Reducing Consumer Demand for Wildlife in Asia:
Insights from Consumer Research in China, Thailand, Vietnam

Webinar, 27 March 2019

Welcome

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Agenda

- **HOW:** Methodology - sampling and data collection process

- **WHO:** Consumer profiles

- **WHERE:** Purchase channels

- **WHY:** Identify the major motivations driving purchase and use of these products

- **HOW [TO CHANGE]:** Addressing the motivations

- **EVIDENCE-BASED RECOMMENDATIONS:** Over to the Panelists

We will review **3 markets**

We'll first look at **China**

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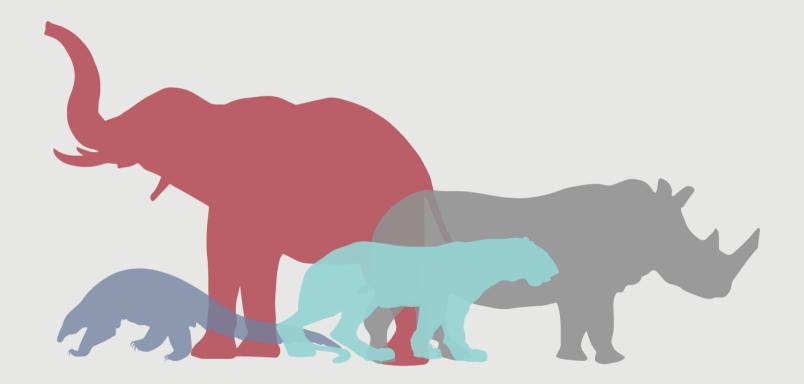
Followed by **Thailand**

We will review **3 markets**

We'll first look at **China**   Followed by **Thailand**   And then **Vietnam**

And investigate **4 species**

Research Design – Why findings are comparable

Quantitative Research Studies in China, Thailand, Vietnam conducted in 2018

In total 4,850 consumer interviews conducted: n=1,800 in China, n=1,550 in Thailand and n=1,500 in Vietnam

- Similar data collection process: quantitative online survey, representing general population

- Similar sampling design: general population 18+ in major urban centers

- Similar questionnaires, with similar definitions for users and segments

WHO:
USER PROFILES

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User Profile **Elephant**: China, Thailand and Vietnam

	Gender	Age	Education	Income
China				
	Female	**Medium**	**Medium**	**Medium**
			Higher	**Higher**
Thailand				
	Female	**Medium**		**Medium**
			Higher	**Higher**
Vietnam				
	Female		**Medium**	**Medium**
				Higher

Highlight = Statistically significantly higher

User Profile **Rhino**: China and Vietnam

	Gender	Age	Education	Income
China	Male	Young		
				Medium
			Higher	Higher
Thailand				
Vietnam	Male	Young		
				Medium
				Higher

Highlight = Statistically significantly higher

User Profile **Pangolin**: China and Vietnam

	Gender	Age	Education	Income
China	Male	Young		
				Medium
			Higher	Higher
Thailand				
Vietnam	Male			
				Higher

Highlight = Statistically significantly higher
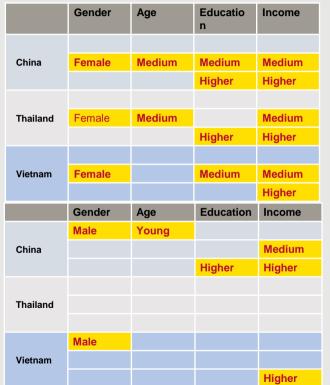
User Profile **Tiger**: China and Thailand
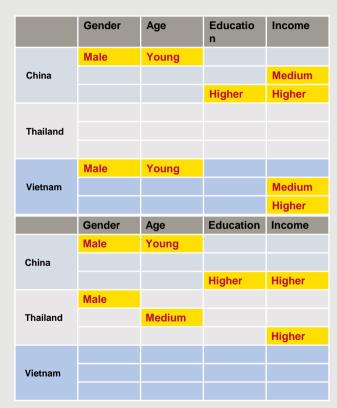
	Gender	Age	Education	Income
China	**Male**	**Young**		
			Higher	**Higher**
Thailand	**Male**			
		Medium		
				Higher
Vietnam				

