Prioritized Audiences for Alaska Oysters

PEOPLE

Growing the market for Alaska oysters
2024

FOOD FOR CLIMATE LEAGUE

ALASKA MARICULTURE CLUSTER

Which eaters & B2B stakeholders are likely to purchase Alaska oysters?

CONTENTS

This deck is part of a broader suite of resources that supports the Alaska Oyster Food Roadmap.

1A Executive Summary - B2C

To grow the market for Alaska oysters among the Lower 48, FCL recommends a **phased** approach and scaling strategy that takes into account the current supply chain and production of oysters in Alaska:

YEAR 1

PHASE 1 (1-2 yrs)

ALASKA VISITORS

2.7 million

Have been to Alaska in the last 5 years

Start with high-income Lower 48 visitors to Alaska, as there is a reliable supply at scale. This segment prioritizes unique, local dining, with food being their largest travel expense. Build Alaska oysters into a premium regional brand.

Unlock initial interest through a sensory experience while visiting the state + **drive repeat consumption** well after their visit.

PHASE 2 (3-5 yrs)

ESTABLISHED EATERS

7.8 million

Have consumed kelp in the last 3 months

Expand distribution to the Lower 48, starting in the Pacific Northwest, through Established Eaters who value sustainable practices and premium Alaska origin branding. They consider Alaska oysters higher quality and fresher than other U.S. varieties.

Increase proportion of total consumption to be from Alaska sources + **increase the number of eating occasions.**

PHASE 3 (5-10 yrs)

FREQUENT SEAFOOD EATERS

36.9 million

Consume seafood at least 2/week

Frequent Seafood Eaters overwhelmingly prefer Alaska-sourced seafood to seafood sourced from other parts of the U.S. and globally. They enjoy local, sustainably sourced seafood of all types, and associate sustainability with safety and quality.

Replace other types of seafood with Alaska oysters.

YEAR 10

BEHAVIORAL INTENTION

1B Executive Summary - B2B

The following strategic **B2B recommendations aim to drive broader adoption** of Alaska oysters by decision-makers **in key channels** where prioritized consumers are most likely to encounter and enjoy them, such as casual seafood and fine dining establishments.

Strengthen the "Alaska Origin" brand

Alaska's reputation for pristine waters and sustainable practices is a strong motivator for B2B buyers. Highlighting the **environmental benefits, safety, and distinct flavors of Alaska oyster varieties**—particularly the unique merroir of the different varieties—will resonate with buyers seeking ethically sourced, high-quality products.

Ensure supply chain reliability

Inconsistent supply and high transportation costs are ongoing barriers. To ensure reliable access to Alaska oysters, it's crucial to invest in infrastructure and supply chain improvements, including partnerships with logistics providers to **reduce cold-chain costs.**

Facilitate access to Alaska oysters

Availability is a big barrier for B2B stakeholders. connect buyers with the small number of distributors who DO have reliable supply **to make Alaska oysters more accessible** within the state and for the Lower 48 buyers.

Address certification challenges for small producers

Support small farmers with the certification process that enables broader access to supermarket channels, like Whole Foods, while ensuring that food safety standards and regulatory compliance are met.

Generate proof of consumer demand

Provide clear data (consumer surveys, point-of-sale data, running pilot programs, etc.) **on consumer demand and trends supporting Alaska oyster adoption**. This will help overcome the barrier of unclear demand, especially for distributors and CPG companies, who require concrete market evidence before investing in a product with Alaska oysters.

2 What Oyster Eaters Care about | Motivators & Barriers

Motivators and barriers that apply broadly across all four audience types were identified. While many data points come from Established Oyster Eaters through our quantitative analysis and from Frequent Seafood Eaters from secondary sources, these trends emerged as general patterns across all segments.

