its having higher calorie content than other flesh foods. Weight problems (or concerns) were also an issue in the decline in beef consumption. Interestingly, criticism of red meats was not so intense as in California and was more often mentioned as a concern by or for people from forty

or so and up, whereas in California younger persons displayed as great a concern as those older. Discussion of consumer interest in or concern about carbohydrates, preservatives, and sodium was also much less frequent in the Texas sessions. While increases in personal fitness activities and an associated change in personal food ethics were made, they were not so frequent as in California, and were more often linked (than in California) with a desire for improved appearance.

"Everyone in Dallas talks about fitness, they want to look beautiful."

A major point of comparability in restaurateur observations in both areas was increasing customer curiosity and willingness to try new or different foods. As a beneficiary of much of the population shift to Sun Belt areas, new residents had often brought new ideas and ethnic preferences to Texas. (Several restaurateurs and a number of diners had lived in Texas less than three years.) At the same time, native Texans had traveled more and expected local food operators to diversify their menus to include the type and quality of foods available in New York, Chicago, San Francisco and other areas. The variety of ethnic specialties referred to in Texas was, however, more limited than that discussed in California.

"Diners here [Houston] are more sophisticated, there's an influx from other parts of the country."

"City [Dallas] became international . . . a lot of different cultures . . . they want steaks sure, but they're also looking for what they could get back home."

"They [diners] want to experiment, try new things."

Comments that consumers had become more price-conscious about dining were also much more frequent in Texas, the net result being increased interest in chicken and veal dishes. From the restaurateurs' perceptions, consumers were also more likely than in years past to make an evening simply of dining, rather than dinner-and-theater or other combinations, partly for cost reasons as well as having become more discriminating about the dining

experience generally. Price-consciousness was a particular concern among restaurateurs catering banquets, as fewer of those making arrangements had a sufficient budget to include steak or prime rib. Beef did, however, remain popular as a banquet entree and was considered a "universal" favorite in that regard.

Most restaurateurs felt that changes in consumer food priorities had affected their menu mix, though to a less substantial degree than was reported in California. Most had a routine for price updates, and except for specialty restaurants whose reputations were based on a certain menu, changes in menu offerings were also considered at the same time as price updates. A few had systems that offered as many "specials" as regular menu items, which allowed them more flexibility in coping with changes in general consumer preference as well as making use of seasonal specialties (particularly seafood items). The menu changes involving beef were not nearly as drastic as those described by California operators, many of them having to do with portion reduction (as has already been discussed). However, elimination of certain shellfish entrees or appetizers (involving crab and lobster) was more common; some restaurateurs felt that cost control with fish or other seafood presented more frequent problems than did meat generally.

The trends identified by restaurateurs were raised by diners as well. That is, they exhibited concern about the dangers of red meat -- cholesterol, weight gain, etc. Both native Texans and more recently arrived residents acknowledged also that they had become more experimental about food, and were aware of a greater variety of ethnic restaurants (particularly Oriental). They had not, however, made as many distinctions in major ethnic cuisines as Californians (e.g., Italian vs. Northern Italian, just Chinese vs. Cantonese and Szechuan, etc.).

Perceptions Of Current Consumer
Attitudes/Preferences/Priorities
Relative To Beef

As noted in the preceding section, a commonly discussed change in consumer food attitudes and behavior had to do with red meat and, in most cases, beef usage was being described. Usage of or interest in pork and lamb were mentioned only rarely by either restaurateurs or diners. While beef usage was described as having declined (in volume), it was still considered to be a primary menu item for "good" restaurants by restaurateurs and diners alike.

Whereas in California, restaurateurs described beef volume decline as primarily a result of concerns about its healthfulness, those in Texas saw the availability of and interest in "different" foods to be as major a factor in beef declines. Concern about beef in the personal eating habits of restaurateurs also appeared to be lower.

Texas restaurateurs felt that the price of beef entrees was a deterrent to its more frequent use in restaurants. None, however, indicated they had purposely overpriced beef items as a hedge against further increases; some felt that in recent years, seafood had presented greater problems in this regard. As already indicated, a number had begun offering smaller steaks, as much for pricing strategy as the trend to smaller portions.

It was even more the case in Texas than in California that in discussing beef, the primary point of reference was steaks and roasts. (Barbecues and beef ribs were also important in Texas references to beef.) This attitude, as in California, signalled a number of drawbacks for beef when dining out. Food professionals and diners alike acknowledged that a steak could as easily be prepared at home, and that at home the diner had more control over the degree of doneness. Restaurateurs and diners alike felt that entrees that were difficult to prepare at home or were very unusual were more desirable menu items, which in effect minimized interest in beef when dining out. It did not appear that familiarity or availability of more unusual or gourmet beef dishes was as high in Texas as in California. In response to probes directed to restaurateurs about the general public's willingness to try new beef items, reaction was more positive. Several cited specific beef specials that had been very successful in recent months.

"Restaurants can't cook steak properly, it's either too raw or too done." [diner]

"I love it and I ordered it a lot 'til I moved down here. For being cattle country, you can't find a place that prepares good steaks."

"Veal has a mystique, won't prepare it at home so they [diners] will buy it out, over beef."

"They want to see something that's completely different."

"Added [beef] brochette, it does very well, has the vegetables, gets away from big steaks."

"I want to increase my business. If new beef items would help, I'd use more."

Unlike California professional participants, Texas restaurateurs had been successful with beef dishes involving sauces (Stroganoff, Bourguignon, Bernaise) and made no comment that diners were skeptical of them (in that they masked the flavor or juiciness of good beef). There was a higher level of mention in Texas -- and no apparent consumer confusion -- about the desirability of aged beef. There were indications, as in California, that it was perhaps more fashionable to order other things, however.

"Now this town's seafood-crazy, used to be all that moved was steak."

The difference in the degree of acceptability of beef between Texas and California was most apparent in the exercises in which session participants were asked to characterize the "typical beef lover." Californians very consistently saw a caricature of an older, overweight, outdoorsy man who was rigid in his preferences and lacking in sophistication. While such overtones were certainly apparent in Texas, the beef lover image was much more flexible. Similar in both areas were references to beef being particularly appropriate for heartier appetites. A major consideration to many was the degree to which cattle-ranching was a factor in the development and identity of

Texas; that is, there was a Texas ethos that prevented negativity toward beef as extreme as that found in California, particularly among restaurateurs. A few restaurateurs felt beef as a restaurant meal was most popular among persons raised (or currently) in lower-income households where it was considered a luxury. To those dependent on out-of-town clientele, images of the typical beef eater were accordingly different.

Typical Restaurateur Comments

"There is no typical beefeater, it's a matter of 'I feel like beef today.'"

"Someone who's hungry for a good steak, male or female."

"Orders a martini . . . some sophisticated cocktail, wine with dinner for sure."

"Income groups make a big difference; lower go for beef, because it's a big deal."

"Single businessman, by himself."

"Our customers [Traildust] aren't gourmet, they're in town from places like Mesquite, they're blue collar people out for a good time."

Typical Diner Comments

"Mostly male."

"I grew up with it, it's a family thing, everyone eats beef."

