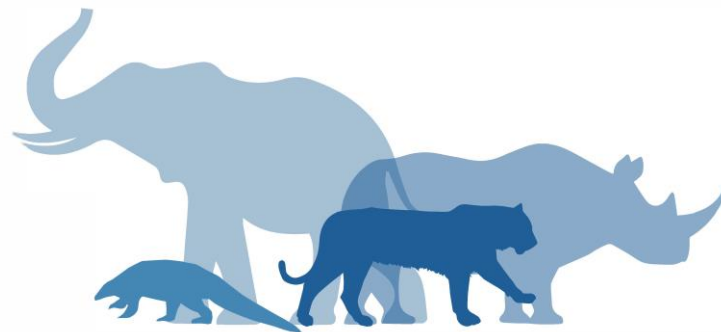




# RESEARCH STUDY ON CONSUMER DEMAND FOR ELEPHANT, PANGOLIN, RHINO AND TIGER PARTS AND PRODUCTS IN CHINA

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USAID WILDLIFE ASIA  
JUNE 12, 2018



# CONTENT - OBJECTIVES

- **HOW:** Background, Objectives and Methodologies
- **WHO:** Identify the key consumer groups of elephant, pangolin, rhino and tiger parts and products AND: Describe and analyze the psychosocial and socio-demographic, attitudinal and other aspects of each consumer profile
- **WHAT:** Identify the prevalence and frequency of purchase and use of these products
- **WHERE:** Purchase channels
- **WHY:** Identify the major motivations driving purchase and use of these products
- **HOW [TO CHANGE]:** Regulations. AND: Assess exposure to messages
- **WHAT NEXT:** The findings will provide baseline data to measure project indicators and inputs to design effective demand reduction campaigns in China targeting consumers and likely buyers of wildlife products.

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# HOW: BACKGROUND, OBJECTIVES AND METHODOLOGIES



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# RESEARCH DESIGN – THE THREE MAJOR COMPONENTS OF THIS STUDY

## Situation Analysis review on earlier studies

**Summary and Review of previous studies** USAID, TRAFFIC, WWF, IFAW and TNC.

GlobeScan studies for National Geographic in 2015, TRAFFIC/ WWF in 2017/8.

## Qualitative research

**8 Focus Group Discussions** with consumers of ivory, pangolin, rhino horn and tiger products in Guangzhou + Shanghai and Kunming + Harbin.

**12 In-depth Interviews** (IDIs) with Traditional Chinese Medicine (TCM) practitioners

## Quantitative research

**n=1800 structured consumer online interviews** in Shanghai, Beijing, Guangzhou (*Tier 1*), and Kunming, Nanning and Harbin (*Tier 2*).

# IMPLEMENTATION AND ETHICAL CONSIDERATIONS

- Research conducted by Globescan
- Both quantitative and qualitative components of this research were granted local **Institutional Review Board (IRB) approval by the Beijing Normal University** on November 30, 2017 and **international IRB approval by FHI 360** on November 27, 2017. Considering this, **strict informed consent procedures to ensure voluntary consent to participate in the research and confidentiality of respondents were followed.**
- USAID Wildlife Asia provided technical oversight to all aspects of research planning and implementation, and reviewed and approved the research protocol, research interview guides and questionnaire, translations to Chinese, data analysis and reports in PPT and word formats. USAID Wildlife Asia also monitored data collection.

# QUANTITATIVE RESEARCH

## **Recruitment and questionnaire**

This quantitative survey was conducted online, from February 13 to March 9, 2018

Questionnaire length of 20 minutes on average

1800 respondents in the six selected cities: classified as Past 12 Months Buyers of 1 of 4 species surveyed

## **Comparison with other surveys**

Selected sample, with a choice of cities being considered active markets in wildlife parts and/or products trade

Key metrics cannot be compared one-on-one with other surveys

Underlying patterns on segmentation, purchase drivers and effective messages are relevant for the buyers, and those can be compared to other surveys

## **Statement Analysis (to measure attitudes and motivations)**

Structural modelling on attitudes and perception of wildlife products we constructed a set of statements that indicate underlying overall attitudes and buying motivations for the 4 wildlife species

## **Maximum Differentiation Scaling:**

Ranking exercise, describe the hierarchy of motives better than direct ratings.

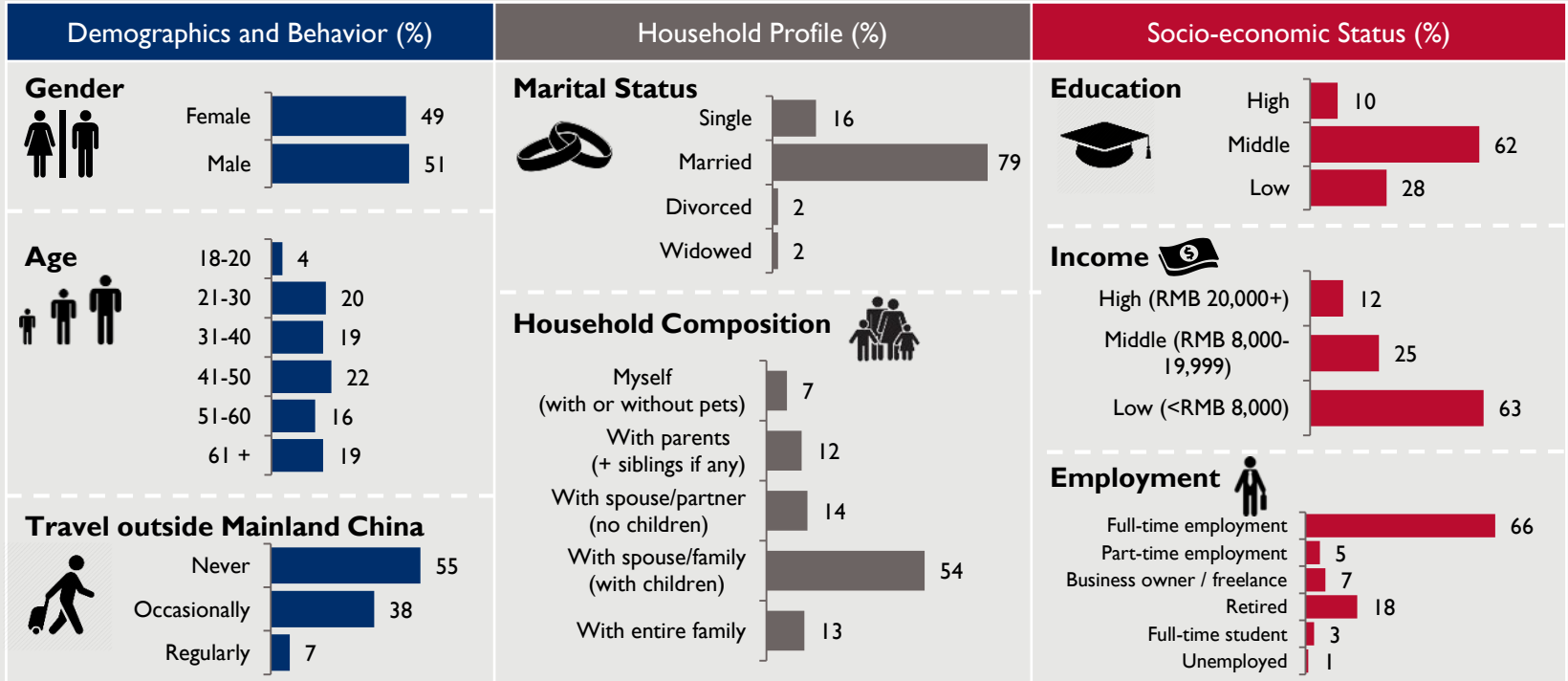
# WHO:

Identification of the key consumer groups of elephant, pangolin, rhino and tiger parts and products

Psychosocial and socio-demographic, attitudinal and other aspects of each consumer profile

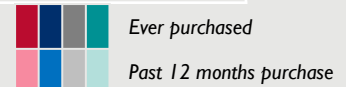
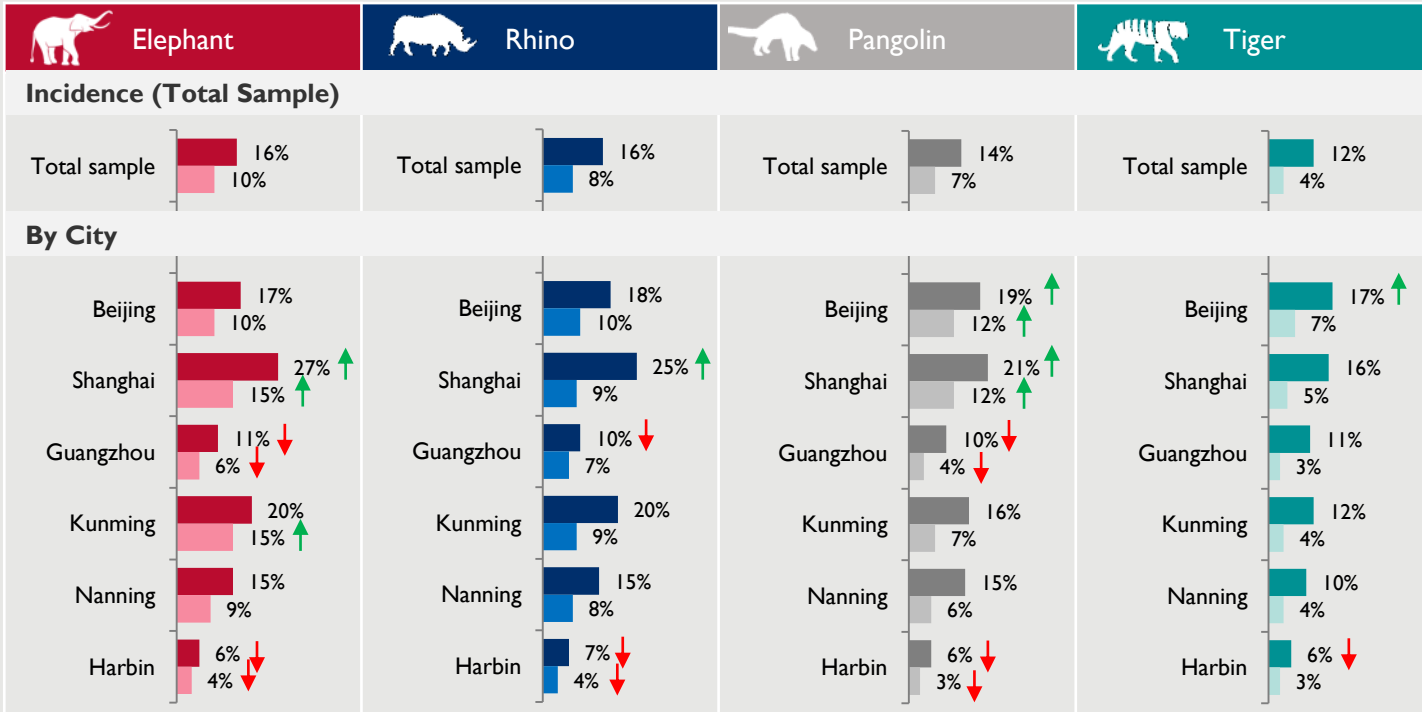


