



Photo Credits: Michael E., flickr.com

# Who moved my pinot?

## Consumer perspectives of climate adaptation

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[www.csiro.au](http://www.csiro.au)



An Australian Government Initiative



# Outline

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

# Adaptive value chain approaches\*

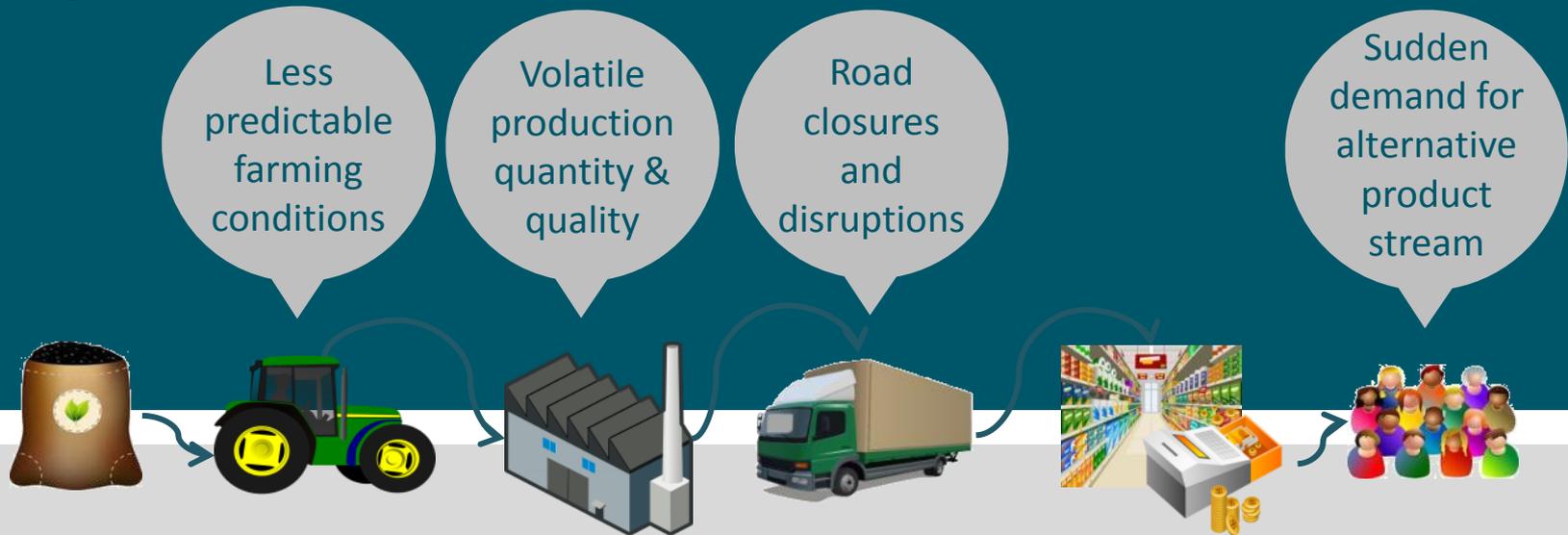
## Research questions

- 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

