



Consumer perspectives of adaptation

Preliminary results

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An Australian Government Initiative



A multidisciplinary approach

Research questions

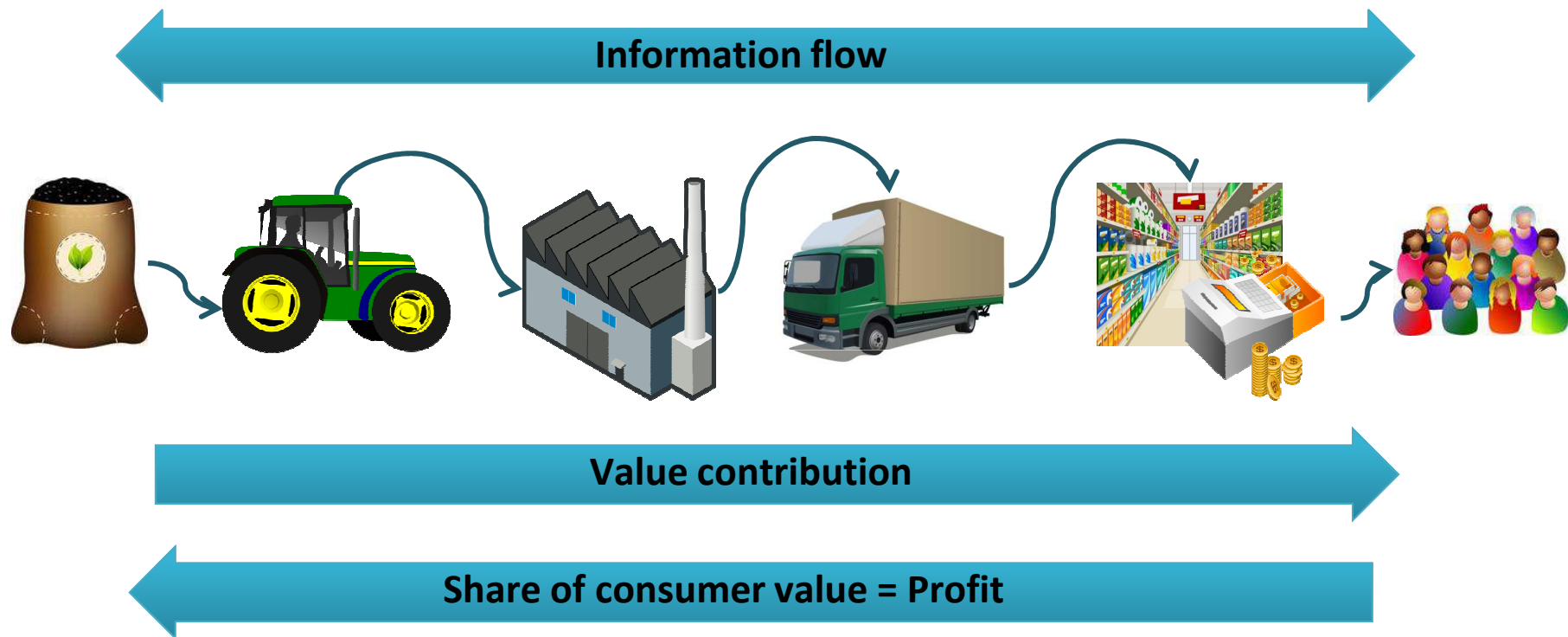
- How are value chains impacted by climate change and climate variability?
- How can value chains effectively respond through adaptation and mitigation strategies?
- What are the impacts of such responses to value creation and competitive advantages in value chains?

