



QUANTITATIVE AND QUALITATIVE STUDY OF CONSUMER DEMAND FOR WILDLIFE PRODUCTS IN THAILAND

USAID WILDLIFE ASIA

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BANGKOK, THAILAND

OUTLINE

- STUDY OBJECTIVES & APPROACH
- GENERAL POPULATION – QUANTITATIVE
 - USAGE & OWNERSHIP (INCIDENCE)
- WILDLIFE PRODUCT USERS/CONSUMERS – QUANT & QUAL
 - ELEPHANT IVORY
 - TIGER
- ATTITUDE & COMMUNICATIONS (CONSUMERS)
- SUMMARY

OBJECTIVES

1

To identify user profiles and motivations associated with ivory and tiger products

2

To determine usage incidence and future purchase tendency

3

To obtain baseline data to serve as tracking indication for demand reduction initiatives

4

To evaluate campaign and communications exposure

APPROVALS

This study is the first consumer demand study with ethical approval from Chulalongkorn University (local approval) and FHI 360 (international approval).

USAID Wildlife Asia guided development and approved the following:

- Study protocol and Informed Consent forms and procedures
- Study instruments (survey questionnaire, FGD and IDI guides)
- Translations
- Data analysis plan
- Data tables
- Research Reports

USAID Wildlife Asia monitored data collection (surveys, FGDs, IDIs).

Glossary of Terms

B2B	Bottom two boxes
CAPI	Computer-assisted personal interview
F2F	Face to face
FGD	Focus group discussion
IDI	In-depth interview
P3Y	Past three years
QL	Qualitative
QT	Quantitative
SES	Socioeconomic status
T2B	Top two boxes
UPC	Upcountry (any other provinces apart from Greater Bangkok)

METHODOLOGY - QUALITATIVE

	IVORY	TIGER
Methodology	Focus group Discussions (FGDs)	In-Depth Interviews (IDIs)
Coverage	Bangkok, Chiang Mai, Surin	Bangkok, Chiang Mai, Surin
Respondent classification	<ul style="list-style-type: none"> • 50% male and 50% female aged 25-45 years old • Mix income level ABC • In Chiang Mai and Bangkok, there were 1-2 online purchasers in each purchaser group. 	<ul style="list-style-type: none"> • Mix of men & women aged 25-45 years old • Mix of income levels within SEC ABC • Potential or current purchasers of products made of tiger parts • Must be purchase decision makers
	<ul style="list-style-type: none"> • Purchased ivory in past 3 years (5 FGDs) • Been gifted with ivory products in past 3 years (1 FGD) 	<ul style="list-style-type: none"> • Believers of tiger's spiritual; benefits (n=6) • Believers of tiger's medicinal benefits (n=3) • Online (potential) purchasers (n=5)

METHODOLOGY - QUANTITATIVE

Remark: P3Y was used as the criteria because of its balance between the limitation due to low incidence for a shorter timeframe and less precise recall for a longer one.

	MAIN SAMPLE (GENERAL POPULATION) (n=1,000)	BOOSTER OF CONSUMERS (n=550)
Methodology	Online – mobile panel	Self-completed CAPI, Referrals, F2F
Coverage	Nationwide (Greater Bangkok + 12 Urban UPC)*	Nationwide (Greater Bangkok + 12 Urban UPC)*
Respondent classification	18-64 years old SES ABC	<ul style="list-style-type: none"> • Purchased ivory in past 3 years • Been gifted with ivory products in past 3 years • Would like to buy ivory products • Purchased/used tiger parts and products in past 3 years
Collection period	15 Jan – 11 Feb 2018	19 Jan – 18 Feb 2018

* Provinces covered:

Greater Bangkok

- Bangkok
- Samut Prakarn
- Nontaburi
- Pathumthani

Central

- Rayong
- Samutsakorn
- Chonburi

North

- Chiang Mai
- Phitsanuloke
- Nakorn Sawan

Northeast

- Khon Kaen
- Nakorn Ratchasima
- Ubon Ratchathani

South

- Suratthani
- Songkhla
- Nakorn Sri Thammarat

ANALYSIS

QUALITATIVE



QUANTITATIVE

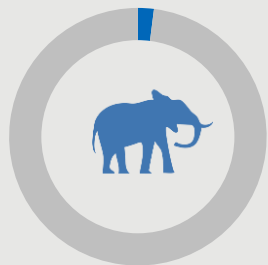


— General Population – Quantitative (QT)



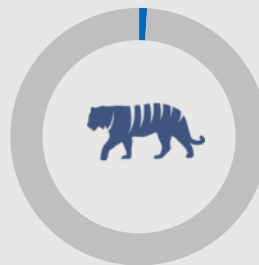
PRODUCT USAGE AND OWNERSHIP

The incidence of use of ivory products and tiger products among the Thai population is 2% and 1% respectively.



2%

Own or use **ivory** products



1%

Own or use **tiger** products

B1. Do you own or use any ivory products?
C1. Do you own or use any tiger products?

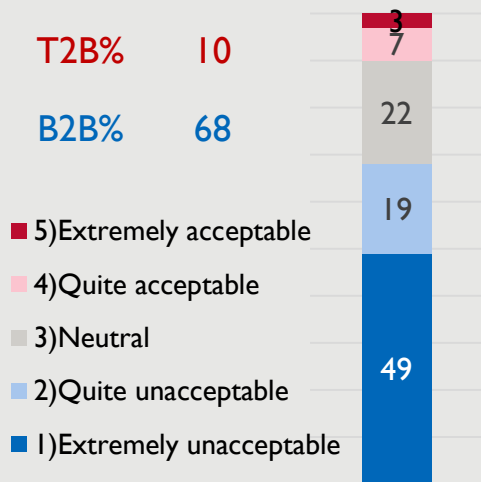
Base: Main Sample – All respondents n=1,000

IVORY PRODUCTS - PURCHASE TENDENCIES

Only 10 percent of Thais perceive the purchase/trade in ivory products as acceptable while 22% are neutral. Three percent say they will probably or definitely buy ivory in the future. Key barriers to future purchase are animal welfare followed by the threat of penalties.

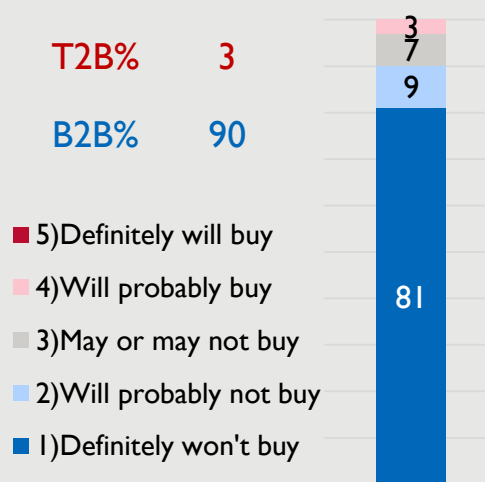
Acceptability

All respondents n=1,000



Purchase Intention

All respondents n=1,000



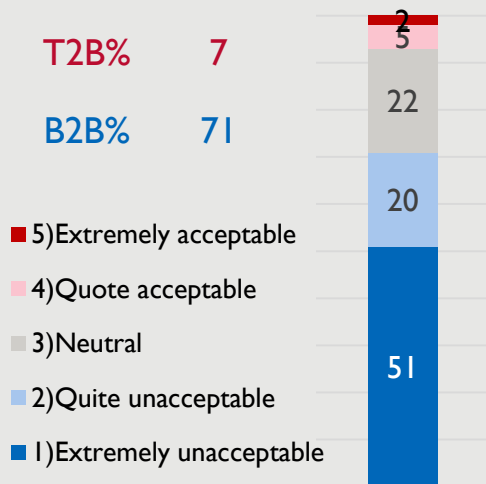
- D1. Personally, do you think buying the following products is acceptable among your friends and family or not?
 D2. How likely would you be to buy the following products in the future?

TIGER PRODUCTS - PURCHASE TENDENCIES

Only 7% think that purchasing tiger products is acceptable (T2B 7%) while 22% are neutral. Three percent say they will probably or definitely buy tiger products in the future. Key barriers to future purchase are tiger extinction, cruelty to tigers, and the law/penalties.