Highlight = Statistically significantly higher

User Profiles in 3 markets and across 4 species

Elephant

	Gender	Age	Education	Income
China	Female	Medium	Medium / Higher	Medium / Higher
Thailand	Female	Medium		Medium / Higher
Vietnam	Female		Medium	Medium / Higher

Pangolin

	Gender	Age	Education	Income
China	Male	Young	Higher	Medium / Higher
Thailand				
Vietnam	Male	Young		Medium / Higher

Rhino

	Gender	Age	Education	Income
China	Male	Young	Higher	Medium / Higher
Thailand				
Vietnam	Male			Higher

Tiger

	Gender	Age	Education	Income
China	Male	Young	Higher	Higher
Thailand	Male	Medium		Higher
Vietnam				

Future Purchase Intention: China, Vietnam and Thailand
(% "Very likely" + "Likely" to purchase in the future)
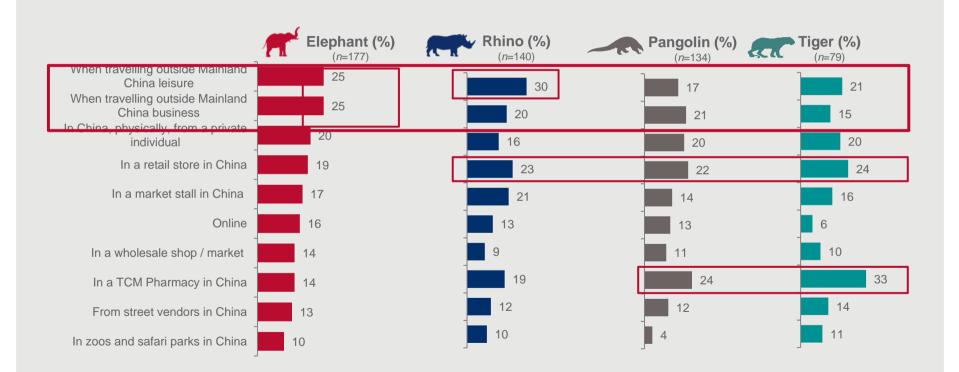
Elephant	Rhino	Pangolin	Tiger

% 'Very likely + Likely to purchase' among <u>Total Representative Sample</u>

Elephant	Rhino	Pangolin	Tiger
China 18%	China 13%	China 13%	China 13%
Vietnam 12%	Vietnam 8%	Vietnam 7%	Vietnam

% 'Very likely + Likely to purchase' among <u>Past 12 Months Buyers in China and Vietnam</u>

Elephant	Rhino	Pangolin	Tiger
China 82%▲	China 77%▲	China 68%▲	China 68%▲
Vietnam 59%▲	Vietnam 73%▲	Vietnam 60%▲	Vietnam N/A

Thailand (reported differently): people who own already ivory or tiger parts or products, have a significantly higher purchase intention than non-owners. I.e.: same pattern as in China and Vietnam.

▲ Significantly **higher** vs Total sample

WHERE:
PURCHASE CHANNELS

Overview – Main Purchase Channels by Species: China

	Elephant (%) (n=177)	Rhino (%) (n=140)	Pangolin (%) (n=134)	Tiger (%) (n=79)
When travelling outside Mainland China leisure	25	30	17	21
When travelling outside Mainland China business	25	20	21	15
In China, physically, from a private individual	20	16	20	20
In a retail store in China	19	23	22	24
In a market stall in China	17	21	14	16
Online	16	13	13	6
In a wholesale shop / market	14	9	11	10
In a TCM Pharmacy in China	14	19	24	33
From street vendors in China	13	12	12	14
In zoos and safari parks in China	10	10	4	11

WHY:

MAJOR MOTIVATIONS DRIVING PURCHASE AND USE OF THESE PRODUCTS

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FROM THE AMERICAN PEOPLE

Purchase Drivers and Concerns: China
Among those who have bought parts and/or products of each species in the past 12 months

Top 5 most described opinions by species – Mean Scores out of 10

Elephant		Rhino		Pangolin		Tiger	
Rarity	4.01	Brings good health, well-being	3.49	Cures from illness	4.14	Rarity	4.78
Reflects purity and spirituality	3.86	Cures from illness	3.40	Brings good health, well-being	3.72	Is expensive	4.25
Is beautiful	3.79	Rhino horn trade is often linked to crime, trade in drugs/guns	3.08	High risk of buying fake products	3.52	Cure for illness	4.25
Brings luck, good fortune	3.19	High risk of buying fake products	3.03	Penalty for violating laws	3.03	Brings good health	3.95
Ivory trade is often linked to crime, trade in drugs/guns	2.83	Affirmation of wealth, success, high position	2.95	Pangolin trade is often linked to crime, trade in drugs/ guns	2.97	Sexual prowess	3.21

■ Drivers of purchase
■ Negative views / concerns

Purchase Drivers and Concerns: Thailand

Among those who have bought parts and/or products of each species in the past 12 months

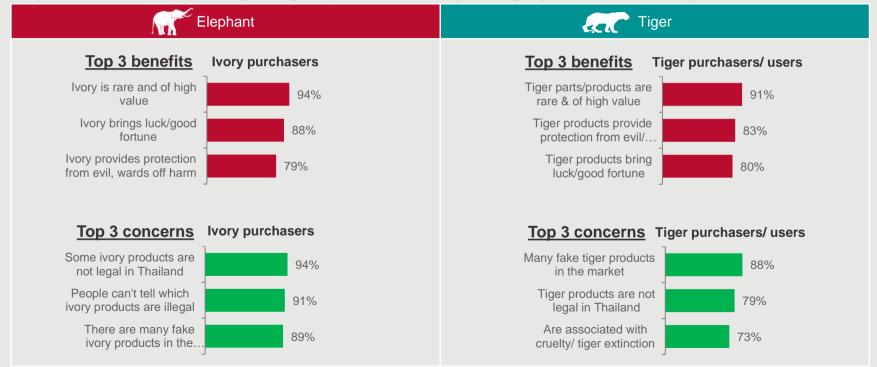**Top benefits and concerns regarding the purchase of ivory and tiger products – in % respondents**

Elephant

Top 3 benefits — Ivory purchasers

Benefit	%
Ivory is rare and of high value	94%
Ivory brings luck/good fortune	88%
Ivory provides protection from evil, wards off harm	79%

Top 3 concerns — Ivory purchasers

Concern	%
Some ivory products are not legal in Thailand	94%
People can't tell which ivory products are illegal	91%
There are many fake ivory products in the…	89%

Tiger

Top 3 benefits — Tiger purchasers/ users

Benefit	%
Tiger parts/products are rare & of high value	91%
Tiger products provide protection from evil/…	83%
Tiger products bring luck/good fortune	80%

Top 3 concerns — Tiger purchasers/ users

Concern	%
Many fake tiger products in the market	88%
Tiger products are not legal in Thailand	79%
Are associated with cruelty/ tiger extinction	73%

Purchase Drivers and Concerns: Vietnam
Among those who have bought parts and/or products of each species in the past 12 months

Top benefits and concerns regarding the purchase of ivory, rhino and pangolin products

Elephant	Rhino	Pangolin

Elephant

Top 3 benefits
Ivory purchasers

Are beautiful	3.77
Are rare	3.65
Are good souvenirs to buy on a holiday	3.58

Top 3 concerns
Ivory purchasers

Causing suffering/ death of animals	80%
These animals are becoming critically…	80%
There are heavy penalties for the buyers	76%

Rhino

Top 3 benefits
Rhino purchasers

Are rare	3.85
Are good for building business relationship	3.51
Help in the detoxification of the body	3.41