Motivators

FLAVOR & APPEALING

78% of Established Oyster Eaters say their biggest priority is taste and 46% rank "looks appetizing" as an important driver.[1,2,4]

SPECIAL TREAT

50% of Frequent Seafood Eaters are motivated to treat themselves with oysters, and 69% thinks fish and shellfish elevate their meals.[1,2]

FRESHNESS & QUALITY

47% of Frequent Seafood Eaters rate freshness as having a high impact in purchase decisions.[1,2]

SUSTAINABILITY

64% of Frequent Seafood Eaters report that at least one aspect of sustainability influences their seafood purchasing decisions.[4]

EASE OF PREP

80% of Frequent Seafood Eaters look for simplicity and approachability within shellfish category.[5]

CULTURAL, REGIONAL, AND TRADITIONAL FOODWAYS

Traditional cultural foods for Alaska Natives – are especially attractive to Alaska Visitors.[3]

Barriers

UNAWARENESS

90% of Established Oyster Eaters and 67% of Alaska Visitors are not very familiar with Alaska oyster varieties.[1,2]

AFFORDABILITY

59.5% of Established Oyster Eaters say they don't eat more oysters because of the price.[1,2]

FOOD SAFETY

25% of Frequent Seafood Eaters say that food safety is one big barrier.[4]

UNCERTAINTY ABOUT THEIR UNIQUE VALUE

Established Oyster Eaters are unfamiliar with how Alaska oysters differ from oysters from other U.S. regions.[4]

[1]FCL Validation Survey *(N=253)*, 2024 | [2]FCL Needfinding Survey *(N=368)*, 2024 | [3]FCL Interviews with Industry Experts, 2024 | [4]FMI - The Power of Seafood 2024 | [5]Mintel - Fish and Shellfish, 2023

3 Deep Dive into our Eaters: Understanding How to Leverage Personas

In the following slides, we'll present detailed Personas representing the key consumer segments likely to purchase Alaska oysters.

How to Navigate These Slides?

What is a Persona? Personas are buyer profiles that provide an overview of different audience types and their characteristics. They humanize data, offering relatable profiles that represent key consumer groups.

Demographics: Insights into average income, geographic location, and age.

Motivators and Barriers: Factors that drive or hinder engagement of Alaska oysters.

Buyer Behaviors: Purchase patterns and preferences specific to each persona.

Perception of Alaska Oysters: How each group views Alaska oysters

How to use this information: Unpacking these personas allows producers and oyster stakeholders to craft more eater-centered messaging and strategies to increase adoption, addressing the unique needs, motivators, barriers, and purchasing behaviors of each consumer group.

4 Meet the 2.7 Million Alaska Visitors

Origin:[1] West (27%), South (36%), Midwest (17%), Northeast (21%)
Average Income:[1] $117K+ / year
Average Age:[1] 48.4

Aiming to explore Alaska by land and sea, these travelers enjoy activities in nature, and seek out unique experiences, drawn to high quality amenities and excursions.

CORE NEEDS*

Control - FLAVOR
Purpose - EXPLORATION
Community - SHARING EXPERIENCES

MOTIVATOR

PREMIUM & LOCAL | Gravitate towards "memorable" dining experiences that are exclusive to that specific place.[2]
EXPLORATION | Enjoy familiar favorites while also embracing new food experiences.[2]
FLAVOR | Top driver when selecting an Alaska oyster product. "It looks delicious" was constantly repeated among respondents.[6]

BARRIERS

LOW CONSUMPTION INTENT | Respondents would consume Alaska oyster dishes or products less than 1-2 times/year.[6]
AFFORDABILITY | High perceived cost of Alaska oyster products[2]
FLAVOR/TEXTURE | Skeptical about the texture[6]

BUYING BEHAVIOR

NAUTICAL ADVENTURERS | Over 50% of travelers focus on cruise-only itineraries.
DINING AS LARGEST SHARE OF WALLET | 80% of visitors say dining is their top activity.[6] Average spending is $300 per person per trip.[3]
LOW FREQUENCY OF CONSUMPTION | 67% consume Alaska oysters never or rarely.[6]
FINE DINING WINS | Seeking special dining experiences, specifically through seafood.[6]

ALASKA OYSTER PERCEPTIONS

PREMIUM | Strong perception of Alaska oysters as high quality and for special occasions with intention to consume 1-2 times every 6 months.[2,6]
SAFE & SUSTAINABLE | Perceived as being sustainable and safer from their provenance.[2,6]
DELICIOUS | Strong association with having a good flavor and a pleasant texture.[2,6]

