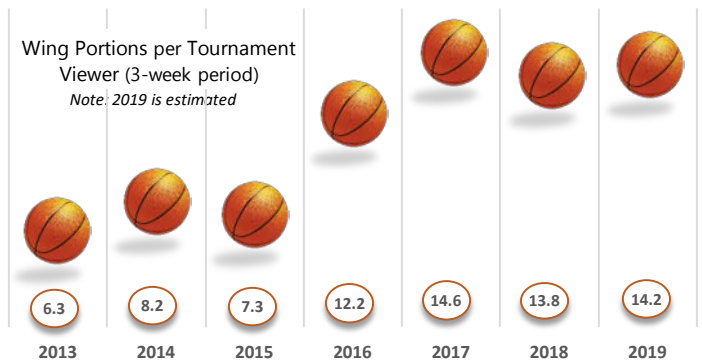


## Wings Part 2 – Marketing for the Big Dance

A few weeks ago, we marked the high water point for annual chicken wing demand which occurs during the Super Bowl. This year, fans consumed an estimated 1.4 billion chicken wing portions for the big game, about 13.5 wing portions for each television and digital viewer. A chicken wing portion is from the upper two thirds of the wing corresponding to your forearm (flat) and upper arm (drumette). We get two portions from every wing, two wings per chicken, for a total of four portions per bird. The remaining third, the tip (think hand), is typically exported as a popular item in Asian markets (we eat a few in the States as well, just not that many).

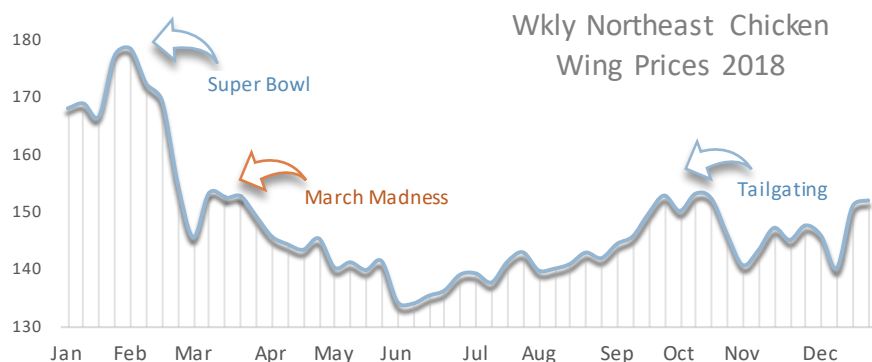
Chicken wings as bar food got their start in 1964 in Buffalo, NY. Over time, they became a popular fan food for the big game, really taking off after the hometown Bills played in four championships in the early 1990's and fans took a little taste of Buffalo home with them. Back in the day, wing demand would peak for the Super Bowl and then would drop off. All that began to change in 1985. That year, the NCAA Men's Division 1 Basketball tournament expanded to 64-teams and the NCAA's control of television rights was limited in a court decision, paving the way for a rapid expansion of televised college games, supported by the emerging cable television industry. To feed this increased game viewership, entrepreneurs moved to translate Super Bowl wing demand to the college basketball tournament and March Madness wing demand was born.



Unlike the Super Bowl where demand is focused on a one-day event, the college basketball tournament is spread out over a three week period which creates unique challenges and marketing opportunities for chicken wings. Restauranters were quick to figure out that the extended tournament schedule and the focus on collegiate ball (with its fervent fan base) was the perfect match and many wing-centric operations sprang up to capitalize. By installing multiple viewing screens to capture several games at once and by creating a nostalgic "college" atmosphere (think St. Elmo's Fire), restaurants created a captive audience that they then plied with platters of chicken wings. Fans responded favorably with a good percentage returning throughout the tournament. Demand for wings got an additional boost when in 2011, all tournament games were televised nationally for the first time. To most wing-focused restaurants, the tournament period marks the high point of annual wing consumption with some reporting increased wing orders of 20-25%.

Wing consumption during the tournament is dependent on viewership which typically rises as play advances, culminating with the championship game, the tournament equivalent to the Super Bowl. However, viewership can vary widely depending on how the games are broadcast (cable or network) and on how well fan favorites fare (college basketball fans are as fickle as they are fervent). Availability of wings and price also influence overall consumption, but chicken wings remain a popular and growing favorite and fans are expected to consume an estimated 2.3 billion wing portions during the 2019 NCAA Men's Division 1 Basketball tournament, about 14 wing portions per tournament viewer.

In 2018, wholesale prices for whole chicken wings in the Northeast declined 14% between the Super Bowl and the start of round 1 of the men's basketball tournament despite wing prices 15% below the level at the start of the 2017 tournament. This was due, in some party, to a 6% decline in consumption during the 2018 tournament run reflected in a 6% decline in movement of wing stocks out of cold storage in March 2018 compared to March 2017.



Data Sources: USDA AMS  
Agricultural Analytics;  
USDA NASS; Nielsen;  
NCAA