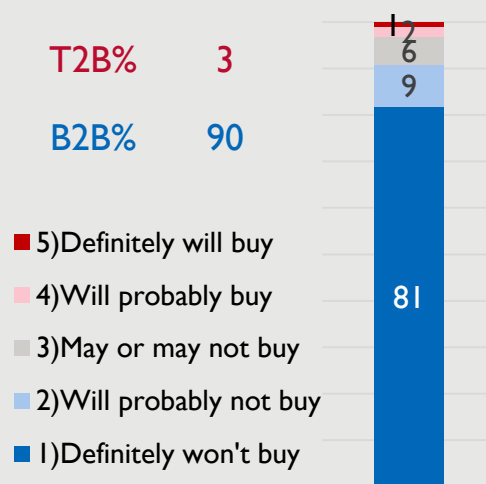
Acceptability

All respondents n=1,000



Purchasing Intention

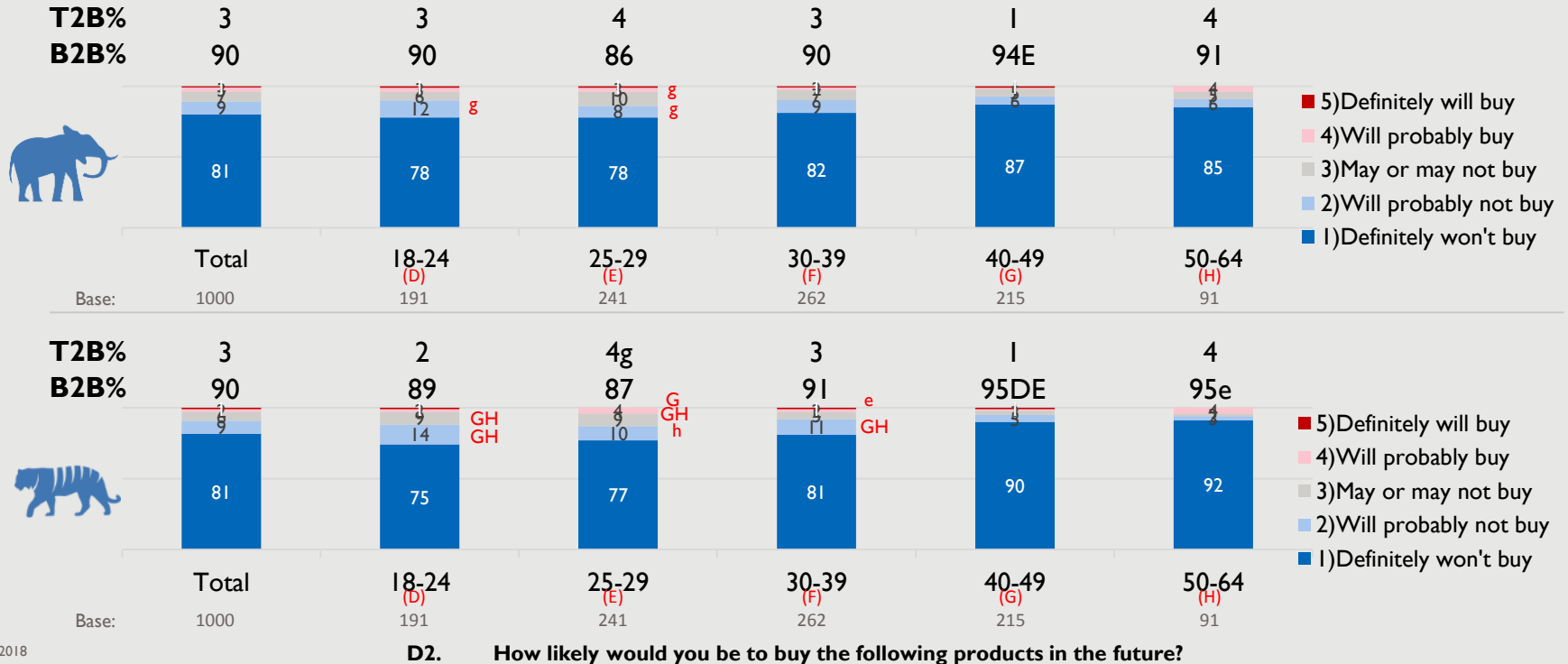
All respondents n=1,000



- D1. Personally, do you think buying the following products is acceptable among your friends and family or not?
 D2. How likely would you be to buy the following products in the future?

PURCHASE TENDENCIES – Age Breakdown

While the incidence of buying/owning ivory or tiger parts is relatively low among the youngsters, there is evidence that some hold an open mind towards the trade. Must ensure that new generation don't turn in to the future buyer/traders.











— WILDLIFE PRODUCT USERS/CONSUMERS



USER DEFINITIONS

User Group	Definition
P3Y Ivory Purchasers:	Those who have purchased ivory products within the past 3 years
P3Y Ivory Receivers:	Those who have received ivory products within the past 3 years
Ivory Purchase Intenders:	Those who claimed that they probably/definitely would buy ivory products
Tiger Purchasers/Users:	Those who have purchased tiger products within the past 3 years or use/own tiger products
Non-Users	Those who are not in any of the above

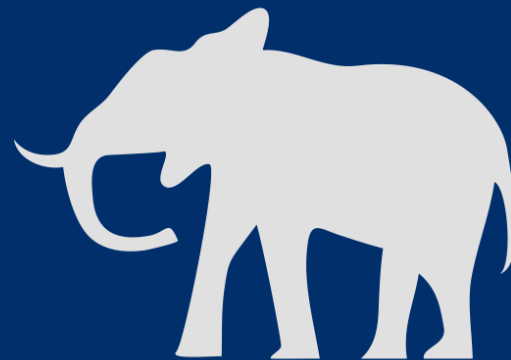
USER PROFILES

	Ivory Purchasers	Ivory Receivers	Ivory Purchase Intenders	Tiger Purchaser/users	
Commonalities	 30-49 yo.	 Married with kids	 SES AB	 Vocational Diploma	 Merchants Business Owners
Differentiators		 Female	 Female	 Male	

IVORY PRODUCT CONSUMPTION

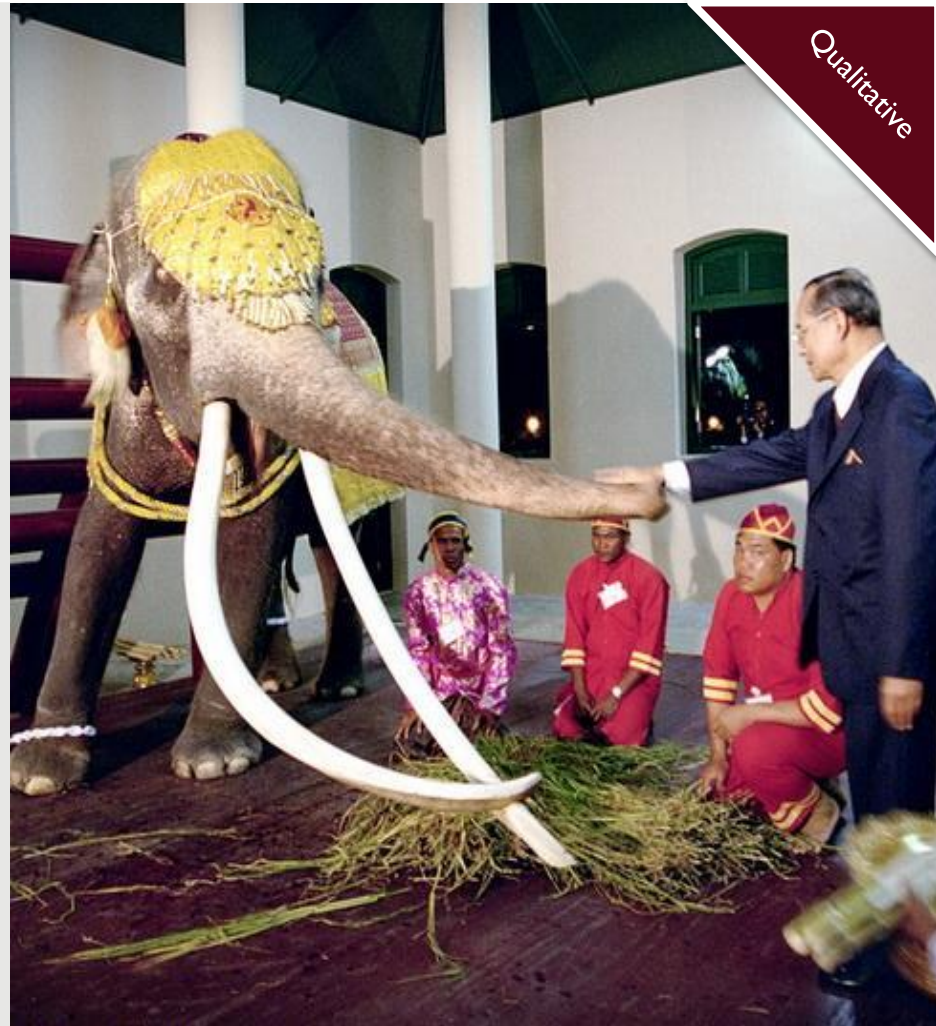


— IVORY PRODUCTS (CONSUMERS): Common Themes from the FGDs and Findings from Consumers (Booster)



ELEPHANTS ARE SPECIAL

- **Elevated** above other animals
 - Referred to as a third person ('Kow' or he/she)
- Associated with the **Monarchy**
 - Ridden by Thai kings in war
 - Present in royal ceremonies
- **Symbol of Thailand**
 - Was on Siam flag