# RESPONDENTS' SOCIO-DEMOGRAPHIC PROFILE





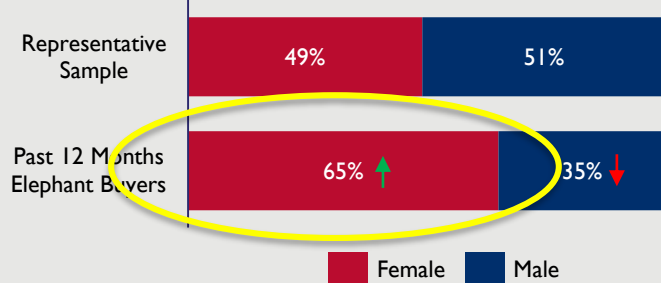
# OVERVIEW – EVER AND PAST 12 MONTHS PURCHASE INCIDENCE



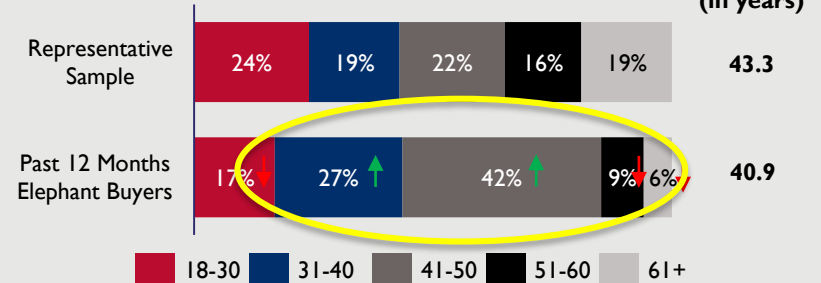
# ELEPHANT PARTS AND/OR PRODUCTS PAST 12 MONTHS BUYERS' PROFILE



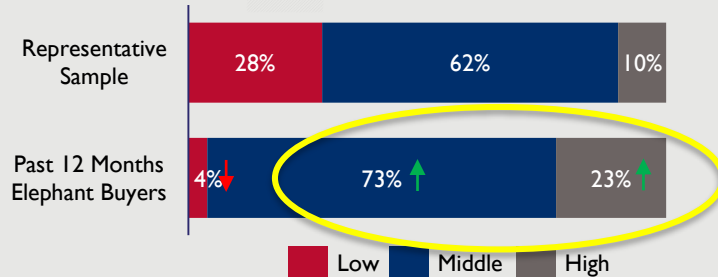
Gender



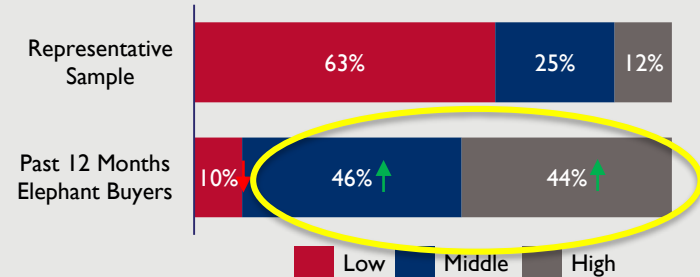
Age



Education



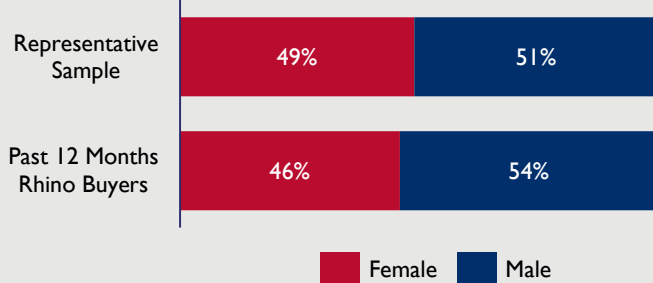
Income



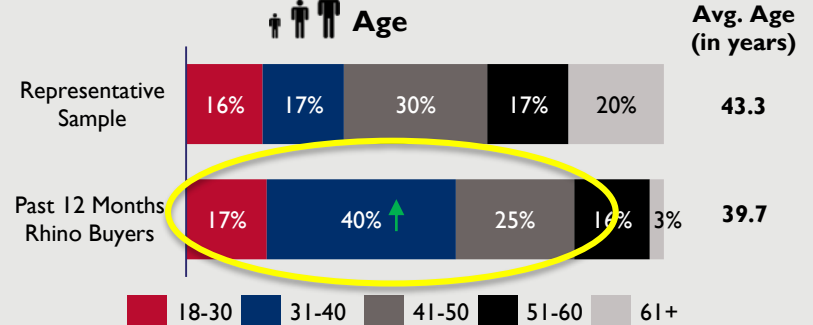


# RHINO PAST 12 MONTHS BUYERS' PROFILE

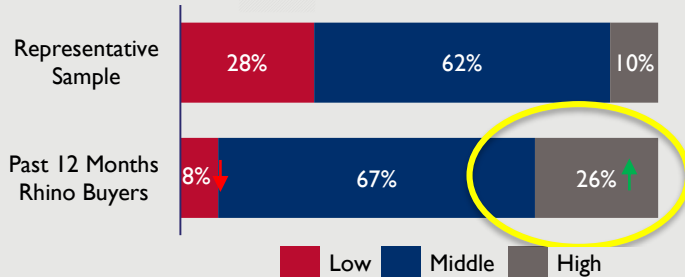
### Gender



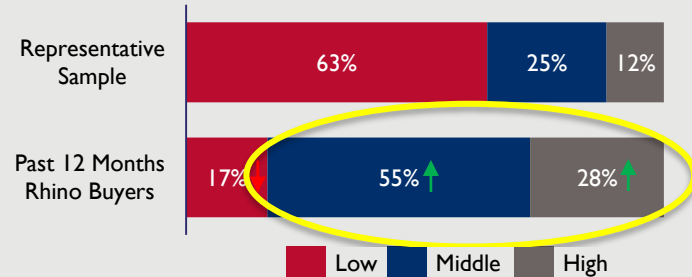
### Age



### Education



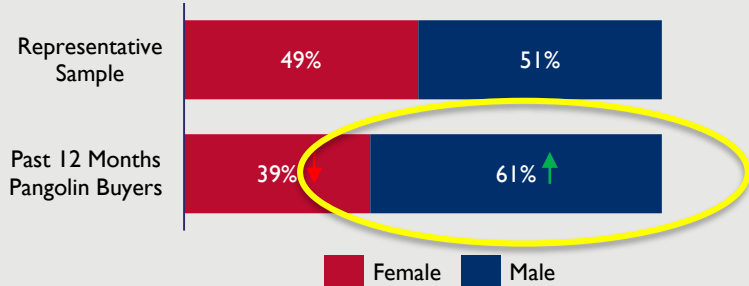
### Income



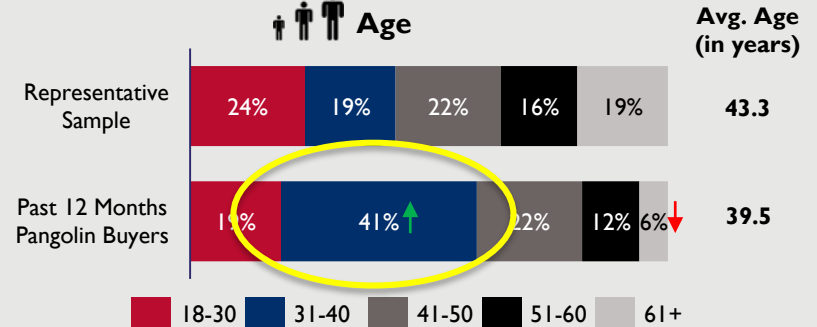


# PANGOLIN PAST 12 MONTHS BUYERS' PROFILE

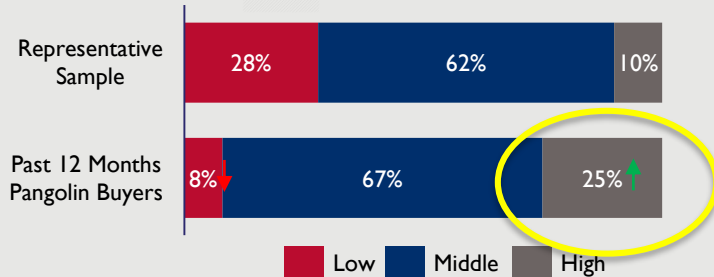
## Gender



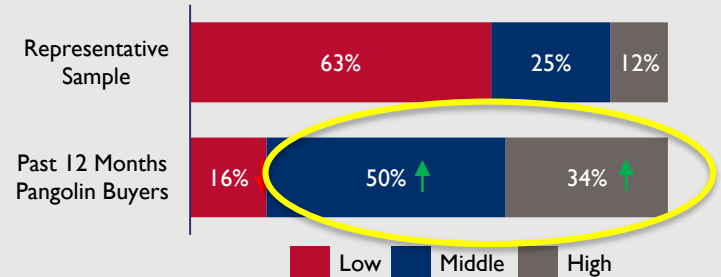
## Age



## Education



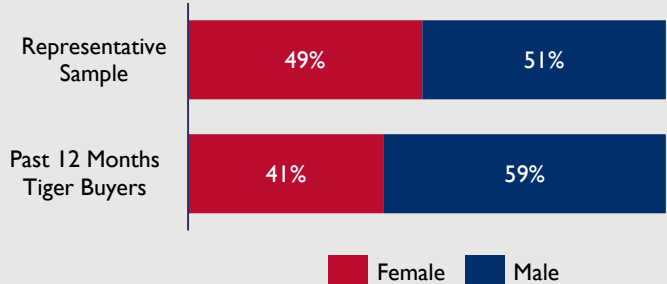
## Income



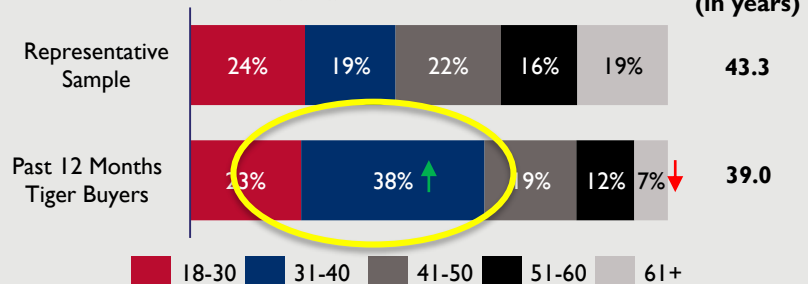


# TIGER PAST 12 MONTHS BUYERS' PROFILE

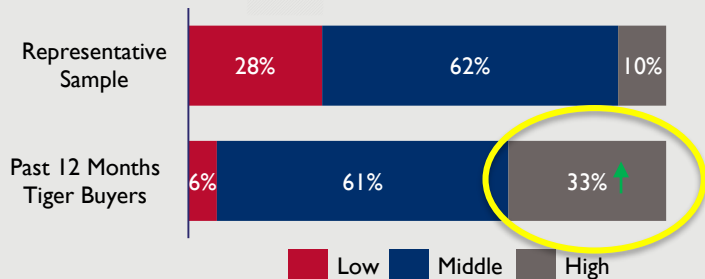
## Gender



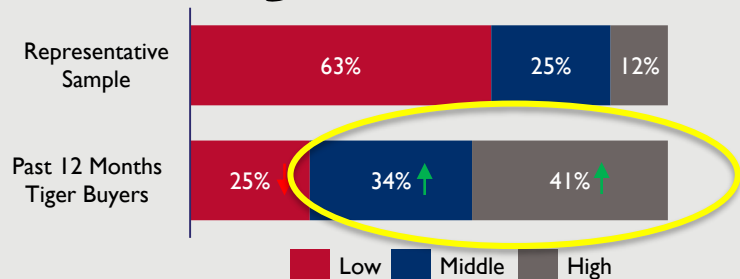
## Age



## Education



## Income



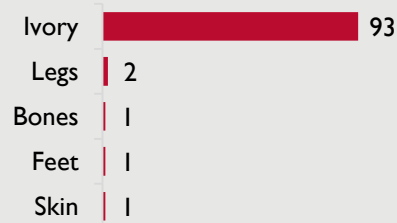
# WHAT:

