



Photo Credits: Michael E., flickr.com

Who moved my pinot?

Consumer perspectives of climate adaptation

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An Australian Government Initiative



THE UNIVERSITY
OF QUEENSLAND
AUSTRALIA



Outline

1. About adaptive value chains
2. Consumer survey results
3. Wine consumer findings

Adaptive value chain approaches*

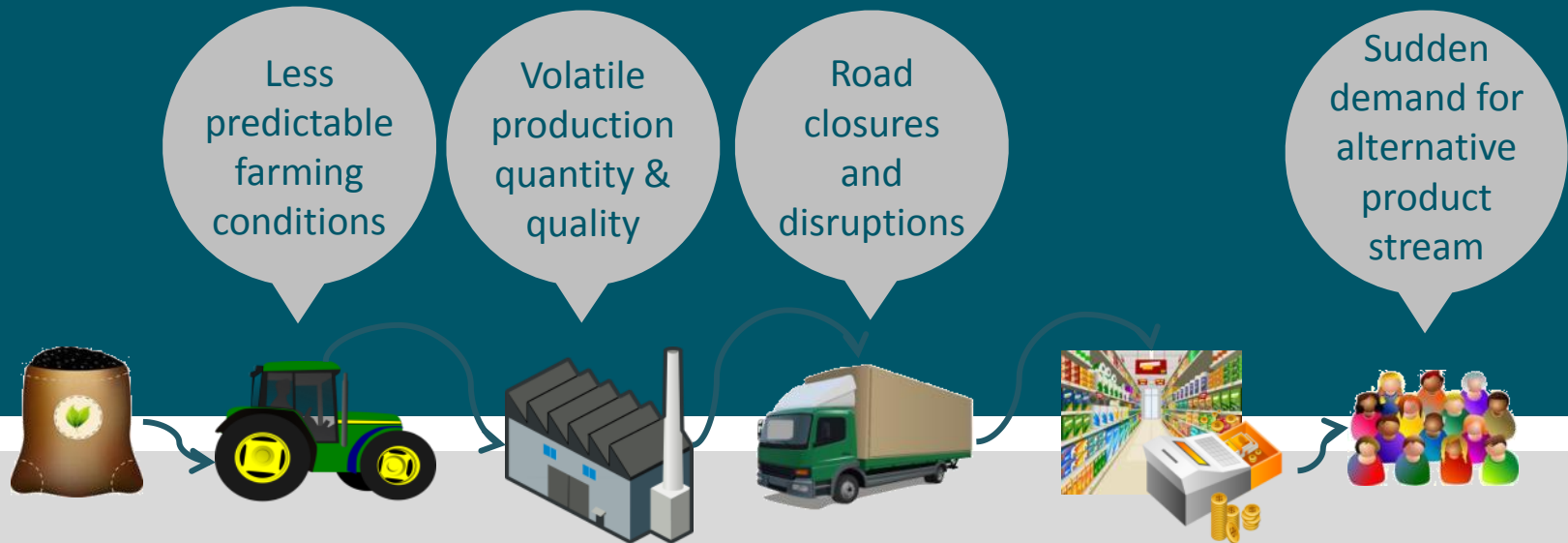
Research questions

- 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?**

*A collaboration between CSIRO, University of Queensland and University of Tasmania and received funding from the Australian Government.

