

Survey of

Missouri Restaurants on Use of Turkey Products

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Acknowledgment

This Special Report is the third and final publication on the use of turkey products in Missouri. Previous publications available in the series include: "An Institutional Survey of the Use of Turkey Products in Missouri," SR 137, January 1972 and "Turkey Products in the Retail Store," SR 150, January 1973. The three studies were made possible through annual grants provided by the Missouri Turkey Merchandising Council.

The authors are deeply grateful for the advice and assistance given by Max Koerner, Executive Vice-President, and Floyd White, Membership Service Director of the Missouri Restaurant Association. We also wish to express our appreciation to the 200 food service personnel and restaurant owners who gave their time and knowledge to respond to the questionnaire. Hopefully, the results will be of benefit to both the turkey industry and those who provide food service across the nation.



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L. A. Voss and W. D. Russell

Introduction

Food Science Specialists tell us the average American today eats approximately one meal out of every three away from home. In spite of higher food prices the food service industry continues to grow. It is estimated that by 1980 half of all the meals served will be outside the home. To the turkey industry this represents a large portion of their total market. Thus, they are interested in exploring every possible avenue to reach full potential of this growing and changing market.

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The primary purpose of surveying restaurants and other eating establishments in Missouri was to get a "feel" of what turkey products are being used now, how they are being used, major problems experienced with their use, and what the industry is thinking about the future. Hopefully, this information would provide processors and food distributors some valuable guidance in planning research and production programs.

Procedure

There are approximately 6,000 restaurants and other eating establishments in Missouri, not including mass feeding institutions. In order to obtain a good cross-section of opinions from this group a mail-in questionnaire was used. ¹A membership list of the Missouri Restaurant Association was used to obtain the sample. Firms and allied members of the association which did not serve turkey are eliminated. The initial mailing went to 425 restaurants. Those who failed to reply within 30 days were sent another identical letter and questionnaire, labeled "second request."

A summary of the mailing follows:

	Number	Percent
Questionnaires mailed	425	
Questionnaires returned	200	47.1
Questionnaires returned showing no turkey served during the year	26	
Questionnaires returned because of faulty address	9	2.1
Number not responding to questionnaire	216	50.8

The questionnaire was kept simple and limited to two pages to encourage good response. Written responses were kept to a minimum by providing spaces that could be checked for items that were applicable. The questionnaire was reviewed and approved by the executive vice-president of the Missouri Restaurant Association prior to mailing to restaurant owners. The letter accompanying the questionnaire explained that the association was cooperating in the study and that the information obtained from it would be available to both parties. A self-addressed business reply envelope was enclosed for convenience in returning the completed questionnaire.

The survey was conducted in early fall of 1973, at a time when turkey prices were moving up rapidly compared to normal prices at that time of year. The response to the price rise was quite apparent as reflected in some of their replies to certain questions.

¹See appendix for a copy of the questionnaire

Study Results

Frequency of Serving Turkey

TABLE I— FREQUENCY OF SERVING TURKEY ON MENU

Turkey Served	Serving Av. No. of Days/Month	Restaurants Reporting Serving Turkey*	
		Number	Percent
At luncheon	12	116	67
At dinners	10	111	64
As sandwiches	19	109	63
As salads	18	57	33
Only on holidays & special occasions		13	7

* 174 restaurants reported serving turkey

The frequency of serving turkey was highly variable among restaurants as could be expected. Of the 174 restaurants included in the survey which reported using turkey, over 60 percent of them featured turkey on their luncheon or dinner menus an average of one day out of three (Table I). This is a much higher exposure of turkey to the public than was expected. The fact that 31 restaurants reported featuring turkey on the luncheon menu every day of the month boosted the average; 22 restaurants featured turkey continuously on their dinner menu.

Also unexpected was the high percentage of restaurants that served turkey sandwiches. Sixty-three percent of the restaurants reported serving turkey sandwiches on an average of two days out of three.

TABLE II—RELATIONSHIP BETWEEN LOCATION OF RESTAURANTS AND FREQUENCY OF SERVING TURKEY DINNERS

Location	Restaurants Reporting* (Numbers)	Serving at Dinners Avg. No. Days/Month
City of over 50,000 Population	39	13
City of 10,000-50,000 Population	20	10
City of 10,000 population or less	31	6

*Less than 174 as the location of some restaurants could not be determined

Further analysis of the data showed that restaurants located in the large cities of 50,000 population or over tended to serve turkey on their dinner menu more frequently than did restaurants located in smaller towns (Table II). In fact, the smaller the city the less turkey was served at dinner. This may have been due to a more limited menu in the smaller eating establishments in small towns. There may also have been more problems with turkey procurement in smaller cities.