Other positives expressed about beef in California were reaffirmed by Texans. Among restaurateurs, it was an essential menu component if one hoped to attract dining companion groups of four or more. Also they felt steaks or roasts offered less sophisticated or unexperimental diners a safe and enjoyable choice. Further, to both professionals and consumers, beef was the most popular choice among those

with big appetites. It remained, as well, the "only" choice when a truly exceptional meal or personally special event was involved. Other comments about beef's continued importance to the American diet generally were also offered.

"It's safe, you know what to expect."

"Beef's the only thing for a special occasion when you eat out. . . Chateaubriand for your anniversary."

"When you're going out for something special, what do you think of? . . . Not chicken, not pork chops, I'm going to get a prime rib or tenderloin, it all boils down to beef."

"My first really wonderful [restaurant] meal was beef."

Other Factors Affecting
 Restaurateurs' Selection Of
 Beef As A Regular Menu
 Item Or Special

California restaurateurs raised a number of points that inhibited their interest in serving more beef, and spoke convincingly to a number of points, particularly that beef was somewhat ordinary or at least was not a major component in Continental/European cuisines and was difficult to prepare to customer satisfaction. On these points, Texas restaurateurs were much different. Beef was an important offering to both the American- and European-trained chefs represented in the discussions (except for non-European ethnic specialties) and a number were clearly proud of their creativity and presentation with beef items. Furthermore, the ability to present beef well had been a key factor in the growth of their operation.

"Restaurants get better beef, can prepare it better, who's got a charcoal broiler? It's part of what's made us [successful]."

"Any special involving beef -- Stroganoff, or any other unusual dish -- is the first thing to sell out."

"I love to see a good steak go out of the kitchen . . . the way it smells, the criss-crosses from the broiler."

Texas professionals less often described themselves as in a rut with beef than did Californians and appeared to consider beef entrees more often as a "special." However, they were clearly also having good success with "catch-of-the-day" specials and with veal and chicken dishes.

The relatively high food cost was also acknowledged for beef, although several restaurateurs had found beef prices to be more stable than those for seafood. None complained (as was the case for a few restaurateurs in California) that demand was unpredictable and they were sometimes left with excessive waste. About half the restaurants represented in Texas cut and trimmed their own beef but did not

usually link that activity with excess expense in running their operation. They preferred to do so in order to tailor the cuts to the preferences of their clientele or to their preparation techniques, to avoid problems with short-weight pre-cut items from their purveyors, and to minimize waste.

As in California, a very few food professionals admitted that most food sent back by customers was beef (although such cases were rare), usually because of a difference in definition of the rareness/doneness desired. Also as in California, the fit of beef as a diet or low-calorie offering had declined. To them and to their clientele, chicken and fish were more acceptable to their calorie-counters.

Factors In Consumer Restaurant Selection

Diners talked at some length about how they select restaurants when going out and what factors contribute to a specific selection. Certainly, food was the primary focus in deciding which restaurant to visit on a given night. The issues of diners having a greater number and variety of restaurants from which to choose as well as a greater inclination to experiment that were touched on by restaurateurs were acknowledged by the diners themselves. However, as already noted, the variety of ethnic specialties mentioned by Californians was greater.

However, in the price range being discussed (\$11 or higher for dinner entrees), a number of other considerations were very important to Texas diners. To many (a point also acknowledged by restaurateurs), the meal was the evening, and was thus the evening's entertainment. Aspects of decor and environment that enhanced the entertainment experience were critical to many. A number indicated they avoided restaurants with a loud and busy atmosphere. The nature of service was also a critical issue in restaurant selection. Tableside food preparation was intriguing to a number and was seen to add to the meal's enjoyment.

"Don't like noise . . . want white tablecloth, nice setup, want an atmosphere that's as pleasing as the food."

"I don't go just for food. I like to start with an elegant chilled martini . . . and I don't want it in a mug! I want the niceties . . . I want to feel taken care of."

There was substantial complaint that relatively few Dallas restaurants take reservations, and a number of diners were so resentful of long waits (particularly if seated in a noisy bar) that they refused to eat where reservations could not be made. A number were also critical about restaurants that hastily cleared their table or otherwise created the feeling they were to hurry away.

Social issues, as in California, were important to restaurant selection. When dining out with friends, establishments with a congenial, unhurried and not-too-subdued ambience were preferred. A number of the Dallas diners interviewed

indicated that they go out with their spouse only for the feeling of togetherness and as an escape from the family routine. In this case, quieter, more romantic environments were selected. Some younger families also took children along to "good" restaurants at least occasionally to broaden their social experience.

Restaurateur Beef Ordering/
Attitudes Toward Purveyors

Beef was typically ordered once or twice a week by the food operations represented in this study. Very large restaurants and those with a steakhouse orientation ordered more often. Volumes ranged from less than 100 lbs. to 8,000 lbs. per week. Most commonly mentioned cuts were whole tenderloins, strips, prime ribs, filets, and brisket (for barbecue). A majority claimed to cut their own, partly for portion control, sometimes because of poor experience (see below) with pre-cut portions. A number of managers left specifications up to their chefs, but relatively few who mentioned grade used anything but prime. Texas restaurateurs were more specific than California professionals in indicating their ageing requirements, a number in large-volume operations preferring to do their own. Twenty-one day or four-week dry ageing requirements were typical. As in California, the majority specified beef that was from or had been "fed-out" in northern states, particularly Colorado, Iowa, and Nebraska, because they saw grain-fed beef as superior.

"As they say, 'northern' beef, probably Iowa."

"Here what you get is shipped north to be fed-out, only way to get grain-fed."

Attitudes toward meat purveyors were not as negative as in California in that there were fewer intimations of dishonesty. Most restaurateurs had established solid long-term relationships and several felt that the price difference among purveyors was not significant enough to disrupt a satisfactory working relationship. A number inferred as well that there could be little variation in quality considering that grade/origin/etc. specifications left little to chance. The relatively few references about dissatisfaction with purveyors usually had to do with occasional short weight deliveries (especially on individual pre-cut steaks), spoilage hidden in large deliveries and excessively-bloody Cryovac-ed portions (the extra blood in effect over-stating the weight).

"Known him for five years, deal with the top guy. If anything's wrong, he flies down from Chicago."

"Only pennies in price difference so I go for the service end. Do I get it when I ask for it."

"Beef is beef. You order by grade and that's what you get."

However, as was the case in California, meat purveyors were seen as comparatively unimaginative order-takers who were relatively insensitive to declines in beef or in individual operator problems. Unlike California, however, seafood/poultry purveyors only rarely drew particular praise for providing new ideas or being especially helpful. Restaurateurs or managers new to Texas were somewhat critical that beef cutting techniques and designations were not always similar to those elsewhere.

"They're salesman, not concerned about what your problems are."

"They're not sales oriented . . . don't offer ideas, you do what you do on your own."

Reactions To Possible Promotion/
Educational Support By Beef Industry

In response to general questions about what the beef industry might do to help them, or to increase beef volume, reaction was less dynamic than in California because of the less negative environment for beef in Texas. Overall, the professionals interviewed felt that the best target for any efforts was the consumer, commenting that restaurants respond to consumer wants and needs, not vice versa. Comment was offered that little had been done to present beef to the consumer as a healthful, not necessarily fattening entree, and that what little information was offered about beef was usually negative, or failed to justify its price.

"The dieters are hurting beef sales."

"Never see much marketing on beef. You hear the update that the industry's in trouble. . . should be more promotion that it's a good value . . . to counteract the health thing if they can."