[1]Established Eaters Survey *(N=664)*, 2024 | [2]DScout - What's on Your Plate" *(N=60)*, 2024 | [3]Alaska Visitor Profile 2022-2023 | [4]Juneau 2023 Tourism Survey | [5]Juneau 2023 Cruise Passenger Survey | [6]FCL Validation Survey *(N=200)*, 2024

*If you want to know more about core human needs, see slide 6 here: link

5 Meet the 7.8 Million Established Oyster Eaters

Origin:[1] West (28%), South (44%), Midwest (15%), East (14%)
Average Income:[1] Diverse ($25K-$150K)
Average Age:[1] 27-43 years

Seafood enthusiasts who value nutritious, premium raw oysters for special occasions, while being open to exploring unique flavors and more affordable options.

CORE NEEDS*

Control - FLAVOR, HEALTHY LIFESTYLE; SAFETY
Purpose - FOOD EXPLORATION

MOTIVATOR

FLAVOR | 78% say their biggest priority is that "they are tasty and like the texture."[1]
SPECIAL TREAT | 50% wants to treat themselves with oysters.[1]
FRESHNESS | 47% rates freshness as a relevant attribute for Alaskan oysters.[1]

BARRIERS

AFFORDABILITY | 59.5% feels they are too expensive. They engage across a broad financial spectrum.[1]
FOOD SAFETY | 25% say that food safety is one major barrier for raw formats.[1]
UNAWARENESS | 90% are not familiar at all or only slightly familiar with Alaskan varieties.[1]

BUYING BEHAVIOR

RAW FORMATS | 51% prefers fresh and raw.[1]
FOODSERVICE AS THE TOP CHANNEL | 62% prefers to eat oysters in fine dining.[1]
CONSUMED FOR SPECIAL OCCASIONS | 75% eats oysters once every other month.
FOOD CHOICES | Culinary professionals and nutrition experts serve as top trusted voices influencing food behavior.[1]

ALASKA OYSTER PERCEPTIONS

PREMIUM | High willingness to pay for Alaska oysters in comparison to other U.S varieties for both for foodservice and CPG.[1,2]
HIGH SENSORY QUALITY | Alaska oysters are perceived larger and higher quality than other U.S. oysters.[1,2]
PRISTINE & SAFE | The untouched landscape, pristine waters, and the U.S. origins enhance perceptions of quality and safety.[1]

[1]FCL Validation Survey (N=253) 2024 | [2]The Power of Seafood 2024 - FMI

*If you want to know more about core human needs, see slide 6 here: link

6 Meet the 36.9 Million Frequent Seafood Eaters

Origin:[6] Coastal, Urban, Suburban
Average Income:[1] $75K+
Average Age:[1] Millennials & Gen Z

Predominantly millennials and urban parents[2] invested in the sustainability and cultural significance of their food choices.[3] This group shows high consumption across fish and shellfish categories,[2] incorporating seafood at least twice a week.[4]

CORE NEEDS*

Control - FLAVOR, HEALTH
Purpose - SUSTAINABILITY

MOTIVATOR

FLAVOR | Visually appealing and tasty as one of the main drivers.[2,5]
HEALTH | 33% would be incentivized to try a new product for its nutritional content.[2,4]
SUSTAINABILITY | 64% report that at least one factor related to sustainability influences their seafood purchasing decisions, and 62% connect sustainability to personal safety.[4]
CONVENIENCE | 49% says ease of prep would encourage to eat more seafood, in this regard, frozen and ready-to-eat were highly popular formats.[5]

BUYING BEHAVIOR

CPG TAKING THE STAGE | Homecooking of seafood is becoming more common as frozen and ready-to-eat options are more available.[4]
VERSATILE & SIMPLE OPTIONS | Eaters picked shrimp as their most preferred seafood due to their taste and versatility.[5]
RAW FORMATS PREFERRED | Still traditional eaters who look for raw formats paired with sauces (lemon, hot sauce, teriyaki, etc).