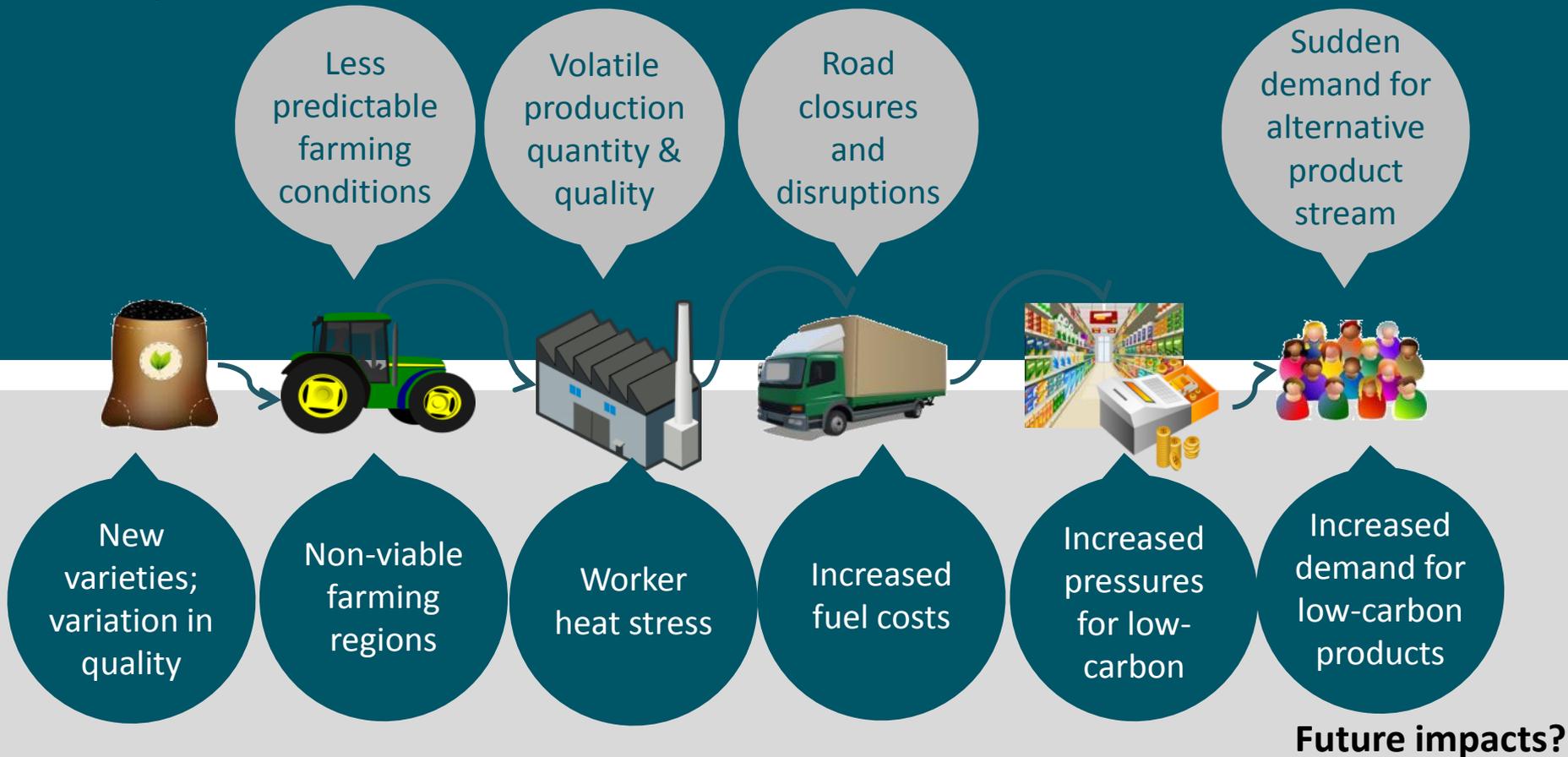
## Current impacts



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

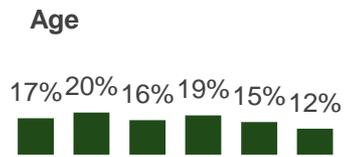
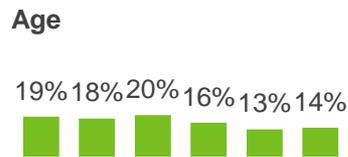
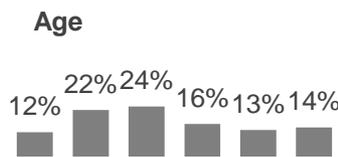
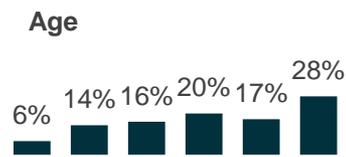
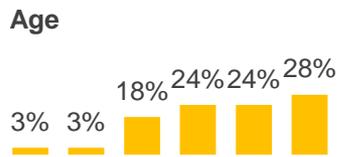
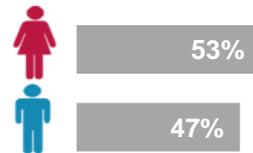
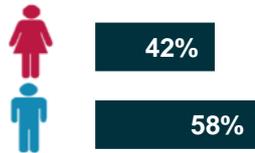
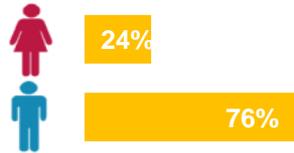
89%  
Largely caused by humans