Qualitative

IVORY-RELATED BELIEFS

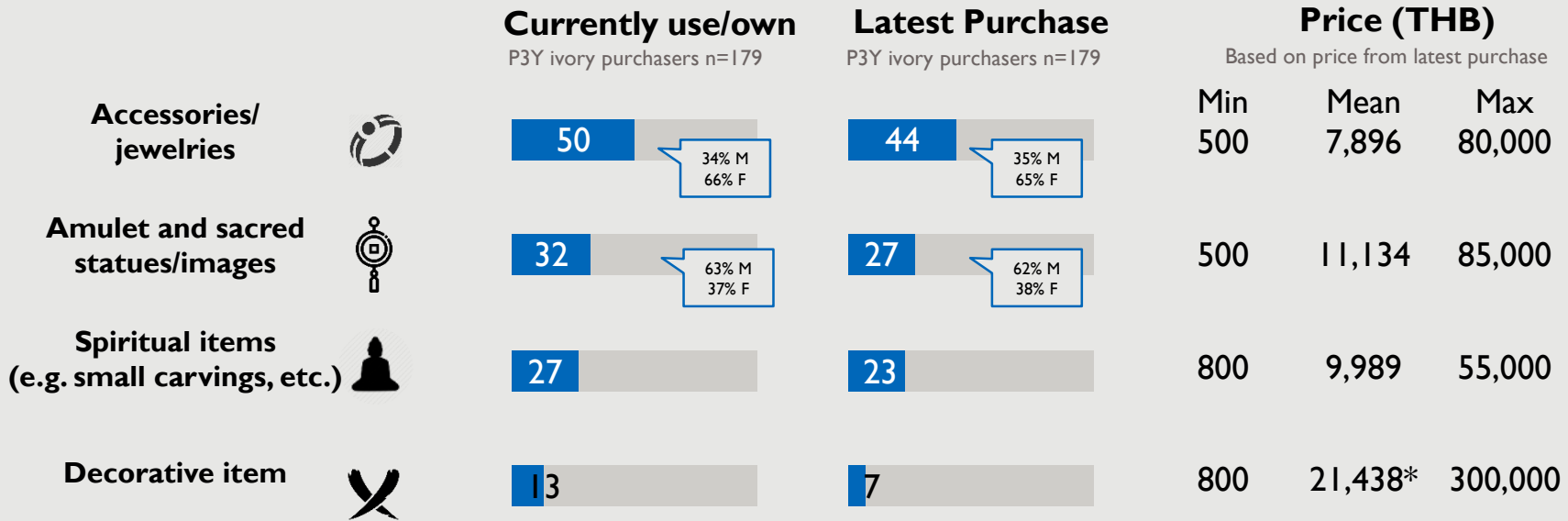
- Ivory is believed to
 - provide **protection**
 - enhance one's power and **popularity**
- Source of beliefs
 - Passed down in the **family**
 - **Internet search** which is triggered by curiosity
 - Online **discussions and articles**



<http://wp-pathos.com.s3.amazonaws.com/blogs/wakeupcall/files/2013/11/family-prayer.jpg>

IVORY PURCHASERS – PRODUCTS

Accessories/jewelry is the most popular format to own, followed by amulets and spiritual items. Price ranges are wide, especially for decorative items.

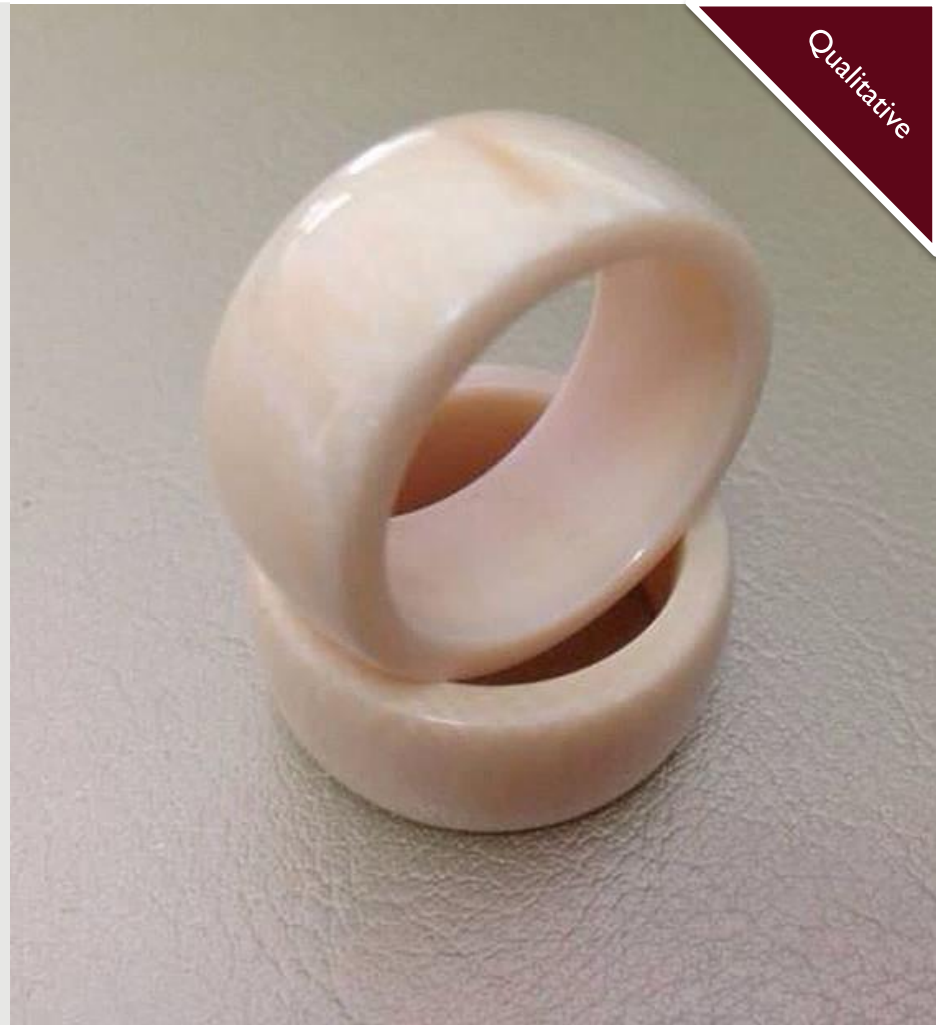


- B2. Which formats of ivory products do you use/own?
- B5. Please think about your latest purchase, which format of ivory product did you buy
- B7. How much did you pay for it? If you cannot remember the exact amount, please give an approximate price.

*Caution: small base

IVORY AS AN ACCESSORY

- **Aesthetic Value:**
 - Texturally beautiful
 - White and shiny
- **Possessed Power:**
 - Provide Protection
 - Positive Influence
- **Rings** are the most popular items, partly because they are relatively small and therefore more affordable



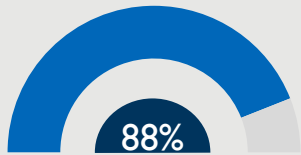
IVORY AS AN AMULET

- **Spiritual anchor**
- Ivory items make the owner feel more **lucky, confident, and safe**
- Although not proven, users believe that ivory products have **positive influences** on their lives

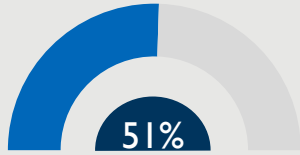


IVORY PURCHASERS - REASONS

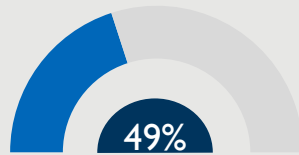
While ivory's **supernatural benefits** are the reason that the majority of the users to purchase, half of them were also triggered by the products' **aesthetic values**.



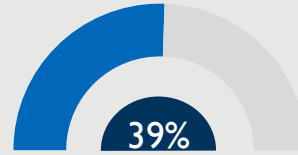
Net: Spiritual



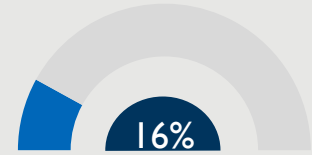
Net: Aesthetic



Net: Value



Net: Social Image



Net: Thai-ness

It brings good luck	53
It is spiritual	41
It wards off harm/provides protection	35
It enhances owner's power	30
It is good for health	9

It is beautiful/decorative	32
It looks pure and noble	31

It is a rare item and worth collection	28
It is a valuable gift	16
It is a good investment	9

It shows my success, affluence	31
It improves my status, prestige	14

It represents Thai heritage and culture	16
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IVORY GIFT RECEIVERS

Half of the receivers had at one point purchased ivory products themselves. Accessories/jewelry and spiritual items were the most popular gift items. Almost all cases were received for a special occasion, especially birthdays

Purchase Incidence

Base: P3Y ivory gift receivers n=55



52%

Of those who received ivory as gifts have at one point purchased ivory products

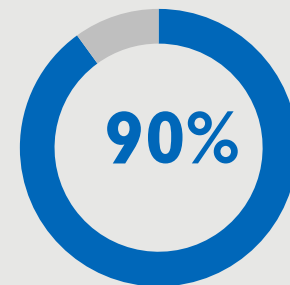
Currently use/own

Base: P3Y ivory gift receivers n=55



Special Occasions

Base: P3Y ivory gift receivers n=55



■ Yes
■ No

Birthdays
56%

- B2. Which formats of ivory products do you use/own?
- B3. How did you have them in your possession?
- B11. Was there any special occasion when you bought/received as gift the ivory product?

IVORY PURCHASE INTENDERS

4 in 10 purchase intenders already own items of ivory – the most popular format being accessories/jewelry.

Usage/Ownership Incidence

Base: Ivory Purchase Intenders n=488



40%

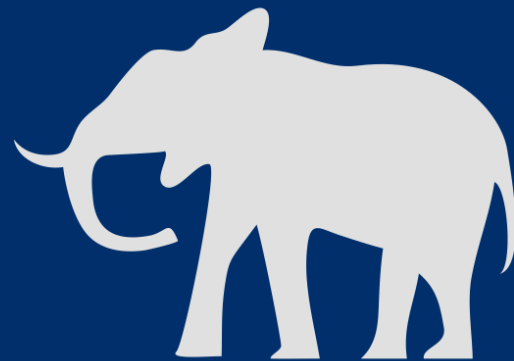
Of those ivory purchase intenders use or own some ivory products

Currently use/own

Base: Ivory Purchase Intenders who use/own ivory product n=193



— PURCHASING CHANNELS (IVORY CONSUMERS)



ROUTES TO AMULET ACQUISITION

The need of
Ivory-specific
amulet

- Influenced by the **belief in ivory power**, whether it is through information from the internet or told by family.
- Triggered by **suggestions** from someone they trust i.e. parents, senior colleague, a neighbor who has knowledge about amulets, uncle
- Or simply the need to **grow amulet collection**.