BARRIERS

UNAWARENESS | "It's not on top of my mind" as top barrier, and usually confused with the unique value of Alaska oysters versus other U.S. varieties.[5]
AFFORDABILITY | 54% say they would eat seafood more often if it was more affordable.[6]

ALASKA OYSTER PERCEPTIONS

DELICIOUS | Flavorful, fresher and higher quality than other U.S. varieties.[5]
SPECIAL TREAT | Seen as a "treat" or "delicacy" for special occasions.[5]
SAFE | Strong associations of Alaska with "organic and natural" and "pristine."[5]

[1]Packaged Facts' Eating Trends: Generational Food ,2020 | [2]Mintel - US Fish and Shellfish Market Report, 2023 | [3]FCL, Food+Planet, and Builders Initiative Aquatic Foods Eater Needfinding 2022 | [4]FMI 2024 | [5]FCL Dscout Mission (N=60) 2024 | [6]The Power of Seafood FMI (2024)

*If you want to know more about core human needs, see slide 6 here: link

7 Estimating Market Potential: Reaching x50 Growth in 10 Years

Based on primary data, **we estimate the Total Addressable Market (TAM)** needed to reach our goal of $15 million in 10 years as follows:
We anticipate that each consumer would spend around $21 per year. This estimate assumes that consumers would make around 3 purchases per year, since the reported consumption per year is 1-2 times/every 6 months,[1] with a willingness to pay between $10-20/product (15$ average).[1] 30% of this spending would go to the producer, which translates to $15 per year per consumer directly contributing to the market goal.

Based on this estimate, we can project the percentage of market share we need to capture in each identified segment to reach our goal.

	Serviceable Obtainable Market (SOM) % estimate	Serviceable Obtainable Market (SOM) Size based on estimate	Estimated $ share to Alaska oyster industry (30% of selling price)
Alaska Visitors	15%	405,000	**$6,076,000**
Established Oyster Eaters	10%	780,000	**$11,700,000**
Frequent Seafood Eaters	2%	738,000	**$11,070,000**

[1]FCL Validation Survey *(N=699)*, 2024

8 Segments For Future Exploration

FCL recommends revisiting the below segments in the future as the Alaska oyster industry grows so that the eater base of sustainable, aquatic foods can evolve to reflect a diversity of incomes, regions, ethnicities, life stages, and eater contexts.

Casual Diners
Foodservice

Casual dining provides a platform to **introduce diners to unfamiliar ingredients in a less intimidating and more affordable setting** compared to fine dining. The adoption of Alaska Pollock by McDonald’s, for instance, serves as inspiration for a wide-reaching, lucrative opportunity for cooked oysters. As oysters **become more accessible**, in the future, FCL recommend revisiting this audience through affordable concepts in fast casual environments, where where diners are seeking **diverse menu options** and **good value for money.**

Independent Senior & Assisted Living Residents CPG

While small and price-sensitive, this segment finds seafood highly desirable due to its nutritional content. As Gen X **continues to age, we recommend revisiting this segment** through culinary stakeholders, such as chefs, who shape menus to accommodate the wellbeing and health needs of residents.

Eco-Conscious Eaters
CPG & Foodservice

This **small but rapidly growing segment** reflects current trends and increasing consumer interest in sustainability. Still, while consumers express a desire to make environmentally friendly choices, other factors such as taste, cost, health, and convenience remain their top priorities. **As collective awareness and consumer empowerment toward climate action continue to grow**, it would be worth revisiting this segment in the future.

9 What B2B Stakeholders Care about | Motivators & Barriers

Motivators and barriers broadly applicable to B2B stakeholders for the wider adoption of Alaska kelp, focusing on identified channels that resonate with both Alaska Visitors and Established Oyster Eaters.

Motivators

FLAVOR & MERROIR
Buyers seek unique merroirs—distinct flavors that reflect the specific terroir of a region. They value diverse Alaska oyster varieties over a monolithic regional identity.

ALASKA ORIGIN
Alaska's reputation for clean, pristine, and premium-quality seafood enhances the desirability of its oysters, offering a strong selling point across buyers.

SUSTAINABILITY & TRANSPARENCY
Buyers prioritize responsibly sourced seafood that aligns with environmental standards and consumer demand for ethical, transparent practices.

SAFETY
Alaska oysters stand out for their safety due to the clean, pristine waters in which they are harvested.

Barriers

INCONSISTENT SUPPLY & AVAILABILITY
Limited and unreliable supply chains make it challenging for buyers to consistently access Alaska oysters in the necessary volumes. Additionally, there is great uncertainty on how and where to get them.

