

CONSUMER RESEARCH FINDINGS ON ELEPHANT, PANGOLIN, RHINO AND TIGER PARTS AND PRODUCTS IN CHINA

BACKGROUND

This consumer research* is part of the USAID Wildlife Asia activity**. It aims to provide information on knowledge, attitudes and practices of the general population in relation to purchasing and using elephant, pangolin, rhino and tiger parts and products. The research probes perceptions, beliefs, motivations and other influencing factors that drive the desire for specific wildlife parts and products in China.

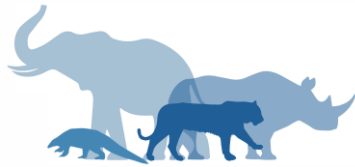


The research study included the following data collection

1. Quantitative survey of **1,800 respondents in six selected cities** classified as past 12 months buyers of one of four species surveyed.
2. Respondents were located in the following six cities: Tier 1 - Beijing, Shanghai, Guangzhou and Tier 2 - Harbin, Kunming, Nanning.

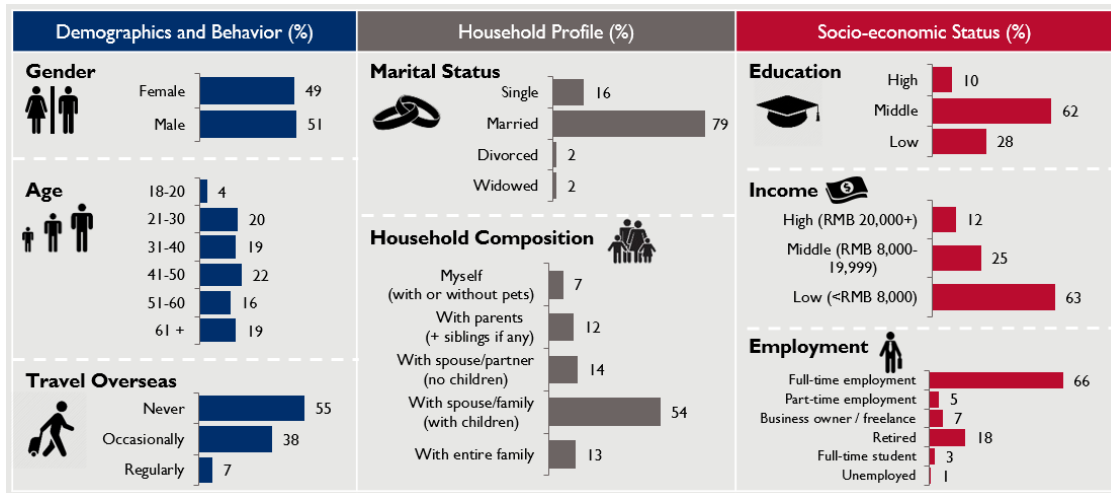
* The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

** The USAID Wildlife Asia activity works to address wildlife trafficking as a transnational crime. The activity aims to reduce consumer demand for wildlife parts and products, strengthen law enforcement, enhance legal and political commitment, and support regional collaboration to reduce wildlife crime in Southeast Asia, particularly Cambodia, China, Laos, Thailand and Vietnam. USAID Wildlife Asia focuses on four species: elephant, rhinoceros, tiger and pangolin.