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."*

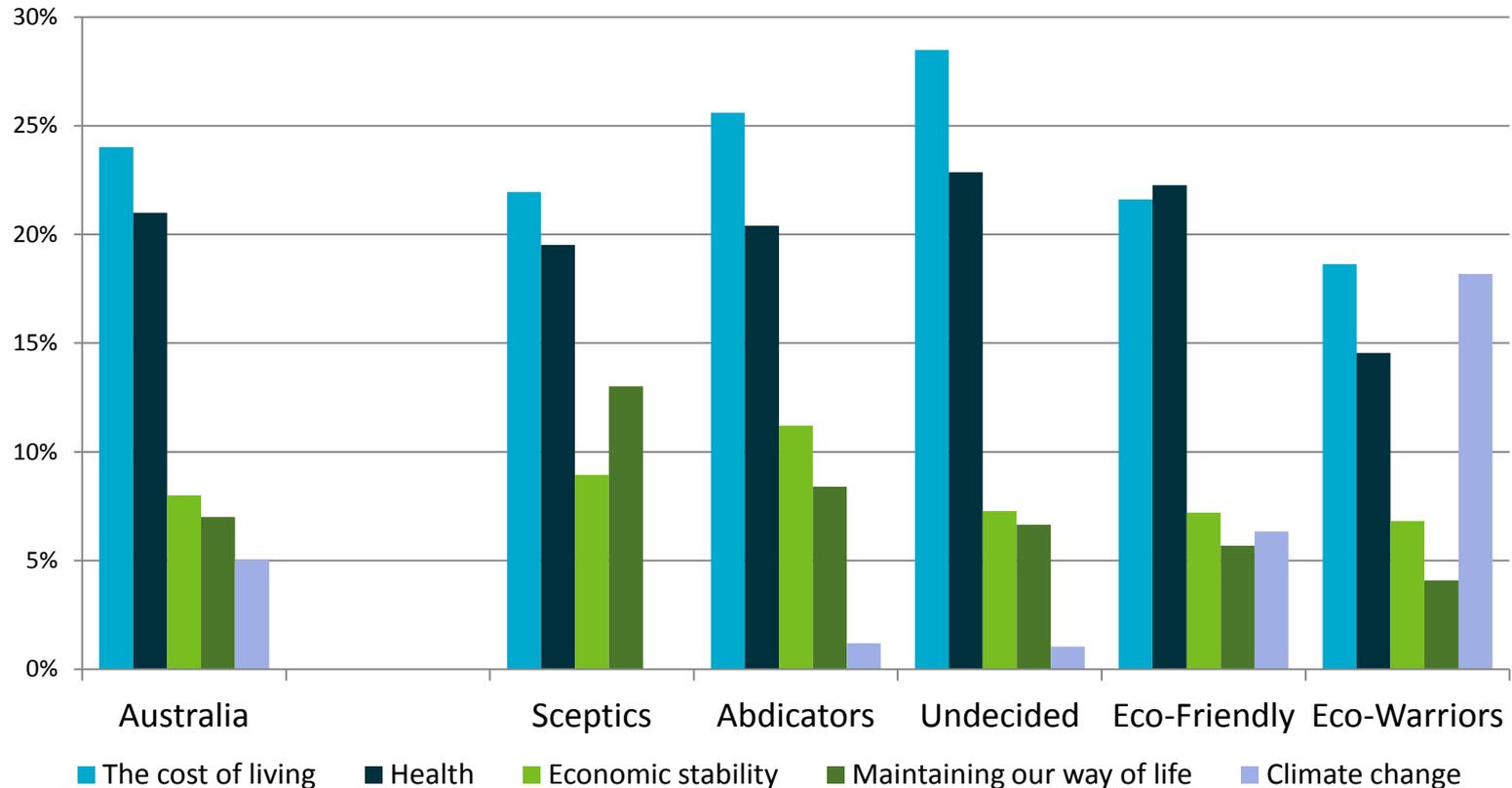
*"We have reduced water consumption, reduced power usage, installed solar panels, recycle and made gardens more water wise."*