"Never hear anything positive . . . no good press . . . no mystique about it."

The idea of in-service assistance for training kitchen personnel was occasionally broached, although a few "realists" acknowledged that employee turnover is so great that in-service training might have nominal value.

"Something like the seafood people who will come out and work with your chef in the kitchen."

"Everything down here's behind New York, [where] groups would come in, tell you ways to get more steak out of a piece; they had cuts that were a good bargain that you don't even have down here."

There was concern among some that past and proposed future changes in beef grading would further erode beef's image. A few felt that getting consistent quality from order to order despite rigorous specifications was already a problem.

"No uniformity, even with choice."

The concept of new recipe development or chef competitions drew little interest. Most felt they or their chefs had sufficient creativity and a number felt that beef was not doing so poorly that such efforts were needed. Seminars for managers were not of great interest either, although better representation at trade shows did spark some interest.

"Most chefs already have imagination."

"Haven't felt the need [for recipes] because it sold so well in the past."

"Too hard to get food people together."

Negativity toward the quality and marketing of beef in supermarkets was rarely expressed, although several restaurateurs felt that beef's popularity for home meals served as a constant reminder of its relatively high price.

As for the future of beef, future declines in volume were predicted by the majority of restaurateurs and diners alike although the expected drops were not likely to be as precipitous as those forecast by their California counterparts.

College/University Participant Characteristics

About half the foodservice participants from colleges/universities were involved with at least a nominal amount of contract feeding, the remainder being in cash environments. The majority had foodservice director or manager titles, some others being cafeteria managers. (A detailed listing of participant titles and the schools represented is appended.)

The volume of food represented by each school varied enormously. The largest reported were the University of Houston, with 30,000 students and a \$5-\$6 million foodservice budget (approximately half being contract feeding), Rice (with 9,700 enrolled) and SMU with 2,300 students on board plan feeding. (SMU had two other feeding units for athletes and graduate students that were not represented in these particular sessions.) The larger schools also had extensive banquet operations.

Smaller colleges (University of St. Thomas) and campuses serving only commuter students (e.g., University of Texas, Dallas campus) were well-represented. Several community colleges (Cedar Valley and San Jacinto) were represented, as was one Catholic theological seminary.

The professional background of the persons representing the various schools tended to be of a higher level than in California (where more participants at the Cafeteria Manager level attended). Experience ranged from two years to as many as thirty-five in college/university foodservice environments. Most were professionals with college training (and degrees) or had had technical school or restaurant backgrounds prior to entering college foodservice.

The nature and style of operations represented was also more varied than in California. Most had cafeteria style operations in their mix, offering both hot-line and grill items. At Rice, evening meals were served to students, restaurant-style. University of St. Thomas had arrangements to deliver meals to resident students with special problems. Except for the smaller community colleges, all served breakfast, lunch and dinner meals. Some had multiple locations for food preparation, others central cooking facilities with satellite eating areas. A number

of contract feeders were using or experimenting with point systems whereby students were given a total number of food points for each quarter or semester and could "spend" them on what they wanted and at the pace they chose.

Student diners were all currently attending classes at Houston campuses including TWU, Rice, UT Medical School, University of Houston and University of St. Thomas. Two were graduate students who during the prior school year had been at UT-Austin and at Texas A&M. Slightly over half the students were on contract plans, the remainder living at home or sharing apartment housing/food expenses with other students. The majority had grown up in Texas.

NOTE: In this and later sections, the term college and university will be used interchangeably to refer to either type of entity. School size, location and the proportion of nonresident students were more important points for analysis than was the distinction between "college" and "university" designations.

Current Usage Of Beef In
College/University Operations

Including ground meat usage, the likelihood to offer a substantial amount of beef in the total menu mix was very little different in cash versus contract operations. (Such was not the case in California, where contract feeders felt constrained in the amount of beef they could offer.) Most operators described their usage of beef as very extensive, a menu mainstay.

Beef was available as hamburger on a daily basis in virtually all the schools represented. Ground meat was certainly a presence in other types of dishes as well, including spaghetti, meat loaf, chili and other Mexican or Tex-Mex dishes, and in casseroles. All of the contract feeders and most cash hot-line operations offered roast beef on a regular basis, the larger ones daily; most contract feeders attempted to offer steak on a regular basis as well (the frequency varying from once a week to once a month). Chicken-fried steak was a widely-offered favorite. Because of steak's popularity, and the difficulty in preparing it "to order" to suit individual preferences, Rice allowed students to actually grill their own steaks to their liking, with the foodservice staff doing the preparation of other meal components.

Other beef dishes mentioned with a fair degree of frequency were -- stews, barbecue, Swedish meatballs, Salisbury steak, beef tips with noodles, flank steak, London Broil, Stroganoff, stir-fry combinations -- all in all a much wider range than in California. Usage of ground beef in pita (or pocket bread) sandwiches was a recent addition at Rice.

Professionals' Perceptions Of
Student Food Preferences/Priorities

In an overview sense, many of the college professionals described students' food preferences as a desire for home cooking, although expression of this was not as great as in California. Quite a number felt that students were at an age and in an environment that encouraged experimentation and were becoming increasingly aware of issues of nutrition/preservatives/food supply and of other cuisines. A number of professionals took a very personal point of view with their students in that they likened them to their own children, having a maternal influence in encouraging them to expand their eating habits.

"Students enjoy variety . . . always wanting something different."

"They're like my kids, I have the responsibility to help them learn to eat right."

"You are there to teach them good eating habits."

Changes in the nature of the student mix that had been observed in California (more older students, a greater foreign-student population) were not as dramatic and put little pressure on the school food professionals in Texas. Preferences based on religious affiliations or cultural differences were not as prevalent either and appeared to have relatively little impact on the menu mix of the Texas schools included in these sessions. Clearly, most were dealing primarily with students in their late teens/early twenties, and were less concerned with the "back-to-college" or "career-changing" adult students reported by California participants. A number were responsible for special athlete menus as well as more routine student foodservice.

Feedback mechanisms that were relatively formal existed in all but very small schools (where foodservice personnel could interact easily with individual students). Most schools had appointed or elected foodservice committees, although the frequency of their input varied from weekly to less than monthly. Most also ran formal periodic surveys evaluating current menu items and soliciting ideas for others. At Rice, when evaluating new product ideas, the foodservice group involved marketing and other related

classes in running and evaluating taste tests, to assure maximum input from students before adding new products to their menu. One director had asked students for their mothers' recipes as a source for menu ideas. The most dynamic dialogue between students and foodservice personnel observed in these sessions was at Rice, where several students knew the Director by name, had talked with her, commented on her responsiveness (and her serving as the "scapegoat" for all complaints). This same woman participated in the professional segment and her opinions of her students' preferences and attitudes was very consistent with what the students had to say. On the other hand, students eating at the University of Houston's facilities had little good to say about it (one indicating a rumor that the main cafeteria had been closed for sanitation reasons), while the foodservice professional from that operation felt his diners would give him "high marks."

"I think the food at Rice is quite good and above average as far as other universities. I've spoken with friends of mine and I think it's good compared to that."

"We do a survey once a year through Research and Evaluation. We have an athletic food council and then a student food council that meet monthly. We go over new things with the councils."