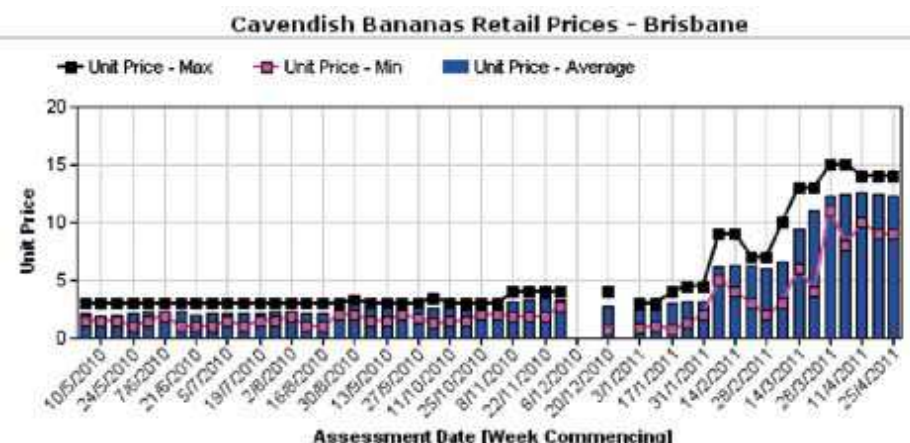
Project team expertise

- Value chain management and analysis
- Climate adaptation in agriculture
- LCA, carbon and water footprinting
- Consumer and marketing strategies for agribusiness
- Financial and investment strategies for agribusiness

...supported by an advisory group representing industry, science and policy.

The concept of chains





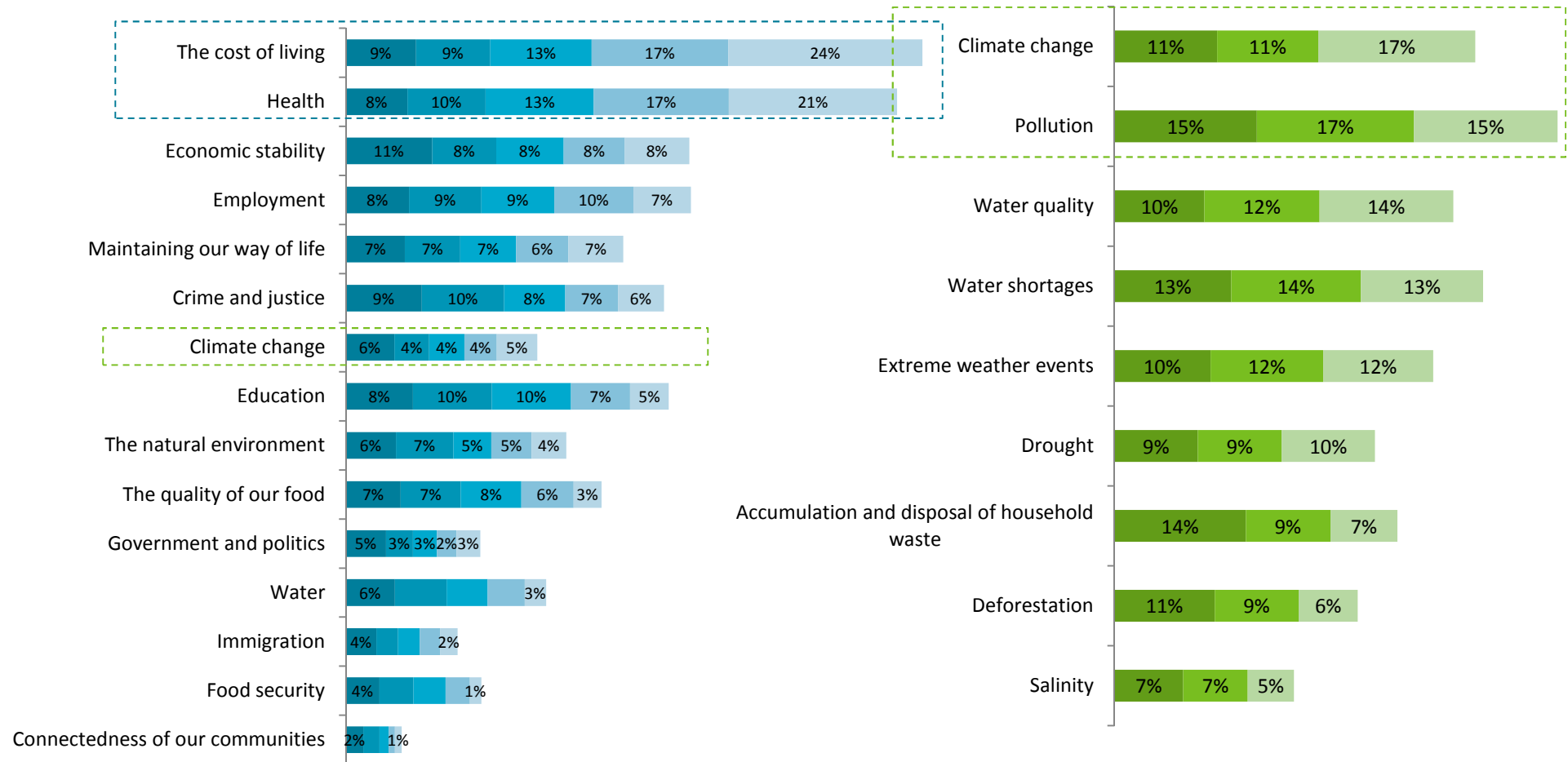
What is the role of food consumers in adaptation?