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

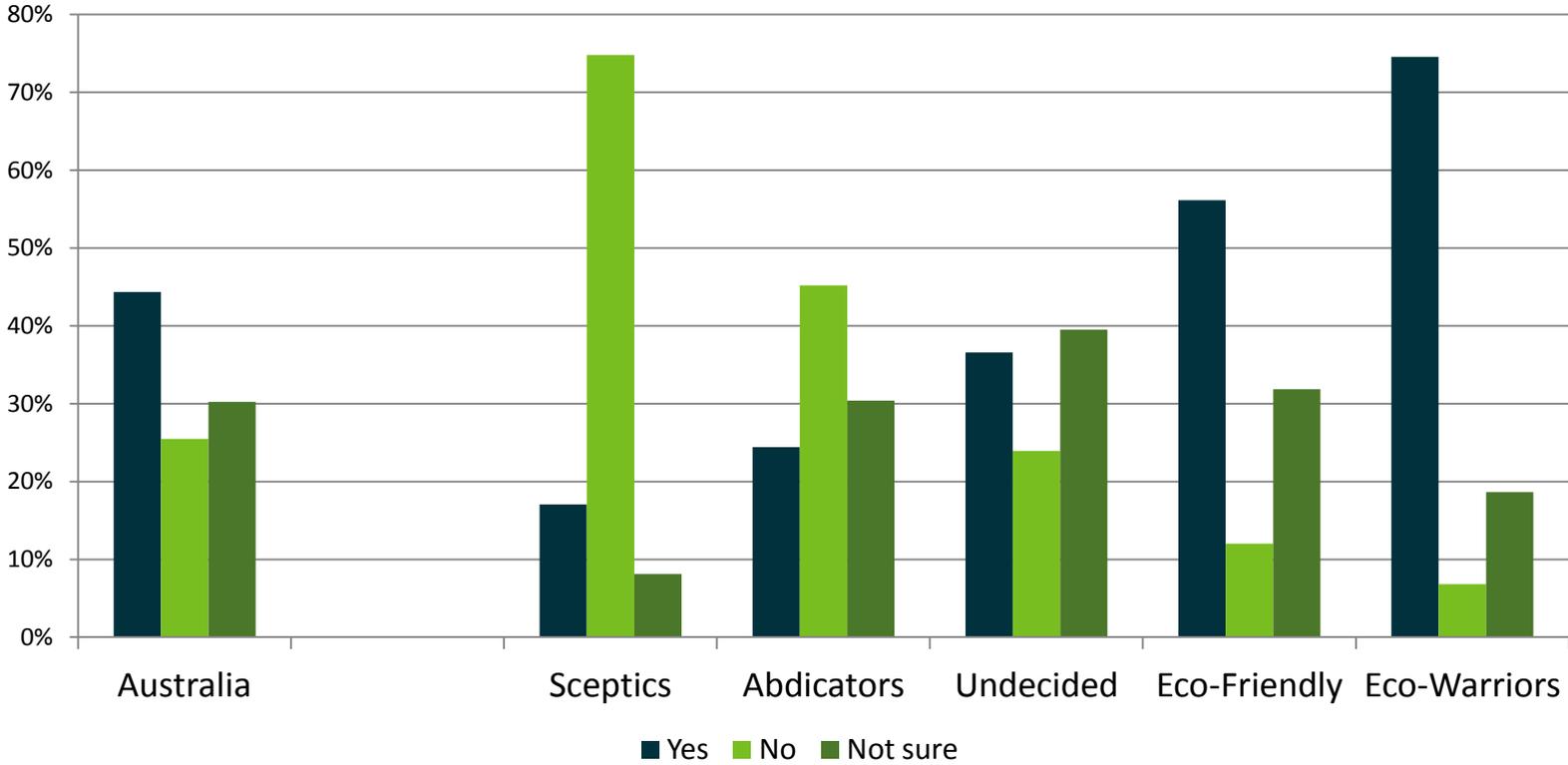
*"I became a vegan due to climate change. We educate our children about how to be resilient, we buy second hand, ferment our own probiotics and are saving up for a small wind turbine to generate electricity."*