TABLE III—RELATIONSHIP BETWEEN FREQUENCY OF SERVING TURKEY AT DINNER AND KIND OF TURKEY USED

Serving at Dinner Days/Month	NUMBER OF RESTAURANTS REPORTING*		
	Whole Birds Only	Turkey Products Only	Whole Birds and Turkey Products
0-10 days	22	6	40
11-20 days	1	1	8
21-30 days	2	16	15

* 111 restaurants reported serving turkey at dinner.

Restaurants that reported using only whole birds tended to list turkey on their menu less frequently than those that purchased a variety of turkey products or a combination of whole birds and turkey products (Table III). Apparently, the ease of preparing and serving the further processed turkey products was a factor in encouraging greater use of turkey on the menu.

Only 13 restaurants reported serving turkey only on holidays and special occasions. Most of these were speciality type restaurants and they used mainly whole birds.

Twenty-six restaurants reported they did not serve any turkey during the year. The majority of these were also speciality restaurants and drive-ins that would have been eliminated from the survey mailing list had it been possible to identify them by name or address. A few reported they were new in the business and interested in placing turkey on the menu at a later date.

Turkey Products Used

TABLE IV—TYPE OF TURKEY PRODUCTS USED DURING THE PAST YEAR

Type of Turkey	Restaurants Reporting*	
	Number	Percent
Whole birds only	36	21
Turkey products only	41	24
Both whole birds and turkey products	93	53
No response	4	2

* 174 restaurants reported serving turkey

The ready-to-cook whole turkey is still a predominate form of turkey meat used in restaurants. Some 21 percent of the restaurants use nothing but whole birds, while another 53 percent use a combination of turkey products (Table IV). The 41 restaurants indicating they have switched entirely to further processed items are mainly sandwich shops and restaurants that have found the turkey roll or breast to their liking.

TABLE V—TURKEY PRODUCTS USED DURING THE YEAR

Turkey Products	Restaurants Reporting* (Number)	(Percent)
Grade A Young Hens (8-16 lbs)	31	18
Grade A Young Toms (14-32 lbs)	103	59
Grade A Self Basting Turkeys	26	15
Grade B or Lower Turkeys	13	7
Fryer-Roasters (6-8 lbs)	3	2
Turkey Steaks	9	5
Turkey Rolls	106	61
Fresh Ground Turkey Meat	2	1
Diced Turkey Cubes	9	5
Turkey Breasts	39	22

* Many restaurants reported using more than one type of product.

Of the whole birds, Grade A young toms (14-32 lbs) are by far the most popular item (Table V). Fifty-nine percent of the restaurants reported using this size turkey. Managers indicated that they felt heavy toms were their best buy in terms of costs per serving. The relatively little use of fryer-roasters and self-basting type turkey can also be explained in terms of economics.

Turkey rolls and breasts made up the bulk of the further processed items used. It was rather surprising that other items — steaks, ground turkey meat, and diced turkey cubes — had such limited use. The survey failed to reveal why these products were not popular but interviews with some restaurant owners tended to indicate that most of them were not familiar with the products and they were not generally available.

Sixty-one percent of the restaurants used turkey rolls last year. A small percentage (22 percent) used turkey breasts but this was a product that seemed to be growing in use and many fine comments were received regarding it. Breasts were purchased in both raw and cooked forms.

Quality of Turkey Products

In general, restaurant owners were pleased with the quality of turkey they were getting. Several commented that the quality is improving each year. One restaurant manager said, "If a person is dissatisfied with what

he is receiving he should perhaps try another brand. There are enough different brands and kinds of turkey products on the market to satisfy everyone's needs."

Many favorable comments were expressed in regard to the quality of the whole carcass birds. Only three respondents expressed any degree of dissatisfaction and this involved the poor quality of specific brands plus the feeling that neck bones and excessive skin should not be included as part of the whole bird package. Instead, their suggestion was to use these parts and pieces in other useable products.

Turkey rolls, on the other hand, received numerous complaints. There was evidence that a number of restaurant owners who had used turkey rolls in past years were dissatisfied and had discontinued using them. Apparently, many of them had tried rolls in the early years when commercially produced rolls were first coming on the market and before standards of quality for rolls had been established. At that time, the quality of rolls was highly variable and many of them contained excessive gelatin or binders and were lacking in flavor. If this observation is true, the turkey industry has a sizable task of re-educating or re-selling many restaurant owners on the fact that they do indeed have an improved product available today.