A number of the professionals interviewed indicated there had been shifts to "lighter" foods (reflected in increased popularity of salads, and fruit rather than baked items for dessert), but rarely did that observation imply a rejection of beef. With regard to meat and specifically beef, student preferences for a solid -- and recognizable -- portion was apparent to many. Student skepticism about and dislike of products that appeared to be formed or processed-looking (e.g., a turkey roll or "steak-ums") was reported to be very high. Overall eye appeal was also important regardless of the dish. One of the most popular beef dishes across the board was chicken-fried steak.

There had been increases in interest in vegetarian dishes and foods or recipes seen to have more healthful aspects (such as yoghurt and quiche), trends that appeared to be on the decline in California schools. Some schools were

experimenting with or had instituted special contract plans for vegetarians, "waist-watchers" or students with special health problems such as hypoglycemia. A marked increased interest in fish had also been observed in the last year or two. Baked potato lines/bars, offering a variety of interesting toppings, were showing some success.

"In past 14 years, biggest single thing to me is that young people are more aware of what they're putting into their bodies."

"I don't know whether they know more, whether they really know what they're talking about, or whether they heard it on Merv Griffin."

"Students have a preconceived notion that a 'processed' piece of meat -- the 'mystery meats,' the turkey rolls -- is less nutritious than what you're going to carve right off that turkey."

"Want fresh fruit, want to know what's in the meat."

Food professionals indicated that students were applying some pressure for change in food preparation techniques -- away from frying, steamed rather than boiled vegetables -- and were negative about the presence of chemicals/additives/ extenders/preservatives. On that latter point, one complained that students believed extenders were in use with ground meat dishes, even though they had been discontinued several years before.

"They always ask about the vegetables. 'Is it steamed?'"

Ethnic dishes were mentioned as making some headway although not to nearly the degree of variety as had been reported in California. Most popular were of the Mexican food style -- chili, tacos, burritos, etc.

"Mexican food's big, Oriental's coming in, trying some German-style dishes."

Student Attitudes Toward
College/University Food
And Toward Beef Generally

Often when a "public" (such as resident students) has no choice about whom it chooses for its wants/needs, the attitudes expressed toward the institution they are forced to use are often extremely negative, even among those who are relatively happy with what they are receiving. While many student comments about university food were definitely negative, not all of the negativity can be attributed to this "no-choice" factor. Often flippantly offered, the indications that college food could be more palatable in the eyes of the students were clear.

As had been noted by the operators, students preferred foods that were "recognizable" and not masked by gravy -- hostile references to "chicken-fried-unidentified," "mystery meat," "floaters" or "swimmers" were common. A number complained that too many foods were fried. Many claimed to avoid such foods and turned to salad, fruit, hamburgers or other items that were or seemed to be less artificial.

College contract food was seen in Texas as in California to be starch-laden and perhaps lacking in sufficient protein. Students saw over-cooking as a severe problem as well. Complaint levels were not as high as in California, nor was there as great a reported inclination to go "off-campus" to eat (except among commuters or those others not on a meal contract plan). A number felt college menus were too heavily oriented to fast food items.

"Evening table's not bad, but there's a lot of starch."

"Can't cook vegetables, cook them 'til they're soggy."

"I'd be ready to eat something with home-style cooking, meat loaf and gravy. But frankly the meals I've eaten are like fast food."

Beef was singled out for criticism no more often than any other food. Many were realistic about the difficulties of preparing it (and all food generally) well for such large numbers. Most found the desserts available to be of better quality than other things. One of the greatest

differences observed in the entire study was the difference in attitudes toward beef between California and Texas college populations. California students were clear in their disinclination towards beef for health, nutrition and weight reasons. A number were also concerned about chemicals and hormones used in beef. In Texas, while students were reasonably aware of the issues few felt they currently avoided beef nor did most expect to change their beef consumption in the future. In fact, several looked forward to the day when they could afford to eat more beef. One of the least concerned was a pre-medical student who offered that the connection between beef consumption and high cholesterol levels had not yet been clearly established.

"No matter where you go, they make desserts all right and everything else is awful . . . leaves you with a good impression that way."

"When I get out of school, once I get to afford to more or less eat what I want to, I'm going to eat the same amount of beef I've always eaten."

"Mine [beef consumption after college] will probably go up, I'll be able to eat at restaurants more."

When asked to typify the "beef lover," Texas students were more likely than the Texas adults in other sessions to imbue it with masculine overtones, the "Western" image and with the "establishment" (parent or business figures). The pattern was quite similar to that reported for California.

"My dad."

"Successful businessmen, his wife has salad."

"Cross between cowboy and a businessman . . . J.R."

Factors Affecting The Selection
Of Beef For College Menus/
Food Outlets

The only factor having a significant effect on the volume of beef being served in the campus environments studied was price. A number had reduced their usage of solid meats (roast beef, briskets) simply because the yield was too low for them to stay within their budgets; those doing so regretted having to make the decision because of the popularity of solid beef. This was a particular concern for cash operators; contract feeders felt more flexible in juggling the degree to which they served other entrees to allow them to continue offering roasts or steaks less frequently, rather than having to phase them out entirely.

"Could never get price for [roast] beef in cash operation, just phased it out."

The campuses represented in California saw a greater degree of competition with surrounding fast-food restaurants than did the Texas operators. Parking, time, budget, and the adequacy of the food being served were all offered as factors in keeping the students on-campus for most of their food needs. Consistent with this foodservice professional judgment was the indication from the students themselves that eating off campus was usually reserved for weekends (Rice did not serve evening meals Saturday or Sunday), special get-togethers with friends, and the occasional availability of extra pocket money.

"[Eating off-campus] depends on the location of the university you're talking about and the tradition that's on that campus."

"We do have a commuter campus, so in their [students'] normal activities, they're going to pull into Burger King."

However, the professionals acknowledged that one of the primary factors affecting their choice of menu items and their own self-appraisals was based on the food available in the areas contiguous to the university or that was being promoted generally by fast food or other eating

establishments. One major operator sent his unit managers out monthly to "audit" the local competition, evaluating the pricing/quality, etc. of the food immediately available to students from his campus against the school's equivalents. Cash operators noticed more fluctuations due to general economic factors than did those in contract environments.

"I've got seven managers. Each month I send one out to hit every one of the competition, write down prices. How competitive are we? Is the product they're serving any better?"

While there was wide acknowledgement among the participants of the versatility of beef for student dishes, many professionals felt that the opportunities for "new" beef uses were relatively limited. They indicated no lack of recipes of applications for beef, the deterrent to greater usage being budget. As is indicated in a later section of this report, however, college foodservice professionals are constantly on the alert for new ideas, and are more than willing to consider new items for palatable foods that can be offered within their budget constraints.

"Can't think of anything different."

"Only so many [ways to fix beef] to work with."

"Have exhausted it."

As in California, there were very few comments that beef presented any preparation problems or was excessively time-intensive for their use.

College Foodservice Beef Ordering/
Attitudes Towards Purveyors

In very large operations, beef needs were assessed weekly or more often, and delivered daily. There was no mention of large on-premise cutting and dressing operations. The volumes of beef used in some operations were truly enormous. At University of Houston, reported usage of ground beef was a ton a week; when serving roast it was ordered in thousand-pound units. Typically, it was reported that half or more of the budget for all meats was devoted to beef.