Impacts of climate change and variability on chains

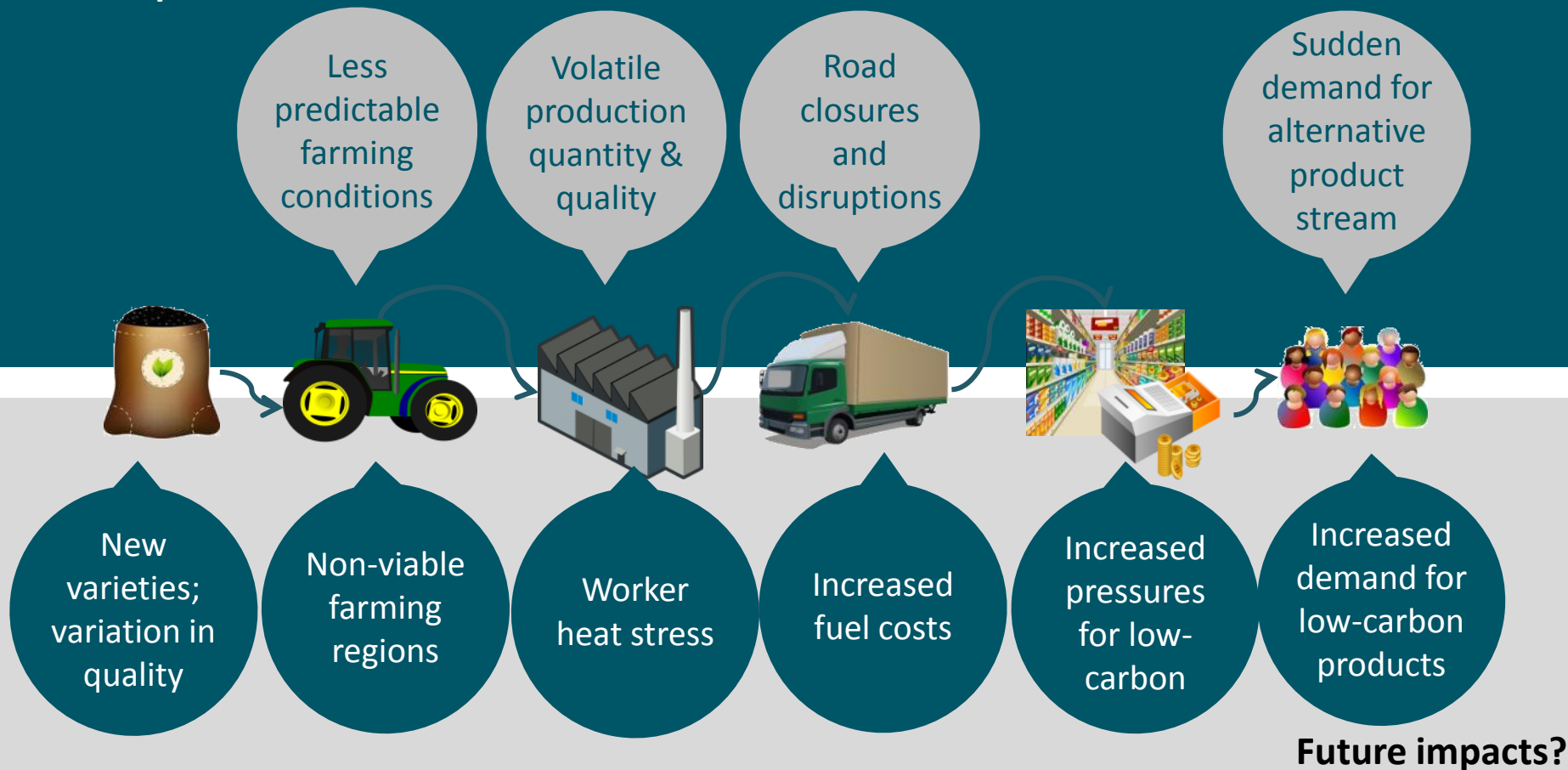
Current impacts



Future impacts?