KEY FINDINGS

TOTAL RESPONDENTS' SOCIO-DEMOGRAPHIC PROFILE

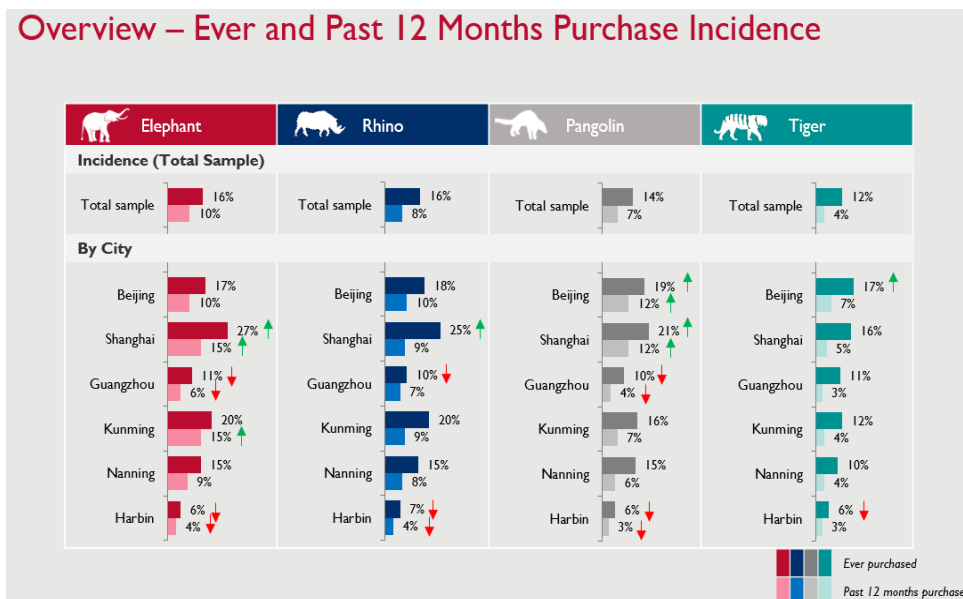


Respondents to the survey are both male and female, a majority have an income under RMB 8,000 (approx. \$1,250), and most are employed. Most respondents, have a middle or high school education, are married with children and 55 percent have never traveled outside Mainland China. (Note: the nationwide median income in China is RMB 6,580 in Q1 2018. Source: National Bureau of Statistics of China).

PURCHASING OVERVIEW

PURCHASE INCIDENCE (PAST 12 MONTHS)

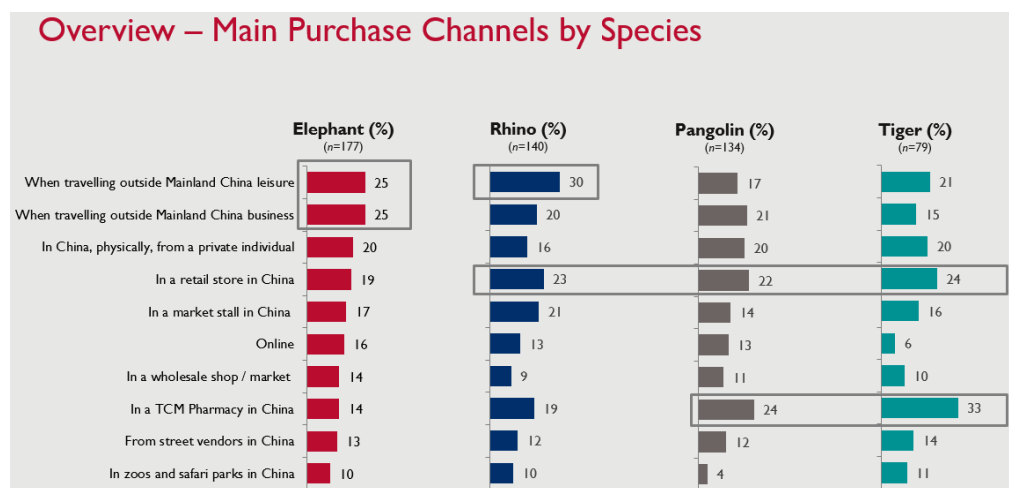
Overview – Ever and Past 12 Months Purchase Incidence



Among all respondents, 10 percent purchased elephant, eight percent rhino, seven percent pangolin, four percent tiger parts or products in the past 12 months. The purchase of parts and/or products of rhino and tiger is relatively homogenous at the city level. For elephant and pangolin, however, there are underlying differences at the city level (lowest in Guangzhou and Harbin, significantly higher in Shanghai).