LONG TRANSPORTATION DISTANCES
High costs and logistical challenges of cold-chain transport from Alaska deter buyers, especially in regions where hyper-local sourcing is prioritized.

AFFORDABILITY
The high price point of Alaska oysters raises concerns about financial viability for chefs, distributors, and CPG buyers.

CERTIFICATION CHALLENGES
High costs associated with certification processes and the lack of clear quality standards create barriers for small producers. This complicates their ability to enter larger markets.

MARKET COMPETITION
Alaska oysters face strong competition from seafood options in Alaska (e.g. salmon), U.S. oyster varieties, premium international markets, and other tinned seafood products globally.

FCL Task 4 B2B Stakeholder Interviews (N=14), 2024.

10 Meet the Foodservice Buyer †

Alaska tourist-focused restaurants. Seafood restaurants in the Lower 48.

Foodservice buyers seek premium, high-quality, and fresh local ingredients that elevate culinary offerings. They highly value supporting local producers but also prioritize stable supply chains, availability, and reliable volumes to ensure menu consistency.

CORE NEEDS*

Control - RELIABLE SUPPLY
Purpose - IMPACT & SOCIAL RESPONSIBILITY
Community - SUPPORT LOCAL PRODUCERS

MOTIVATORS

FLAVOR & MERROIR - The unique *merroir* of Alaska oysters—reflecting the distinct taste of place from the region's cold, pristine waters—is highly appealing to foodservice buyers. They value understanding the diversity of Alaska oyster varieties, rather than treating the state as a monolithic region.

ALASKA ORIGIN - Alaska's upscale reputation as a source of clean, pristine, and premium-quality seafood is a strong selling point.

FRESHNESS & QUALITY - Chefs are familiar with oysters and will be drawn to Alaska varieties if they can demonstrate high quality to justify a premium price point.

SOCIAL SUSTAINABILITY - Chefs are captivated by the stories behind the ingredient, making purpose-driven food a compelling choice.

SEASONALITY - Limited summer oyster production in the Lower 48 creates an opportunity to source from Alaska as waters are colder.

BARRIERS

LOW AVAILABILITY & INCONSISTENT SUPPLY - Chefs face challenges accessing Alaska oysters due to inconsistent supply, volume mismatches, and sourcing difficulties in both Alaska and the Lower 48 restaurants.

COMPETITION WITH LOCAL SEAFOOD IN ALASKA - Chefs are worried that Alaska oysters compete with established local options (e.g., crab) with larger recognition and similar price points.

LONG TRANSPORTATION DISTANCES - Oysters are seen as a hyper-local product, making chefs in the Lower 48 hesitant to source them from Alaska.

AFFORDABILITY - High prices make Alaska oysters less appealing, with chefs uncertain about their financial viability.

*If you want to know more about core human needs, see slide 6 here: link

† Note: Buyer refers to the decision-maker within a foodservice operator or restaurant, and can sometimes be a manager, chef, procurement professional, etc.

FCL Task 4 B2B Stakeholder Interviews (N=14), 2024.

11 Meet the CPG Brand Owner

Premium seafood tinned companies.
Premium oyster CPG companies (fresh & frozen).

CPG brand owners prioritize local, sustainable, and nutritious ingredients that enhance product quality and align with their financial and environmental goals. They prioritize a stable supply chain, large-volume availability, and cost-effectiveness, while remaining mindful of financial risks and regulatory hurdles.

CORE NEEDS*

Control - CONSISTENCY
Purpose - SUSTAINABILITY & ETHICAL SOURCING
Community - SUPPORT LOCAL PRODUCERS

MOTIVATORS

FLAVOR & QUALITY – Premium buyers would be drawn to include Alaska oysters if they meet quality standards.
LOCAL & SUSTAINABLE PRODUCTION – A strong need for control and assurance in responsible, sustainable, and transparent production practices is essential for B2B buyers.
ALASKA HALO – Alaska's pristine environment enhances the premium reputation of its oysters. Buyers perceive it as being one of the safest and highest-quality seafood options.
HEALTH & SAFETY – Alaska oysters, sourced from pristine waters, are prized for their exceptional nutrition and safety, making them a compelling option for B2B buyers addressing the rising demand for healthy and sustainable seafood.