Identify the prevalence and frequency of purchase and use of these products

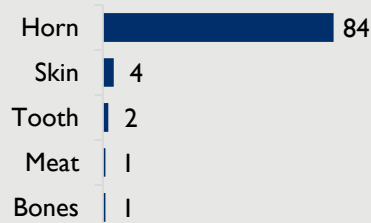


# OVERVIEW – MAIN PARTS PURCHASED BY SPECIES

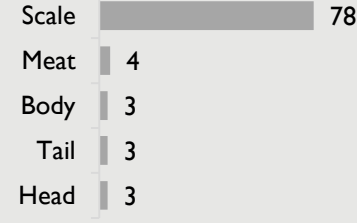
**Elephant (%)**  
(n=177)



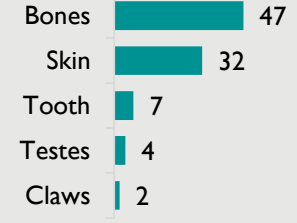
**Rhino (%)**  
(n=140)



**Pangolin (%)**  
(n=134)



**Tiger (%)**  
(n=79)



**Top 2 By City (%)**

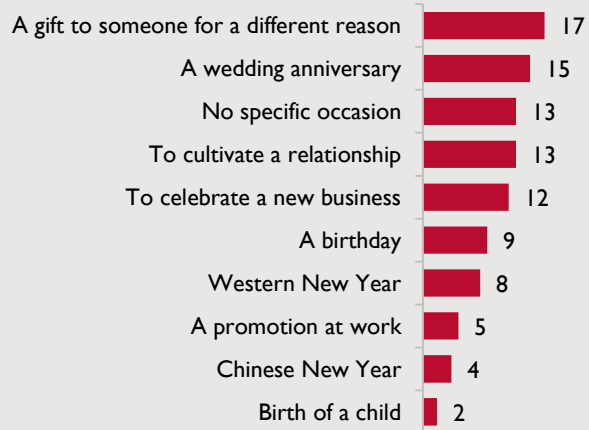
	Beijing	Shanghai	Guangzhou	Kunming	Nanning	Harbin
<b>Elephant</b>	Ivory 87% Legs 6%	Ivory 94% Legs 2%	<i>*Small Sample</i>	Ivory 96% Nose 2%	Ivory 96% Skin 4%	<i>*Small Sample</i>
<b>Rhino</b>	Horn 77% Skin 3% ↓	Horn 79% Skin 10%	Horn 100%	Horn 82% Skin 4%	Horn 84% Skin 4%	<i>*Small Sample</i>
<b>Pangolin</b>	Scales 63% Meat 8%	Scales 79% Tail 5%	<i>*Small Sample</i>	Scales 86% Head 5%	<i>*Small Sample</i>	<i>*Small Sample</i>
<b>Tiger</b>	Skin 45% Bones 36%	<i>*Small Sample</i>	<i>*Small Sample</i>	<i>*Small Sample</i>	<i>*Small Sample</i>	<i>*Small Sample</i>



