

Beyond the Ivory Ban

Research on Chinese Travelers While Abroad



A report from GlobeScan Incorporated

October 2020



Contact Us

For more information, contact:

GlobeScan

Wander Meijer

Director Asia Pacific

wander.meijer@globescan.com

Team further composed of:

- **Dr. Daniel Bergin**, Senior Project Manager
- **Derek Wu**, Project Manager
- **Timothy Cheng**, Analyst
- **Dr. Eugene Kritski**, Vice President, Methodology

WWF Office

Anny Liang

yliang@wwfchina.org

The research questions and results reported herein are provided on a confidential basis to the World Wildlife Fund (WWF). WWF is free to use the findings in whatever manner it chooses, including releasing them to the public or media, after consultation with GlobeScan on the use and dissemination of the data.

GlobeScan Incorporated subscribes to the standards of the World Association of Opinion and Marketing Research Professionals (ESOMAR). ESOMAR sets minimum disclosure standards for studies that are released to the public or the media. The purpose is to maintain the integrity of market research by avoiding misleading interpretations. If you are considering the dissemination of the findings, please consult with us regarding the form and content of publication. ESOMAR standards require us to correct any misinterpretation.

Project: 3652

Produced by GlobeScan

Published by WWF

Any reproduction in full or in part must mention the title and credit the above-mentioned publishers as the copyright owners.

© TEXT 2020 WWF



Table of Contents

1. Background and Objectives	04
2. Key Findings	12
3. Analysis of Travelers	
3.1 Travel Behaviour	26
3.2 Before Traveling: Planning Wildlife Purchases	31
3.3 While Traveling: Wildlife Shopping While Abroad	39
3.4 Post Travel: Transporting Wildlife Products Back to Mainland China	55
3.5 Awareness and Attitudes Toward the Legality of Purchasing and Transporting of Wildlife	59
4. Analysis of Non-travelers	
4.1 Planned Travel Behaviour	63
4.2 Attitudes and Perceptions Towards Ivory Purchase Behavior	65
4.3 Awareness and Attitudes Towards Legality	69
5. Appendices	74



1. Background and Objectives

Research Objectives – Context

From the 31st of December 2017, China banned the commercial processing and trade of elephant ivory. This closure of such a large market for ivory is inevitably changing the consumer behavior of ivory purchasers in the region. Many people will respect the ban and not purchase ivory (again). However, some people will subvert the ban in various ways.

China's bordering markets have had their own legal and illegal ivory trade since long before the ban and in some cases, this is driven by local demand. In other cases, often in tourist spots, products are aimed at Chinese nationals, with many carvings done in traditional Chinese style and prices displayed in Chinese Yuan.

With the closure of the Mainland Chinese markets, these overseas markets have the potential to increase in size and in the volume of ivory sold as the trade may be displaced. As illustrated by GlobeScan and WWF's 2019 report "Demand under the Ban – China Ivory Consumption Research 2019", some Mainland Chinese nationals intend to travel to other markets for their ivory purchases since the ban. From information identified in this annual tracking survey which focused on 16 cities in China with active ivory markets before the ban came into effect, a substantial percentage of the group "regular overseas travelers" (travelers who travel outside Mainland China at least twice per year) were found to have high intention of persistently purchasing ivory, despite the ban.

According to the UN World Tourism Organization, China is the world's largest outbound travel market when measured by trips and expenditures. In 2018, Chinese outbound tourists took approximately 150 million outbound trips, and this is expected to reach 160 million by 2020 (estimate pre-COVID-19 epidemic).

Chinese outbound tourists are undergoing significant changes in travel preferences, behaviors, and spending patterns, and these habits are different among consumer segments i.e. between old and young people, between rural and urban dwellers etc.

Some experts interviewed by GlobeScan during this research suspect that there is a danger that the ivory traders in Southeast Asia especially had been waiting for the ban to take full effect in China and are now taking advantage of the weaker law enforcement in their own countries to increase their operations while still targeting Chinese tourists who visit these countries.

The ivory ban is widely recognized as a game changer for elephant conservation. However, more work must be done to tackle illegal wildlife trade, including urgent action to reduce intention of ivory purchases from Chinese travelers visiting neighboring countries. Therefore, in-depth research on Chinese travelers' ivory consumption overseas is urgently needed so that effective messaging could be developed to influence this important group of consumers.

Research Objectives and Timing

In this survey, we seek to better understand the motivations and potential influencing factors of outbound Chinese national travelers, specifically about their purchases abroad of wildlife parts and products, with a focus on elephant ivory and a secondary focus on rhino horn. This research will serve as baseline data for future initiatives in relation to attitudes, values, motivations, and behaviors of the buyers, users, and intending consumers of elephant ivory while traveling, as well as identifying the hotspots of ivory purchase and investigating the groups that are most likely to purchase ivory while abroad.

The objectives of the survey are to identify:

Travelers:

- The travel habits and sources of information for Chinese travelers planning trips.
- The number of travelers who plan to buy ivory.
- The sources of information for purchasing wildlife products outside of Mainland China.
- The estimated proportion of people who buy ivory while traveling, the products they buy, and the amount they spend.
- Awareness and attitudes toward the illegality of purchasing ivory outside

of Mainland China and the illegality of transporting ivory across borders.

- The methods of transporting ivory internationally.
- Most popular destinations for ivory purchase.

Non-travelers:

- Barriers to travel and travel plans for non-travelers.
- Interest and opinions towards purchasing wildlife parts and products outside Mainland China.
- Knowledge of the illegality of purchasing wildlife products outside Mainland China.

Timing:

- Jul – Aug 2019: Desk research
- Jul – Aug 2019: Interviews with WWF offices and travel experts
- Aug – Sep 2019: Qualitative data collection – focus group discussions
- Oct 2019 – January 2020: Quantitative data collection – online surveys
- Feb – Apr 2020: Data analysis and reporting

Research Design

Survey Design

This study employs a mixed-method approach to answer the research objectives, using qualitative and quantitative data collection. Qualitative data collection allows for in-depth discussions to gain insights from people who have purchased wildlife products. Quantitative data collection provides robust, comparable results that allow for analysis of trends and preferences across representative research population. These data can be used to spot trends in ivory consumption, beliefs, knowledge, and attitudes.

Qualitative data collection

The qualitative phase was required to define the research objectives. We first wanted to explore and understand traveler behavior, and to explore in an in-depth manner their perceptions and attitudes towards the purchase of Ivory or Rhino horn products outside Mainland China in target markets, i.e. Cambodia, Laos, Japan, Hong Kong SAR, Myanmar, Thailand and Vietnam. Focus groups were conducted in Guangzhou and Beijing, from August 28th – August 30th, 2019. In each city, 2 groups of 8 people were interviewed for approximately 2 hours.