Other than hamburger (a four-to-the-pound ratio being common), ground round was used for other dishes such as spaghetti; typical solid cuts were whole rounds, briskets, tips, and steaks (usually sirloin). Premium cuts were rarely ordered, except for special banquet needs.

Lower volume operators usually dealt with only one purveyor. Those working for food management companies such as Saga were limited in their choice of purveyors. Very large operations dealt with a number of beef suppliers, both to assure supply, and to maintain pressure for the most favorable pricing.

There were minor indications of purveyors cheating on weight, although as with the restaurant segment it was less prevalent in Texas than in California. While there was not necessarily an unanimity of opinion, the college food professionals in Texas felt they generally got more substantive help from their beef purveyors than those for fish and chicken. To a number, the contacts from purveyors were too frequent, and some professionals did not have enough time (or interest) to see them so often. Also, they described themselves as having to seek out fish or chicken suppliers whereas they had no such problems with those offering beef. However, it appeared that the nature of purveyor contact offered little in the way of new ideas and was merely sales-oriented. Some professionals were skeptical of those ideas and preferred to generate them by other means. (Dialogue with peers, trade shows, etc. will be discussed in the following section.) Another problem expressed was that some local purveyors did not stay abreast of new developments and failed to carry interesting items discovered at trade shows or among other outside sources.

"Salesmen boast, don't really know anything."

"You have to watch everything. You have to tell them what's best for you."

"We go after the fish purveyors ourselves, they're not coming to us."

"We probably do get more attention out of the beef people."

"There are too many times I find a product outside and bring it to their [purveyor] attention."

"Went to two or three trade shows. Every time I saw a product I liked, I'd say [to my purveyor] 'I'd like to try that.' [His response:] 'We're not handling it!'"

Reactions To Possible Promotional/
Educational Support To College
Foodservice Operations By Beef Industry

Despite what they saw as cost constraints for considering usage of more beef (particularly solid rather than ground), college professionals were very interested in the prospect of more support from the beef industry. Many volunteered that support (or promotion) was needed at both the consumer and professional level to assure a continued high demand for beef.

Professionals in Texas seemed particularly curious about new food ideas generally. Although (as noted) a number were skeptical that anything truly new could be found, virtually all were open to the concept. (One had recently tried a new Sysco kebab offering with good success.) For beef as well as for other foods, sources for new ideas included peer dialogue, cookbooks and magazines (both consumer and institutional), student feedback/home recipes, and trade shows. With regard to the latter, the presence of the beef industry was found to be somewhat deficient, and as alluded to earlier, the products featured at trade shows were not always available through local purveyors.

"Industry needs to come out and see what's really happening, what equipment you're using."

In-service training or training seminars for both preparation and planning personnel was seen as a major need by the majority of professionals included in these sessions. An appropriate forum would be the various foodservice association conventions or meetings. Areas of emphasis included preparation of low-cost but tasty recipes, cutting basics and the like. An area singled out for particular attention was that greater educational efforts with regard to grades and cuts of beef were needed. Only one or two professionals seemed to be aware of industry reference manuals in this regard. (It is quite possible that high turnover has contributed to the management problem of maintaining a staff of knowledgeable people.)

"I was Program Director in N.Y. for three years for Food Service Execs. We were plagued with people -- meat,

rice, poultry, peach industries. Everybody wanted to have a portion [of our time] . . . they would sponsor a night, a meeting. Not going on in this part of the country."

"If only the beef industry could show people how to honestly do beef."

A number of foodservice directors felt that past changes in grading had reduced the overall qualities of beef available to all segments. Others felt the trade often "over-represented" the quality of what they sold. Several felt that in addition the beef industry should actively seek to reverse that trend, and to find ways to reduce or stabilize the cost of beef.

"Let's take what they've got and improve it."

"Keep the charlatans out of beef. There are some unscrupulous sales people."

"The industry themselves are going to have to keep their act under control and be sure that it's a good piece of meat. Then it's up to the people to prepare it . . . [so the user] would actually be tempted to take that meat over a piece of chicken or fish."

"Same on cooking techniques, best methods for what cuts."

"Show how to use products on a school-by-school basis."

As for pilot programs to develop and test new ideas or promotions, a majority were positive but concerned that the execution of such assistance might interfere with the efficiency of their operations. There was very little interest in merchandising aids.

"Definitely if it's really a help. I'd consider anything beneficial."

The need for public information programs emphasizing the "goodness" of beef was suggested by both students and professionals. Underlying this suggestion appeared to be a silent wish that the beef industry would rationalize away

some of the fears about beef that have arisen in the last decade or so, so that they might continue to enjoy it without undercurrents of guilt or worry. (It should be noted that the great majority of students and professionals interviewed personally enjoyed beef a good deal.)

"The nutritional aspects [of beef] are there, but they're saying 'stay away from beef.'"

"The industry is going to have to come back and re-educate everybody."

As for the future of beef, college professionals saw a steady demand, provided its price held constant relative to other commodities.

"I think beef is going to stay real strong in Texas. When I came here, I think I was probably surprised more than anything by the amount of beef. The chicken-fried steak thing really threw me."

"The only thing I feel that would hurt it, is its price."

"Beef's been here and it's going to be here. I think the demand's going to stay stable."

The Vocabulary For Beef

The vocabulary patterns for beef were very similar in Texas to those in California. That is, the term "meat" was used primarily to discuss "beef." (There was some comment that pork, except for spareribs, is not particularly popular in Texas, and lamb is only beginning to be accepted.) Further, among all segments studied, people tended to exclude ground beef or hamburger when responding to questions about "beef," the word usually implying solid meat.

In Texas, the likelihood to associate the word "heavy" with beef was even more pronounced than in California. A number of respondents from different segments (and one of the participant menus studied) used the term "heavy" to describe higher-quality beef. Thus the connotations were not always quite as negative as in California. Beef could as light -- for example, in stir-fry combinations -- but for the most part, the majority thought of steaks and roasts -- and very ample portions -- when thinking of meals involving the usage of beef. "Heavy" also carried positive overtones, particularly among men, of beef being a hearty, satisfying or filling meal, but among others, the term signalled increased levels of calories and fat than in other foods (especially fish and chicken).

The word "fresh" did not fit particularly well with beef among Texans. Again, as in California, the awareness that "aged" beef is superior (or supposed to be) negated the appropriateness of the word "fresh" with beef.

Again, as in California, other positive terms linked with beef had to do with its being a more juicy and flavorful flesh food than fish or chicken. It also had a degree of certainty about it -- "you can trust beef" -- and was less often described as "boring" or "ordinary" in Texas than in California. Its versatility was also widely acknowledged.

Especially among students, beef was associated with family or special events. To many of them, it connoted good or happy times.

"I was raised to consider steak a treat. I love the taste."

"It just reminds you of a good time."

"Backyard barbecue, good friends and good food."

"Something to look forward to."

The "American Cuisine" Trend

All white tablecloth segments were asked whether or not they had heard anything about a trend identifying and specializing in "American cuisine." Participants were asked about their awareness and understanding of the term. In this regard, Texans were more knowledgeable than the Californians interviewed. A number of Dallas restaurateurs spoke knowledgeably about it both as a "style" and as having been identified by its own Institute and chef training.

"Absolutely up and coming thing, see it in the trade... traditional American foods -- jams, turkey, cranberries."

"New institute in New York. Traditional home cooking fancied up."