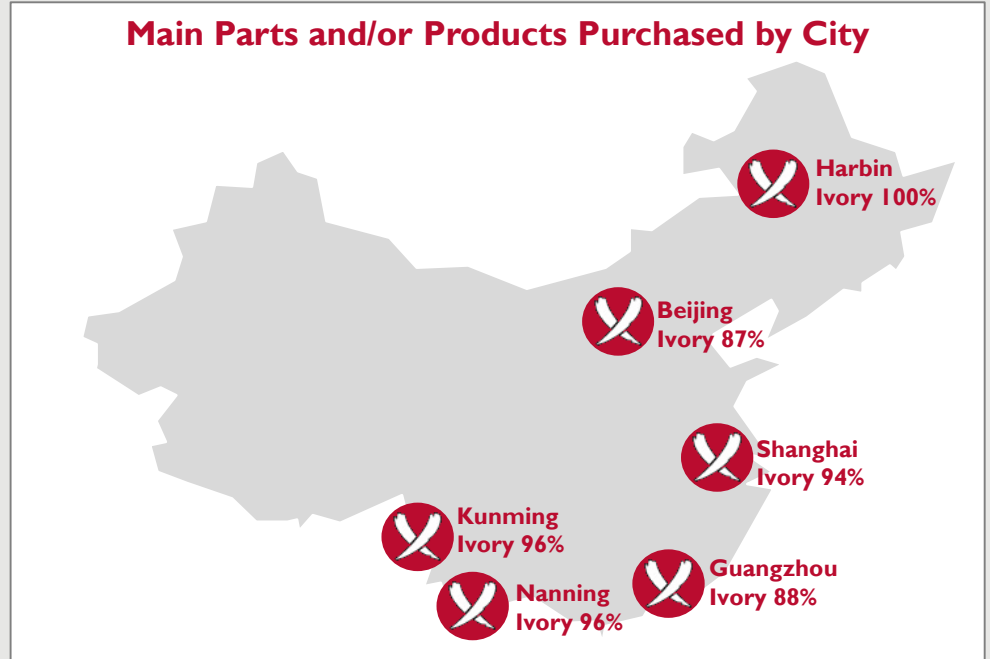
# PURCHASE OCCASIONS – PRODUCTS AND/OR PARTS OF ELEPHANTS

AMONG THOSE WHO HAVE BOUGHT ELEPHANT PARTS AND/OR PRODUCTS IN THE PAST 12 MONTHS

## Top 10 Purchase Occasions (for the Last Purchase) (% of Buyers)



## Main Parts and/or Products Purchased by City



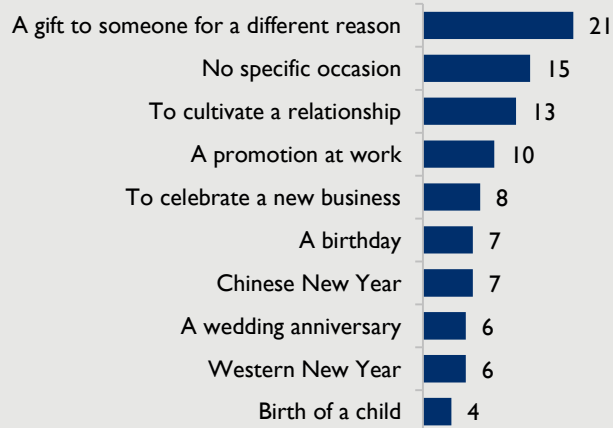




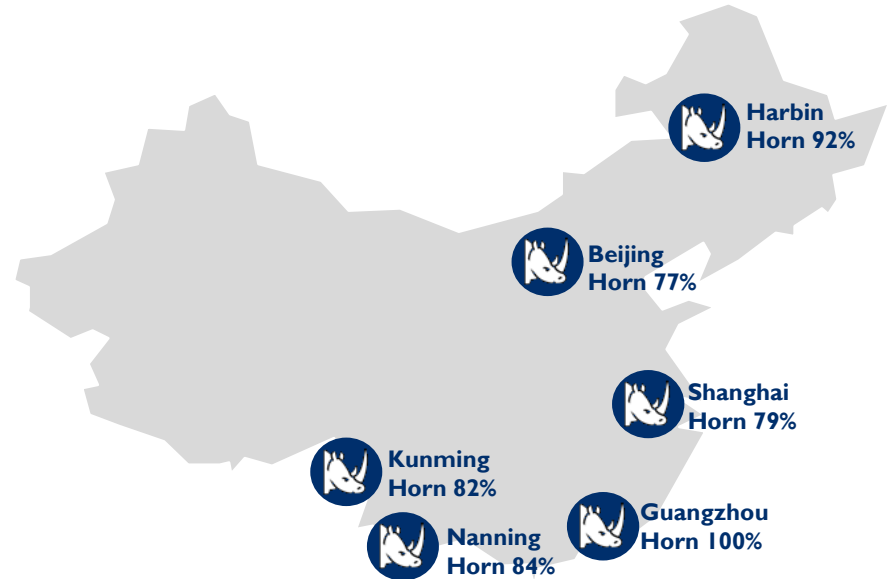
# PURCHASE OCCASIONS – PRODUCTS AND/OR PARTS OF RHINOS

AMONG THOSE WHO HAVE BOUGHT RHINO PARTS AND/OR PRODUCTS IN THE PAST 12 MONTHS

## Top 10 Purchase Occasions (for the Last Purchase) (% of Buyers)



## Main Parts and/or Products Purchased by City

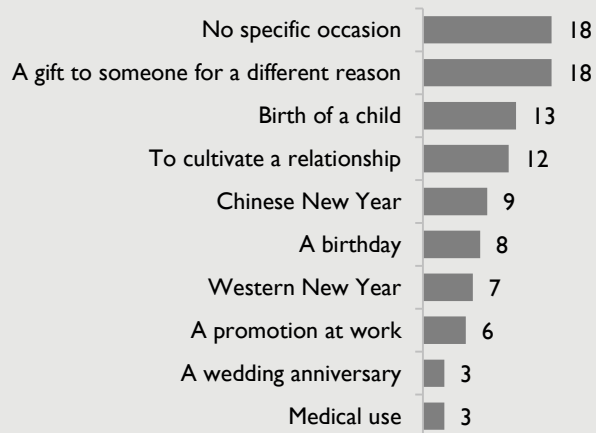


# PURCHASE OCCASIONS – PRODUCTS AND/OR PARTS OF PANGOLINS

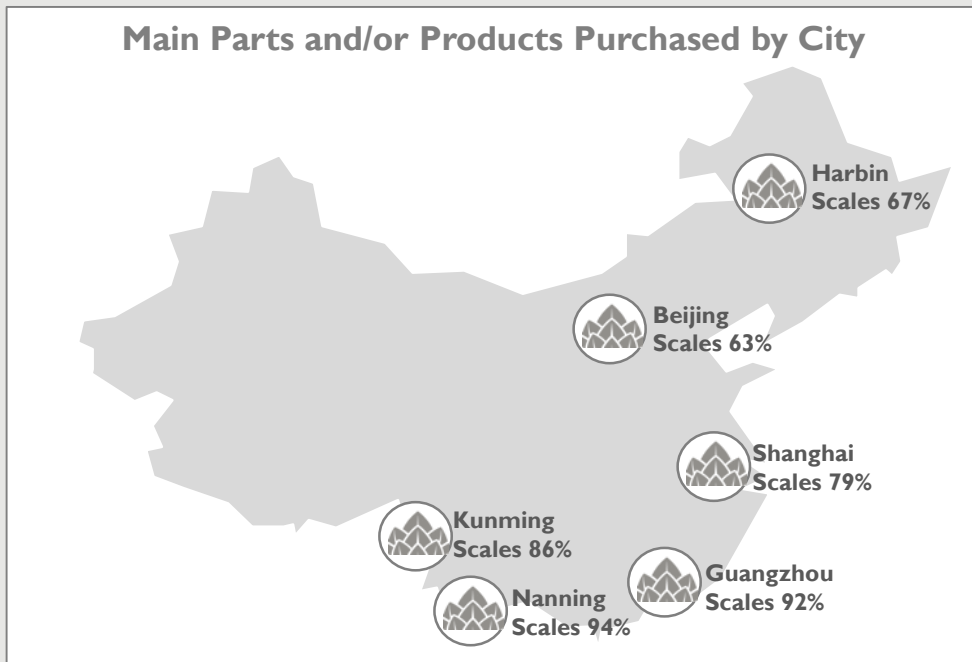


AMONG THOSE WHO HAVE BOUGHT PANGOLIN PARTS AND/OR PRODUCTS IN THE PAST 12 MONTHS

## Top 10 Purchase Occasions (for the Last Purchase) (% of Buyers)



## Main Parts and/or Products Purchased by City

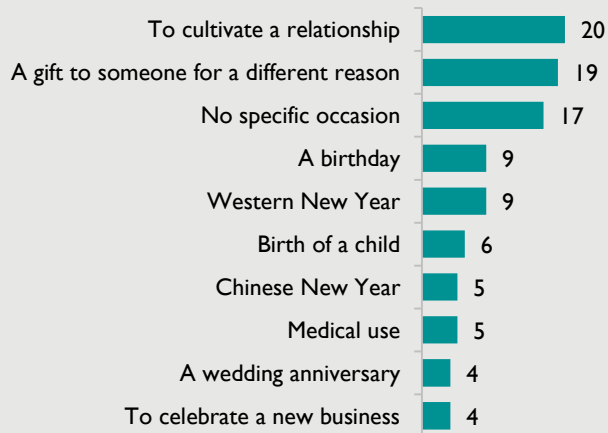




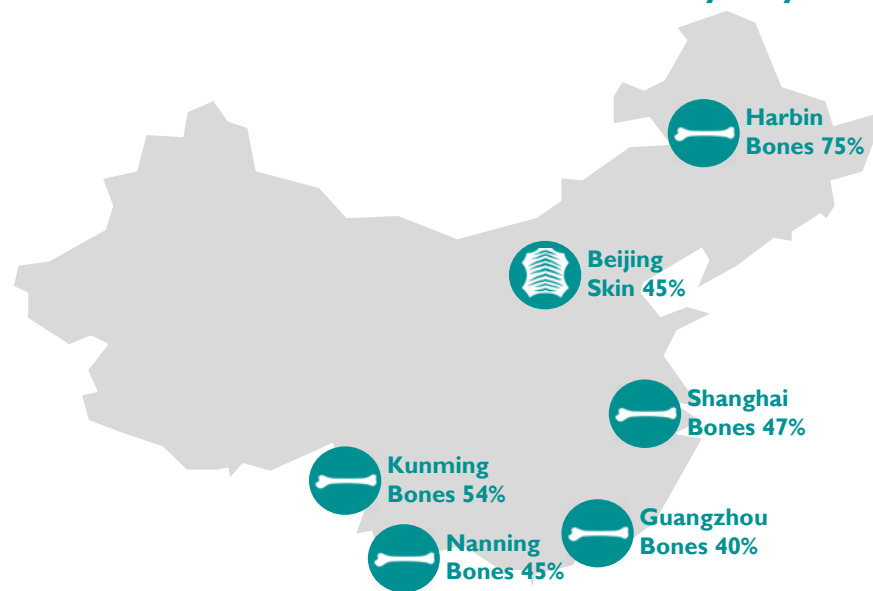
# PURCHASE OCCASIONS - PRODUCTS AND/OR PARTS OF TIGERS

AMONG THOSE WHO HAVE BOUGHT TIGER PARTS AND/OR PRODUCTS IN THE PAST 12 MONTHS

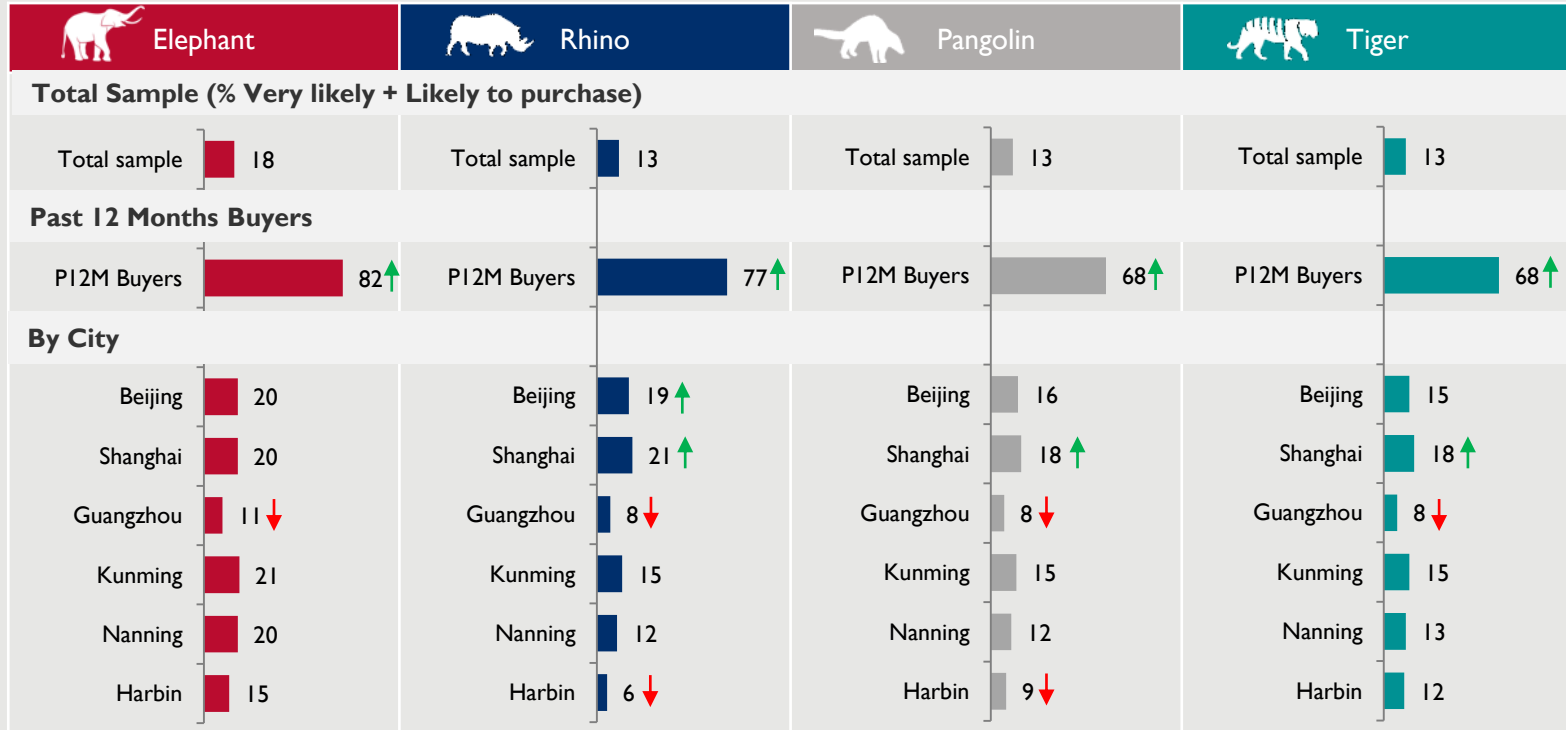
## Top 10 Purchase Occasions (for the Last Purchase) (% of Buyers)



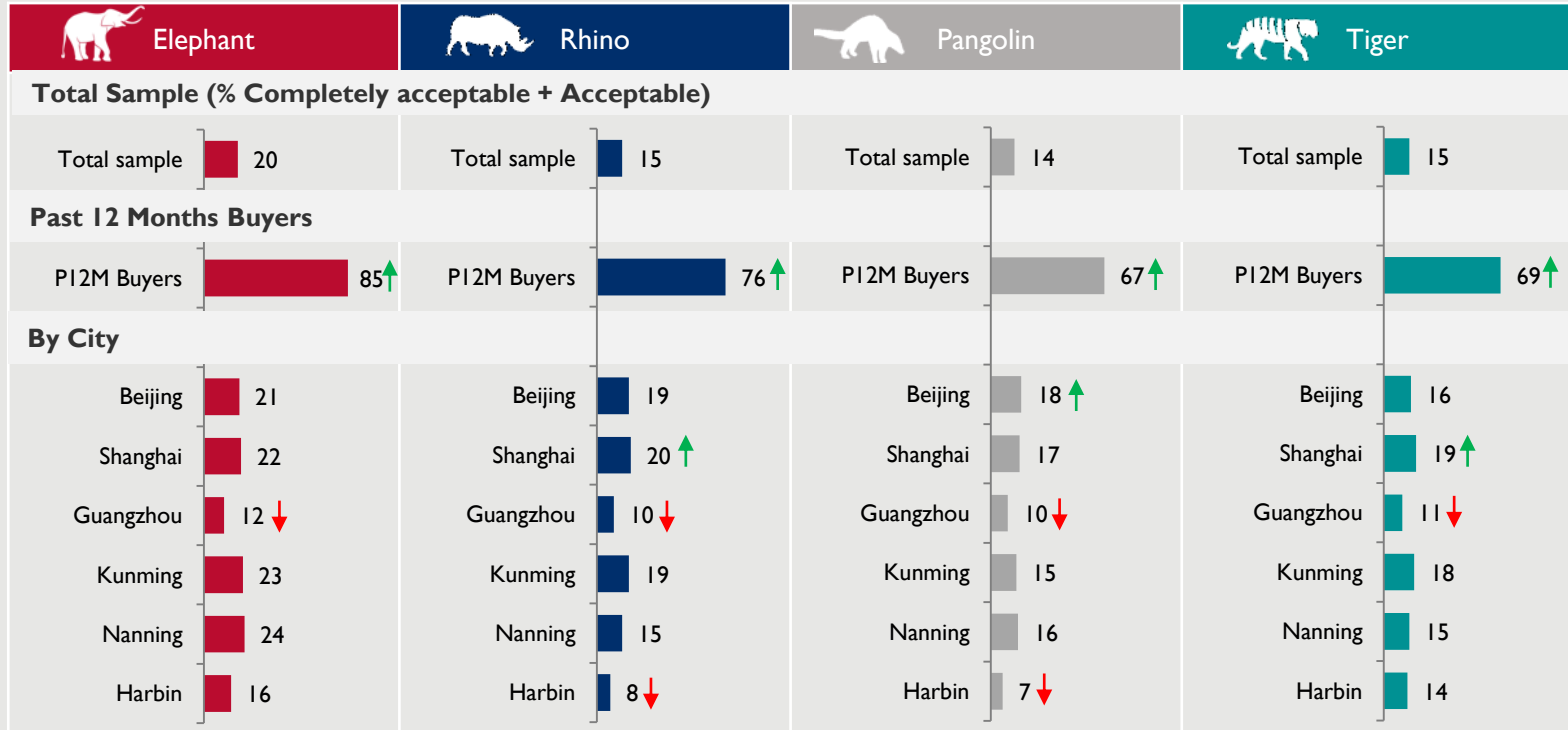
## Main Parts and/or Products Purchased by City