# Climate change is not high priority

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

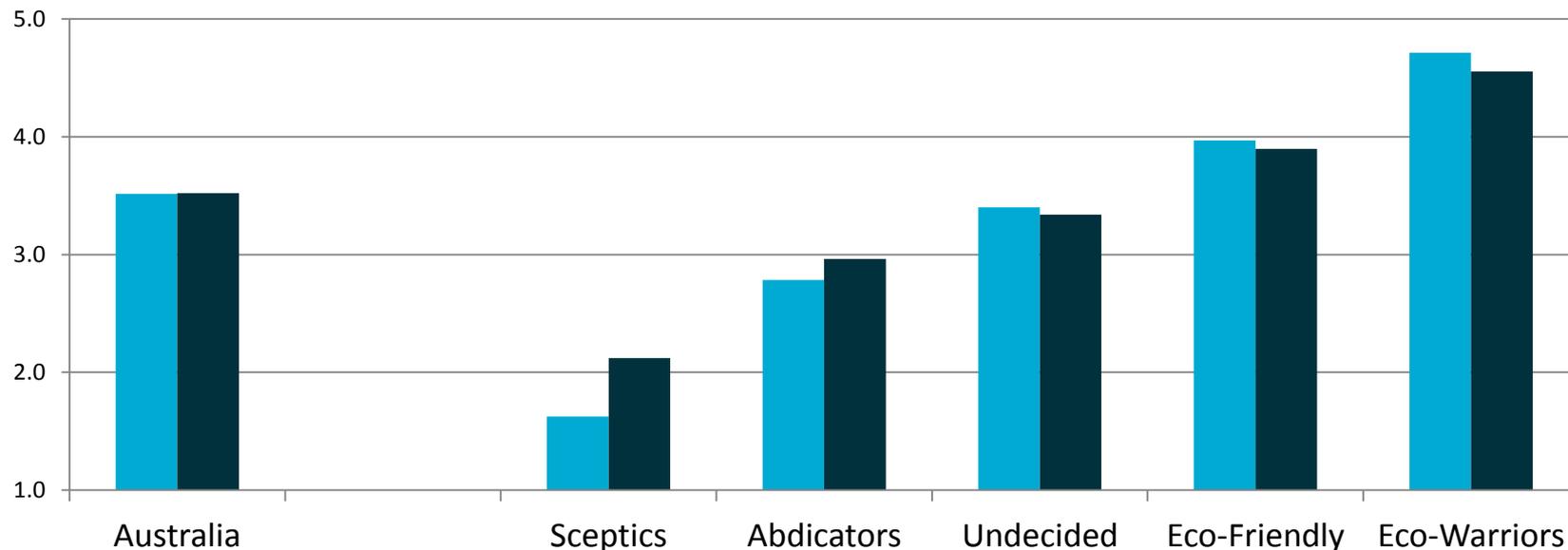


# Is there anything you have done to adapt to climate change? (N=1532)



# Thoughts on adaptation

Mean levels of agreement, N=1532

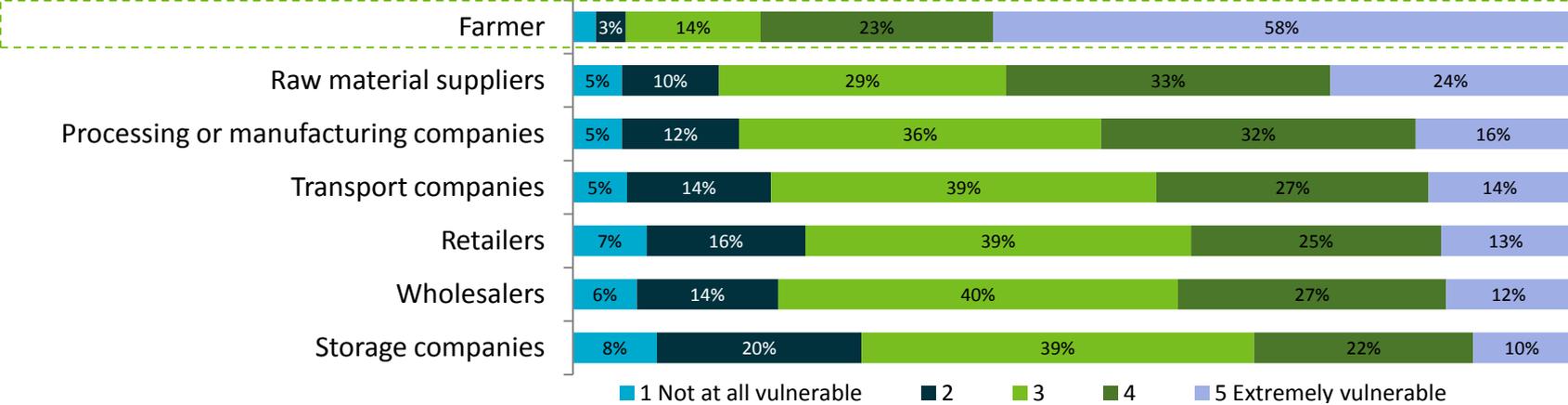


■ When considering the challenges of climate change it is important to look for things that I can address and change in my everyday life

■ 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?