Facebook or google search
“ivory product” “sell
ivory” etc.

Usually lead to Facebook
pages of shops that sell
ivory

Ask for place of purchase
from someone
knowledgeable

This can lead to physical
shops/area or online shops.

Purchase spontaneously either
offline or online (i.e. the
Facebook groups they joined)

As rare items, some always
look to own ivory amulets.

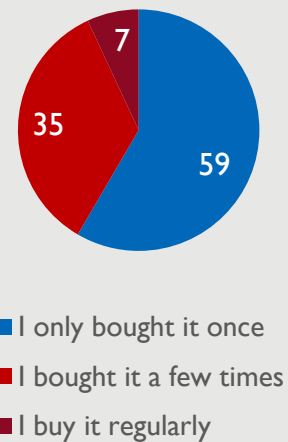
IVORY PURCHASERS - PURCHASING BEHAVIOR

Jewelry stores, amulet markets/temples, relatives/friends/acquaintances are key purchase channels. The majority of respondents have purchased only once, although there is a sizable group that are repeat buyers. 4 out of 10 purchases were for a special occasion

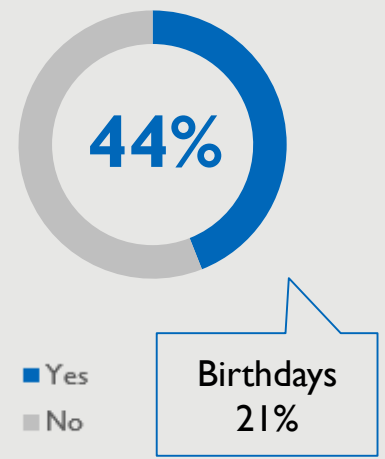
Purchasing Channels



Purchasing Frequency



Special Occasions



CONCERNS WHEN PURCHASING IVORY PRODUCTS

Authenticity

Most respondents **cannot tell the difference** between ivory, elephant bone, bones of other animals and etc.

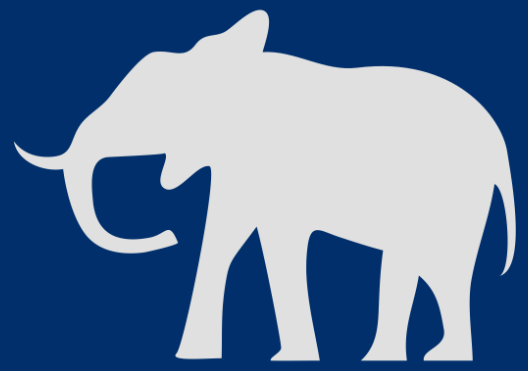
So they base the product's "**genuineness**" on the place/person buy it from

- Familiar sellers
- Monks
- OTOP
- Certified shops

Curse

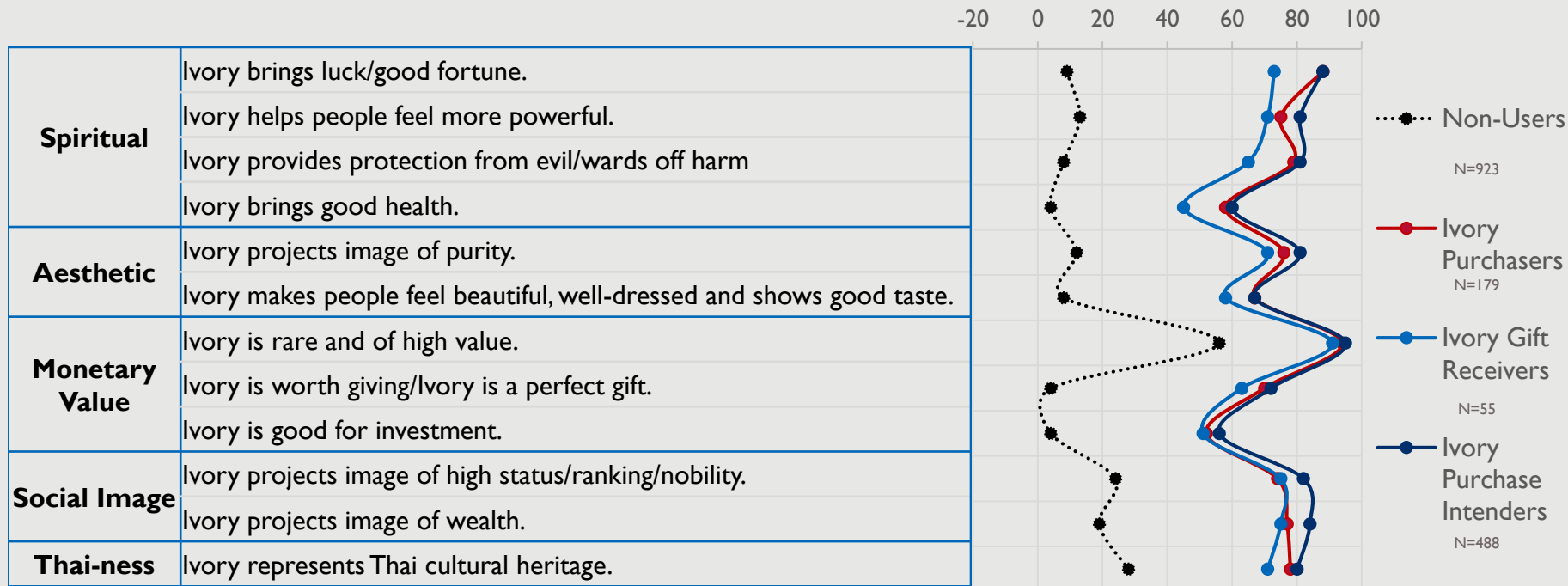
- If an elephant has been killed, its tusks are believed to have **malevolent power** because a curse has been put on them
- It will bring **damnation** to the user.
- **All believe, or choose to believe,** that their ivory products came **from elephants that have died of natural causes**, or from tusks that have been trimmed.

— PERCEPTION (IVORY CONSUMERS)



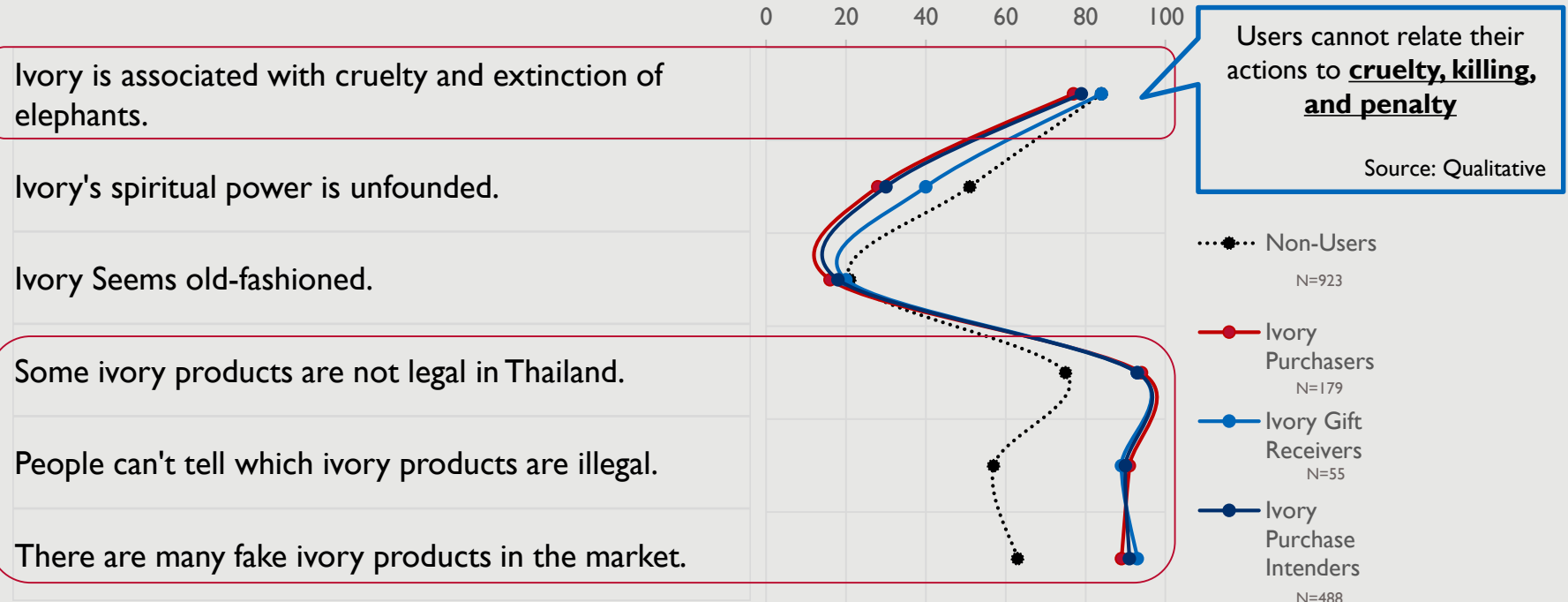
IVORY PRODUCTS – BENEFITS

Ivory users and intenders regard ivory products as much more beneficial than non-users. Of these three groups, ivory purchase intenders hold a stronger perception of the potential benefits of ivory.



IVORY PRODUCTS – CONCERNS

Purchasers have a stronger perception towards the spiritual power of ivory than Receivers. Among all groups engaged with the ivory trade, there is awareness of the illegality of some items as well as concerns surrounding fake products.