Photo credits: News.com.au, cairns.com.au, bellamiotherofthree.com, daff.qld.gov.au

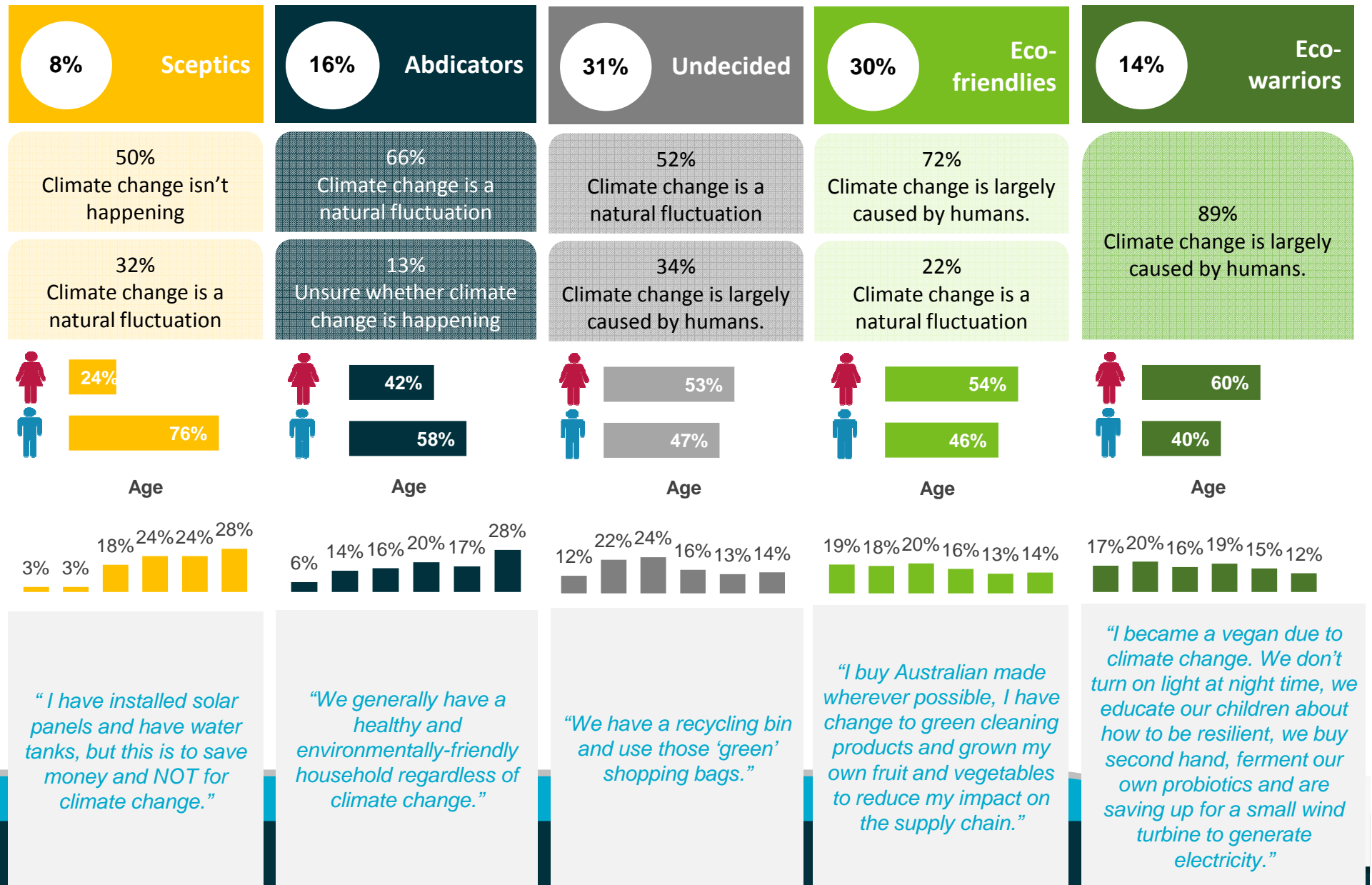
Horticulture Australia Limited, 2011. Banana Industry Annual Report 2011. <http://www.horticulture.com.au>, 21 May 2013