Some of the comments about turkey rolls, however, tend to indicate that restaurant people are still not entirely satisfied with the present rolls. They complain about the color of turkey rolls. "It looks too commercial."

Some say the roll lacks flavor and texture because it doesn't taste like the whole roasted bird. This latter criticism, however, seems to be hardly justifiable as long as its own distinctive taste and flavor is acceptable to the majority of consumers. Perhaps what is needed is more recipes and instructions on how to use turkey rolls to make them more appealing and tasteful. For example, the way some restaurants use turkey rolls—placing a slice of the roll over dressing and baking in an oven thereby drying out the pale meat and making it tough and unappealing—indeed makes them a second rate product.

The fact that turkey meat is rather bland does reduce its appeal to some people but the number involved is apparently small. Those expressing favorable reactions to rolls also stressed the other good features such as: no waste, easy to serve, portion control.

Raw and cooked turkey breasts were generally well liked. One respondent wrote, "The quality of cooked ready-to-eat breasts have enabled us to feature turkey on the menu more often." Another said, "Cooked turkey breast is an excellent product, easy to serve and control portions."

Acceptance by Customers

TABLE VI—ACCEPTANCE RATING ON HOW WELL TURKEY IS RECEIVED BY CUSTOMERS

Turkey Products	Number of Restaurants Reporting*		
	Good	Fair	Poor
Roasted Whole Turkey	118	1	1
Turkey Rolls	46	42	37
Turkey Breasts	37	3	1
Turkey Diced	2	0	0
Turkey Steaks	1	1	0

* 174 restaurants reported serving turkey

Respondents were asked to rate turkey products they served as to how well they were received by their customers. Roasted whole turkey was outstanding, everyone liked the product. Ratings on turkey rolls were about equally divided between good, fair, and poor. Turkey breasts were rated exceptionally high. Other products had such limited use that the ratings could not be considered significant.

Source of Turkeys

TABLE VII—WHERE TURKEYS WERE PURCHASED BY RESTAURANTS

Source	Whole Turkeys		Turkey Products	
	(Number)	(Percent)	(Number)	(Percent)
Food Wholesaler	20	11	29	17
Retail Store	19	11	0	0
Processor-distributor	21	12	15	9
Meat-produce distributor	58	33	39	22
Company warehouse	5	3	8	5
Other	4	2	2	1
No response or did not use	47	27	81	46

* 174 restaurants reported serving turkey.

Respondents were asked to name the supplier(s) of whole turkey and turkey products. These suppliers were classified into 6 groups defined as follows:

- Food wholesaler— Firm that handles a large variety of food, restaurant, and institutional supplies.
- Retail store— Regular grocery store or supermarket.
- Processor-distributor— Large nationally known brand distributors such as Armour, Swift and Wilson.

- Meat-produce— distributor Firm that usually operates on a local basis, handles primarily poultry, meat and possibly fruits and vegetables. Limited as to types of items offered.
- Company warehouse— Large restaurant chains often have their own warehouse and get all their turkeys through this source.
- Other— Any source that could not be classified in any of above — mostly producers or production sources.

The major source of turkey to restaurants is clearly through the meat-produce distributor (Table VII). One-third of the whole turkeys and 22 percent of the turkey products were purchased through this source.

Eleven percent of the restaurants got their whole birds through the retail store but none of the turkey products were purchased through this source. Most of the restaurants getting their birds through the retail store were located in towns of under 10,000 population. Restaurants located in the larger towns tended to get their turkeys through distributors.

Problems with Supply

TABLE VIII—SUPPLY PROBLEMS ENCOUNTERED WITH WHOLE TURKEY OR TURKEY PRODUCTS

Problems Encountered	Restaurants Reporting* (Number)	(Percent)
Availability	51	29
Deliveries	46	26
Pricing	18	10
No Response	59	34

* 174 restaurants reporting serving turkey

One-third of the respondents apparently did not have any problems with availability, delivery, or pricing of turkey products as indicated in Table VIII. The majority of those who did report problems in this area referred to the unusual economic situation which the nation was experiencing at the time of the survey. Some further processed items and heavier weight toms were in short supply and prices were fluctuating upward rapidly in response to the food shortage situation. At the same time, restaurant owners were trying to hold the line on prices they were charging customers for items on their menu. Some thought turkey prices were higher in relation to the rising red meat prices and were concerned whether they would be able to continue to feature turkey as regularly as they had in the past. It was quite evident that restaurant owners are extremely sensitive to prices paid for menu ingredients.