Impacts of climate change and variability on chains

Current impacts



Consumer survey results

Five segments of consumers

8%

Sceptics

16%

Abdicators

31%

Undecided

30%

Eco-
friendly

14%

Eco-
warriors

Five segments of consumers

8%

Sceptics

16% Abdicators

31% Undecided

30% Eco-friendlies

14% Eco-warriors

50%
Isn't happening

66%
A natural fluctuation

52%
A natural fluctuation

72%
Largely caused by humans

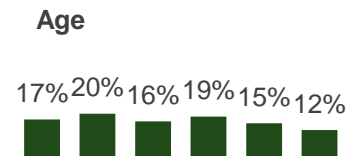
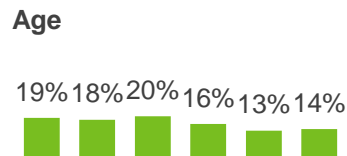
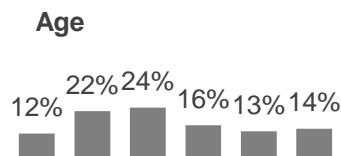
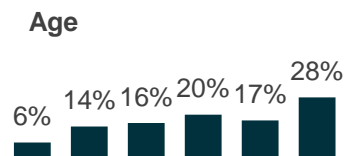
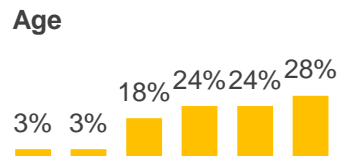
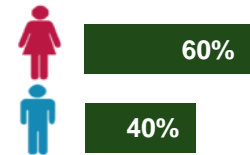
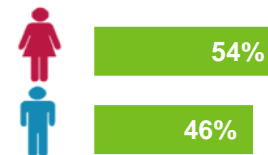
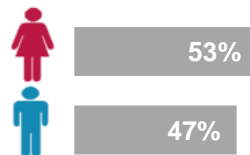
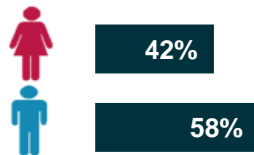
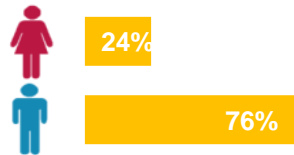
89%
Largely caused by humans

34%
A natural fluctuation

13%
Unsure whether it is happening

34%
Largely caused by humans

22%
A natural fluctuation



"Fitted solar power, but to save money, not to save the planet."

"We generally have a healthy and environmentally-friendly household regardless of climate change."