Cluster analysis results

What are the important issues?

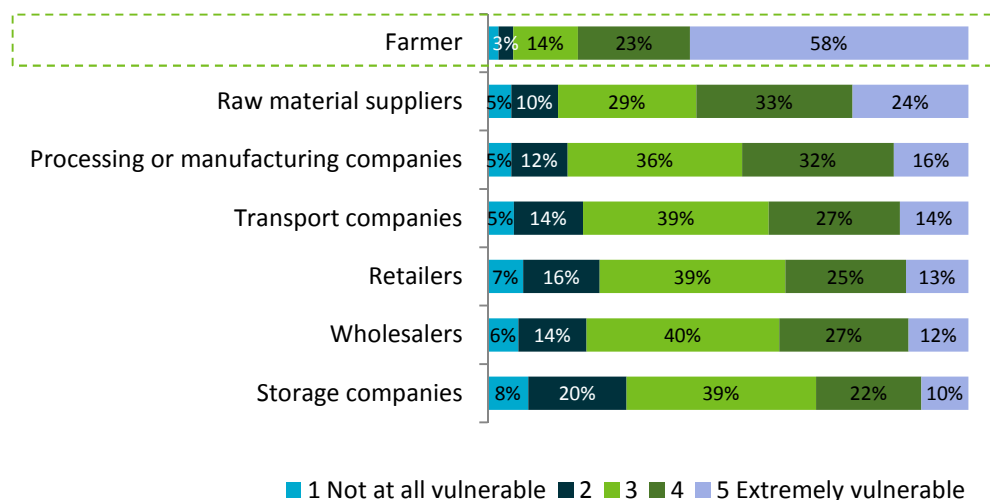


Based on their attitudes to climate change, consumers can be generally grouped into five clusters