BARRIERS

PROCESSING CHALLENGES – Lack of nearby facilities for shucking and canning oysters at scale
LACK OF PARTNERSHIPS IN ALASKA – Difficulty in establishing sourcing relationships with Alaska producers, as many buyers already have established cannery or distributor connections in other regions.
LONG TRANSPORTATION DISTANCES – High cold-chain costs and concerns over the environmental impact of transporting oysters over long distances.
UNSTABLE SUPPLY CHAIN – Reliability issues with the supply chain and the challenge of meeting large-volume demands.
COMPETITION WITH INTERNATIONAL MARKETS – Intense competition from premium tinned seafood markets in regions like Europe affect Alaska oysters' total market share.
AESTHETICS IN TINNED FORMAT – Concerns about the visual appeal of Alaska oysters in tinned packaging.
AFFORDABILITY – High perceived cost of Alaska oysters as a concern for CPG buyers.

! *If you want to know more about core human needs, see slide 6 here: link

FCL Task 4 B2B Stakeholder Interviews (N=14), 2024.

12 Meet the Large Supermarket Distributor

Natural grocery stores (e.g. Sprouts, Whole Foods) in the Pacific Northwest.

Large supermarket distributors prioritize sustainable ingredients with transparent production practices that meet quality standards, balancing affordability, premium quality, and a reliable supply chain. They aim to tailor part of their offerings to include local products, with Alaska ingredients particularly appealing to Pacific Northwest buyers.

CORE NEEDS*

Control - CONSISTENCY; SAFETY (COMPLIANCE & REGULATORY)

Purpose - SUSTAINABILITY & ETHICAL SOURCING

MOTIVATORS

SUSTAINABLE & TRANSPARENT PRODUCTION – Distributors prioritize sustainably sourced ingredients that align with environmental standards and consumer demand for ethical practices.

ALASKA HALO – Alaska oysters are perceived as some of the safest and highest-quality options available due to the Alaska's pristine environment.

LOCAL APPEAL – Distributors, especially in regions like the Pacific Northwest, value Alaska products as part of their local-focused offerings, aligning with regional consumer preferences.

PARTNERSHIPS IN ALASKA – Existing collaborations with Alaska seafood producers streamline the process of adding Alaska oysters to their product portfolios.

AFFORDABILITY – Distributors value ingredients that deliver premium quality at a competitive price, ensuring a balance between cost and value.

BARRIERS

HIGH COST OF CERTIFICATION PROCESS FOR SMALL FARMERS – Expensive certification processes make it challenging for small farmers to access large supermarket channels.

STRINGENT SAFETY REQUIREMENTS – Distributors prioritize strict safety protocols, particularly for oysters, requiring robust handling processes and rigorous testing on farms to ensure compliance and consumer safety.

UNSTABLE SUPPLY CHAIN & VOLUME CHALLENGES – Distributors need assurance of reliable producers who can meet volume requirements and delivery timelines.

UNCLEAR DEMAND & RISKY – Distributors struggle with inconsistent volumes and unreliable delivery timelines, hindering supply chain stability.

*If you want to know more about core human needs, see slide 6 here: link

FCL Task 4 B2B Stakeholder Interviews (N=14), 2024.

13 APPROACH

How Food for Climate League (FCL) Arrived at Our Eaters

SOURCES

25+ Industry Reports & Articles (e.g., ASMI, Mintel, FMI)

5 Academic Articles

17 Datasets

Exploratory Segments Qualitative Study (N=60)

Established Eaters Needfinding Survey (N=296)

Established Eaters Validation Survey (N=253)

Alaska Visitors Validation Survey (N=200)*

Step 1

Identify Eaters via Secondary Research

FCL first identified potential eater segments through an analysis of secondary research, e.g., industry reports, articles, and datasets. We examined eaters' core needs, barriers, motivators, values, trusted voices, and overall market size.

FCL then prioritized consumer segments using a 2x2 matrix, triangulating data around estimated market size, income, and eaters' values and needs.

Step 2

Consumer Segmentation via Primary Research

FCL evaluated and addressed gaps in secondary literature on eater segments through quantitative needfinding research. We identified needs, channels, and core motivations to consume oysters as well as barriers to adoption, narratives, and product preferences.