All focus groups were observed by GlobeScan consultants with detailed notes taken.

A debriefing session with the moderator was conducted after every focus group discussion to consolidate the findings.

Recordings and transcripts in Chinese were provided and referenced to ensure all discussion items were properly included.

Respondents were recruited and reviewed before the start of fieldwork to make sure they followed the list of respondents' screening criteria below:

FGD Screening Criteria	
2 FGDs per city:	
-	1 x Age 25-45; 1 x Age 46-65
8 respondents per FGD:	
-	4 x Male; 4 x Female
-	4 x Bought ivory products in Mekong countries (Cambodia/ Laos/ Myanmar/ Thailand/ Vietnam) in past 12 months;
-	4 x Bought ivory products in Hong Kong/ Japan in past 12 months;
-	At least 1 who bought rhino horn products in Mekong countries/ Hong Kong/ Japan in past 12 months
-	4 x planned ivory buyers
-	4 x unplanned (impulse) ivory buyers
-	4 x Very likely/ Likely to buy ivory in the future;
-	4 x Very unlikely/ Unlikely to buy ivory in the future

Research Design

Quantitative Data Collection

According to China Internet Watch, the national internet penetration rate in China is 60 percent, but in urban centers it is estimated to be 75 percent¹, with different genders, ages, and education levels well represented online. This has led China to be one of the most Internet-driven economies in the world. This survey utilized the ability of online research to gain insights from a wide variety of respondents. Respondents could answer the survey either on their smartphones or on their computers, at their convenience and were chosen according to a representative sampling plan (Slide 9).

The Chinese traveler survey was conducted from November 2019 to January 2020. Respondents from an online panel were invited to participate in the online survey via email. The survey had a questionnaire length of median 14 minutes for travelers and 4 minutes for non-travelers.

Any respondents under 18 years of age and those working in the advertising, public relations, marketing, market research, and media industries were screened out and were not allowed to participate in the survey.

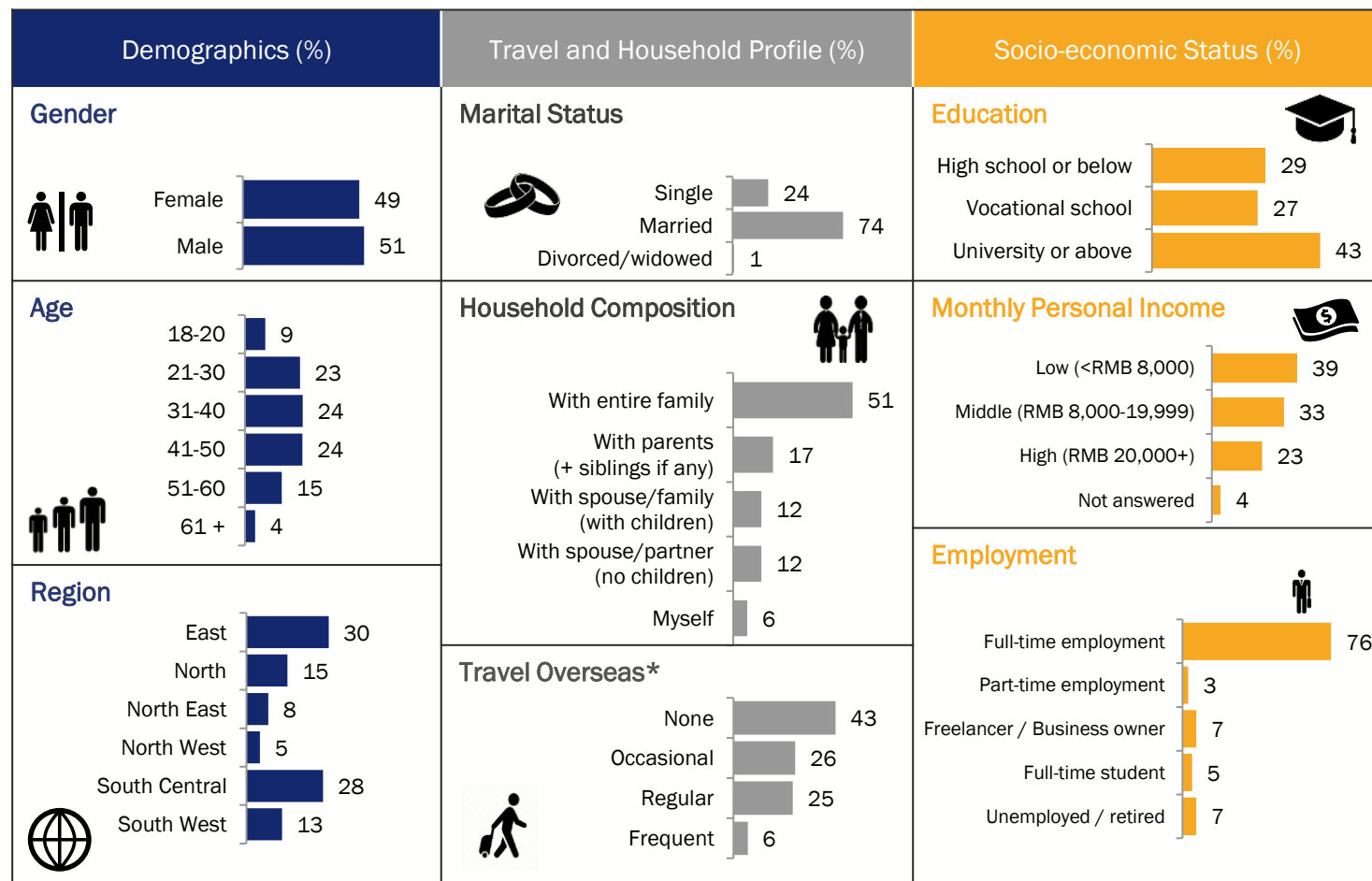
Respondents who had traveled outside of Mainland China to any of the target destinations – Cambodia, Hong Kong SAR, Japan, Laos, Myanmar, Thailand, or Vietnam – at least once in the past 24 months was directed to a questionnaire about their travel habits and knowledge of and interactions with ivory and rhino horn while traveling. Non-travelers (those who had not traveled anywhere outside of Mainland China in the past three years) were directed to a shorter survey about their perceptions of ivory and rhino horn trade outside of Mainland China.