The large number of restaurant owners not responding to this question probably indicates they did not have any supply problems to report.

Problems with Whole Turkeys

TABLE IX—MAJOR PROBLEMS IN PREPARING AND SERVING ROASTED WHOLE TURKEY

Problems	Restaurants Reporting* (Number)	(Percent)
Storage	30	17
Oven Space	30	17
Labor	49	28
Portion Control	49	28
Sanitation	4	2
Waste	2	1
No Response	69	40

* Some restaurants reported several problems

Forty percent of the respondents apparently felt they did not have any problems with preparing and serving whole turkey (Table IX). This may partly explain why the majority of restaurants still continue to use the whole bird and have not switched entirely to use of further processed products. The other factor in this decision, of course, is the high regard they have for the quality of meat from the roasted whole bird.

Labor and portion control were the two main problems reported. Large, "high speed" restaurants and cafeterias report a reluctance to use any product that requires a great deal of time and labor in serving.

TABLE X—OVEN TEMPERATURE USED ROASTING WHOLE BIRDS

Temperature (°F)	Restaurants Reporting* (Number)	(Percent)
275 or Less	16	9
276-325	48	28
326-350	42	24
351 or more	17	10
No response	51	29

* 174 restaurants reported serving turkey

We asked what temperature they used in roasting whole birds. One-half of those reporting were using a roasting temperature of higher than the recommended 325°F (Table X). Only about one-fourth of them used a thermometer in testing their turkey for doneness. An earlier survey revealed that about the same situation exists in institutional restaurants.**

** SR137 An Institutional Survey of the Use of the Turkey Products In Missouri

Need for Materials

TABLE XI—NEED FOR MORE MATERIALS ON TURKEY

Material Requested	Restaurant Reporting*	
	(Number)	(Percent)
Quantity recipes	44	25
Holiday promotion	43	25
Place mats	17	10
Other types of promotional materials	15	9
No response	100	57

* 174 restaurants reported using turkey

Fifty-seven percent of the respondents did not feel a need for any promotional materials other than what they are now using (Table XI). The need for quantity recipes and holiday promotional was reported by 25 percent of the respondents. Any recipes that are prepared for restaurant use should be designed on standard recipe cards for easy filing. Interviews with restaurant owners report that folders, booklets, or other type of publications are easily lost.

It is not known how the restaurants would have responded had they not been receiving any materials.

Future Use of Turkey

TABLE XII—RELATIONSHIP BETWEEN TYPE OF TURKEY PRODUCTS USED AND THEIR EXPECTED FUTURE USE OF TURKEY

Type of Products Used Now	Number Restaurants Reporting Expected Future Use		
	More	Same	Less
Whole birds only	18	10	2
Turkey products only	24	13	0
Whole birds and turkey products	47	39	8
TOTAL	89	62	10

Why did 55 percent of the respondents report that they would be serving more turkey in the future? The main reasons seemed to relate to two facts — (1) people like turkey, (2) it's a good profit item. One respondent probably stated it best when he said, "The general public is fond of turkey. They have it at home seasonally. They are happy to find it on the menu in restaurants; therefore, it is very favorably received." Numerous comments elude to the fact that demand for turkey is increasing and

many restaurants are moving away from treating turkey as a special or holiday item.

Other reasons for expecting increased use of turkey include:

- "Improvements noted in turkey products (e.g. turkey pastrami)."
- "Products are more convenient to prepare and serve (e.g. ready-to-eat turkey breasts)."
- "More people are eating out."
- "Price - portion control-utilization."

Those indicating less use of turkey in the future were primarily responding to the high price of turkey meat at the time of the survey. Many of the respondents felt turkey prices had reached a point where turkey was too high in relation to other competing meat and thus they would be forced to reduce sales.

One respondent apparently felt that a good substitute for the whole turkey had not been found. He said, "Whole turkey requires too much time. Rolls are the best buy, but they do not look good on the buffet." Another commented, "Turkey is a pain in the neck for fast service, large, busy restaurants."