Vincent Van Zalinge

TIGER PRODUCT CONSUMPTION

— TIGER PRODUCTS (CONSUMERS): Common Themes from IDIs and Findings from Consumers (Booster)



King of the Jungle

TIGERS ARE ALL ABOUT POWER AND STRENGTH.

- Respondents believe that tigers are **elusive and mysterious**.
- The aura of the tiger is **dark and dreadful**.
- Tigers' ferocity inspires **fear and awe**.
- It is believed that the **souls of great beasts live on in their parts**, and those who own such parts also own the animal's essence.



Qualitative








TIGER USERS/PURCHASERS

The majority of those who use/own tiger products made the purchase themselves. Spiritual items are most popular, followed by amulets. Very few respondents own tiger parts or products for medicinal purposes. Tiger products have a narrower price range than ivory.



76%

Of those who are tiger users purchased the products by themselves

	Currently use/own		Latest Purchase		Price (THB)		
	Base: Tiger users/purchasers n=116	Base: Tiger purchasers n=91	Base: Tiger users/purchasers n=116	Base: Tiger purchasers n=91	Min	Mean	Max
Spiritual items 	59	51	100	11,237	50,000		
Amulet 	37	27	290	5,504*	20,000		
Accessories/jewelries 	13	11	1,000	11,220*	50,000		
Decorative item 	7	3	900	N/A*	80,000		
Traditional medicine 	2	2	800	N/A*	800		
Tiger wine 	2	3	2,000	N/A*	3,000		
Tiger ointment 	2	2	150	N/A*	200		

Based on price from latest purchase

*Caution: small base

C1. Do you own or use any tiger products?
C2. Which formats of tiger products do you use/own?

C5. Please think about your latest purchase, which format of tiger product did you buy?
C7. How much did you pay for it? If you cannot remember the exact amount, please give an approximate price.

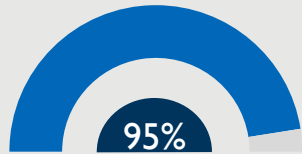
THE NEEDS LEADING TO TIGER PART AMULETS

- **Protections:**
 - From **physical** harm
E.g. car accidents
 - From **'supernatural'** harm
E.g. dark spirits when going to unfamiliar places/dark spirits disturbing infants
- **Rare Items:**
 - To **collect** as rare amulets



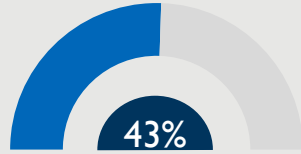
TIGER PURCHASERS - REASONS

The main reason to purchase tiger products is their **spiritual benefits**.



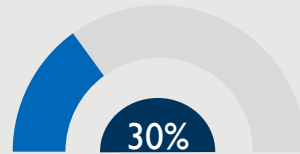
Net: Spiritual

It wards off harm/ provides protection	65
It is spiritual	65
It enhances owner's power	41
It is good for health	18
It boosts masculinity /sexual prowess	8



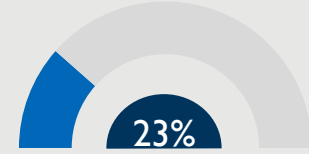
Net: Social Image

It shows my success, affluence	34
It improves status, prestige	18



Net: Value

It is a rare item and worth collection	20
It is a valuable gift	11
It is a good investment	8

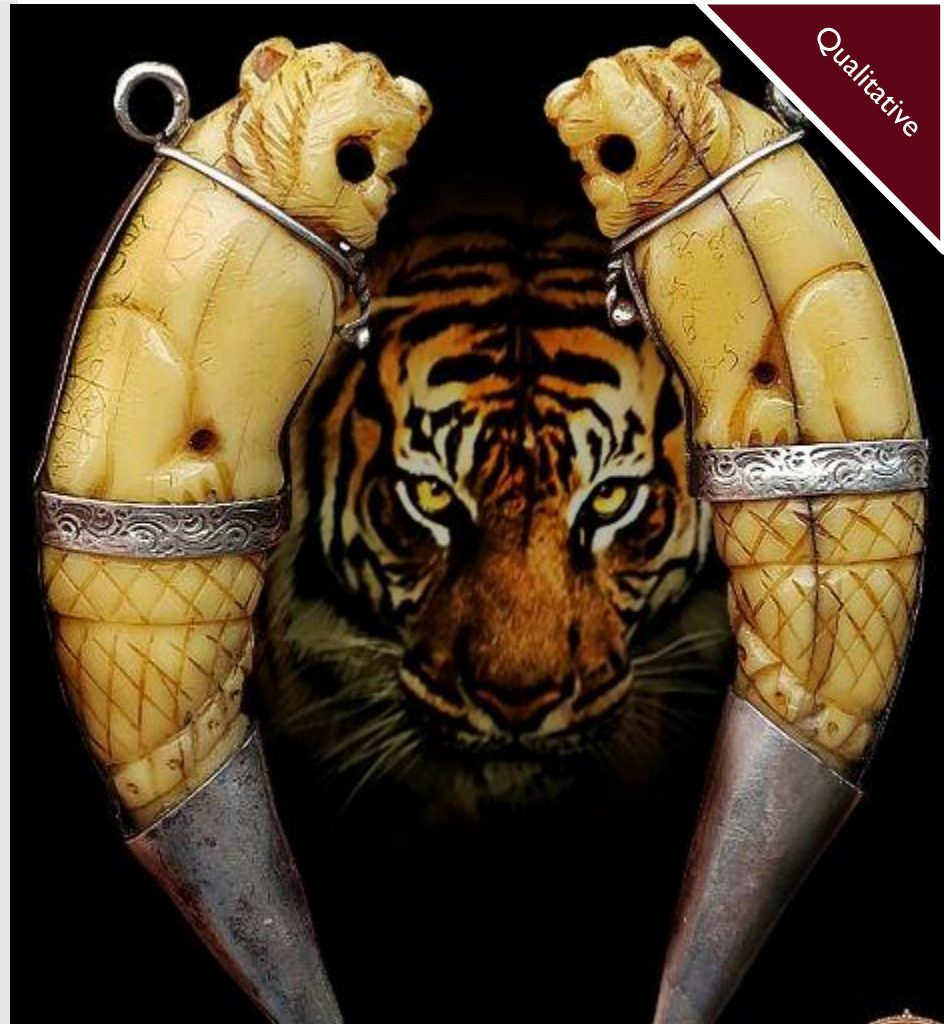


Net: Aesthetic

It is beautiful/decorative	15
It is a fashionable item	11

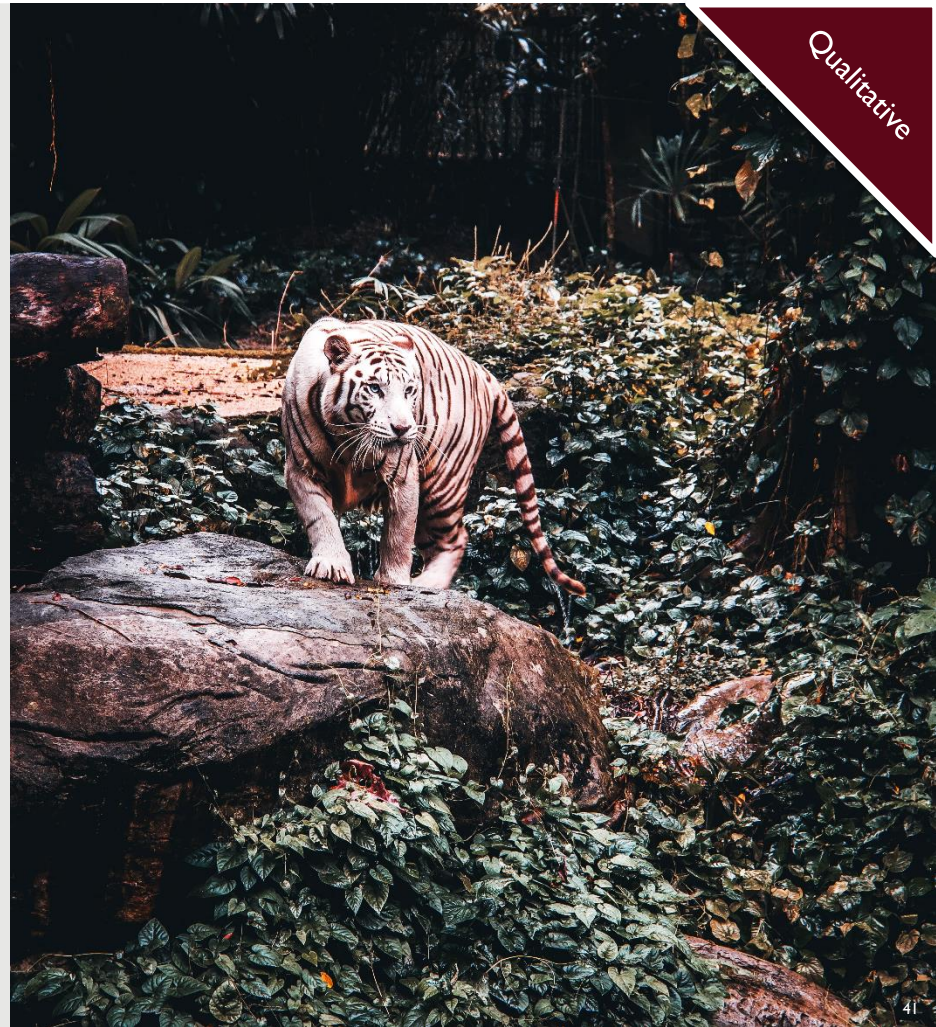
'SPIRIT' ADDED TO AMULETS

- Amulets from unanimated materials only gain potency from chants and prayers.
- Tiger amulets are made from something that was **once alive**.
- When they go through rituals and incantations, the spirit of the dead animal is '**awakened**' which makes the amulets and their spells even more powerful.