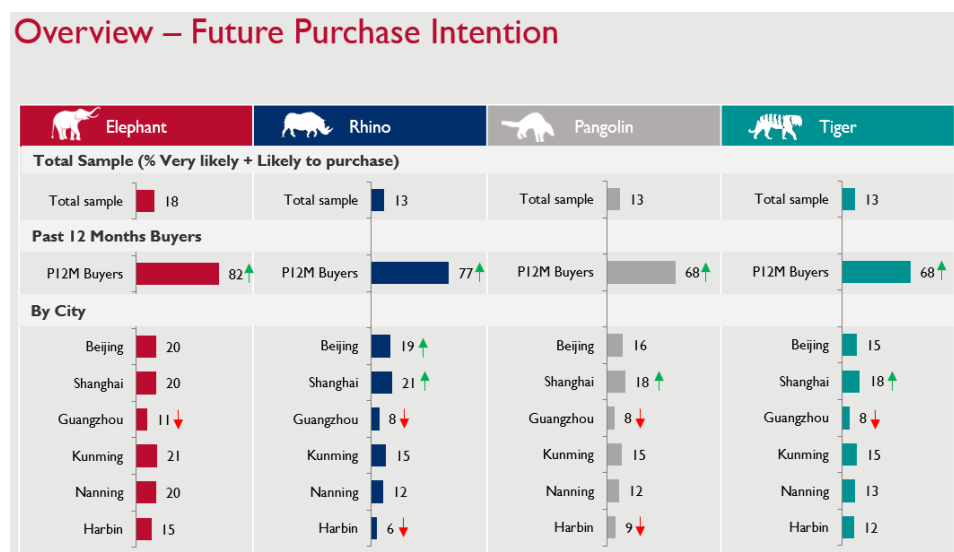
The main parts purchased by species are ivory (93 percent) for elephant, horn (84 percent) for rhino and scales (78 percent) for pangolin. For tiger, the main parts purchased are both bones (47 percent) and skin (32 percent).

PURCHASE CHANNELS



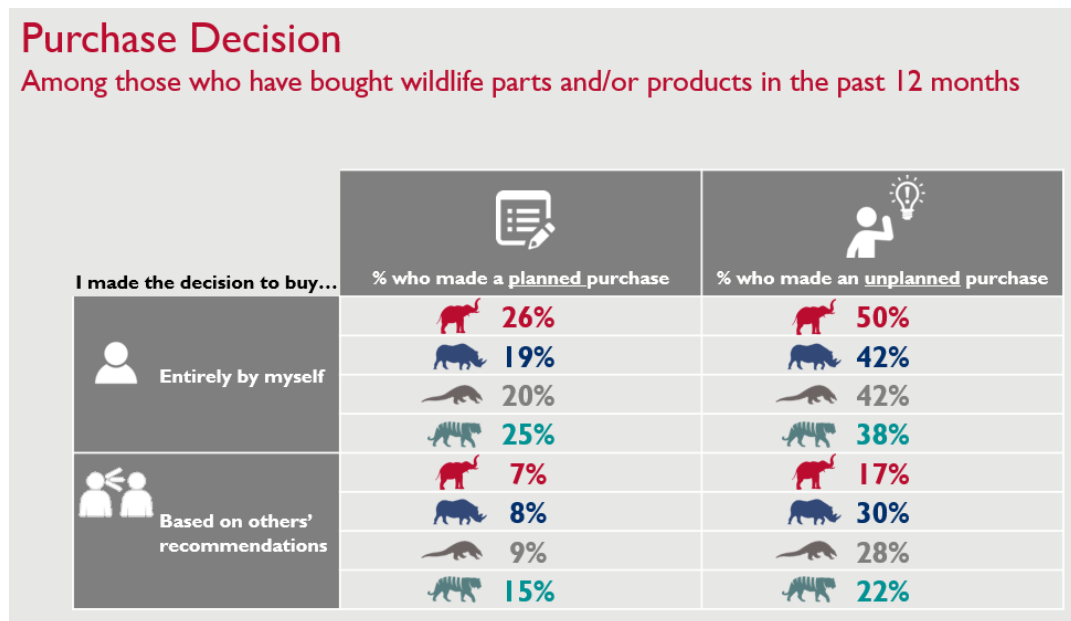
Parts and/or products of pangolin and tiger are generally purchased in Traditional Chinese Medicine (TCM) pharmacies and retail stores in China. For rhino, however, while retail stores in China remain a popular channel of purchase, a significant proportion of buyers (30 percent) purchase them when traveling outside Mainland China for leisure. For elephant parts and/or products, important purchase channels are during travel outside the Mainland for leisure (25 percent) or for business (25 percent).