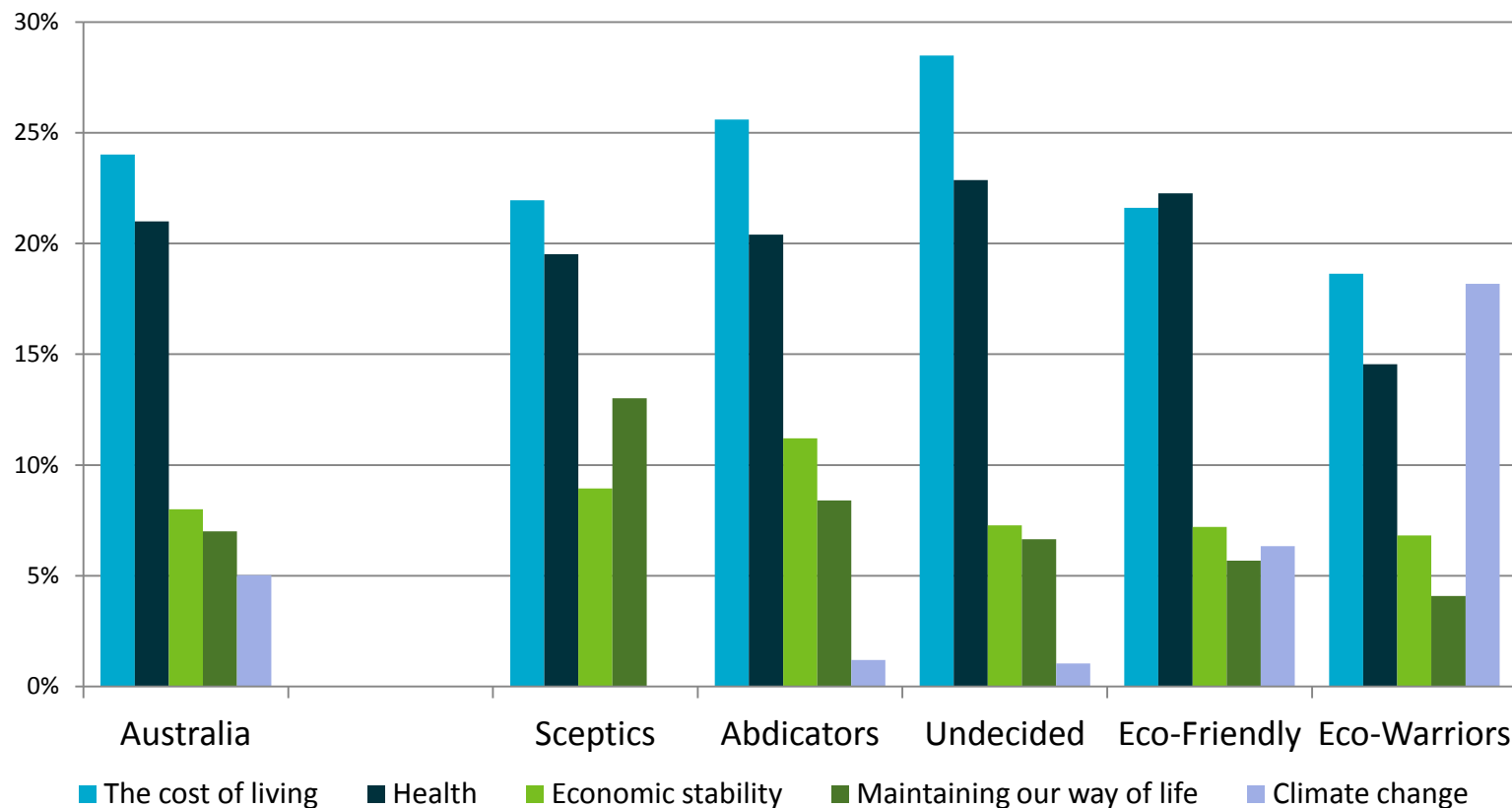
"We have reduced water consumption, reduced power usage, installed solar panels, recycle and made gardens more water wise."

"I have changed to green cleaning products and grow my own fruit and vegetables to reduce my personal impact on the supply chain."