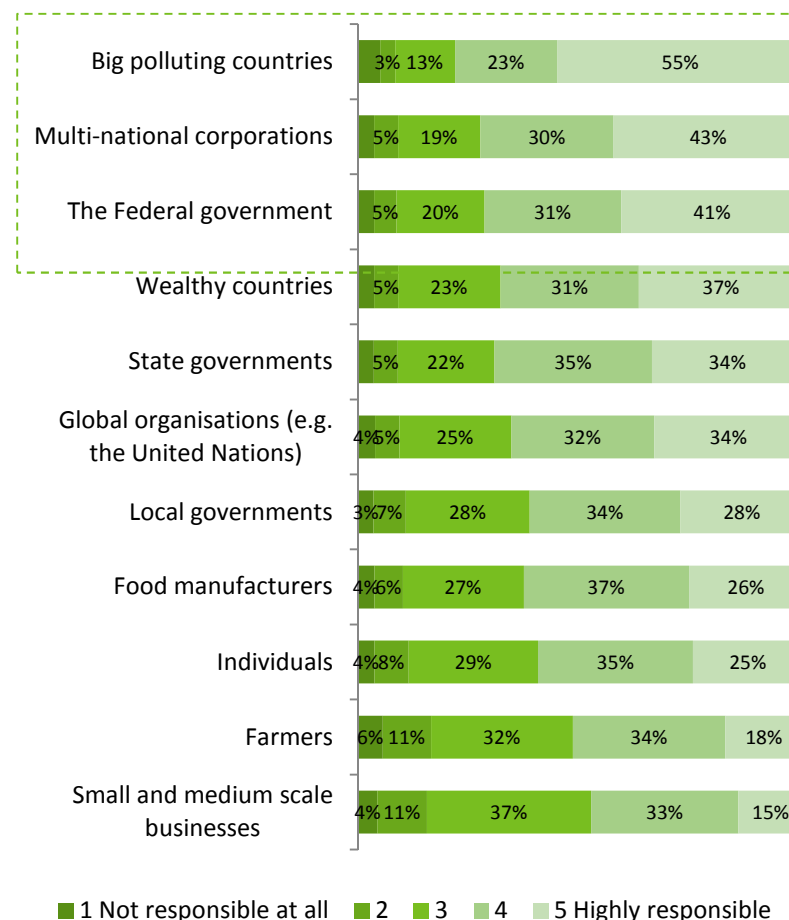


Consumers think that the 'big players' should take responsibility for adapting to the impacts of climate change

Who is vulnerable?



Who is responsible for adapting?



Consumers are *starting* to consider what they can do to adapt...

... in their own way

70%

Increasingly more concerned about the increase in food prices

54%

Look for things to address and change in everyday life as a result of the challenges of climate change

54%

Think about what is acceptable and sustainable with respect to products, packaging and consumption

Wine consumer survey results

What type of wine consumers do we have?

59%

Consume at least 2-3 times a week

63%

Purchase through bottleshops + 16% via 'supermarkets'

5.1

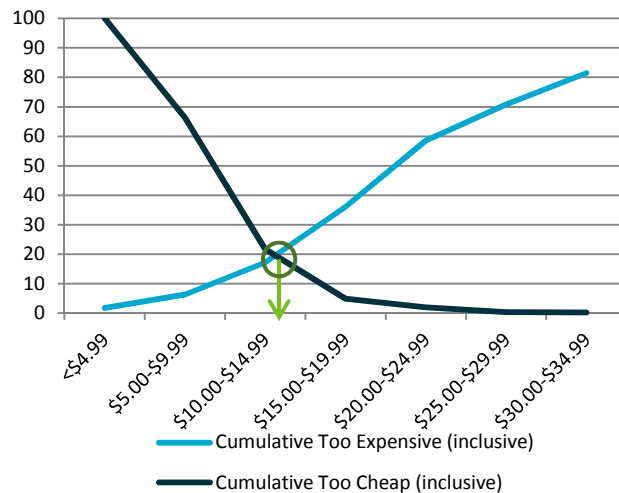
No. of bottles per purchase by 50%

\$15

Price willing to pay for the usual bottle of wine, BUT expect to pay only \$14

Adaptation scenarios for wine

Scenario: Favourite Sauvignon Blanc temperature affected

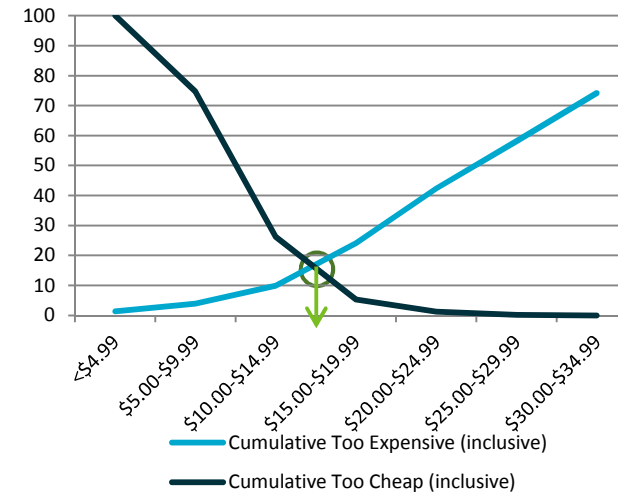


30% Most likely to purchase Sav Blanc from another region

24% Most likely to substitute another variety of wine

EW Most open to continuing to purchase Sav Blanc from the Adelaide Hills

Scenario: Award-winning Margaret River to Stanthorpe



56% Most likely to continue purchasing

21% Most likely to purchase a different type of wine instead

\$1.30 Price premium – likely because it is award winning

Implications for the wine industry

Will your key growth markets support adaptation?

What opportunities does adaptation present?

What are the implications for your value chain?

Thank you

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