# OVERVIEW – FUTURE PURCHASE INTENTION



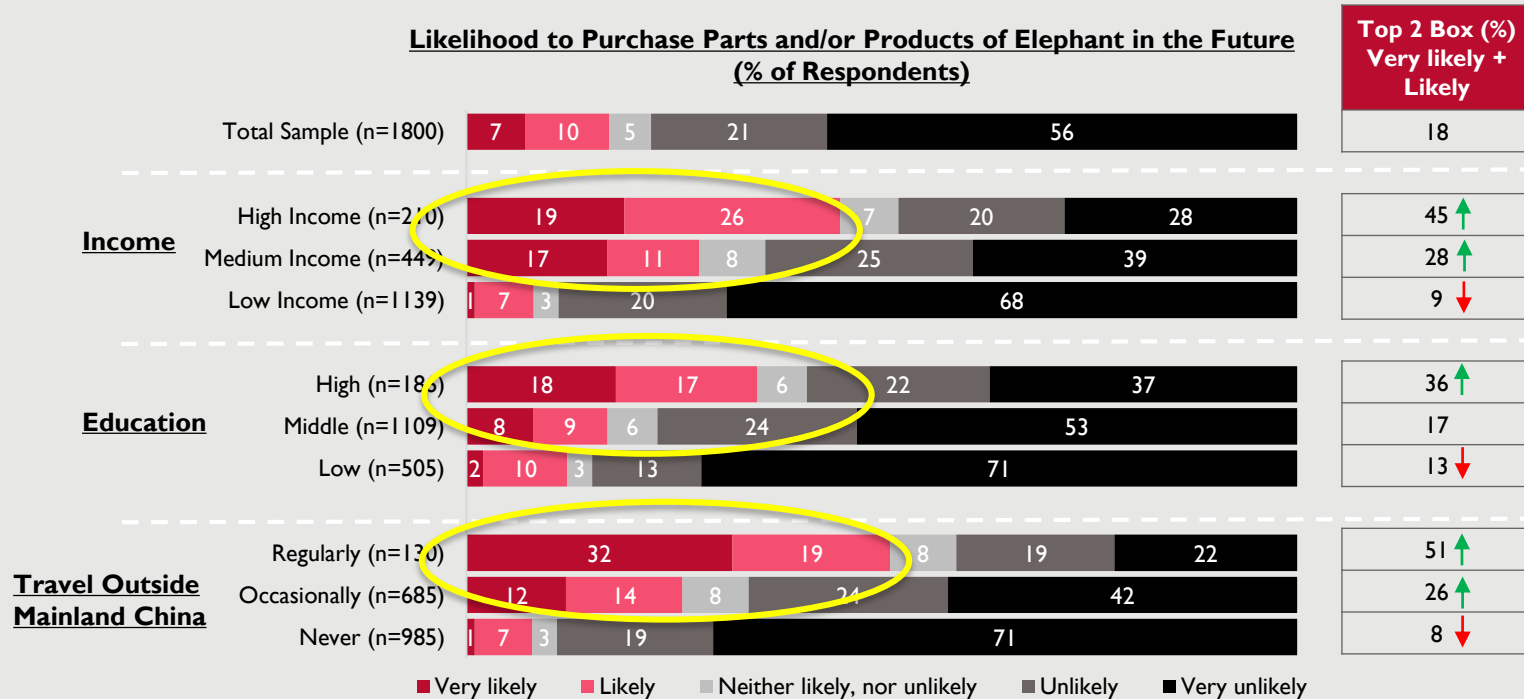
# OVERVIEW – ACCEPTABILITY





# FUTURE PURCHASE INTENTION – ELEPHANTS (ALL SPECIES SIMILAR)

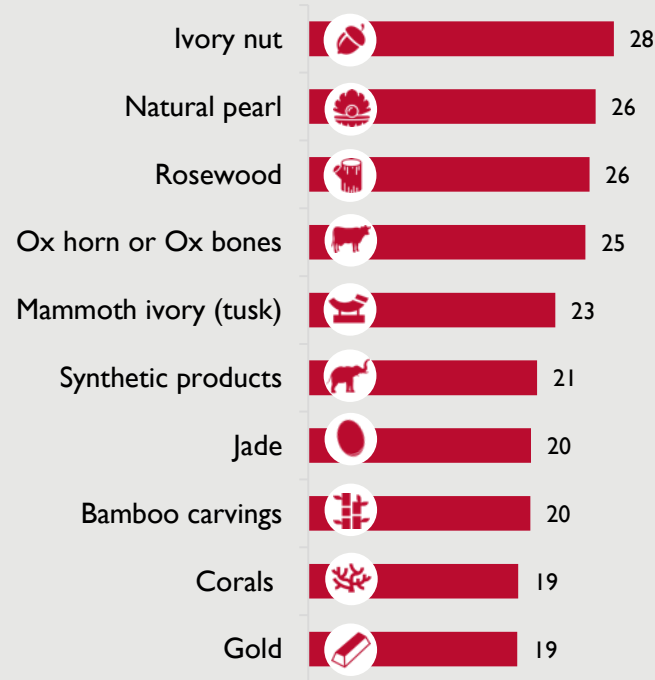
**Likelihood to Purchase Parts and/or Products of Elephant in the Future  
(% of Respondents)**





# ALTERNATIVES TO ELEPHANT IVORY

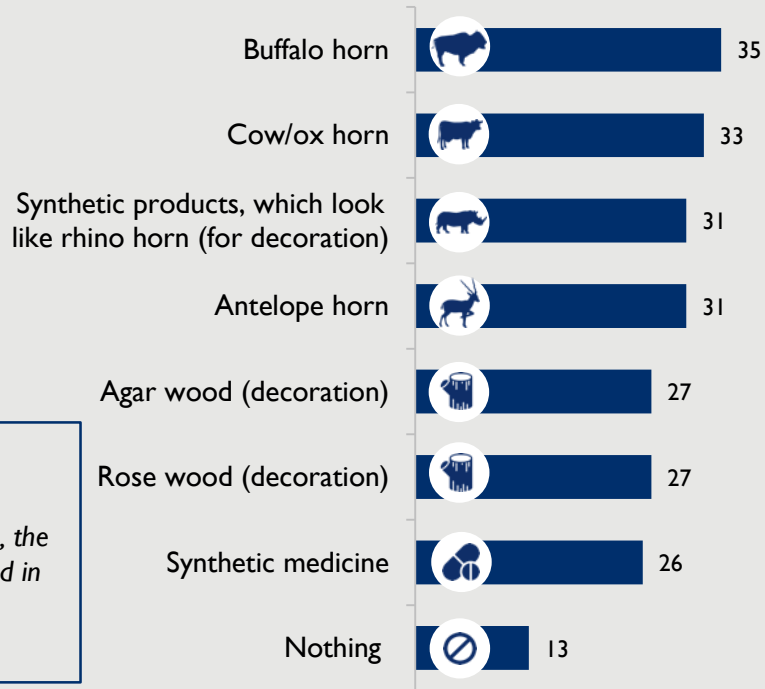
(TOP 10, % OF RESPONDENTS)



*Note: of these alternative products, coral is protected in China.*



# ALTERNATIVES TO RHINO (TOP 10, % OF RESPONDENTS)

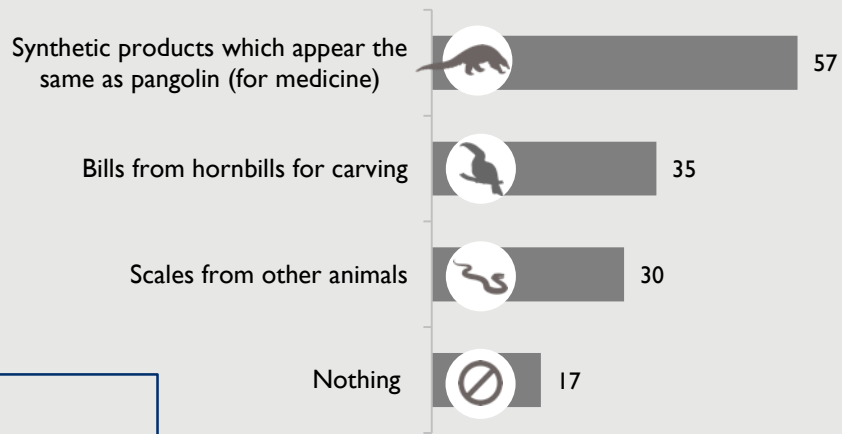


*Note: of these alternative products, the antelope is protected in China.*





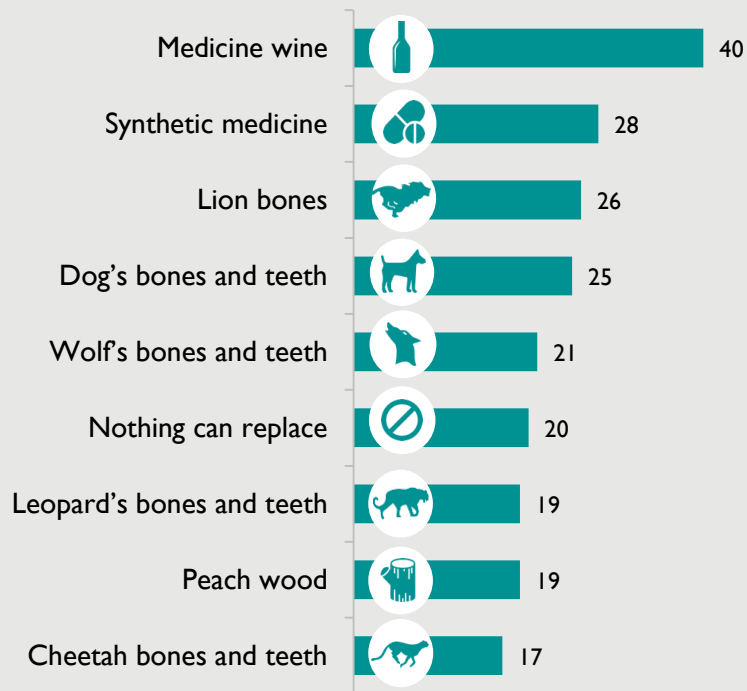
## ALTERNATIVES TO PANGOLIN (TOP 10, % OF RESPONDENTS)



*Note: of these alternative products, the hornbill is protected in China.*



## ALTERNATIVES TO TIGER (TOP 10, % OF RESPONDENTS)



*Note: of these alternative products and related species, the wolf and leopard are protected in China.*