WILD TIGERS ARE MORE POWERFUL

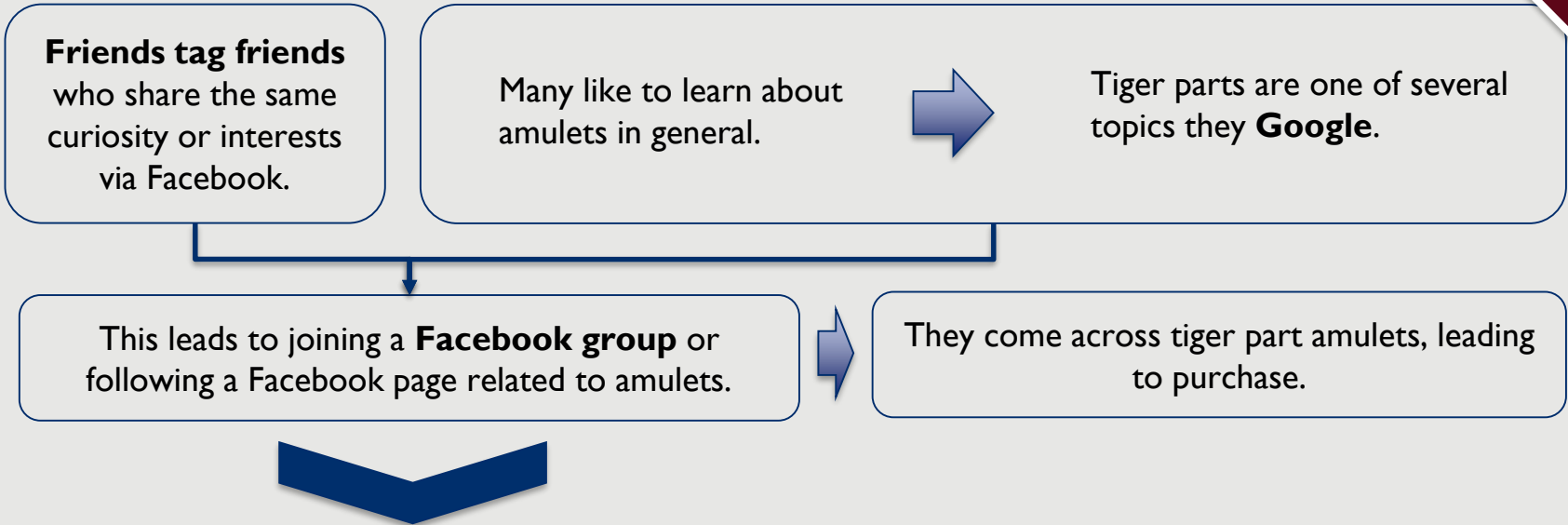
- The senses of captivated tiger have been **blunted**.
- The aura of **invincibility is lost**.
- **Wild tigers** are believed to be more **ferocious**.
- Hence, amulets made from wild tigers are perceived as more **powerful**.



— PURCHASE CHANNELS (TIGER CONSUMERS)



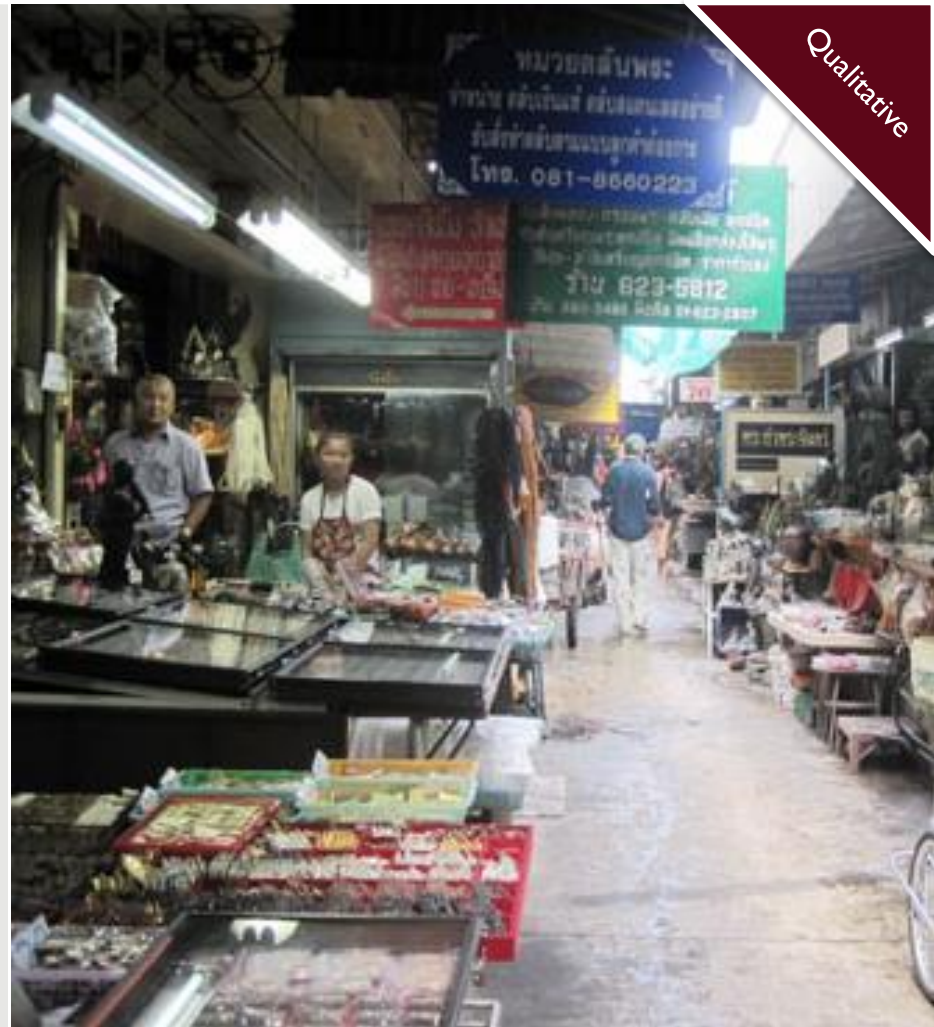
ONLINE: A channel for information as well as trade



- Groups are either **open or closed**. To join a closed group, a person has to go through a **vetting process** before being allowed in. Closed groups are where the **rare and/or illegal items** can be found.
- One can also **befriend a person in the group**. Items may then be sold at very reasonable prices, leading to subsequent purchases.

OFFLINE CHANNELS

- Offline channels are found by **recommendation** or simply being **stumbled across**
- Tiger amulets can be bought at **temples, amulet markets, markets, some specialized malls, and local fairs**
- Tiger products are **not openly displayed**. Serious buyers are taken to the **back room**. Alternatively, they need to **contact the shop owner beforehand**

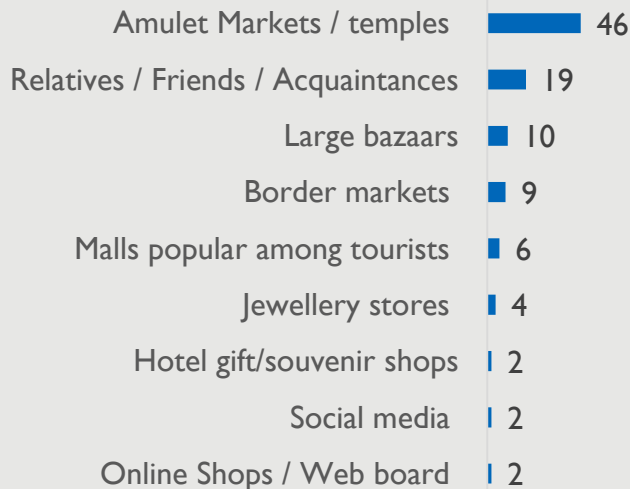


Qualitative

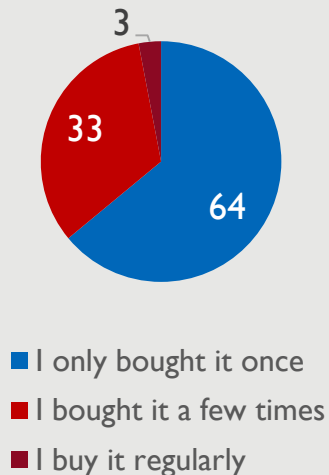
TIGER PURCHASERS - PURCHASING BEHAVIOR

Amulet markets/temples is the key purchase channel and to a lesser extent, from relatives/friends/acquaintances. The majority either buy it once or just a few times, typically not for a special occasion.

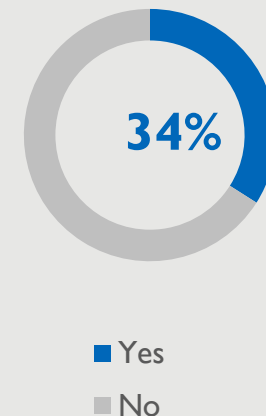
Purchasing Channels



Purchasing Frequency



Special Occasions



B8. Where did you buy it?
B12. How often do you buy ivory products?