Survey respondents could indicate the region in which they lived from a list of 31 cities / regions – East China: Anhui, Fujian, Jiangsu, Jiangxi, Shandong, Shanghai, Zhejiang
North China: Beijing, Hebei, Inner, Mongolia, Shanxi, Tianjin,
Northeast China: Heilongjiang, Jilin, Liaoning
Northwest China: Gansu, Ningxia, Qinghai, Shaanxi, Xinjiang,
South Central China: Guangdong, Guangxi, Hainan, Henan, Hubei, Hunan,
Southwest China: Chongqing, Guizhou, Sichuan, Yunnan, Tibet

¹<https://www.chinainternetwatch.com/29010/china-internet-users-snapshot/>

Total Sample Profile

Quotas were set on region, age, gender and education. These quotas applied to *all survey participants (n=5291)*, so that as accurate a representation as possible of travelers and non-travelers, and travelers to each destination, would be represented.



* Over the past three years (2017-2019): Occasional is 1 time per year or less; Regular is 2-3 times per year; Frequent is more than 3 times per year

S1. Region; S2. Age; S3. Gender; S4. Monthly personal income; S5. Education; Q1. Travel behavior; Q52. Current marital status; Q53. Household composition; Q54. Employment – Weighted data

Base: Total, n=5291

Total Sample Profile – Travelers VS Non-travelers

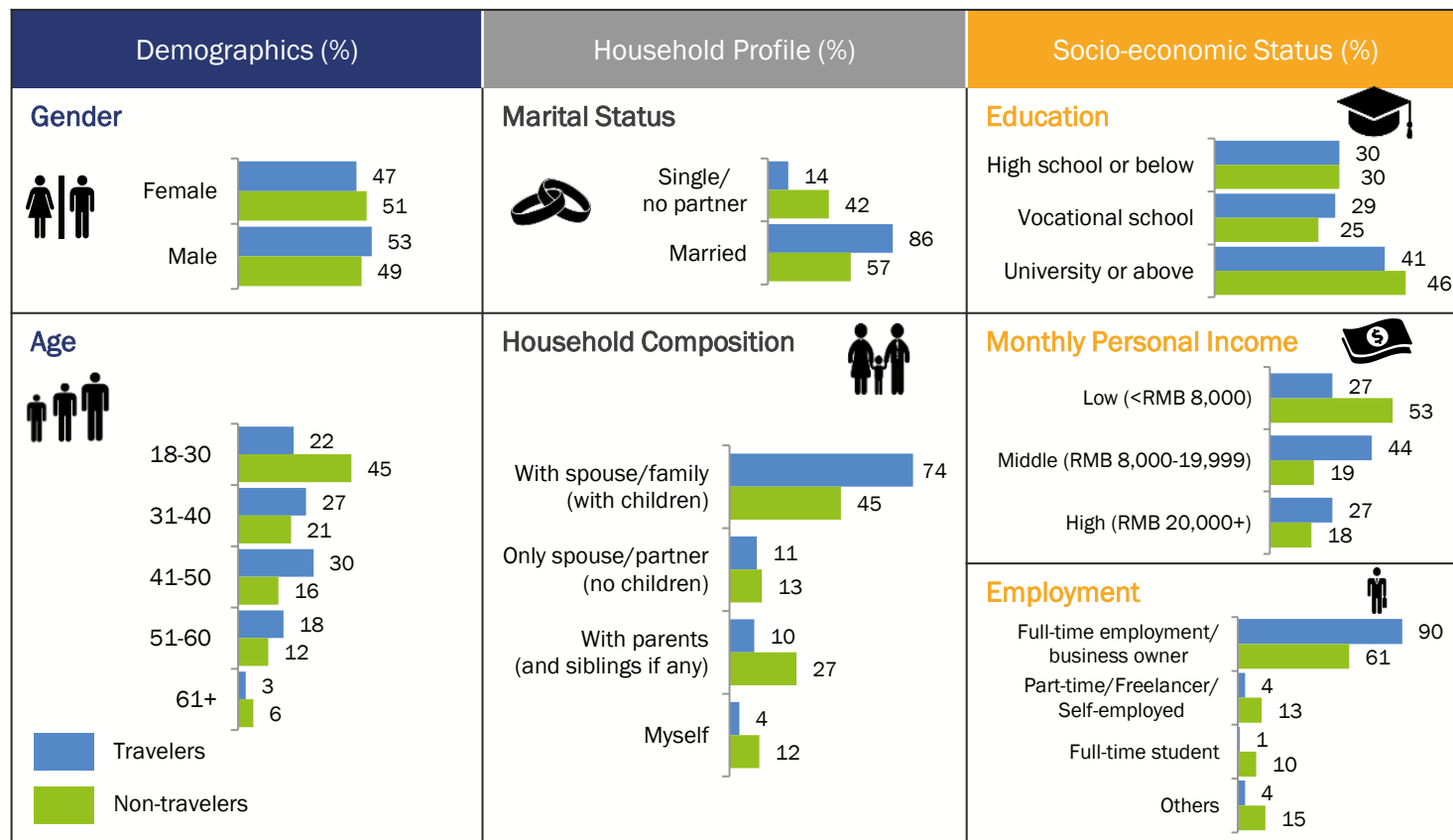
Travelers are more likely to be wealthier, between the ages of 31 and 60, and in full-time employment.

Travelers were more likely to be married and live with their spouse/family than non-travelers.

Travelers were more likely to be in higher income brackets and were more likely to be in full-time employment than non-travelers.

Travelers: respondents who have traveled anywhere outside of Mainland China in the past three years.

Non-travelers: respondents who have **not** traveled anywhere outside of Mainland China in the past three years.



S2. Age; S3. Gender; S4. Monthly personal income; S5. Education; Q1. Travel behavior; Q52. Current marital status; Q53. Household composition; Q54. Employment – Weighted data

Base: Travelers total, n=3011; Non-travelers total, n=2120



Targeted Sampling: Destination

Travelers (respondents who had traveled outside of Mainland China in the past 36 months) were asked which destinations they had visited in the past 24 months. 24 months was chosen as the optimum period for which travelers could remember specifics relating to their trip. Travelers who had been to one of the target destinations (shown on the left) were invited to answer questions about that destination. If a traveler selected multiple target destinations, they were assigned one destination about which they were asked to answer the remaining questions. The table below shows the total number of travelers were assigned to answer about each destination.

Assigned Travel Destination	Weighted Sample Size	% of Total Sample
Cambodia	370	12
Hong Kong SAR	457	15
Japan	422	14
Laos	389	13
Myanmar	375	12
Thailand	407	14
Vietnam	591	20
Total travelers	3011	

Note to travelers who had been to multiple target destinations: For the questions in this survey, please consider your most recent trip to [assigned destination].