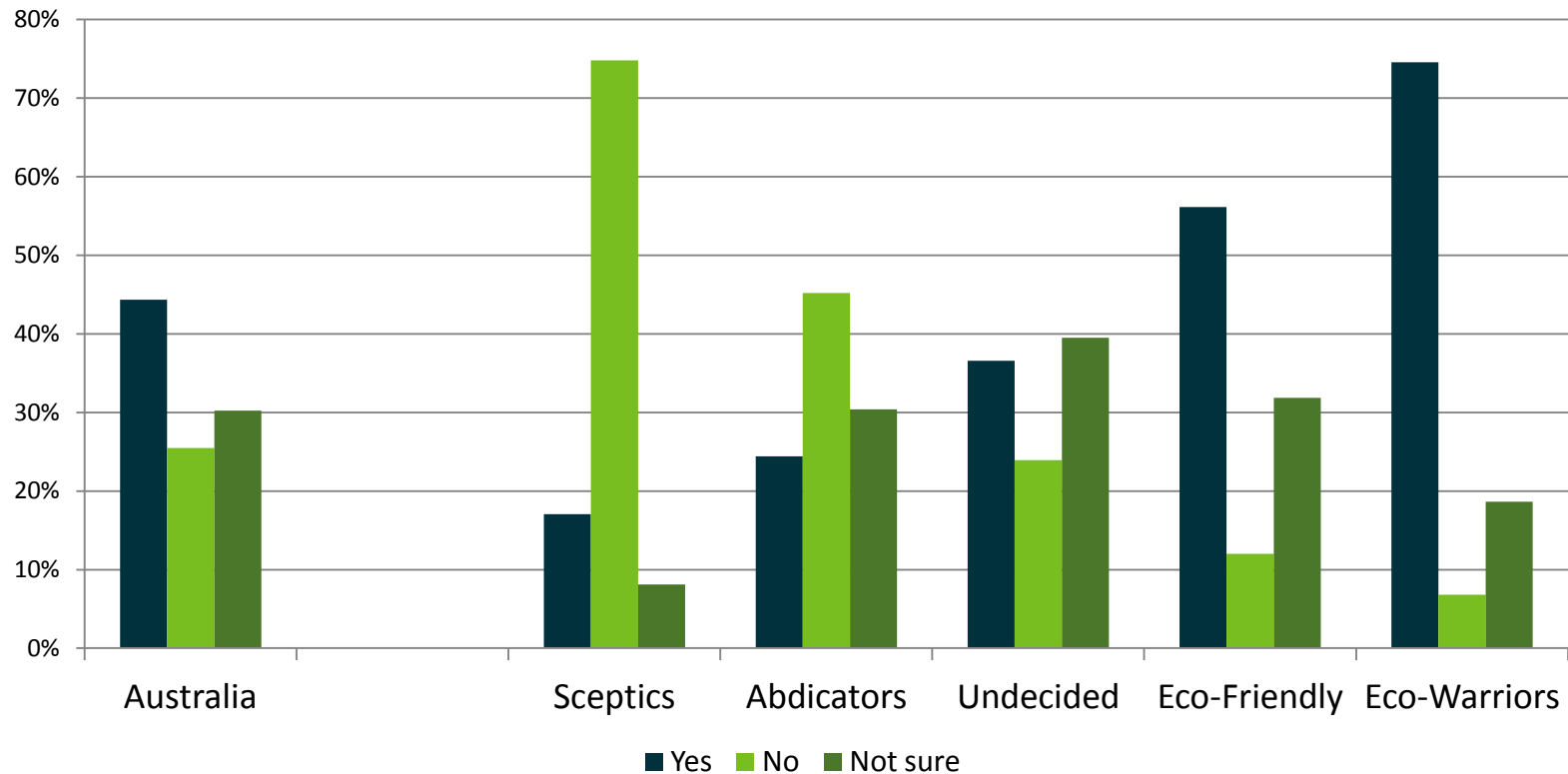
"I became a vegan due to climate change. We educate our children about how to be resilient, we buy second hand, ferment our own probiotics and are saving up for a small wind turbine to generate electricity."

Climate change is not high priority

Climate change against our most important social issues (N=1532)