Other restaurateurs felt that the food they were offering was already distinctively American (especially steaks and prime rib, certain regional seafoods or fish, such as crayfish, and Creole dishes). Whether or not they had heard of "American cuisine" as a specialty, diners and restaurateurs alike felt that beef is (or was) its primary component, and that other regional specialties or distinctively American foods (e.g., turkey) would be included. A number of European-trained restaurateurs indicated respect for the trend, and one diner claimed that her private club had recently begun to emphasize that orientation in the menu.

"Who decides what's American, each area is noted for its particular dishes, so it's not just one thing."

"We belong to the Tower Club and that's what they intend to specialize in."

Opinions Of Texas Beef

As has already been noted, both restaurateurs and white tablecloth diners had expressed a preference for Northern beef (or from one state or another outside Texas) when a truly special dining experience was sought. Additionally, several of the diners who had recently moved to Texas had noticed major differences in the beef available through local supermarkets, which they assumed to be from Texas cattle, and the beef that had been available in supermarkets in the north.

"Can't get good beef from a grocery store, not like the fine restaurants buy."

"Customers say it's not as good . . . might be feeding, microclimate."

Broadly stated, the differences observed were attributed to the difference in the way beef cattle are fed in Texas versus Northern states, that being range-fed versus grain-fed. Grain feeding was considered to develop superior marbling in the beef, as well as better flavor. Texas-fed beef was seen to be stringier, less tender, soft, bloody or watery among those who had noticed differences. Another regional difference observed by some was that beef in Texas (regardless of origin) has more fat trimmed away, a factor some felt reduced the tastiness and texture qualities of a finished dish.

"Beef is so dry here because it's range-fed, doesn't have marbling and then they insist on taking all the fat off it."

"More red, not marbled."

"Not firm, squishy."

College foodservice professionals also had noticed similar differences, but for budget reasons were not usually specifying beef from outside Texas. A number commented that they assumed most ground meat and hamburger to be from Texas cattle as well. One hinted that Texas beef could be as good as Northern beef, if cattle producers in Texas chose to convert to grain-feeding or were more leisurely about the time required to bring the cattle to market.

APPENDIX

THE RESEARCH ALLIANCE

500 Sutter Street, Suite 914, San Francisco, Calif. 94102
Telephone 415 986-1333

Project #8246-02
October/November, 1982
Foodservice Study

COMPLETE THIS SECTION ONLY IF RECRUITED

Name _____
Restaurant/University Name _____
Business Address _____
City _____ State _____ ZIP _____
Telephone: Home () _____ Work () _____
Recruited by (interviewer) _____ on (date) _____
Reminder mailed _____ (date) _____ Reminder call _____ (date) _____
RECRUITED FOR: <input type="checkbox"/> COLLEGE SESSION <input type="checkbox"/> RESTAURANT SESSION

SCREENING QUESTIONNAIRE (Restaurants/University Feeders)

Hello, this is (YOUR NAME) of (RECRUITING SERVICE). We're doing a national survey today for a food association to understand foodservice food trends in this area. Could you take a minute to help?

1. First of all, do you or anyone else of your family or close friends work in any of the following fields?

- ... Advertising?
- ... Marketing research?
- ... Growing or distribution of farm crops or livestock?

IF "YES" TO ANY → TERMINATE AND TALLY

2. Would you say you are in a position to make decisions or recommendations about the menu or food purveyors used in your restaurant (or, at your college/university)?

- Yes → CONTINUE
- No → TERMINATE AND TALLY

COLLEGE SCREENING
SKIP TO Q. 5

3. (RESTAURANT) What is your title? That is, are you a full or part owner, the manager, the chef, or just what?

- Owner
- Manager
- Chef
- Other (SPECIFY) _____

- 4a. (RESTAURANT) What would you say is the average price of your luncheon entrees? And your dinner entrees? (CHECK ONE ANSWER FOR EACH.)

- | LUNCHEON | DINNER |
|--|---|
| <input type="checkbox"/> Under \$7.00 | <input type="checkbox"/> Under \$11.00 |
| <input type="checkbox"/> \$7.00 or higher* | <input type="checkbox"/> \$11.00 or more* |
| <input type="checkbox"/> No luncheon | |

* MUST INDICATE IN ONE OR MORE. IF RESPONDENT GIVES A RANGE (e.g., \$5 to \$10) COMPUTE AVERAGE (e.g., \$7.50 IS AVERAGE OF \$5 TO \$10).

(IF ONE OR MORE NOT CHECKED → TERMINATE AND TALLY.)

- 4b. (RESTAURANT) Is your cuisine strictly vegetarian?

- Yes → TERMINATE AND TALLY
- No → SKIP TO Q. 7

5. (COLLEGE/UNIVERSITY) What is your title? (WRITE IN)

6. (COLLEGE/UNIVERSITY) And are you a full-time employee of the college or university or of the foodservice company providing the food at your location?

Yes → CONTINUE

No → TERMINATE AND TALLY

7. I will read you a list of statements that others have made about their food preferences. Please listen to all of them and tell me which one comes closest to describing your personal general views about food other than religious considerations.

a. I am a practicing vegetarian and do not eat meat of any kind, including red meat, poultry or fish and seafood.

IF ANSWER "YES" → TERMINATE AND TALLY.
ALL OTHERS, CHECK QUOTA.

b. I am not a vegetarian, but I try to avoid use of red meats such as pork, beef and/or lamb whenever possible.

c. I enjoy meats such as pork, beef and lamb or poultry or seafood but I try to watch my consumption of them.

d. Curtailing my consumption of meats such as pork, beef and lamb or poultry or seafood is not a major concern to me.

8. SEX OF RESPONDENT.

Male

Female

→ CHECK QUOTA FOR UNIVERSITY FEEDERS

9. A major food association is doing a series of discussion groups nationwide among food professionals such as you about trends in diner preferences and ways in which their industry can be of more help to you. Your answers are needed -- only ten or so people will be asked to participate from this area. Each will be given \$50 as a thank-you gift. You will not be asked to discuss proprietary or confidential information.

(RESTAURANTS ONLY - You will be asked to bring along your current menu(s) so that we fully understand the nature of your operation.)

Your opinion is very highly valued and we hope you can join us.

(GIVE TIME/DATE, ETC. IF RECRUITED, COMPLETE INFORMATION AT TOP OF SCREENER.)

Recruited for group to be held: (Time) _____ (Date) _____

IF REFUSES → NOTE ON TALLY SHEET AND SAVE SCREENER.

ADDITION TO UNIVERSITY FEEDER SCREENER

ASK PRIOR TO Q. 5, SECOND PAGE

A. Some college facilities serve mainly sandwiches or hamburgers, sometimes including salad or soup. Others offer complete hot meal entrees for lunch or dinner in addition to or instead of sandwiches or hamburgers. How would you describe your operation -- is it . . . (READ)

Primarily sandwiches, with or without soup and salad? → TERMIAE AND TALLY.

or

One that offers hot meal entrees for lunch or dinner as well as or instead of sandwiches or hamburgers? . → CONTINUE

Q. A TERMINATES

B. Are there student dormitories at the campus where your food operation is located?

Yes

No.