Base: Travelers total, n=3011

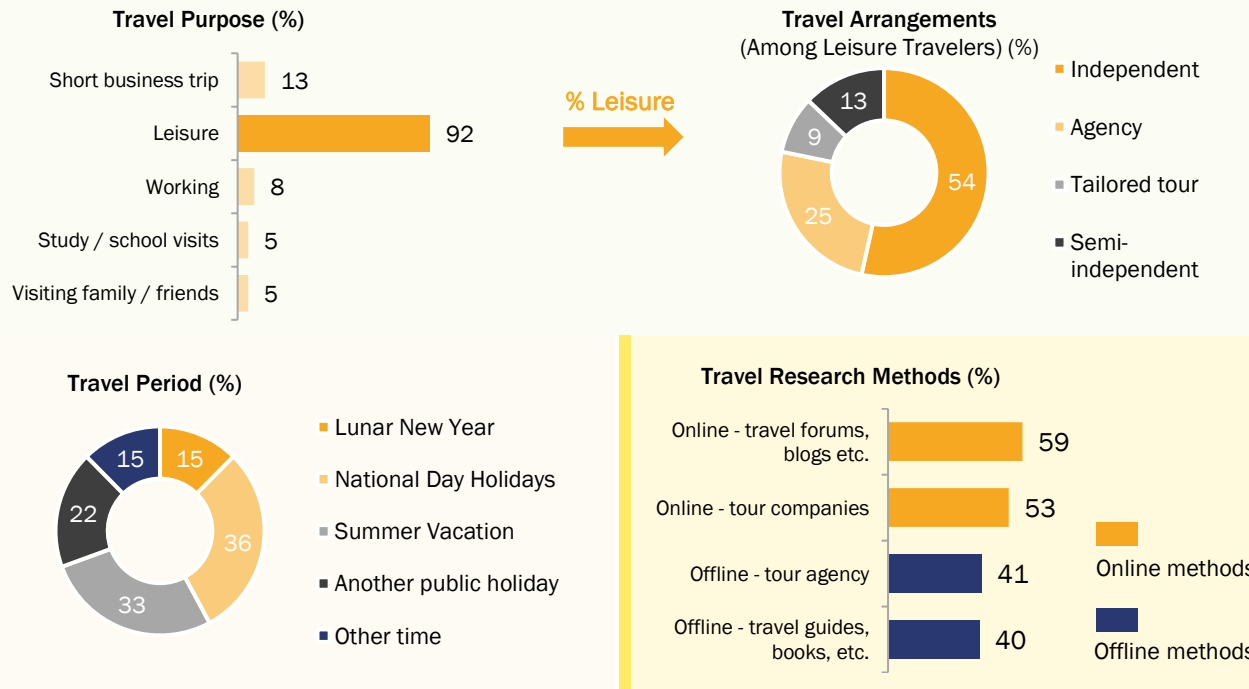


2. Key Findings

Travel Behavior

Traveling for leisure is by far the most common reason to travel among Chinese respondents. Of these leisure travelers, over half travel independently. They research these trips predominantly online.

The primary reasons for travel are to spend time in nature, to experience local food and because they believe travel makes them look interesting / fun. More than half of Chinese outbound travelers travel during the two one-week holidays of Lunar New Year (January / February) or Golden Week (celebrating China's national day; October).



Path to Purchase: Travelers Purchasing Ivory Outside of Mainland China

11 per cent of the 3,011 travelers surveyed report that they plan to purchase ivory prior to making a trip to one of the seven target destinations. Over 20 per cent of travelers had somebody recommend visiting an ivory shop while they were abroad on this trip, and almost a quarter of travelers visited at least one shop that sold ivory. We calculated that an estimated 6.8% of travelers purchase ivory while traveling outside of Mainland China. **Note:** this incidence rate is estimated using indirect questioning (See slide 75 for more details)

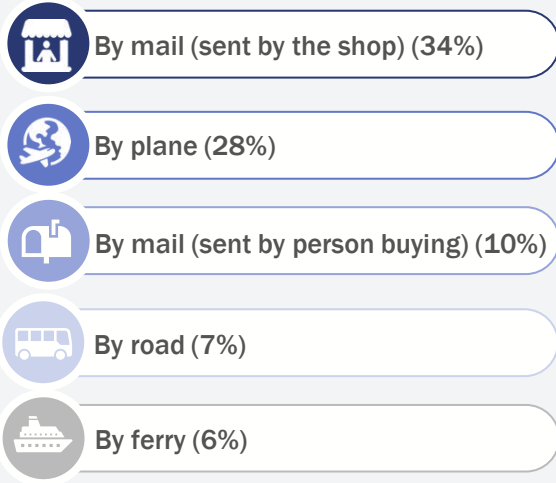


Post Purchase: Transporting Ivory back to Mainland China

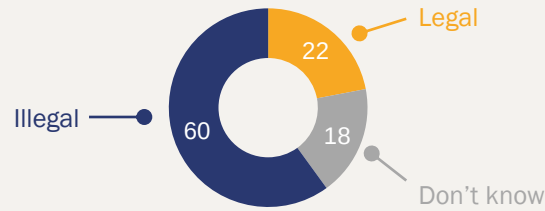
Sending ivory back to Mainland China by mail was the most common method of transporting it across borders. The majority of travelers believed that purchasing ivory in their destination was illegal, and even more were aware that transporting ivory across borders was illegal.

Travelers purchase ivory primarily as a gift for a friend / family member / business contact, closely followed by those that kept the items for themselves.

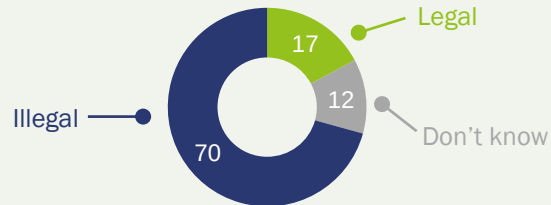
Top 5 ways the person buying ivory brought it back to Mainland China



Perceptions of illegality of buying ivory in destinations (%)



Awareness of illegality of bringing ivory back (%)



Top 5 reasons to buy ivory



Traveler Profile per Destination*

*A typical traveler profile indicates the demographics that are more likely to be represented. See slide 75

+ Completed vocational school / high school

^ University or above

Cambodia Travelers

(n=370)

Age: 45-54 (30%)

Gender: Male (60%)

Income: Low to middle (RMB 20,000 or less per month) (75%)

Education: Low to middle+ (84%)