FCL then refined and further prioritized consumer segments based on drivers identified through quantitative validation research.

Lastly, FCL conducted qualitative research on prioritized eater segments and analyzed data to inform untapped product and narrative opportunities.

! ***Note:** We chose not to conduct a needfinding survey for Alaska Visitors because we found reliable secondary research on their needs and buying behaviors. As the primary goal for the Established Oyster Eaters needfinding survey was to fill the gaps in secondary literature (academic papers, market research reports) with primary data (predominantly quantitative).

13 APPROACH

How Food for Climate League (FCL) Arrived at Our Eaters

SEGMENTATION MATRIX

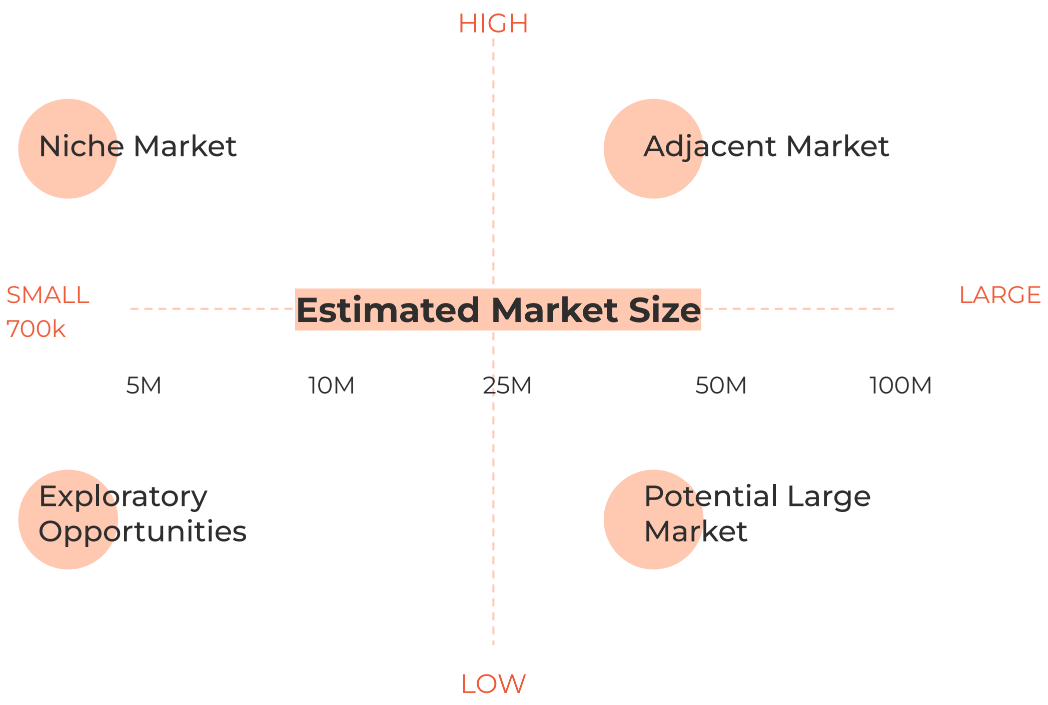
Mapping Ideal Consumers on a 2X2 matrix.

Horizontal (X-axis):
Estimated market size Using existing research and educated assumptions about population size, we estimated how many people might be interested in Alaska oyster products.

Vertical (Y-axis):
Likelihood to consume This line shows how likely each group is to actually try Alaska oyster products. We looked at people's values and needs, and considered how much they might be able to spend based on income.

Based on size and likelihood to consume Alaska oyster products, we were then able to pinpoint which were the best groups to target.