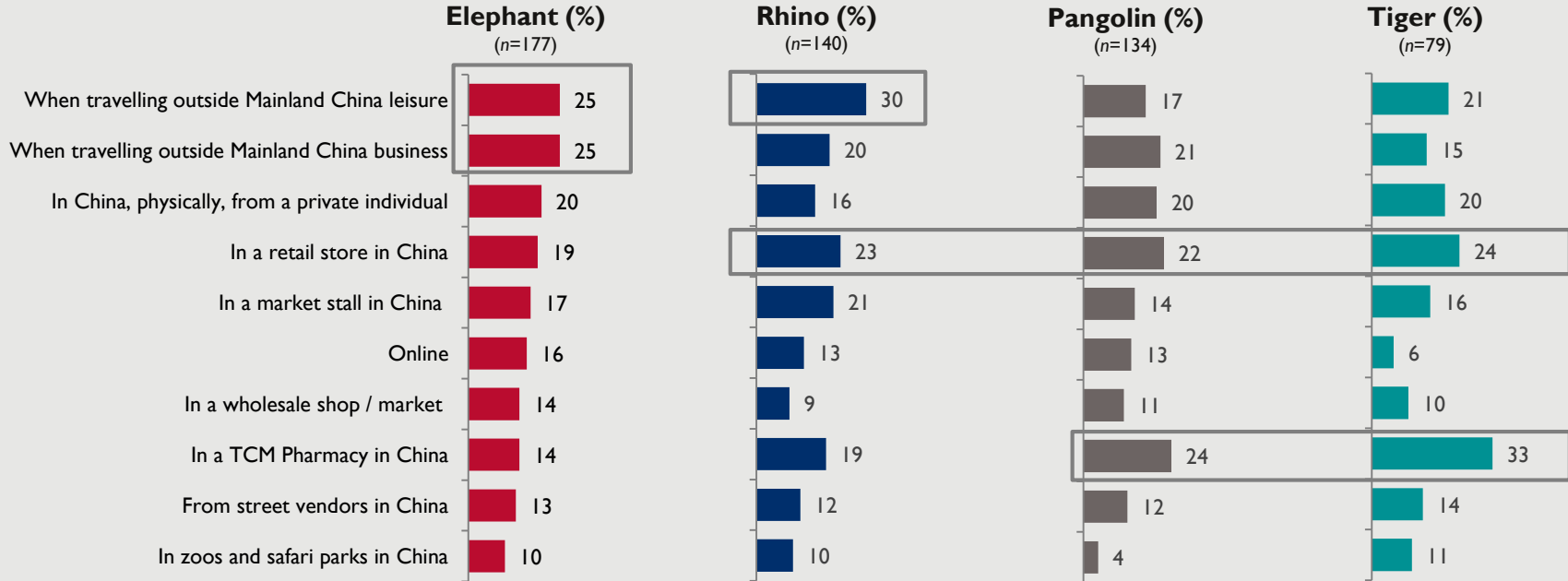
**WHERE:**

Purchase channels























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# OVERVIEW – MAIN PURCHASE CHANNELS BY SPECIES

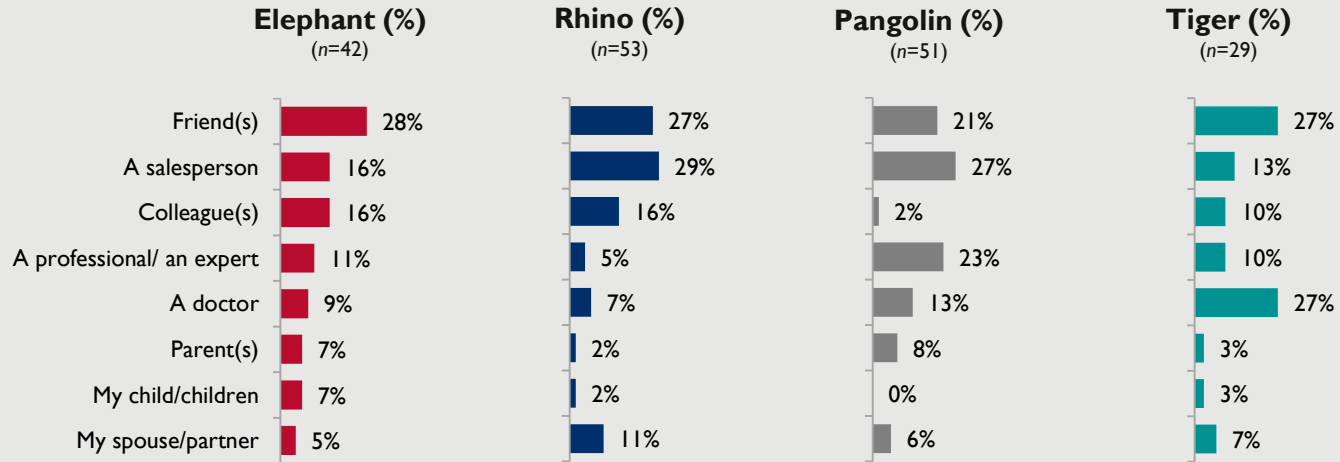


# PURCHASE DECISION

AMONG THOSE WHO HAVE BOUGHT WILDLIFE PARTS AND/OR PRODUCTS IN THE PAST 12 MONTHS

I made the decision to buy...	 % who made a <u>planned</u> purchase		 % who made an <u>unplanned</u> purchase	
	 Entirely by myself	 <b>26%</b>	 <b>50%</b>	
 Based on others' recommendations	 <b>19%</b>	 <b>42%</b>		
	 <b>20%</b>	 <b>42%</b>		
	 <b>25%</b>	 <b>38%</b>		
	 <b>7%</b>	 <b>17%</b>		
	 <b>8%</b>	 <b>30%</b>		
	 <b>9%</b>	 <b>28%</b>		
	 <b>15%</b>	 <b>22%</b>		

# OVERVIEW – THOSE WHO MADE AN UNPLANNED PURCHASE BASED ON OTHERS' RECOMMENDATION BY SPECIES



# WHY:

Major motivations driving purchase and use of these products



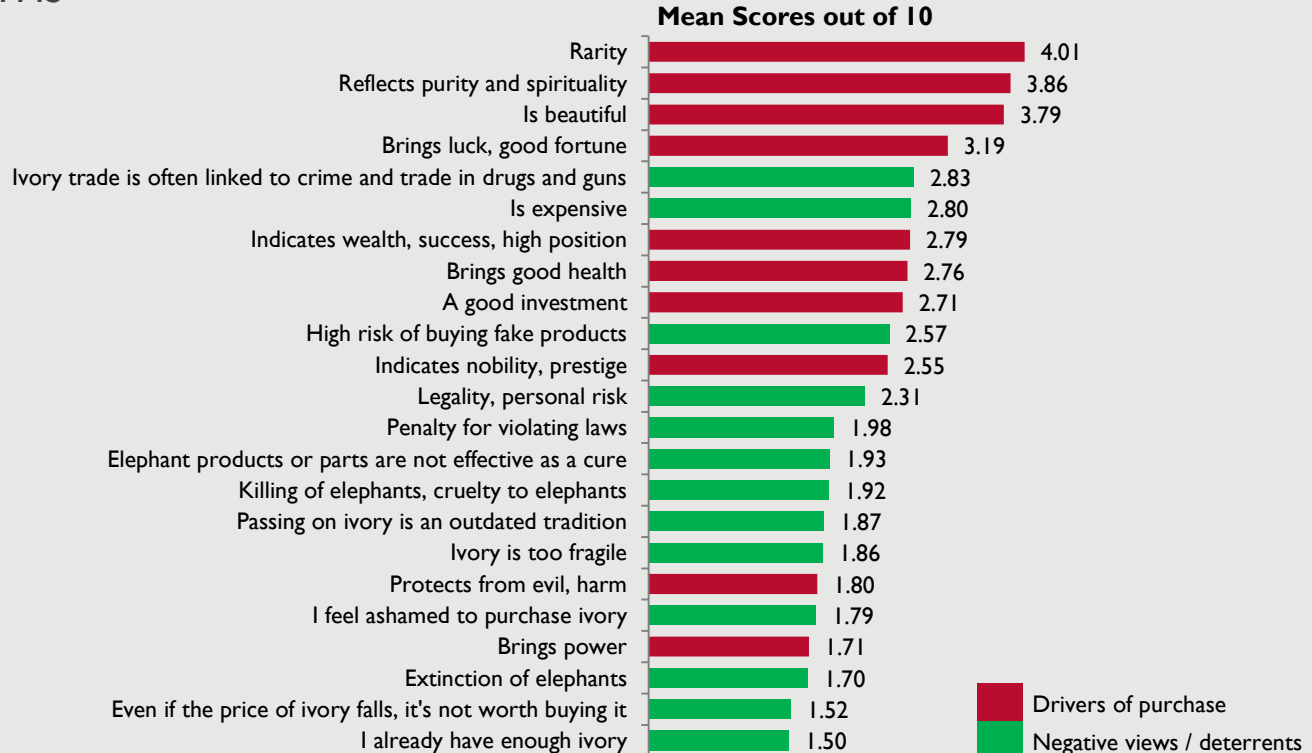


# DRIVERS AND DETERRENTS

AMONG THOSE WHO HAVE BOUGHT ELEPHANT PARTS AND/OR PRODUCTS IN THE PAST 12 MONTHS

Most describes people's opinions

Least describes people's opinions







# METHODOLOGY OVERVIEW: NARRATIVE ANALYSIS (I)

Statement groupings

Indicates nobility, prestige	0.817
Brings luck, good fortune	0.747
Indicates wealth, success, high position	0.693
Killing of elephants, cruelty to elephants	-0.681
Ivory is too fragile	-0.718
Extinction of elephants	-0.822

Passing on ivory is an outdated tradition	0.735
Ivory trade is often linked to crime and trade in drugs and guns	0.659
Even if the price of ivory falls, it's not worth buying it.	0.652
I feel ashamed to purchase ivory	0.649
Brings good health	-0.730
A good investment	-0.776

I already have enough ivory	0.646
Elephant products or parts are not effective as a cure	0.602
Protects from evil, harm	-0.587
Reflects purity and spirituality	-0.667
Is beautiful	-0.692
Rarity	-0.810

High risk of buying fake products	0.766
Penalty for violating laws	0.657
Brings power	-0.759



Narratives

**Narrative 1:**

Ivory brings/indicates success, wealth and social status.

**Narrative 2:**

Ivory is neither a good investment nor a cure. Passing on ivory is an outdated tradition, and ivory trade is often linked to crime. I personally feel ashamed to purchase ivory.

**Narrative 3:**

I own ivory and know for a fact that it protects from evil and harm.

**Narrative 4:**

Ivory doesn't bring power. There's a high risk of buying fake ivory and being penalized for violating laws.