Trip arrangement: Independent (53%)



Hong Kong SAR Travelers

(n=457)

Age: 25-34 (31%)

Gender: Female (61%)

Income: Middle to high (RMB 8,000 or more per month) (79%)

Education: High^ (74%)

Trip arrangement: Independent (67%)



Japan Travelers

(n=422)

Age: 25-34 (34%)

Gender: Female (54%)

Income: Middle to high (RMB 8,000 or more per month) (87%)

Education: High^ (83%)

Trip arrangement: Independent (49%)



Laos Travelers

(n=389)

Age: 35-44 (36%)

Gender: Female (51%)

Income: Low to middle (RMB 20,000 or less per month) (81%)

Education: Low to middle+ (88%)

Trip arrangement: Independent (47%)



Myanmar Travelers

(n=375)

Age: 45-54 (38%)

Gender: Male (58%)

Income: Low to middle (RMB 20,000 or less per month) (74%)

Education: Low to middle+ (85%)

Trip arrangement: Independent (59%)



Thailand Travelers

(n=407)

Age: 35-44 (33%)

Gender: Female (55%)

Income: Middle to high (RMB 8,000 or more per month) (78%)

Education: High^ (79%)

Trip arrangement: Independent (44%)



Vietnam Travelers

(n=591)

Age: 45-54 (38%)

Gender: Male (69%)

Income: Low to middle (RMB 20,000 or less per month) (85%)

Education: Low to middle+ (88%)

Trip arrangement: Independent (57%)





Destination Snapshot of Travelers Purchasing Ivory

Before Purchase

Did you plan to buy ivory before your trip?



5%

Did you visit a shop / market that sold ivory?

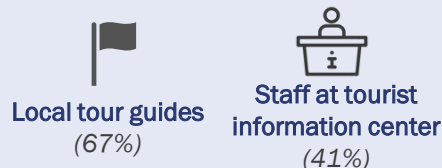


18%

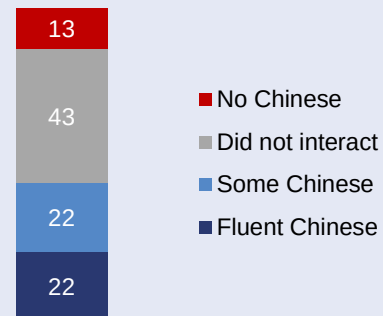
Did anyone suggest visiting a shop that sold ivory while you were traveling?
Who suggested it to you?



11%



Did any of the sellers of ivory speak Chinese?
(n=189) (%)



After Purchase

The incidence rate for ivory purchase while traveling in Cambodia was estimated at:

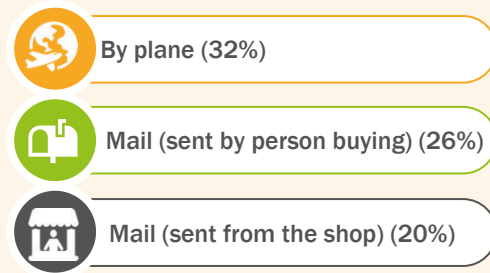


3.1%

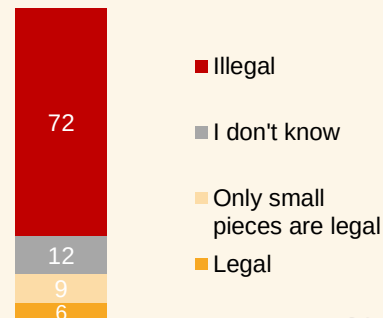
Average spend on ivory
(RMB) (n=27)

¥2,940

How did this person bring these wildlife products back into China?
(n=29)



Is it legal to buy ivory in this destination? (%)





Destination Snapshot of Travelers Purchasing Ivory

Before Purchase

Did you plan to buy ivory before your trip?



17%

Did you visit a shop / market that sold ivory?



32%

Did anyone suggest visiting a shop that sold ivory while you were traveling?
Who suggested it to you?



36%



After Purchase

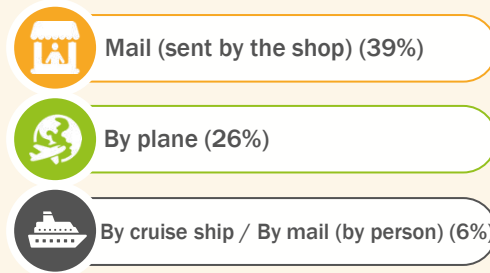
The incidence rate for ivory purchase while traveling in Hong Kong SAR was estimated at:



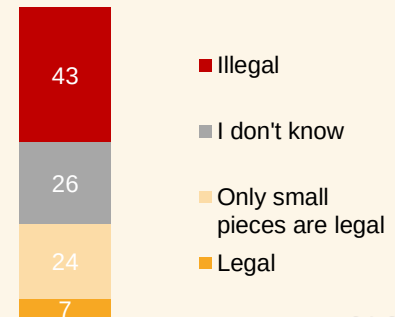
11.3%

Average spend on ivory
(RMB) (n=115) **¥7,166**

How did this person bring these wildlife products back into China?
(n=123)



Is it legal to buy ivory in this destination? (%)



Destination Snapshot of Travelers Purchasing Ivory



Before Purchase

Did you plan to buy ivory before your trip?



19%

Did you visit a shop / market that sold ivory?



36%

Did anyone suggest visiting a shop that sold ivory while you were traveling?

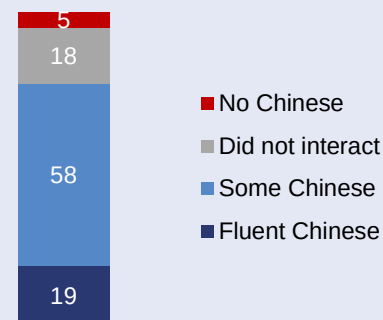
Who suggested it to you?



36%



Did any of the sellers of ivory speak Chinese? (n=250) (%)



After Purchase

The incidence rate for ivory purchase while traveling in Japan was estimated at:

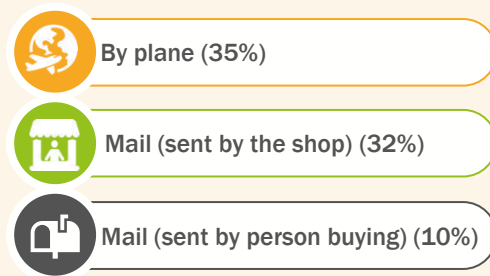


12.0%

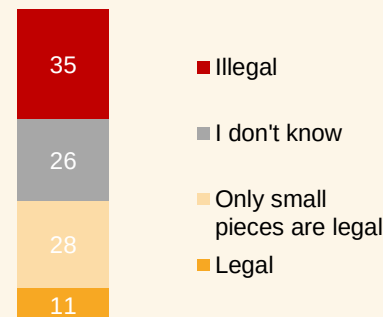
Average spend on ivory (RMB) (n=125)

¥6,598

How did this person bring these wildlife products back into China? (n=134)



Is it legal to buy ivory in this destination? (%)





Destination Snapshot of Travelers Purchasing Ivory

Before Purchase

Did you plan to buy ivory before your trip?