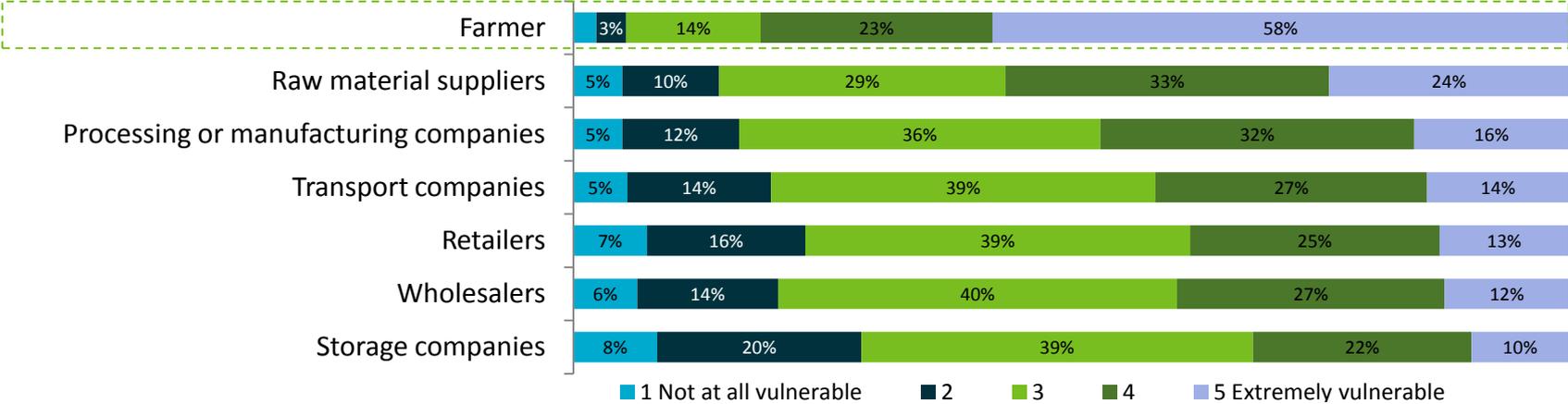


## Who is responsible for adapting?

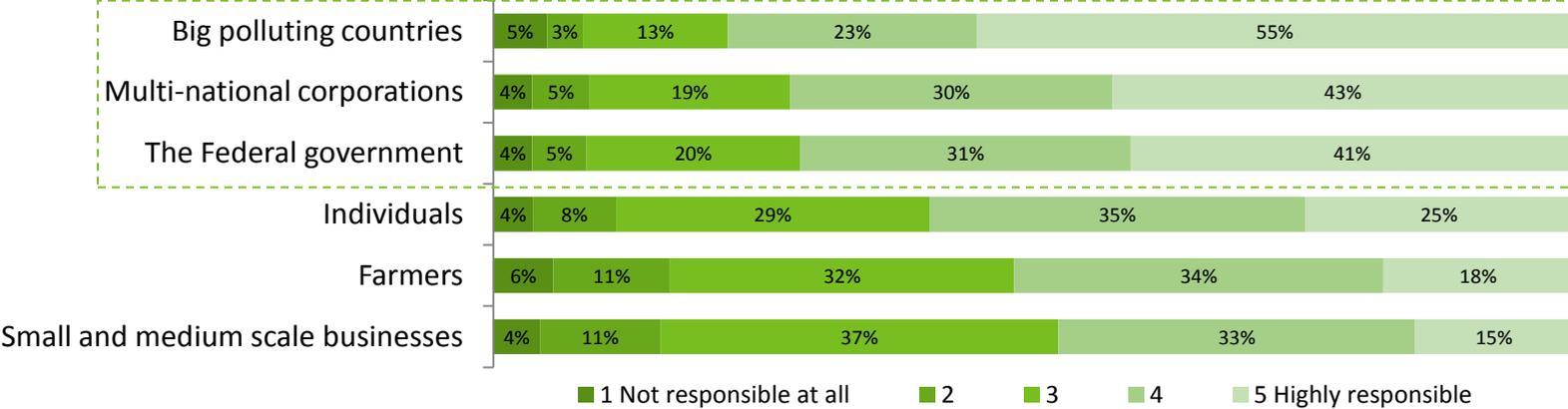


# Consumers think that the 'big players' should take responsibility for adapting to the impacts of climate change (N=1532)

## 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**

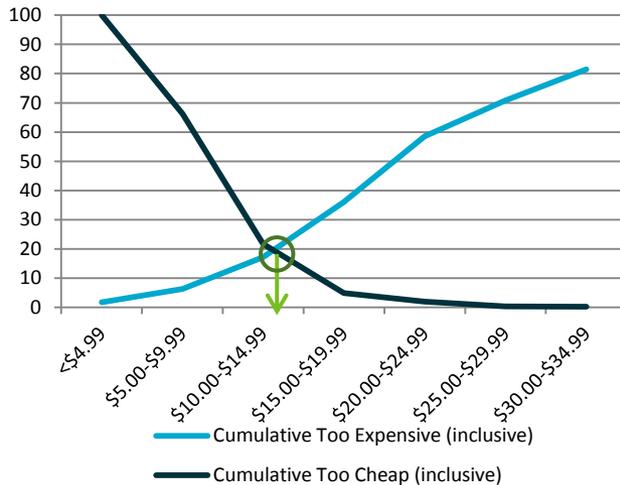
No. of bottles per purchase by 50%

**\$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



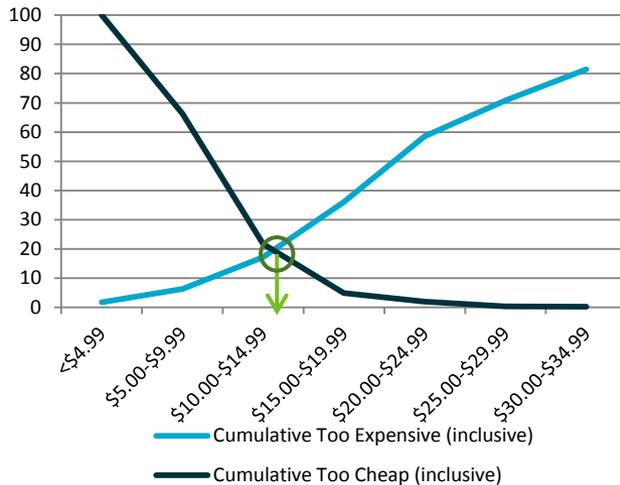