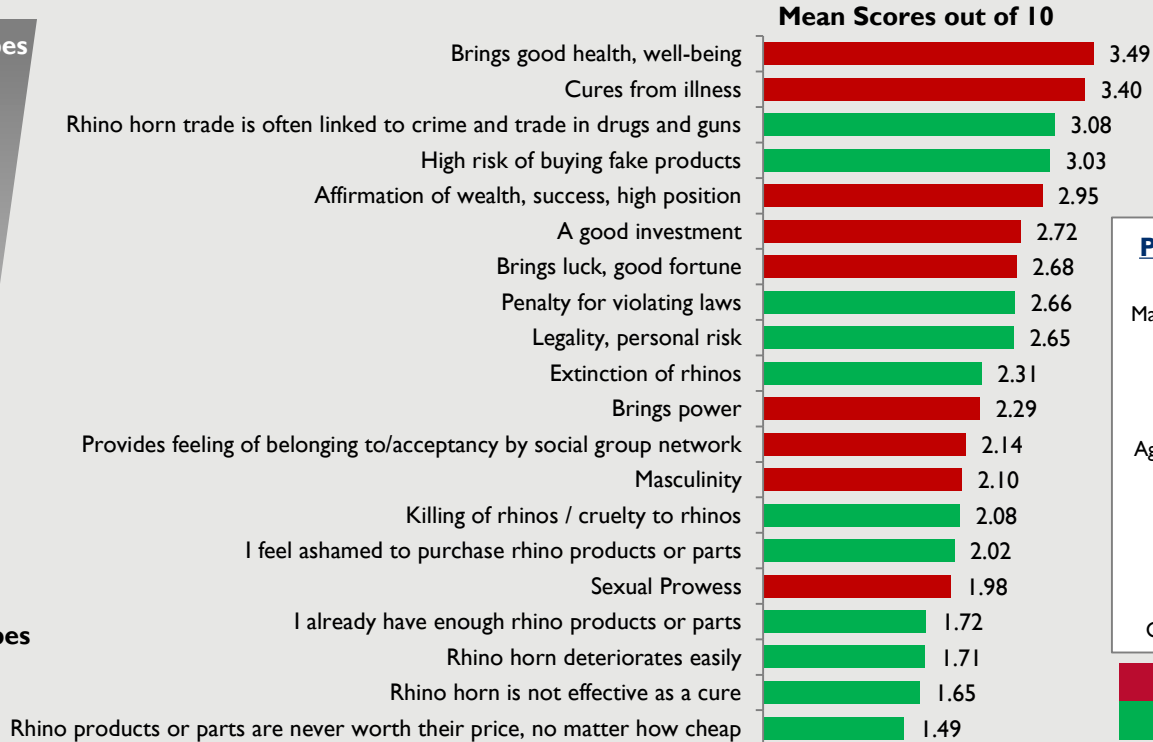


# DRIVERS AND DETERRENENTS

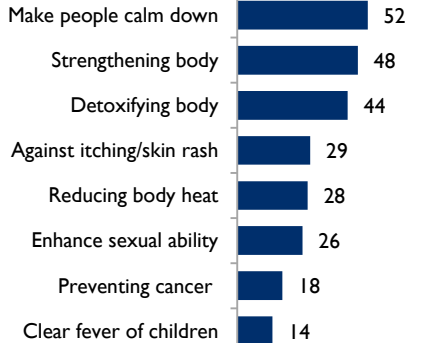
## AMONG THOSE WHO HAVE BOUGHT RHINO PARTS AND/OR PRODUCTS IN THE PAST 12 MONTHS

Most describes people's opinions

Least describes people's opinions



### Perceived Health Benefits of Rhino Among Past 12 Months Buyers (n=140)



Drivers of purchase

Negative views / deterrents



# STATEMENT GROUPINGS AND NARRATIVES FOR RHINO

Statement groupings

Killing of rhinos / cruelty to rhinos	0.861	Cures from illness	0.942	Brings power	0.885	Legality, personal risk	0.758	I already have enough rhino products or parts	0.940
Extinction of rhinos	0.739	Brings good health, well-being	0.875	Brings luck, good fortune	0.639	Masculinity	-0.666	Provides feeling of belonging to/acceptancy by social group network	0.568
I feel ashamed to purchase rhino products or parts	0.543	Rhino products or parts are never worth their price, no matter how cheap	-0.787	Affirmation of wealth, success, high position	0.519				
Rhino horn trade is often linked to crime and trade in drugs and guns	0.504	Rhino horn is not effective as a cure	-0.900	High risk of buying fake products	-0.943				
A good investment	-0.604								
Sexual Prowess	-0.672								



Narratives

<p><b><u>Narrative 1:</u></b> The belief that rhino horn enhances sexual prowess, wealth and social status is a huge misconception. Rhino horn trade means cruelty, death and extinction of rhinos. Buying rhino horn is illegal and shameful.</p>	<p><b><u>Narrative 2:</u></b> Rhino horn is an extremely powerful cure.</p>	<p><b><u>Narrative 3:</u></b> I believe that rhino horn brings luck, good fortune and power. Rhino horn sold is not fake.</p>	<p><b><u>Narrative 4:</u></b> Rhino horn does not enhance masculinity, and is illegal.</p>	<p><b><u>Narrative 5:</u></b> I own Rhino horn and know for a fact that it brings a feeling of belonging and social acceptance.</p>
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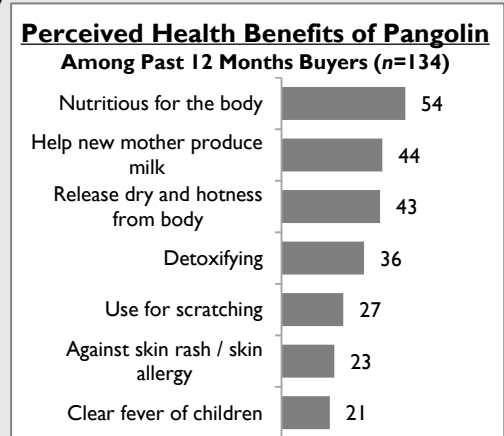
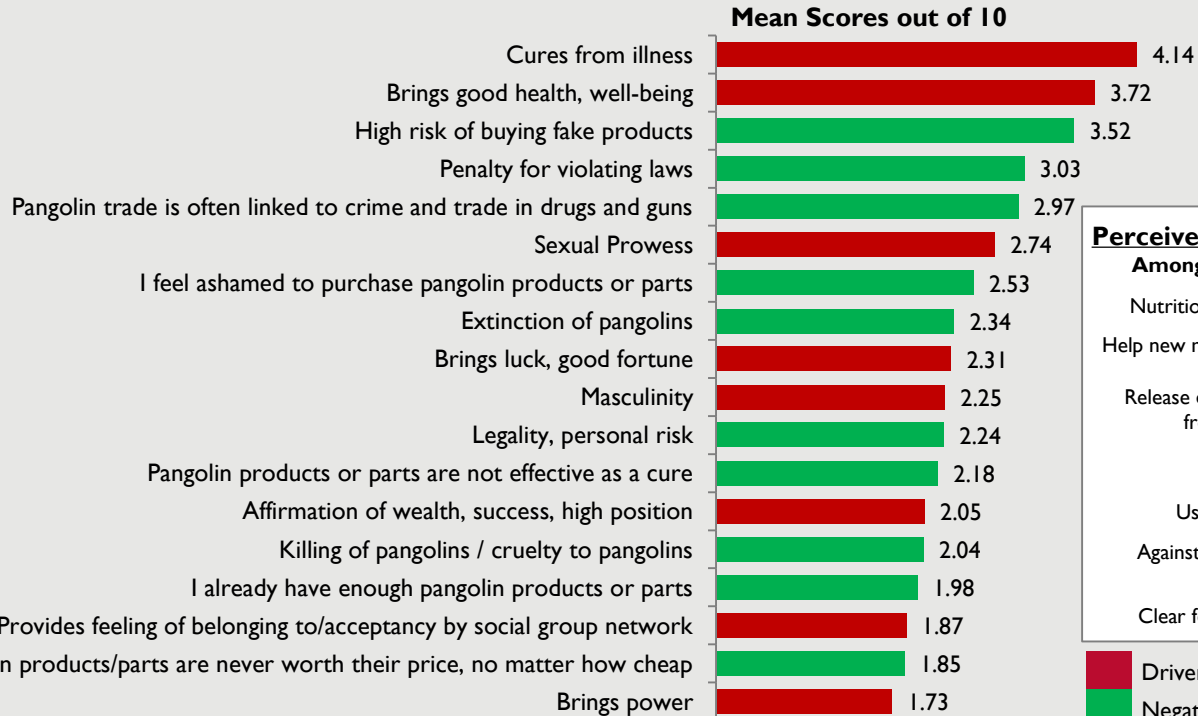


# DRIVERS AND DETERRENENTS

## AMONG THOSE WHO HAVE BOUGHT PANGOLIN PARTS AND/OR PRODUCTS IN THE PAST 12 MONTHS

Most describes people's opinions

Least describes people's opinions



Drivers of purchase

Negative views / deterrents



# STATEMENT GROUPINGS AND NARRATIVES FOR PANGOLIN

Statement groupings

Brings power	0.885
Brings luck, good fortune	0.826
Provides feeling of belonging to/acceptancy by social group network	0.811
Affirmation of wealth, success, high position	0.809
Pangolin products or parts are not effective as a cure	-0.693
High risk of buying fake products	-0.761

Brings good health, well-being	0.883
Cures from illness	0.866
Masculinity	0.711
I feel ashamed to purchase pangolin products or parts	-0.756

Penalty for violating laws	0.820
Pangolin trade is often linked to crime and trade in drugs and guns	0.820
Killing of pangolins / cruelty to pangolins	0.815
I already have enough pangolin products or parts	0.757
Extinction of pangolins	0.704
Sexual Prowess	-0.677

Pangolin products or parts are never worth their price, no matter how cheap	0.629
Legality, personal risk	0.890



Narratives

**Narrative 1:**  
Pangolin brings power, wealth, luck, success and high social status.

**Narrative 2:**  
Pangolin brings good health and enhances masculinity. I am not feeling ashamed to purchase pangolins parts or products.

**Narrative 3:**  
Killing pangolins is cruel and illegal and can lead to the extinction of this species. Sexual prowess resulting from consumption of pangolin is a misconception.

**Narrative 4:**  
Pangolins are never worth their price and are risky to purchase because of illegality and personal risks.



# DRIVERS AND DETERRENENTS

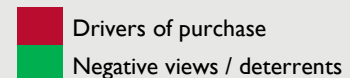
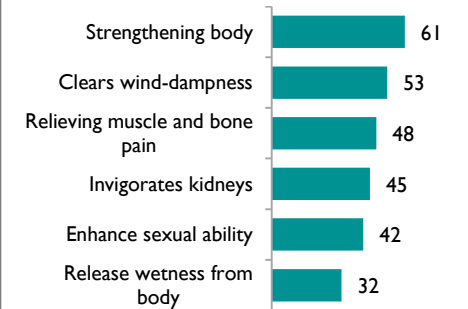
AMONG THOSE WHO HAVE BOUGHT TIGER PARTS AND/OR PRODUCTS IN THE PAST 12 MONTHS

Most describes people's opinions

Least describes people's opinions



## Perceived Health Benefits of Tiger Among Past 12 Months Buyers (n=79)





# STATEMENT GROUPINGS AND NARRATIVES FOR TIGER

Statement groupings

Brings good health	0.785
Is expensive	0.773
Cure for illness	0.753
Rarity	0.666
Tiger products or parts are never worth their price, no matter how cheap	-0.713
I already have enough tiger products or parts	-0.742
Tiger products or parts are not effective as a cure	-0.751

High risk of buying fake products	0.745
Trade in tiger products is often linked to crime and trade in drugs and guns	0.726
Extinction of tigers	0.626
A good investment	-0.632
Purity and spirituality	-0.761
Brings luck, good fortune	-0.800

Nobility, prestige	0.920
Brings power	0.837
Contributes to the affirmation of wealth, success, high position	0.726
Protects from evil, harm	0.647

Masculinity	0.842
Sexual prowess	0.826

I feel ashamed to purchase tiger products or parts	0.559
Killing of tigers, cruelty to tigers	0.596
Legality, personal risk	0.770



Narratives

**Narrative 1:**  
Tiger parts and/or products is a rare, expensive but extremely effective cure. It is well worth the price.

**Narrative 2:**  
Tiger products don't possess any spirituality, they don't bring luck or good fortune. The truth is that tiger products are often linked to criminal activities and products sold are often fake.

**Narrative 3:**  
Tiger indicates prestige, power, social status. It protects from evil and harm.

**Narrative 4:**  
Tiger enhances masculinity and sexual prowess

**Narrative 5:**  
I am scared of the risks, or ashamed to buy tiger, especially as they are harvested in a very cruel way.