9%

Did you visit a shop / market that sold ivory?



17%

Did anyone suggest visiting a shop that sold ivory while you were traveling?
Who suggested it to you?



13%

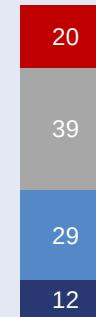


Chinese tour guides
(48%)



Local tour guides
(40%)

Did any of the sellers of ivory speak Chinese?
(n=213) (%)



■ No Chinese
■ Did not interact
■ Some Chinese
■ Fluent Chinese

After Purchase

The incidence rate for ivory purchase while traveling in Laos was estimated at:



4.3%

Average spend on ivory
(RMB) (n=31)

¥5,174

How did this person bring these wildlife products back into China?
(n=36)



Mail (sent by the shop) (40%)



By road (18%)



Mail (sent by person buying) (14%)

Is it legal to buy ivory in this destination? (%)



■ Illegal
■ I don't know
■ Only small pieces are legal
■ Legal



Destination Snapshot of Travelers Purchasing Ivory

Before Purchase

Did you plan to buy ivory before your trip?



4%

Did you visit a shop / market that sold ivory?



15%

Did anyone suggest visiting a shop that sold ivory while you were traveling?

Who suggested it to you?

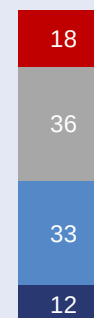


8%

Local tour guides
(41%)

Staff from my accommodation
(36%)

Did any of the sellers of ivory speak Chinese?
(n=161) (%)



■ No Chinese
■ Did not interact
■ Some Chinese
■ Fluent Chinese

After Purchase

The incidence rate for ivory purchase while traveling in Myanmar was estimated at:



2.2%

Average spend on ivory
(RMB) (n=17)

¥5,955

How did this person bring these wildlife products back into China?
(n=17)



Mail (sent by person buying) (32%)



By road (18%)



By plane/mail (sent by shop) (14%)

Is it legal to buy ivory in this destination? (%)



■ Illegal
■ I don't know
■ Only small pieces are legal
■ Legal



Destination Snapshot of Travelers Purchasing Ivory

Before Purchase

Did you plan to buy ivory before your trip?



21%

Did you visit a shop / market that sold ivory?



38%

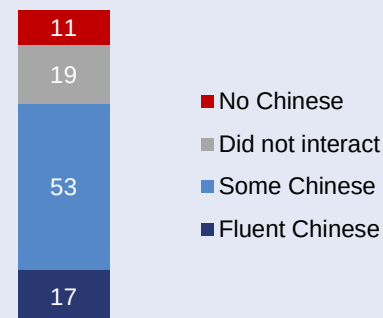
Did anyone suggest visiting a shop that sold ivory while you were traveling?
Who suggested it to you?



44%



Did any of the sellers of ivory speak Chinese?
(n=282) (%)



After Purchase

The incidence rate for ivory purchase while traveling in Thailand was estimated at:

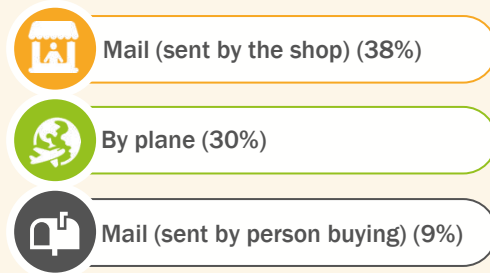


13.5%

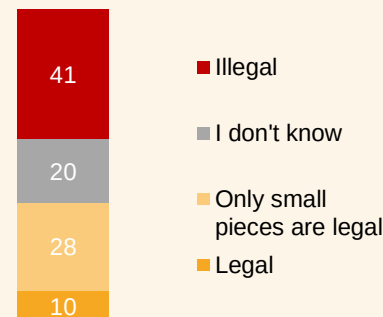
Average spend on ivory (RMB) (n=124)

¥5,835

How did this person bring these wildlife products back into China?
(n=133)



Is it legal to buy ivory in this destination? (%)





Destination Snapshot of Travelers Purchasing Ivory

Before Purchase

Did you plan to buy ivory before your trip?



4%

Did you visit a shop / market that sold ivory?



17%

Did anyone suggest visiting a shop that sold ivory while you were traveling?

Who suggested it to you?

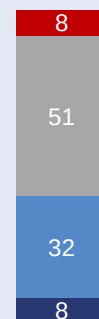


8%

Local tour guides
(59%)

Other travelers
(35%)

Did any of the sellers of ivory speak Chinese?
(n=300) (%)



■ No Chinese
■ Did not interact
■ Some Chinese
■ Fluent Chinese

After Purchase

The incidence rate for ivory purchase while traveling in Vietnam was estimated at:



1.9%

Average spend on ivory
(RMB) (n=27)

¥3,426

How did this person bring these wildlife products back into China?
(n=35)



Mail (sent by the shop) (30%)

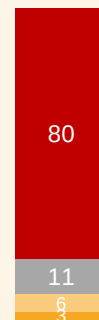


By road / plane (22%)



By ferry (11%)

Is it legal to buy ivory in this destination? (%)



■ Illegal
■ I don't know
■ Only small pieces are legal
■ Legal

Recommendations - Market

Reducing demand for ivory is determined by two main factors: the MARKET (availability/supply) and the MIND (satisfying of rational and emotional consumer needs). In our recommendations to WWF, we address these factors.

MARKET – DISTRIBUTION

- **Focus on the illegality of transport of all ivory across borders**

Although most travelers (70%) know that transporting ivory across borders is illegal, 7 percent reported that they were being told in their destination that it is ok to bring across and 11 percent report that they are being told to bring small products to avoid detection or legal consequences. There also remains a significant proportion of people (17%) who believe it is legal to bring some form of ivory across international borders. This segment of the population buy ivory at a high rate – 40.3% estimated incidence rate for those that believe all ivory is legal and 23.8% estimated incidence rate for those who believe some ivory is legal to transport across borders. This compares to an estimated incidence rate of 1.6% for those who believed this transport was illegal. Qualitative results support this, with participants believing that ‘smuggling’ only referred to large pieces. Informing the public that all ivory or rhino is illegal to transport across borders in any circumstances will help address this disconnect.