Favorite Dishes

We asked restaurant owners to tell us their favorite way of preparing turkey. Over 70 percent of those responding listed roasted turkey with dressing and giblet gravy as their favorite. Several specified the type of dressing and side dishes to enhance the fare such as cornbread, bread crumb or sage dressing; cranberry, raisin and pecan sauce, etc. Interesting enough, one respondent said he found the most profitable way to serve turkey was to roast the largest birds he could find and serve them in the traditional holiday manner.

Hot and cold sandwiches rated second in popularity. Here again owners were usually specific in describing their particular sandwich feature such as: prosperity sandwich, club sandwich-triple decker, hot turkey sandwich with mashed potatoes and gravy, cold plate with turkey, cold turkey sandwiches with cheese on onion roll. These and similar dishes were especially popular with drive-ins and on luncheon menus.

Other turkey dishes that were mentioned included: turkey ala king, turkey tetrazini, turkey divan, turkey fries, turkey chow mein, smoked turkey on the barbecue grill, turkey pot pies, turkey steaks with sauce. One respondent listed his favorite as being poached turkey steak, simmered in a white mushroom sauce and served over wild rice.

The question brought out 36 different ways of serving turkey and demonstrated the versatility of this meat product.

Summary and Conclusion

Restaurants provide a large market for turkey meat. A representative sample of 425 restaurants in Missouri were surveyed by mail in regard to their use of turkey products. A total of 200 restaurants, or 47 percent, responded to the questionnaire; and of this number, 13 percent said they did not serve turkey. Sixty percent of the 174 restaurants serving turkey served it on one day out of three. Turkey was used daily at lunch in 18 percent of the restaurants and at dinner in 13 percent. Turkey sandwiches were served frequently in many of the restaurants. Restaurants in the larger cities served turkey twice as often as those in small towns.

Half of the respondents reported using both whole turkeys and turkey products. Approximately one-fourth of them use either only whole birds or only some form of turkey products, mainly turkey rolls or breast. Large toms, weighing up to 32 pounds, were most popular among the whole birds.

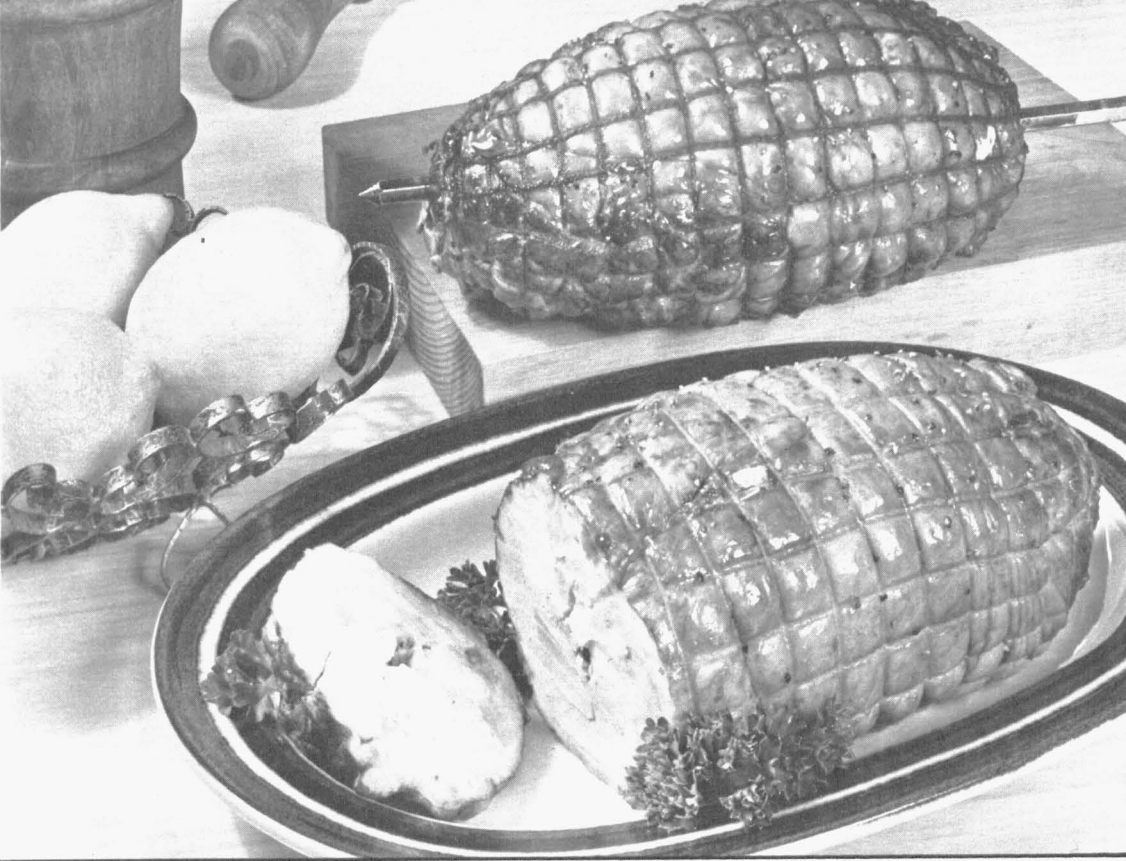
In spite of preparation and serving problems, the roasted whole turkey was widely used, due largely to the reported good acceptance by customers. Turkey rolls were also widely used but the customer ratings were considerably lower. The number of restaurants rating rolls as good, fair, and poor were about equally divided. Rolls were used primarily for the convenience which they provided. The turkey industry should make a concerted effort to improve the quality of turkey rolls and to make them more acceptable to consumers. Research should be conducted to see if the cooked or raw rolls are preferred. Turkey breasts were well received by customers.