**30%** Most likely to purchase Sav Blanc from another region

**24%** Most likely to substitute another variety of wine

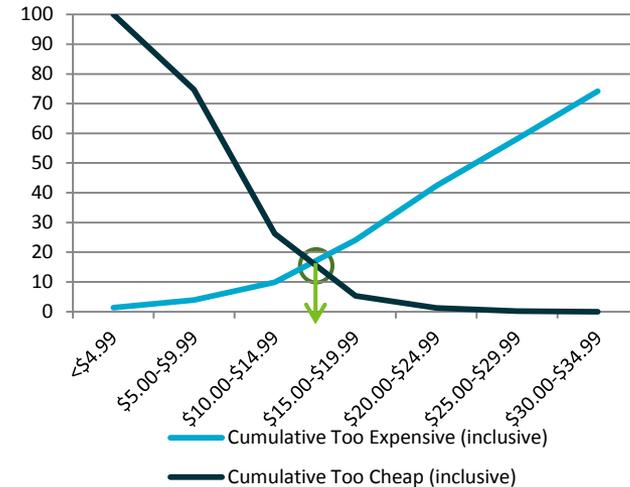
**EW** Most open to continuing to purchase Sav Blanc from the Adelaide Hills

# Adaptation scenarios for wine

Scenario: Favourite Sauvignon Blanc temperature affected



Scenario: Award-winning Margaret River to Stanthorpe



**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

**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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