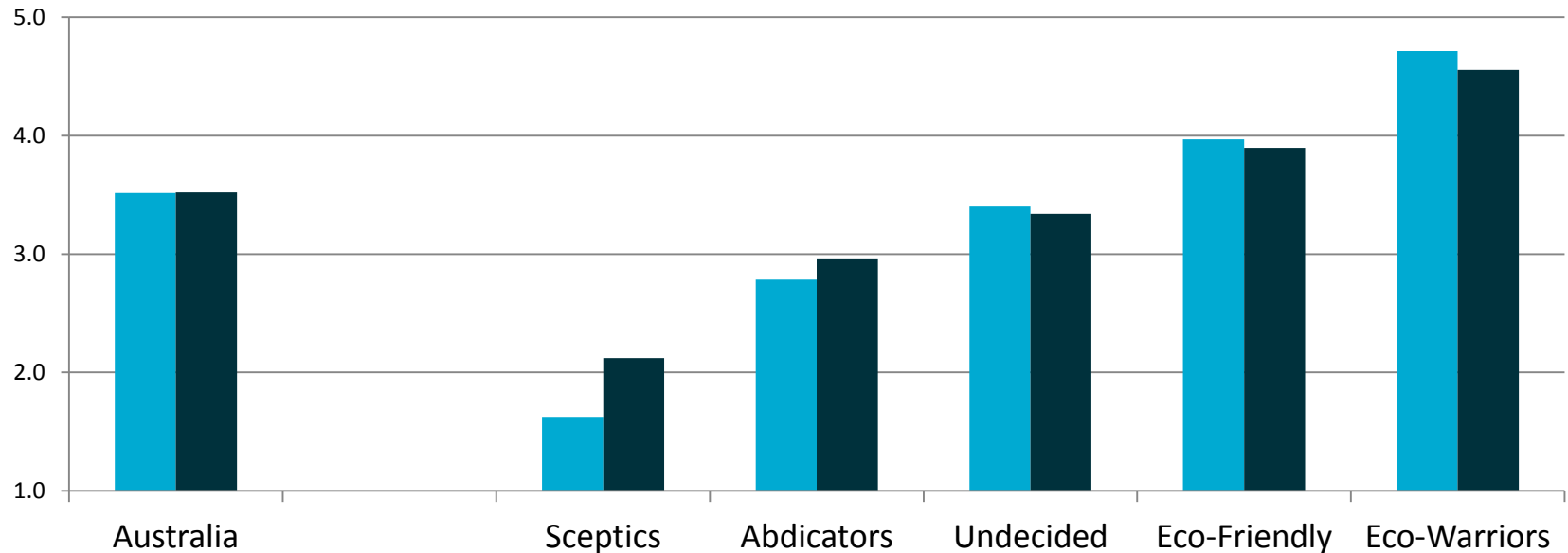


Is there anything you have done to adapt to climate change? (N=1532)



Thoughts on adaptation

Mean levels of agreement, N=1532

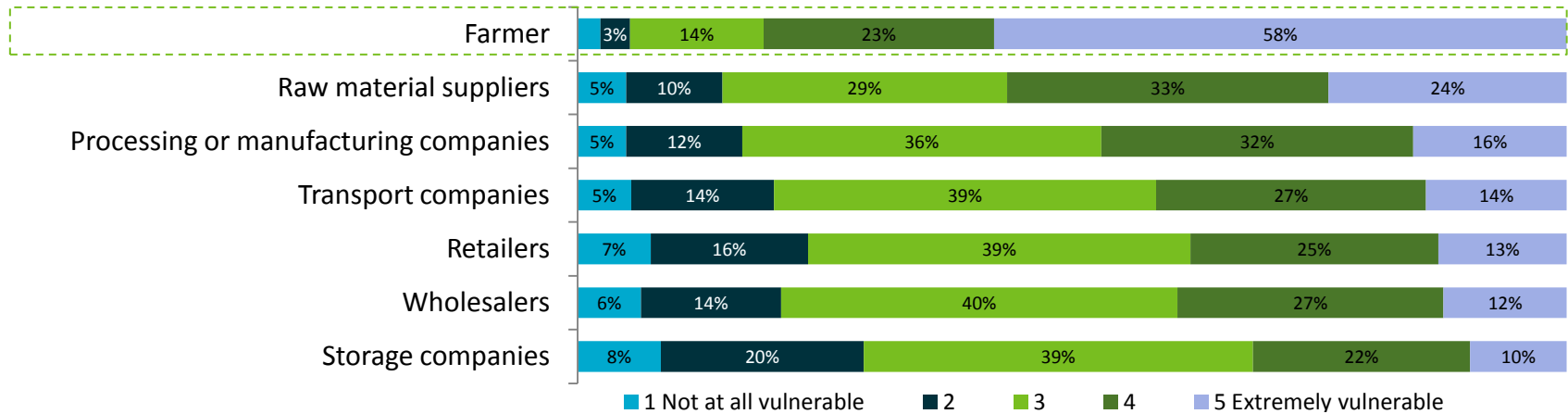


■ When considering the challenges of climate change it is important to look for things that I can address and change in my everyday life

■ I tend to think differently these days about what is acceptable and sustainable and not acceptable with respect to consumer products and packaging, and consumption in general

Consumers think that the ‘big players’ should take responsibility for adapting to the impacts of climate change (N=1532)