Most of the restaurants received their turkeys through a meat-produce distributor. In smaller towns the retail store was a frequent source for whole birds. This study agrees with a previous study involving mass feeding institutions that there is a need for better distribution service to eating establishments in small towns and outlying areas. Restaurant owners apparently did not have any unusual supply problems that were not related to the economic conditions of the summer of 1973.

Problems of preparing and serving roasted whole turkey were cited, along with other problems such as portion control, labor, oven space and storage of the whole bird. While the turkey industry cannot help the restaurant owner solve some of these problems, they can at least help keep customers asking for turkey at restaurants. They can also inform chefs on the proper oven temperature and the advantages of using a thermometer to test for doneness.

Less than half of the respondents wanted more promotional materials on turkey. They did, however, request that all recipes be printed on standard recipe cards for easy filing.

Restaurant owners say that customers like turkey; it is a good profit item, and more of it will be used in the future. The imagination and creativeness of restaurant owners was apparent in their response to the question about their favorite way of preparing turkey. While over two-thirds of them listed roasted turkey dishes, over 36 different ways of serving turkey were given as favorites.



Appendix

Missouri Restaurant Survey

Sponsored by the Missouri Turkey Merchandising Council
The Missouri Restaurant Association and University of Missouri-
Columbia Extension Division, Cooperating

Name _____ Job Title _____

Name Restaurant _____

Mailing Address _____

-
1. How many days during the average month do you have turkey on the menu?
at luncheons _____ (days) as sandwiches _____ (days)
at dinners _____ (days) as salads _____ (days)
 2. What turkey products have you used during the past year? (Check those used)

- Grade "A" young hens (8-16 lbs) _____
- Grade "A" youngtoms (14-32 lbs) _____
- Grade "A" self-basting turkeys _____
- Grade "B" or lower turkey _____
- Fryer-roasters (6-8 lbs) _____
- Turkey steaks _____
- Turkey rolls _____
- Fresh ground turkey meat _____
- Diced turkey cubes _____
- Other (list) _____

3. From whom do you usually buy: (List name(s) of supplier).

(a) Whole turkey? _____

(b) Other turkey products? _____

4. What are your major problems in preparing and serving *roasted whole turkeys*? (Check those applicable)

Storage _____

Oven Space _____

Labor _____

Portion _____

Sanitation _____

Other (list) _____

5. What oven temperature do you use in roasting whole birds? _____°
F

6. Do you use a meat thermometer in determining doneness?

No _____ Yes _____

7. How well is turkey received by your customers? (Check one)

Roasted whole turkey Good _____ Fair _____ Poor _____

Turkey rolls Good _____ Fair _____ Poor _____

Other turkey products (list)

_____ Good _____ Fair _____ Poor _____

_____ Good _____ Fair _____ Poor _____

8. Do you have any comments on the quality of turkey products you are now receiving? Suggestions for improvement.

9. Do you have need for materials on turkey: (Check)

Quantity recipes _____

Holiday promotion _____

Place mats _____

Other promotion materials (lists) _____

10. Do you have any problems with:

Availability of products _____

Deliveries _____

Pricing _____

Other (list) _____

11. In the years ahead, would you expect to be serving more _____, same _____, less _____, (check one) turkey than you are now? Why?

12. What is your favorite way to prepare and serve turkey? (Describe)



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