B11. Was there any special occasion when you bought/received as gift the ivory product?
Base:tiger purchasers n=91

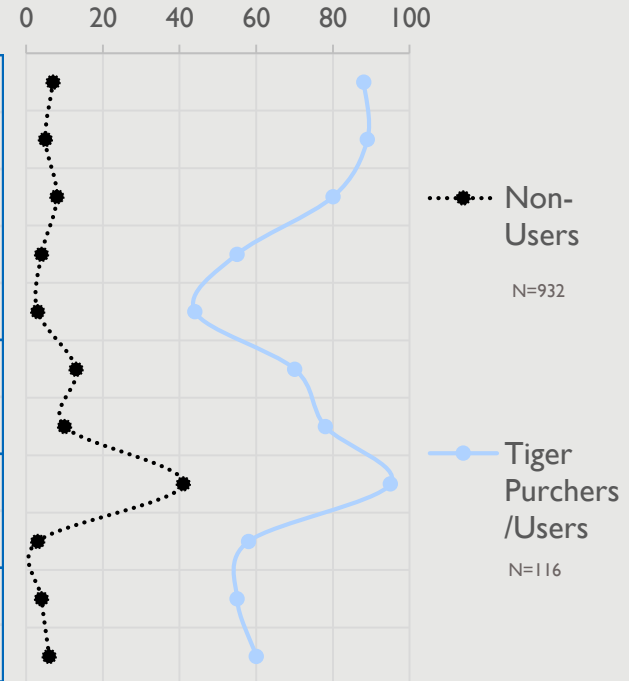
— PERCEPTIONS (TIGER CONSUMERS)



TIGER PRODUCTS – BENEFITS

Compared to non-users, Users perceive more benefits to tiger products. Users strongly associate Tiger products with bringing good luck/fortune, providing protection from evil/harm, making people feel more powerful, and being rare and of high value.

Spiritual	Tiger products provide protection from evil/harm.
	Tiger products bring luck/good fortune.
	Tiger products help people feel more powerful.
	Tiger products enhance good physical health/cure illness.
	Tiger products enhance masculinity/sexual prowess
Social Image	Tiger products project image of high status/ranking and nobility.
	Tiger products project image of wealth.
Monetary Value	Tiger parts and products are rare and of high value.
	Tiger products are good for investment.
Aesthetic	Tiger products enhance charisma.
	Tiger products are fashionable.



Some respondents consider tiger parts as an investment opportunity.

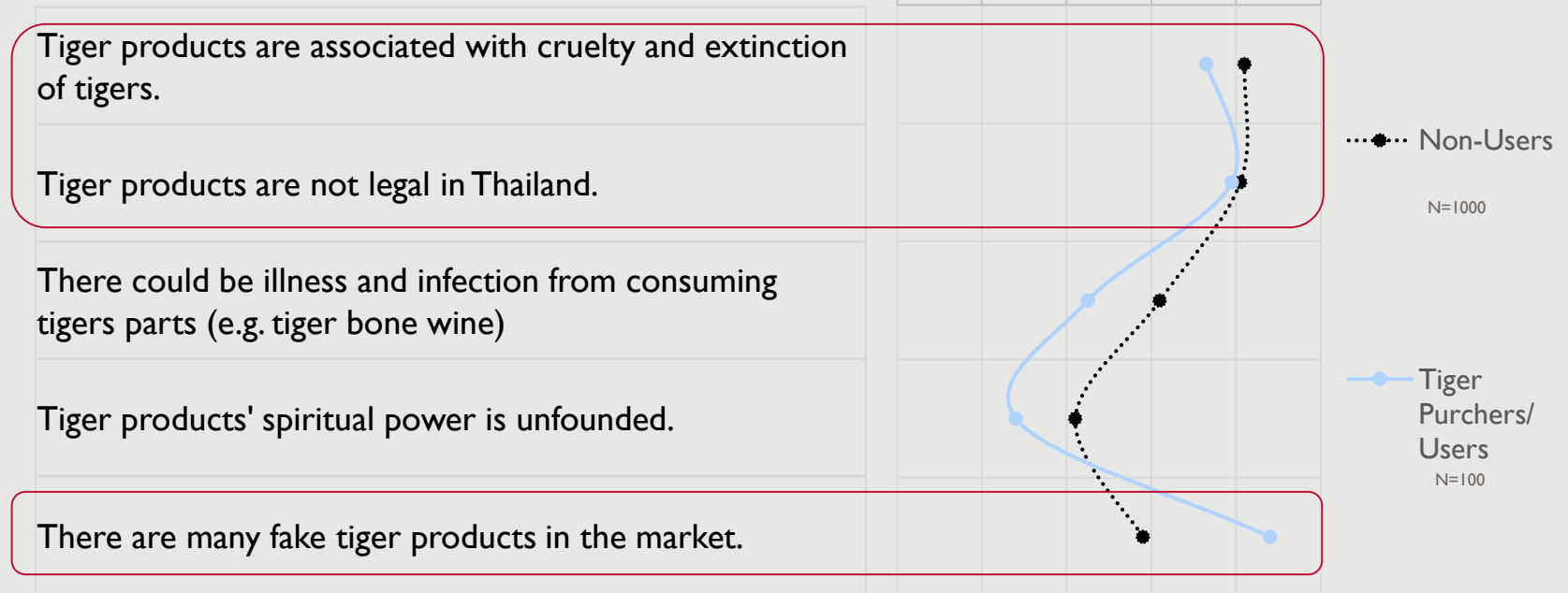
Rarity creates investment opportunities, and the curse may be perceived as increasing the potency of the amulet.

“In the future I might collect more and more... if I become more adept at it. It's like buying land. The longer you have it, the more valuable talismans become.”

“One of the men I worked with... I saw him going out on his motorbike and coming back, and I asked him, where have you been? He said he'd taken some amulets to the post office. At first I didn't think much about the belief itself, but then I saw that it can make money. Salaries of 30,000 to 40,000 Bath? Forget that. This can make a lot more money the more you learn about it.”

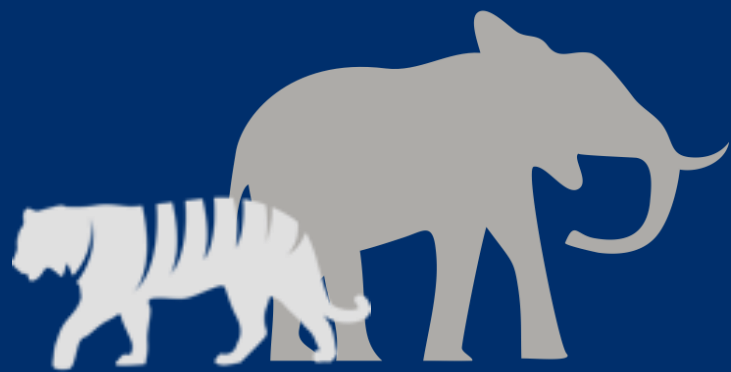
TIGER PRODUCTS – CONCERNS

Users and non-Users have high awareness that the tiger trade is illegal in Thailand. Users are less concerned about potential illness and infection from the consumption of tiger parts but worry more about the prevalence of fake products.



E3. What are the concerns that people might have for purchasing tiger products?

— ATTITUDE & COMMUNICATIONS (CONSUMERS AND NON-CONSUMERS)



ATTITUDES TOWARDS WILDLIFE PRODUCTS

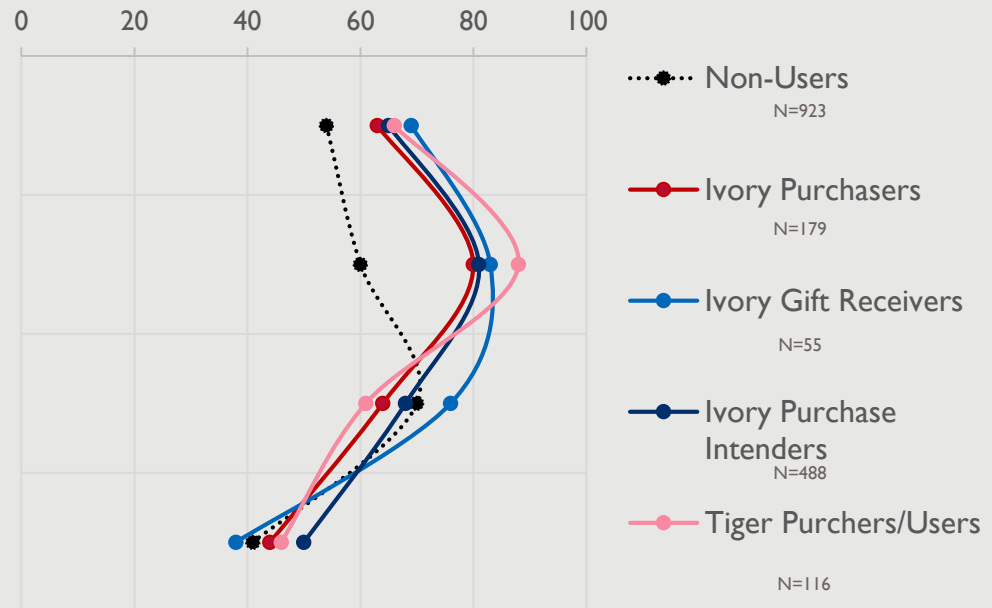
More Users and Purchase Intenders agree that more and more people have stopped buying ivory and tiger, and people are now more careful about buying or owning these products. More Ivory gift receivers agree that using these products can project the image of being ignorant about the wildlife crisis.

More and more people have stopped purchasing ivory and tiger products.

People now are careful about saying that they buy or own ivory and tiger products.

Using ivory/tiger products may give the image of being ignorant about wildlife crisis.