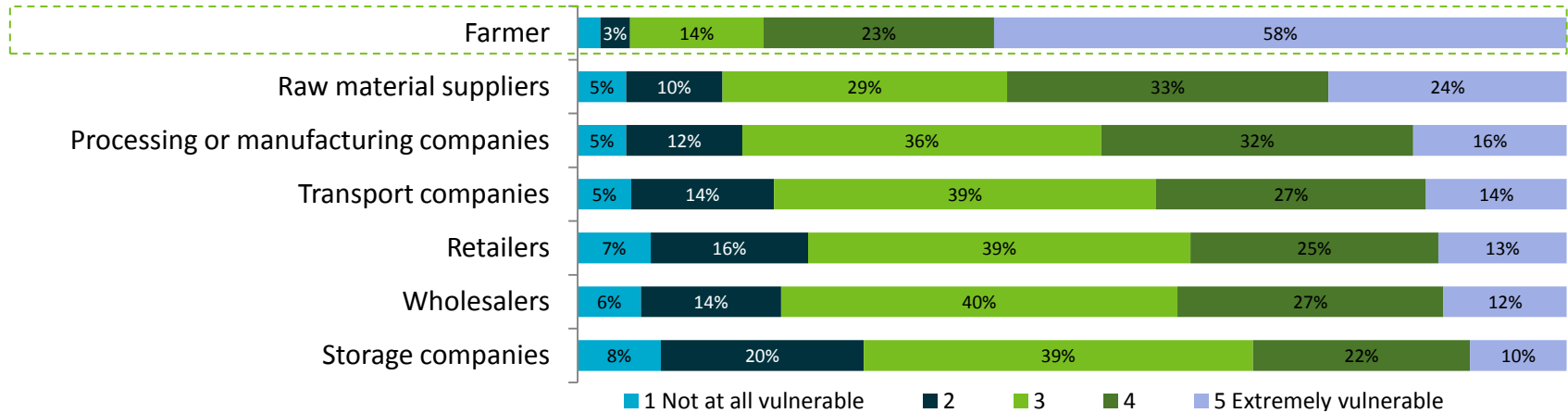
Who is vulnerable?



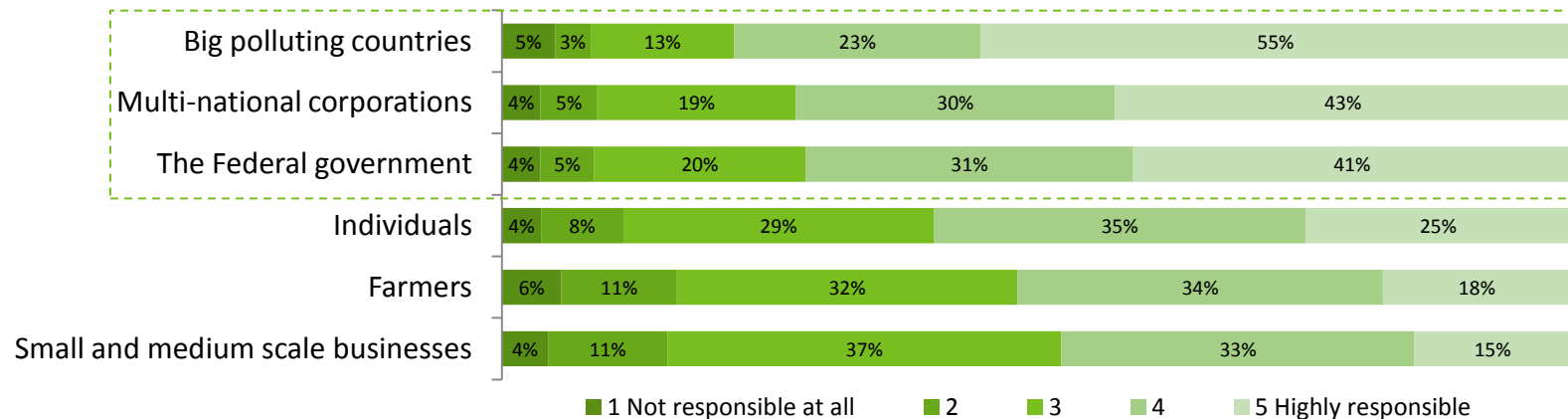
Who is responsible for adapting?