- **Target mail deliveries of ivory and rhino horn**

Sending ivory and rhino horn products by mail is the most popular method of transporting it back to Mainland China, with 44 percent of people either having the shop send it (34%) or sending it themselves (10%). This is

therefore an important avenue that courier and delivery companies can be targeted to reduce illegal cross-border transportation of these goods.

- **Focus on online travel platforms but don’t neglect offline channels for planning a trip**

Online travel platforms should be targeted as they are particularly popular with travelers who planned to purchase ivory and rhino horn. Offline sources such as tour agencies and travel guides, however, were still common and should not be overlooked.

- **Focus on the tour guides and tourist information centers**

A high number (22%) of travelers were told to visit ivory shops while they were traveling. The majority of these (60%) said that local tour guides were suggesting that they visit ivory shops, and these guides were most likely to suggest ways of smuggling wildlife products across international borders. Staff at information centers were the next most likely to suggest ivory shops (37%). The qualitative findings support this, with unplanned buyers reporting that Chinese and local guides informed them of, and in some cases, promoted shops to purchase ivory or rhino horn. Focusing on these actors could reduce a lot of the unplanned purchases that people make.

- **Continue to target the Lunar New Year and Golden Week holiday**

Combined, these two periods accounted for over half of the travel undertaken by travelers to the 7 destinations in this study and these time periods therefore provide a focal point that campaigns can be targeted towards to increase efficiency.

Recommendations - Mind

MIND – MOTIVATION (ATTITUDE / KNOWLEDGE)

- **Target messages about the seriousness of bringing ivory across the border, regardless of the size of the products.**

People are being told that small pieces or pieces on their person won't be found and that they should 'try their luck' by leaving small pieces in their bag. They believe that if they are caught, the worst that will happen is that the item will be confiscated. Targeting messages at this group to inform them that this is a serious crime with serious repercussions will help deter future attempts at bringing these items into Mainland China.

- **Continue with campaigns, as they are dissuading people who intend to purchase ivory**

Messages in the destination warning against ivory purchase was the number one reason why people who had intended to buy ivory did not, and messages in China was the third most influential reason. Over 90 percent of people who intend to purchase ivory or rhino horn abroad visit a shop that sells these items and campaigns are having a noticeable impact on this group.

- **Mobilize those who are against ivory trade as advocates**

Group sizes tended to be large, but the number of people buying ivory in each group tended to be 3 or less. By mobilizing group members who do not want to purchase ivory to push back against visiting these shops, campaigns can have a greater effect.

- **Gifts of ivory should be targeted**

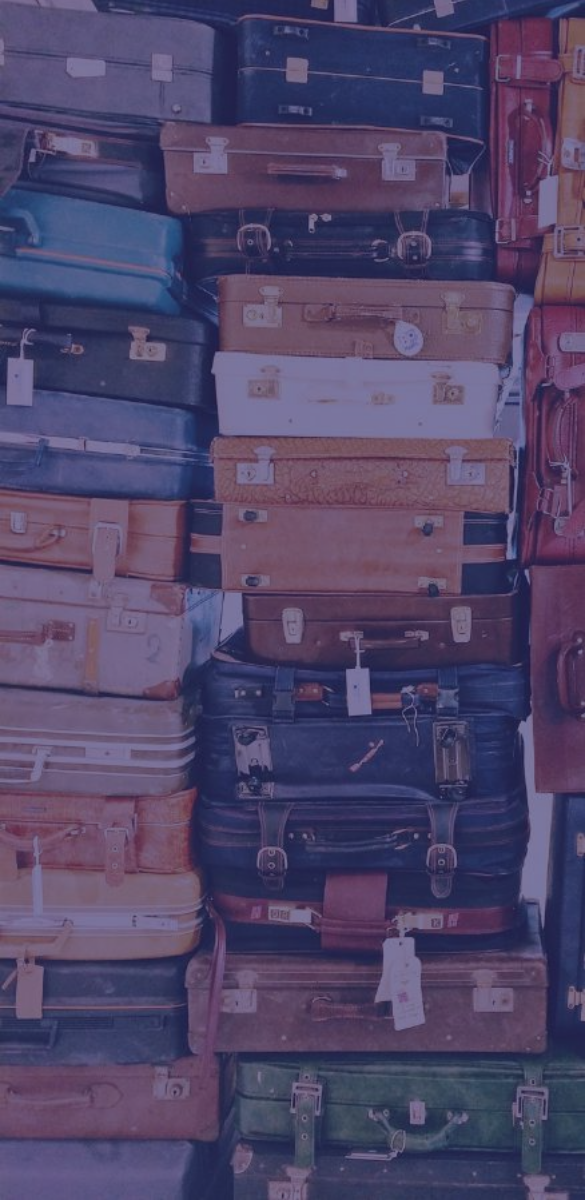
Buying ivory as a gift for a family member / friend or a work colleague is still popular among travelers and combined, gifting is the number one reason people buy ivory while traveling. Targeting campaigns against this practice could influence a lot of the ivory purchase.

- **Erode trust in “authenticating” documentation**

Only 24 percent of travelers believed they could identify real ivory themselves, and the number that actually can is likely far lower. Even in destinations in which the purchase of ivory is not legal, travelers therefore place a lot of trust in authenticating documentation to prove that the ivory is real (47% say this is how they know the ivory is real and participants in the qualitative focus groups supported this). By diminishing the trust that people have that the product they are purchasing is real, conservation campaigns could reduce the number of people who are willing to buy it. Informing people that documentation is often forged, or in some cases, cannot be legal, is therefore a positive campaign strategy.

- **Enforce the link to nature**

Spending time in nature was the number one stated reason for travel. Enforcing the link between wildlife in markets and the animals in their natural state will help drive social acceptability away from buying these products.