LIKELIHOOD TO CONSUME
(triangulation of consumer values, needs, and income)



13 APPROACH

How Food for Climate League (FCL) Arrived at Our Eaters

PRE-SELECTED SEGMENTS FOR TASK 2

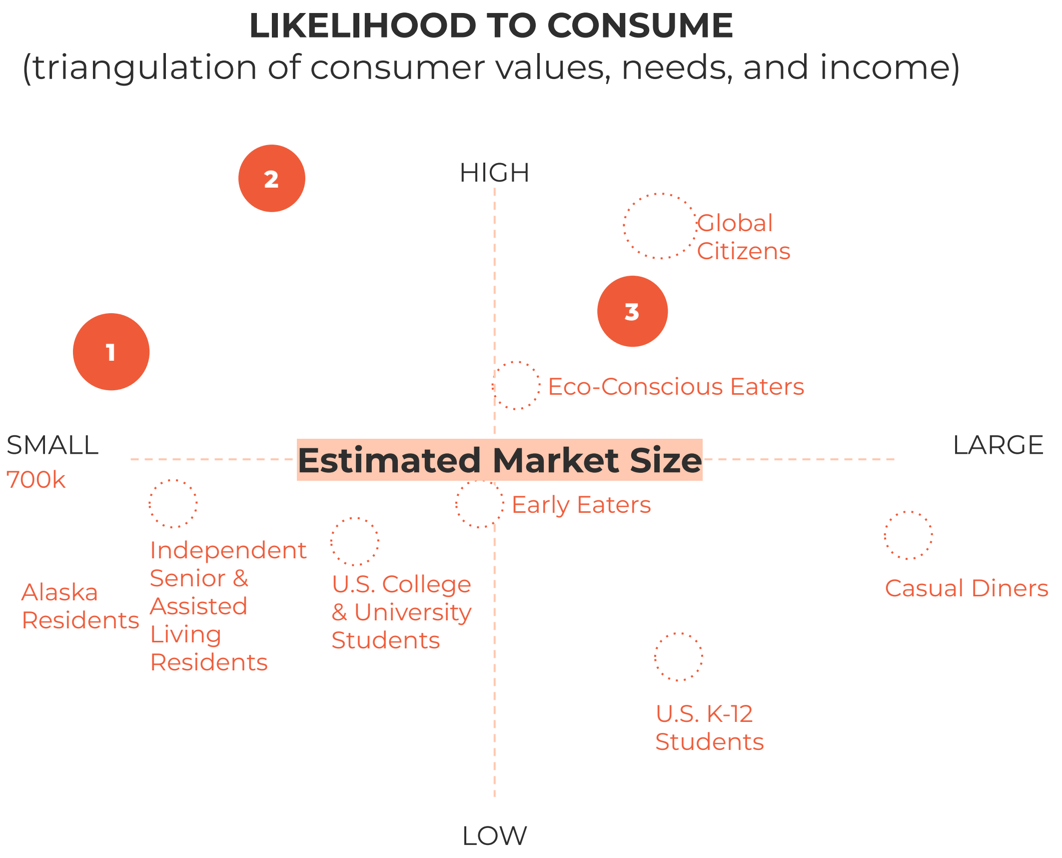
Based on our research, these are the key consumer segments to pursue.

These groups have the potential to grow the market for Alaska oysters in retail and foodservice.

1. Alaska Visitors

2. Established Oyster Eaters

3. Frequent Seafood Eaters



13 APPROACH

How Food for Climate League (FCL) Analyzed the B2B Stakeholders

SOURCES

14 interviews with B2B stakeholders, (e.g., R&D chefs, including an Indigenous chef, CPG brands, large distributors, and food historians)

Step 1

Identifying key B2B stakeholders

FCL curated a strategic list of B2B stakeholders, guided by insights from prior primary and secondary research with eaters and industry experts. Stakeholders were evaluated across an ingredient adoption spectrum:

- Non-adopters (e.g., unaware or unfamiliar with Alaska oysters).
- Partial adopters (e.g., sourcing oysters but not from Alaska).
- Full adopters (e.g., those who have already integrated Alaska oysters into their menus or CPG products).

Step 2

Primary research with B2B stakeholders

FCL conducted qualitative research with B2B stakeholders in prioritized segments through personalized, semi-structured interviews. The goals of this research were to:

a) Further unpack the needs, motivators, and barriers among B2B segments for wider adoption.

b) Validate and refine findings from eater-focused research on preferred product formats, narratives, and pricing.

This research surfaced actionable opportunities and challenges while pressure-testing marketing strategies with stakeholders at different adoption levels.

THANK YOU!

Questions? Please contact us at:
info@foodforclimateleague.org

Visit the Southeast Conference website to access the Roadmap Resources Hub