Consumers think that the 'big players' should take responsibility for adapting to the impacts of climate change (N=1532)

Who is vulnerable?



Who is responsible for adapting?



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

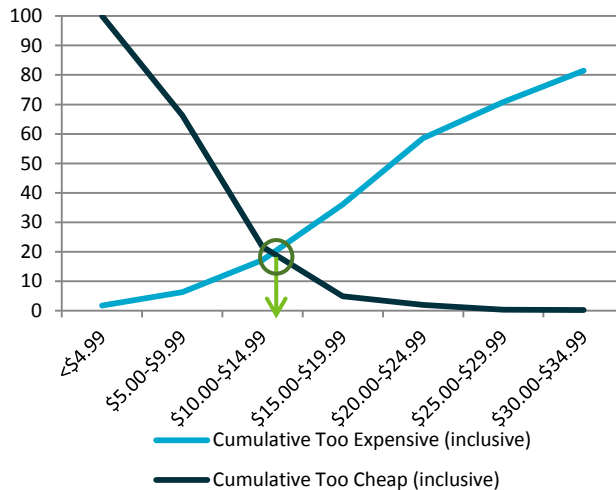
No. of bottles per purchase by 50%

\$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



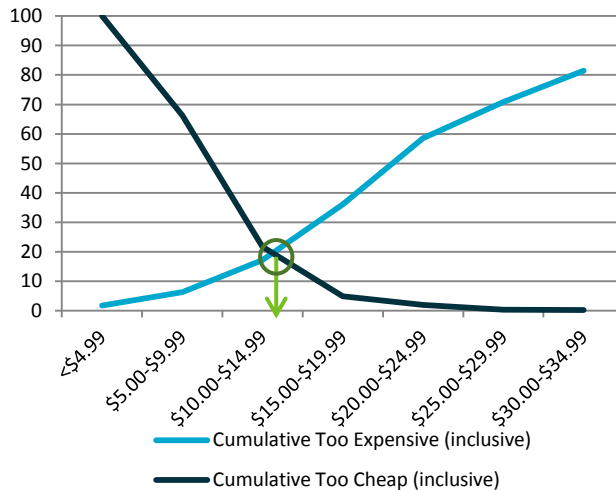
30% Most likely to purchase Sav Blanc from another region

24% Most likely to substitute another variety of wine

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

Adaptation scenarios for wine

Scenario: Favourite Sauvignon Blanc temperature affected

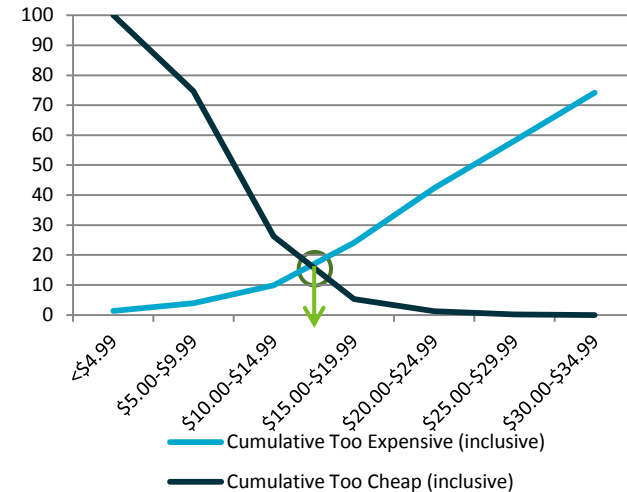


30% Most likely to purchase Sav Blanc from another region

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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