PURCHASE INTENTION (FUTURE)



Among the general population, less than 20 percent intend to purchase elephant, rhino, pangolin or tiger parts and/or products in the future. However, among those who bought parts/products in the past 12 months, the majority intend to purchase again in the future.

PURCHASE DECISIONS



Across species, purchases were unplanned and recommendation from others was an influencing factor to purchases.

ACCEPTABILITY



Among the general population, a small proportion find owning or buying wildlife parts and products socially acceptable (20 percent for elephant, following by rhino and tiger, both at 15 percent and 14 percent for pangolin). However, among respondents buying wildlife products in the past 12 months, there is a much higher acceptability level to buying or owning these wildlife parts and products (85 percent for elephant, followed by rhino at 76 percent, tiger at 69 percent and pangolin at 67 percent).

AWARENESS OF MESSAGES



Only 19 percent have heard of awareness of messages on the topic of stopping consumption of animal parts and/or products or on animal protection in the past six months. Awareness is highest in Beijing (26 percent) and lowest in Harbin (14 percent).

PERCEPTIONS & AWARENESS OF LEGALITY

Among the general population, many are not aware about the current laws or regulations around the sale of wildlife parts and/or products.

- Awareness of the Ivory Ban
 - Forty-four percent of respondents had heard about the Ivory Ban. There is generally higher awareness in Tier 1 cities (Beijing – 49 percent, Shanghai – 53 percent, Guangzhou – 47 percent) than in Tier 2 cities (Kunming, - 41 percent Nanning – 37 percent, Harbin – 38 percent).
 - Ninety-two percent of respondents agree with the Ivory Ban.
- Awareness of the Revised Wildlife Protection Law
 - Forty-four percent of respondents had heard of the revised wildlife Protection Law. There is generally higher awareness is in Tier 1 cities (Beijing -54 percent, Shanghai – 51 percent, Guangzhou – 47 percent) than in Tier 2 cities (Kunming, - 38 percent, Nanning – 38 percent, Harbin – 38 percent)



KEY FINDINGS : MOTIVATORS & DRIVERS

ELEPHANT

Among those who bought elephant parts and/or products in the past 12 months, the four main drivers to purchase are perceptions of (i) rarity, (ii) purity and spirituality, (iii) beauty and (iv) good luck or good fortune.

RHINO

Among those who bought rhino parts and/or products in the past 12 months, the top two drivers to purchase are perceptions that rhino (i) brings good health/well-being and (ii) cures illness. The perceived health benefits of rhino are that it makes people calmer and that it both strengthens and detoxifies the body.

PANGOLIN

Among those who bought pangolin parts and/or products in the past 12 months, the top two drivers to purchase are beliefs that pangolin parts (i) cure illness and (ii) bring good health/well-being. The perceived health benefits of pangolin are that it is nutritious for the body, helps new mothers produce milk and releases dryness and heat from the body.

TIGER

Among those who bought tiger parts and/or products in the past 12 months, the top four drivers to purchase are perception that tigers (i) are rare, (ii) cure illness, (iii) bring good health and (iv) improve sexual prowess. The perceived health benefits of tiger are that it strengthens the body, clears “wind-dampness” and relieves muscle/bone pain.

USAID RDMA

Jedsada Taweekan

Tel: +662 257-3285

Fax: +66-2-257-3099

Email: jtaweekan@usaid.gov

info-rdma@usaid.gov

<http://www.usaid.gov/asia-regional>

USAID WILDLIFE ASIA

Eleanora De Guzman

Demand Reduction Team Lead

Tel: +66 2 015 5941 – 43 ext. 118

Email: eleanora.deguzman@usaidwildlifeasia.org

<http://www.usaidwildlifeasia.org/>

USAID WILDLIFE ASIA

MA Chenyue (YK)

Tel: +86 139 1080 4800

Email: cma@usaidwildlifeasia.org

cma@ifaw.org