Buying or using ivory or tiger products is no longer acceptable among many celebrities, and influential members of Thai society.



SELF-JUSTIFICATION & LACK OF ACCOUNTABILITY

I only own small items.

The products have been blessed by monks. They are cleansed.

These animals died of natural causes.

The government should be the responsible party to control these products

They are sold in shops, they must be legal.

It was passed down in my family. We've had it for a long time.

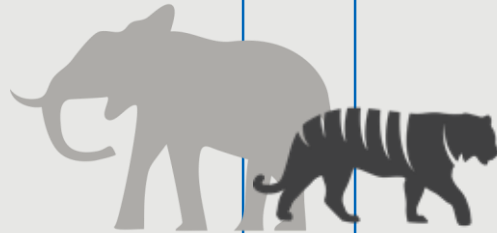
UNCERTAINTY REGARDING THE LAW

IVORY

- Not sure if **domestic** ivory trade is legal
- Not sure if **imported** ivory trade is legal
- Not sure if the law applies to **small-sized** ivory items

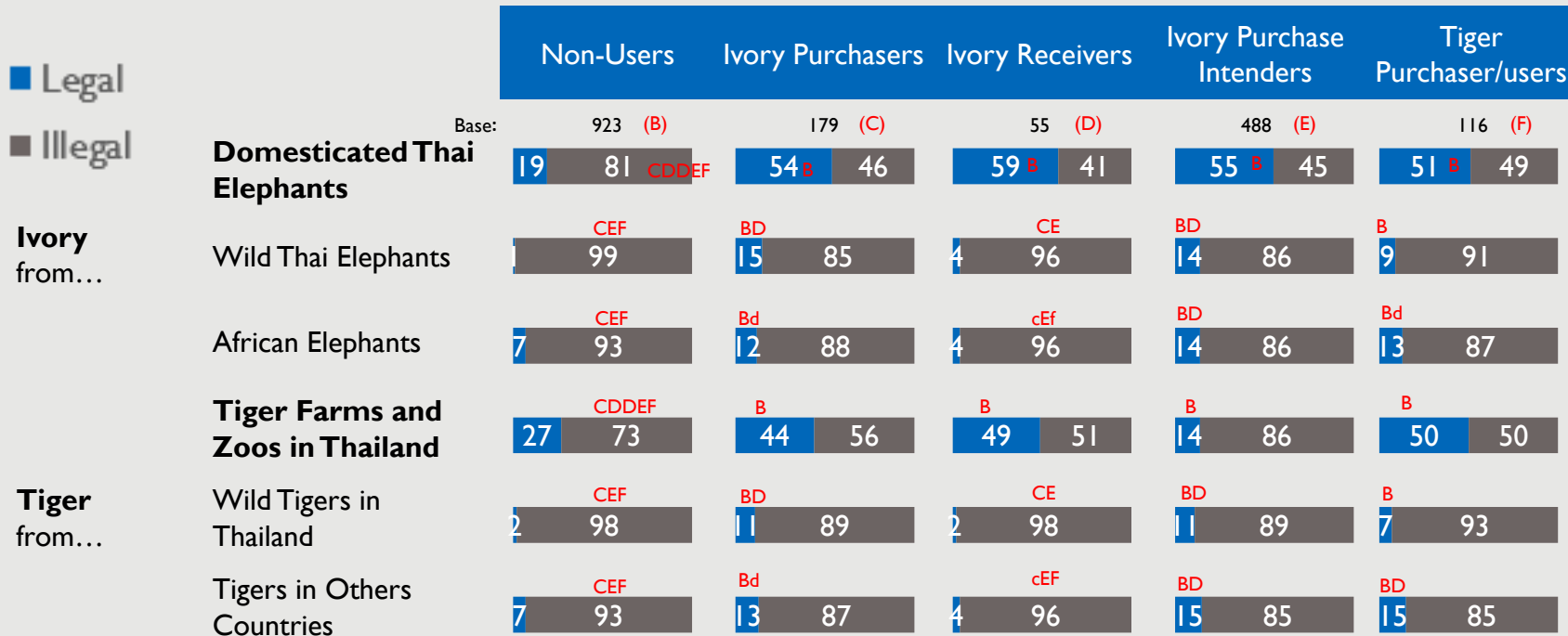
TIGER

- Not sure if tiger product trade is legal.
- Not sure if the law applies to **small-sized** tiger items
- Not sure if the law applies to **the products they have had for a long time**



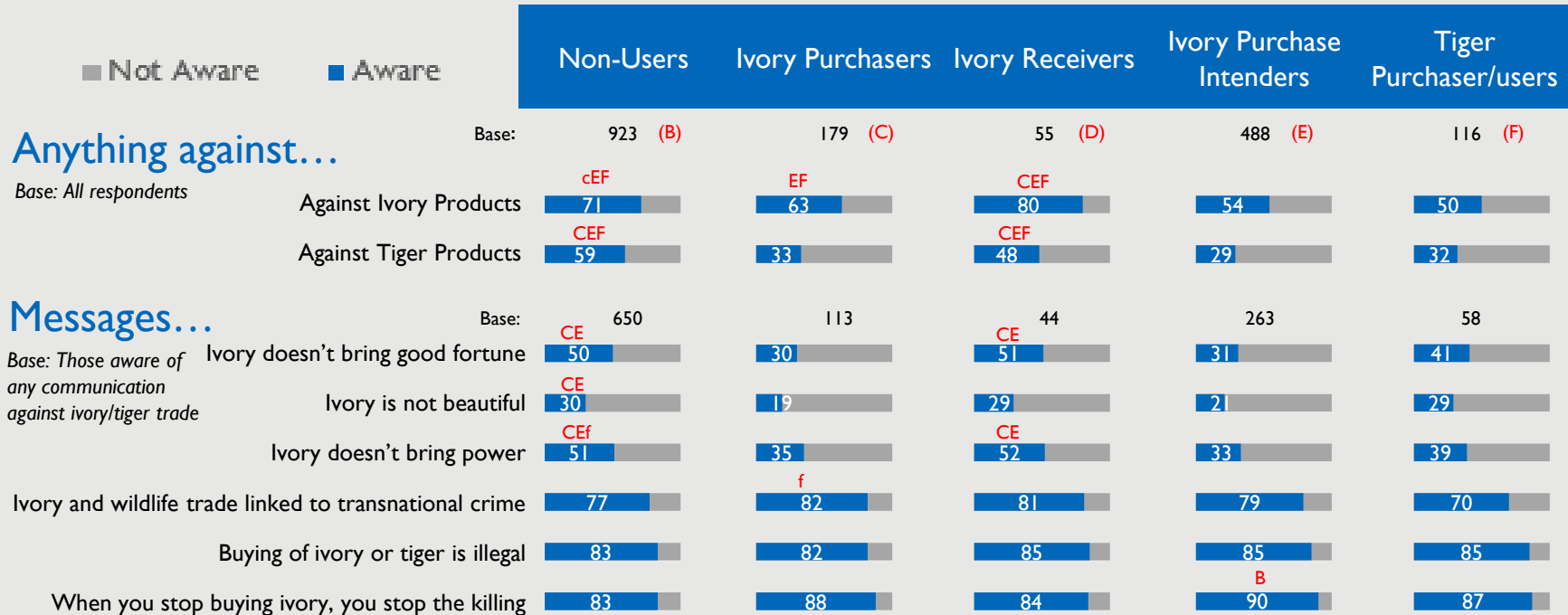
LEGAL PERCEPTION

Compared to Non-Users, more Users are unclear about certain legal issues regarding Ivory and Tiger. Both groups agree that Ivory from Wild Thai and African Elephants and Tiger from Wild Tigers from Thailand and Other Countries are illegal.



COMMUNICATION AWARENESS

Compared to Non-Users, fewer Purchasers/Intenders have seen or heard messages re. buying, selling or consuming Ivory/Tiger products.



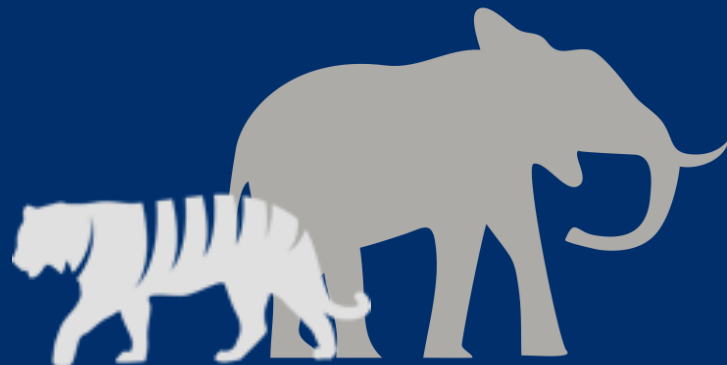
BAN ON ALL DOMESTIC IVORY TRADE



92%

Of Thai General Population said that
the Government should ban all
domestic trades of ivory products

— SUMMARY



WHO

Mid-old age, affluent,
Business owners and
merchants



WHAT

Jewelry
Amulets



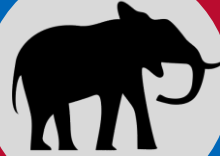
WHERE

Jewelry stores
Amulet markets/Temples
Relative/Friends



WHY

Spiritual anchor
Aesthetic value



WHO

Male, Mid-old age, affluent,
Business owners and
merchants



WHAT

Spiritual items
Amulets



WHERE

Amulet markets/Temples
Relative/Friends



WHY

Protective power
Collectability





USAID
FROM THE AMERICAN PEOPLE

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