THE RESEARCH ALLIANCE

500 Sutter Street, Suite 914, San Francisco, Calif. 94102
Telephone 415-986-1333

Project #8246-02
October/November, 1982
Foodservice Study

COMPLETE THIS SECTION ONLY IF RECRUITED

Name _____	
Address _____	
City _____	State _____ ZIP _____
Telephone: Home () _____	Work () _____
Recruited by (interviewer) _____ on (date) _____	
Reminder mailed _____ (date)	Reminder call _____ (date)

SCREENING QUESTIONNAIRE

(White Tablecloth Diners)

Hello, this is (YOUR NAME) of (RECRUITING SERVICE). We're doing a survey today about food preferences. Do you have a moment to help?

1. First of all, do you or anyone else of your family or close friends work in any of the following fields?

- . . . Advertising?
- . . . Marketing research?
- . . . Growing or distribution of farm crops or livestock?

IF "YES" TO ANY → TERMINATE AND TALLY

- 1a. Have you ever taken part in any consumer research discussions on dining out?

(IF "YES" → TERMINATE AND TALLY.)

2. In an average month, how often do you personally eat lunch or dinner outside of your home? Include both personal and business dining in your answer.

(WRITE IN NUMBER. IF LESS THAN "2" → TERMINATE AND TALLY.)

_____ times

3. Of these (NUMBER IN QUESTION 2) times, how many are in restaurants other than fast food chains, coffee shops, cafeterias, lunch counters and the like?

(WRITE IN NUMBER. IF LESS THAN "2" → TERMINATE AND TALLY.)

_____ times

- 3a. Of these (NUMBER IN QUESTION 2) times, how many are in restaurants where the average luncheon entree price is \$7 or higher, or the average dinner entree is \$11 or higher? Again, include any business dining you may do.

(WRITE IN NUMBER. MUST BE AT LEAST "2" TO CONTINUE.)

(IF "0" OR "1" → TERMINATE AND TALLY.)

_____ times

4. I will read you a list of statements that others have made about their food preferences. Please listen to all of them and tell me which one comes closest to describing your personal general views about food other than religious considerations.

- a. I am a practicing vegetarian and do not eat meat of any kind, including red meat, poultry or fish and seafood.

IF ANSWER "YES" → TERMINATE AND TALLY.
ALL OTHERS, CHECK QUOTA.

- b. I am not a vegetarian, but I try to avoid use of red meats such as pork, beef and/or lamb whenever possible.
- c. I enjoy meats such as pork, beef and lamb or poultry or seafood but I try to watch my consumption of them.
- d. Curtailing my consumption of meats such as pork, beef and lamb or poultry or seafood is not a major concern to me.

5. SEX OF RESPONDENT.

- Male
 - Female
- CHECK QUOTA

6. Which age grouping describes you?

- Under 30
 - 30 - 39
 - 40 - 49
 - 50 - 59
 - 60 or older
- CHECK QUOTA. NO MORE THAN THREE (3) PARTICIPANTS 60 OR OLDER.

7. We are doing a survey for a food association to help understand current food trends, and would like to invite you to a discussion.

(IF RESPONDENT IS QUALIFIED AND INTERESTED, COMPLETE INFORMATION AT TOP OF SCREENER AND SAY:)

Because this is a research project, it is important that none of the participants know each other. Please tell me whether or not you know any of the following people. (READ LIST OF PEOPLE ALREADY RECRUITED. IF RESPONDENT KNOWS NONE, CONTINUE RECRUITMENT EXPLAINING TIME, INCENTIVE, ETC. IF RESPONDENT DOES KNOW ANYONE ALREADY RECRUITED, TERMINATE AND TALLY. SAVE SCREENER.)

Recruited for group to be held: (Time) _____ (Date) _____

IF REFUSES → NOTE ON TALLY SHEET AND SAVE SCREENER.

COMPLETE THIS SECTION ONLY IF RECRUITED

Name _____

Local Address _____

City _____ State _____ ZIP _____

Telephone: Local Number () _____

Recruited by (interviewer) _____ on (date) _____

Reminder mailed _____ (date) Reminder call _____ (date)

SCREENING QUESTIONNAIRE

(Student Diners)

Hello, this is (YOUR NAME) of (RECRUITING SERVICE). We're doing a survey today about food preferences. Do you have a moment to help?

1. First of all, do you or anyone else of your family or close friends work in any of the following fields?

- . . . Advertising?
- . . . Marketing research?
- . . . Growing or distribution of farm crops or livestock?

IF "YES" TO ANY → TERMINATE AND TALLY

1a. Have you ever taken part in any consumer research discussions on dining out?

(IF "YES" → TERMINATE AND TALLY.)

2. Are you currently a registered student at any college or university for at least 10 semester or quarter hours during the most recent quarter or semester?

(IF "NO" → TERMINATE AND TALLY.)

3. Which college or university are you currently attending? (WRITE IN ANSWER)

4. How often do you personally eat food other than that dispensed in coin-operated machines, on a campus facility? (By "campus facility" I mean a dormitory, commons, coffee shop, or dining hall in a building that is part of a college or university.) Would you say it is ... (READ LIST)

- More than once a day 1
- At least once a day. 2
- Less than once a day, but at least several times a week. 3
- At least once a week 4
- Less than once a week but at least once a month. 5
- Less than once a month 6

DOES NOT QUALIFY → TERMINATE AND TALLY

5. Are you a resident at the university with a meal contract that provides a specific number of meals per quarter or semester, or do you always pay cash for each meal you have at university facilities?

- Contract
- Cash

→ CHECK QUOTAS BEFORE CONTINUING

6. I will read you a list of statements that others have made about their food preferences. Please listen to all of them and tell me which one comes closest to describing your personal general views about food other than religious considerations.

- a. I am a practicing vegetarian and do not eat meat of any kind, including red meat, poultry or fish and seafood.

IF ANSWER "YES" → TERMINATE AND TALLY.
ALL OTHERS, CHECK QUOTA.

- b. I am not a vegetarian, but I try to avoid use of red meats such as pork, beef and/or lamb whenever possible.
- c. I enjoy meats such as pork, beef and lamb or poultry or seafood but I try to watch my consumption of them.
- d. Curtailing my consumption of meats such as pork, beef and lamb or poultry or seafood is not a major concern to me.

7. SEX OF RESPONDENT.

- Male
- Female

→ CHECK QUOTA

8. What is your exact age? (WRITE IN → CHECK QUOTA)

9. IF QUALIFIED, INVITE TO APPROPRIATE SESSION. COMPLETE INFORMATION AT TOP OF SCREENER AND IF WILLING TO PARTICIPATE, SAY:

Because this is a research project, it is important that none of the participants know each other. Please tell me whether or not you know any of the following people. (READ LIST OF PEOPLE ALREADY RECRUITED. IF RESPONDENT KNOWS NONE, CONTINUE RECRUITMENT EXPLAINING TIME, INCENTIVE, ETC. IF RESPONDENT DOES KNOW ANYONE ALREADY RECRUITED, TERMINATE AND TALLY. SAVE SCREENER.)

Recruited for group to be held: (Time) _____ (Date) _____

IF REFUSES → NOTE ON TALLY SHEET AND SAVE SCREENER.