Top 3 concerns
Rhino purchasers

These animals are becoming critically…	76%
There are heavy penalties for the buyers	73%
Causing suffering/death of animals	71%

Pangolin

Top 3 benefits
Pangolin purchasers

Increase efficacy of other medicinal…	3.40
Bring good health	3.38
Pangolin meat is nutritious	3.37

Top 3 concerns
Pangolin purchasers

These animals are becoming critically…	76%
Causing suffering/death of animals	73%
There are heavy penalties for the buyers	71%

HOW [TO CHANGE]:

USING DRIVER ANAYSIS TO CONSTRUCT MESSAGES

Narratives Elephant – Drivers to Address

Narrative a:
Beauty

Narrative b:
Uniqueness and artistic value

Narrative c:
Investment

Narrative d:
Rarity

Narrative e:
Social status

Narrative f:
Good luck (and protection)

Narratives Rhino – Driver to Address

Narrative b:
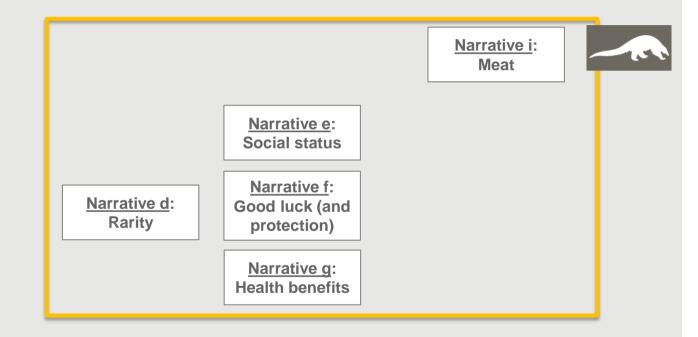**Uniqueness and artistic value**

Narrative c:
Investment

Narrative d:
Rarity

Narrative h:
Sexual prowess

Narrative e:
Social status

Narrative f:
Good luck (and protection)

Narrative g:
Health benefits

Narratives Pangolin – Driver to Address

Narrative i:
Meat

Narrative e:
Social status

Narrative d:
Rarity

Narrative f:
Good luck (and protection)

Narrative g:
Health benefits

Narratives Tiger – Drivers to Address

Narrative e:
Social status

Narrative d:
Rarity

Narrative f:
Good luck (and protection)

Narrative h:
Sexual prowess
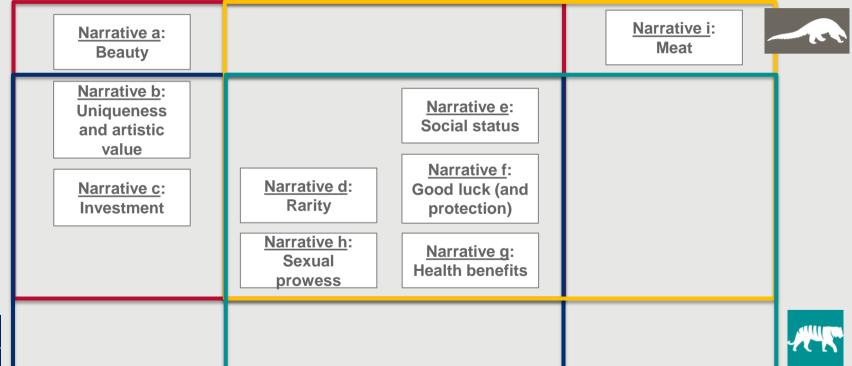
Narrative g:
Health benefits

Narrative Overview All Species – Driver to Address

Narrative a:
Beauty

Narrative i:
Meat

Narrative b:
Uniqueness and artistic value

Narrative e:
Social status

Narrative c:
Investment

Narrative d:
Rarity

Narrative f:
Good luck (and protection)

Narrative h:
Sexual prowess

Narrative g:
Health benefits

HOW to use these Insights …. Over to our Panelists

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