# HOW [TO CHANGE]:

Legislation and Regulations

Assess exposure to messages

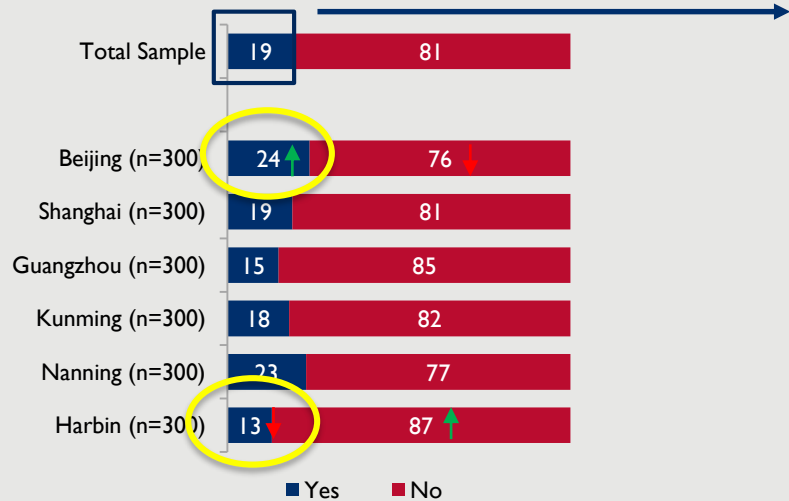


“妈妈，我长牙了”  
“.....”  
“妈妈，我长牙了耶！”  
“.....”  
“妈妈！我长牙了！”  
“妈妈.....？”  
“妈妈，你不为我高兴吗？”



# AWARENESS OF AGREEMENTS AND REGULATIONS

**Are You Aware of the Current/Upcoming Agreements or Regulations Controlling the Sale of the Protected Species? (%)**

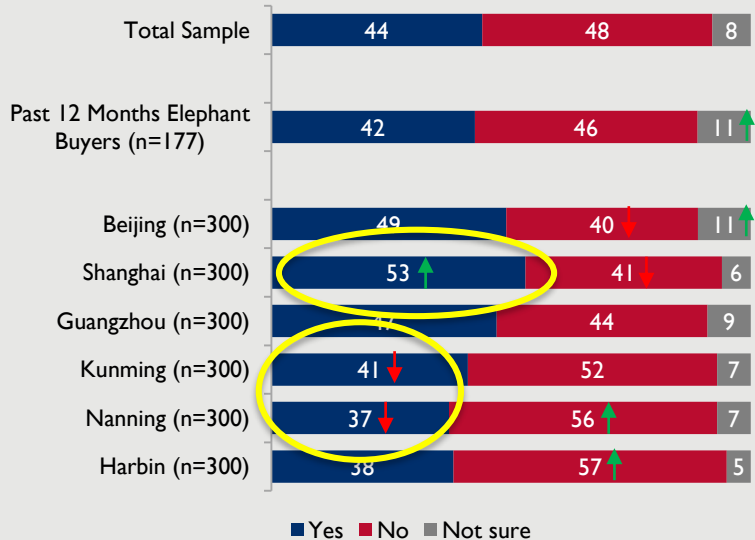


**Regulations/Agreements (or Elements of Regulations) Aware of – Open-ended Responses (% Among Those Aware, n=335)**

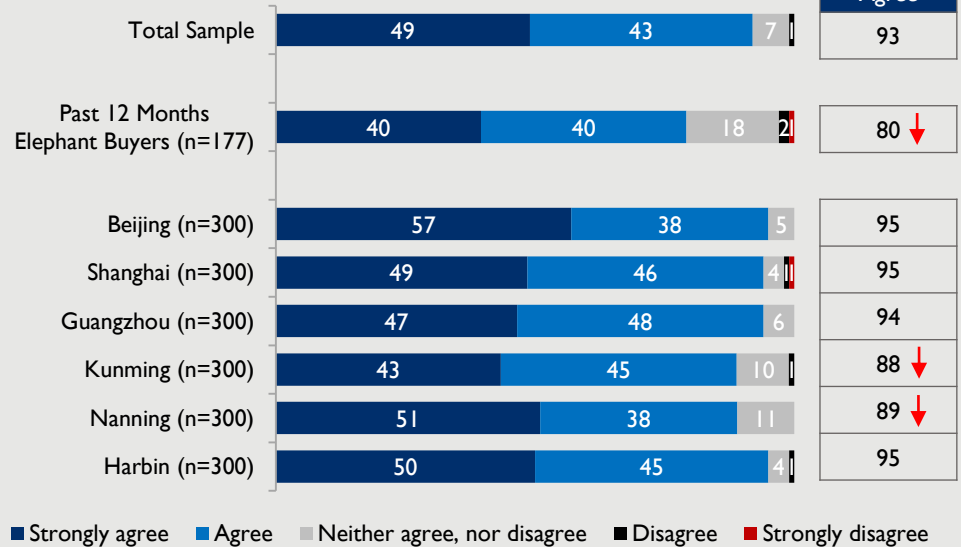


# AWARENESS OF THE IVORY TRADE BAN

**Have You Heard About the Ban on Ivory Trade?**  
(% of Respondents)

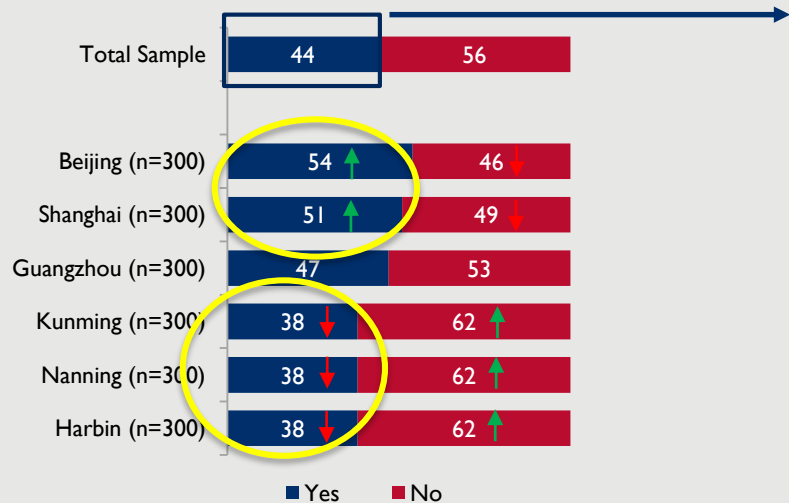


**How Much do You Agree with the Ivory Trade Ban? (%)**

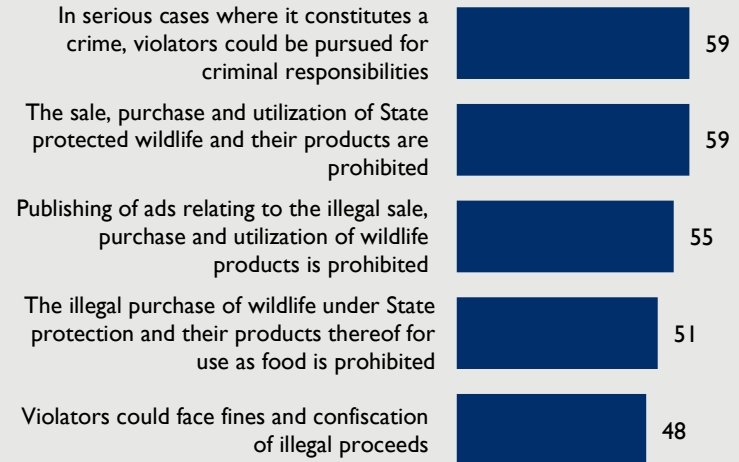


# AWARENESS OF THE REVISED WILDLIFE PROTECTION LAW

**Have You Heard of the Revised Wildlife Protection Law of 2016? (%)**

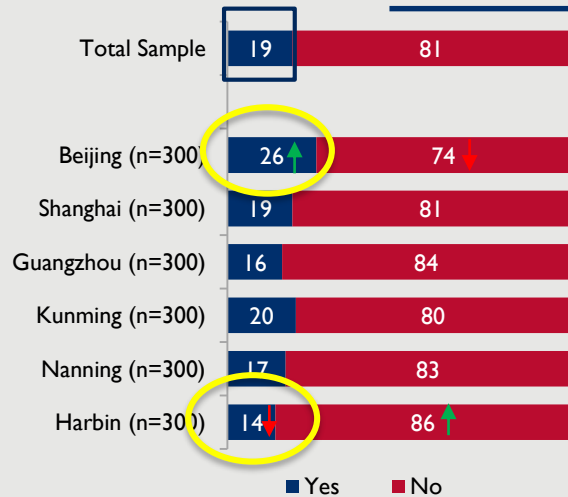


**Which Revisions or Additions Have You Heard of? (% Among Those Aware, n=798)**



# AWARENESS OF MESSAGES

**Awareness of Messages on the Topic of Stopping the Consumption of Animal Parts and/or Products or on Animal Protection in the Past Six Months (%)**



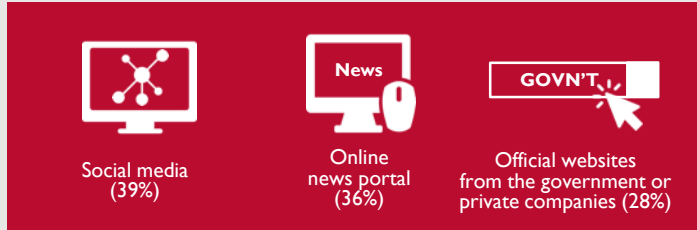
**Which Revisions or Additions Have You Heard of? (% Among Those Aware, n=336)**



# SOURCES OF AWARENESS

## Top 3 Sources of Messages

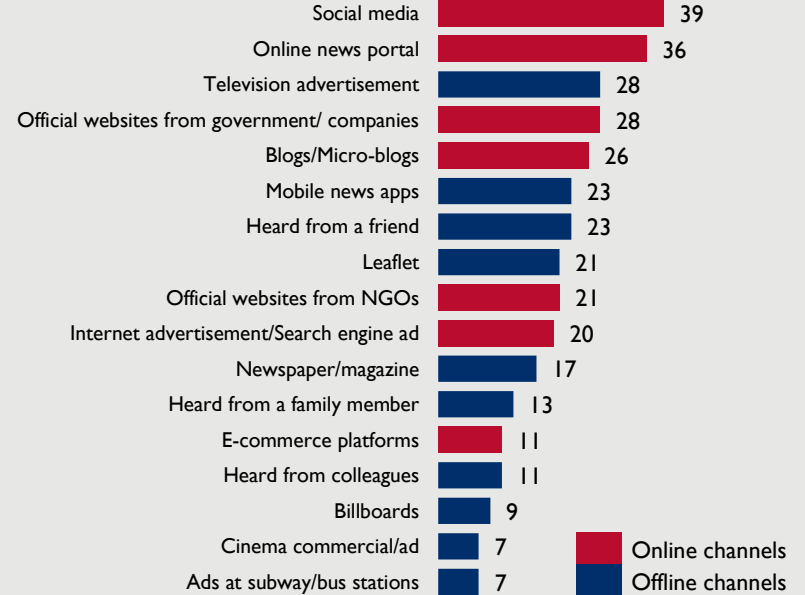
Online  
(Net: 82%)



Offline



## All Sources of Awareness (% of Respondents)



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