THE RESEARCH ALLIANCE

500 Sutter Street, Suite 914, San Francisco, Calif. 94102
Telephone 415/986-1333

Project #8246-02

November, 1982

Food Study - Professionals

NOTES

DISCUSSION GUIDE

(Operators)

I. INTRODUCTION/ORIENTATION

A. Explanation of process/assurances of anonymity and moderator objectivity

B. Self introduction

- names
- current affiliation
- years in business

II. MENU DECISION PROCESS

A. Scope of authority

B. Current operation's menu (all meals, if applicable)

- entrees
- price range
- volume

C. Frequency/nature of change

- annual adds/drops to menu
- how need for change is identified (end-user feedback, management decision, cost or general preferences, waste analysis, etc.)
- whether enjoy/actively interested in new ideas (what types, from what sources)
- person who initiates/person(s) who decides

D. Current satisfaction (or not) with suppliers (especially beef)

III. OBSERVED FOOD-PREFERENCE CHANGES

A. What is dropping/increasing?

- (perceived) reasons why (i.e. cost considerations, end-user preferences, or production/handling considerations)

NOTES

- B. Changes in portion sizes (for which entrees/why)
- C. Awareness of new wave to "American" cuisine
 - which entrees associated
 - if beef, why -- if not beef, why not

(DIRECTED DISCUSSION REGARDING BEEF)

- D. What is growth/decline pattern for beef generally
 - (perceived) reasons for change (i.e., cost, quality, availability, nutrition concerns, weight-consciousness, preparation issues including waste/storage, etc.)
 - perception as to whether a permanent/temporary trend
- E. Ordering process
 - frequency
 - nature of specifications (grade, amount, portion size)
 - changes in recent past/why
- F. (Any) activities to counteract (any) decline (i.e., new recipes, cost-reduction recipe revisions, special promotions, etc.)
 - if none, why not
 - success or failure with activities
 - purveyor assistance (or not) in keeping beef on the menu

IV. PERCEPTION OF CUSTOMERS/END-USERS

- A. How does consumer perceive beef vis-a-vis fish/poultry entrees
 - if "heavy" or "not light," how can beef be presented to be "light"
 - same probes for "fresh"

NOTES

- B. Who is "typical" beef "lover"?
 - how is he/she different from "fish" or "poultry" lover
 - what other entree does this person like/what does he or she drink
 - what recipes (steak, prime rib, with sauces, etc.) favored
 - how experimental is typical beef user

- C. What are consumers seeking in low calorie entrees -- where does beef fit/or not
 - ideas for better low calorie offerings
 - interest in serving

- D. (Perceived) Responsiveness of general public/beef lover to new items

- E. Expected/past reactions to beef promotion
 - advertising
 - table tents/ "specials", etc.

V. PERSONAL ATTITUDES

- A. Personal likes about beef -- as both a "consumer" and "food service professional"

- B. Concerns about/drawbacks of beef -- as consumer and professional

- C. Personal changes, if any, in beef consumption

NOTES

VI. INCREASED USAGE PROBLEM SOLVING (other than cost changes)

- A. What would like beef industry in Texas to do/not do
 - why/why not
 - opinions of Texas beef
- B. What kind of promotions/support needed or amenable to
 - recipe development (in which area, for what cuts, etc.) or chef recipe contest
 - seminars/trade shows
 - promotion (table tents, advertising, etc.)
- C. (PROJECTIVE) If head of "beef council" for a day, what would do to encourage/increase beef consumption
- D. What is the future for beef/rationale for answer
- E. Interest in participation in pilot program

THE RESEARCH ALLIANCE

500 Sutter Street, Suite 914, San Francisco, Calif. 94102
Telephone 415/986-1333

Project #8246-02

November, 1982

Food Study -
College Diners

DISCUSSION GUIDE

NOTES

I. INTRODUCTION/ORIENTATION

- A. Explanatory of process/assurances of anonymity and moderator objectivity
- B. Self introduction
 - name/major
 - part of Texas (or other state) from

II. COLLEGE DINING EXPERIENCE

- A. Frequency of use of college facilities
 - type (dorm, fraternity, commons, cafeteria)
 - usually eat alone or with friends
- B. Likes/dislikes about college dining
- C. Dislikes/complaints about college dining
- D. (Contract Students) How often eat off-campus -- where/why

III. SATISFACTION WITH ENTREE SELECTIONS

- A. Selections usually available/which selected and why
- B. Dishes available involving beef (including hamburger)
 - how often selected -- reason for frequency or infrequency
- C. Likes/dislikes for beef/hamburger offerings at college facilities

NOTES

IV. DINING-OUT BEHAVIOR (Non-college environment)

- A. Frequency/types beef ordered
 - type
 - favorite cut
 - other beef favorites
- B. Changes in out-of-home consumption of beef
 - how great
 - reasons why not more beef (price, weight, nutrition, quality, taste, etc.)
- C. Changes in at-home consumption of beef
- D. What would typify beef entrees generally vis-a-vis fish/poultry
 - if "heavy" or "not light," how can beef be presented to be "light"
 - same probes for fresh"
- E. Who is typical "beef lover?"
 - physical characteristics/attitudes
 - how different from fish or poultry lover?
 - what else eat or drink
 - whether or not experimental

V. RECAP OF PERSONAL ATTITUDES TOWARDS BEEF

- A. Likes about beef (words that describe beef)
- B. Dislikes/concerns/drawbacks for beef
- C. Expected usage of beef in future
- D. (PROJECTIVE) If head of "Beef Council" for a day, what would do to encourage/increase beef consumption

RESTAURANTS REPRESENTED

Dallas

Centre Plaza, Holiday Inn, Food and Beverage Manager
- Continental, steaks, coffee shop/banquet

Victoria Station, General Manager
- Beef prime rib, some fish/chicken

Minx, General Manager
- American, steaks, veal dishes

Ewald's, Owner/Chef
- Continental and steaks

Bent Tree Country Club, Food and Beverage Manager
- Continental/American/steaks

Traildust Steak House, Manager
- Steaks

Kirby's, Manager
- Steaks

Trader Vic's, Manager
- Polynesian

Regent Hotel, Captain
- Continental, steaks

Mother Tuckers, Manager
- American, steaks

The Adolphus Hotel, Food and Beverage Director
- French Room (French) and
separate grill (steaks) operations

(continued)

Bagatelle, Owner/Chef
- French

Southern Kitchen, Manager
- Family style chicken/shrimp/steak

HOUSTON

Chez Orleans, Owner
- Creole

Rockwell's, Owner
- American (beef, veal, fish)

Texas Steak Ranch & Saloon, Manager
- Steaks

Encore, Manager
- American/Continental

Sheraton Town & Country, Food and Beverage Manager
- American/Continental

Shanghai East, Manager
- Szechuan specialties

COLLEGES/UNIVERSITIES REPRESENTED

Dallas

University of Texas at Arlington, Director of Foodservices
Cedar Valley College, Foodservice Manager
Southern Methodist University, Administrative Dietician
(Board Plan Unit)
Hilton Family Food Corporation (serves eight small colleges
and boarding academies), Owner
University of Texas at Dallas, Foodservice Manager
Brookhaven, Foodservice Manager (PFM employee)
Texas Wesleyan University, Director of College Foodservice

Houston

University of Houston - Director of Foodservice
- Cafeteria Manager
- Downtown Campus Food Administrator
St. Marys Seminary, Treasurer
North Harris Community, Foodservice Manager
San Jacinto College, Foodservice Manager (Saga)
Rice University - Foodservice Director
- Sammy's (cash grill operation)
University of St. Thomas, Assistant Director of Dining Services