3. Analysis of Travelers

3.1 Travel Behavior



Travel behavior: Travel Frequency in the *Past 24 Months*

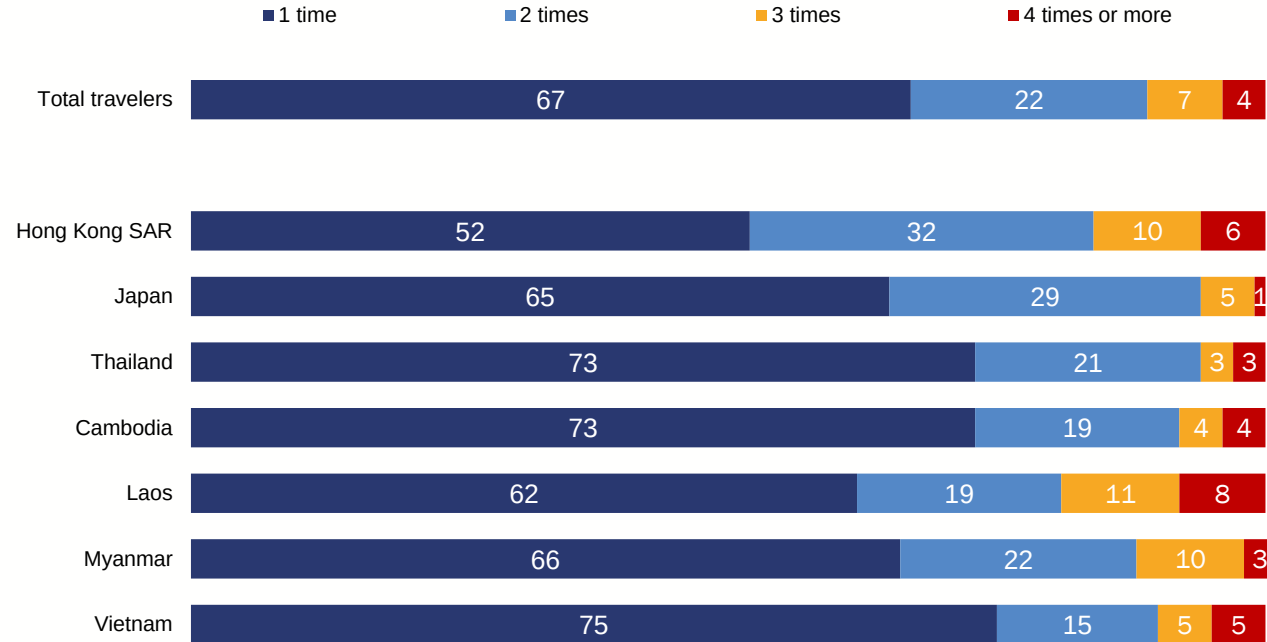
One in three travelers had visited their assigned destination (See slide 11 for explanation) more than once in the past 24 months.

Comparatively higher numbers of people visiting Hong Kong SAR had done so more than once in the past 24 months.

Travelers to Vietnam, Cambodia, and Thailand were more likely to have been on only one single occasion in this time frame.

Japan and Thailand were the destinations least likely to have been visited 3 times or more in this time frame, while Laos, Hong Kong SAR and Myanmar were more likely to receive these frequent visitors.

Travel Frequency by Destination in Past 24 Months (%)



Q4. How many times have you visited [assigned destination] in the past 24 months?

Base: Travelers total, n=3011; assigned destination : Cambodia, n=370, Hong Kong SAR, n=457, Japan, n=422, Laos, n=389, Myanmar, n=375, Thailand, n=407, Vietnam, n=591



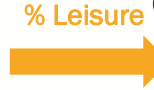
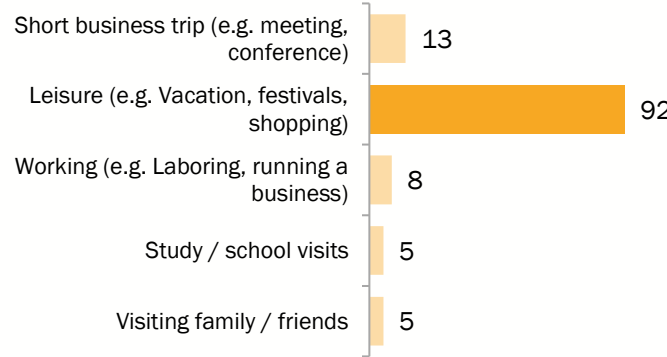
Travel behavior: Travel Purpose and Travel Arrangements

Most travelers (92%) are traveling for leisure, and over half of these leisure travelers planned their trips themselves. Many travelers visit multiple destinations in a single trip.

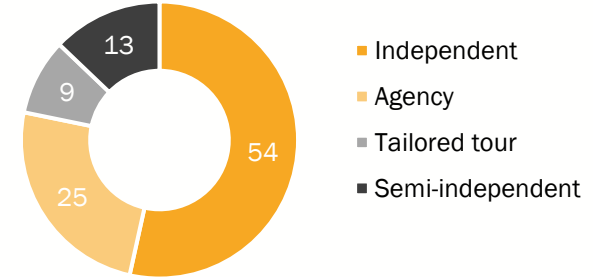
Most people traveled during public holidays and over half of the people who traveled abroad in the past 24 months traveled during the two one-week holidays of Lunar New Year (January / February) or Golden Week (celebrating China's national day; October).

Six out of ten people who visited more than one of the target destinations in the past 24 months had visited multiple destinations in a single trip, e.g., visiting both Vietnam and Thailand in one trip.

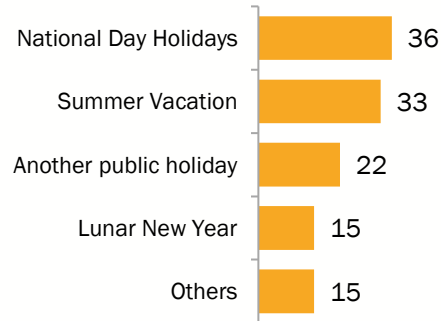
Travel Purpose (%)



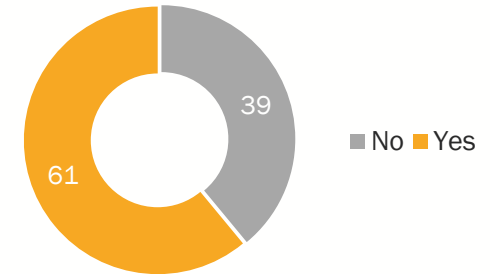
Travel Arrangements
(Among Leisure Travelers)(n=2777) (%)



Travel Period (%)



Multiple Destinations in a Single Trip
(Among those Who Had Visited Multiple Destinations) (n=1196) (%)



Q3. Did you visit more than one of these destinations in a single trip?

Base: Visited two or more destinations, n=1196

Q5. When did you travel to [assigned destination]? Please select all that apply. Base: Travelers total, n=3011

Q6. What was the purpose of your trip to [assigned destination]? Please select all that apply. Base: Travelers total, n=3011

Q7. Which of the following best describes your travel arrangements during your trip to [assigned destination]? Base: Leisure travelers, n=2777



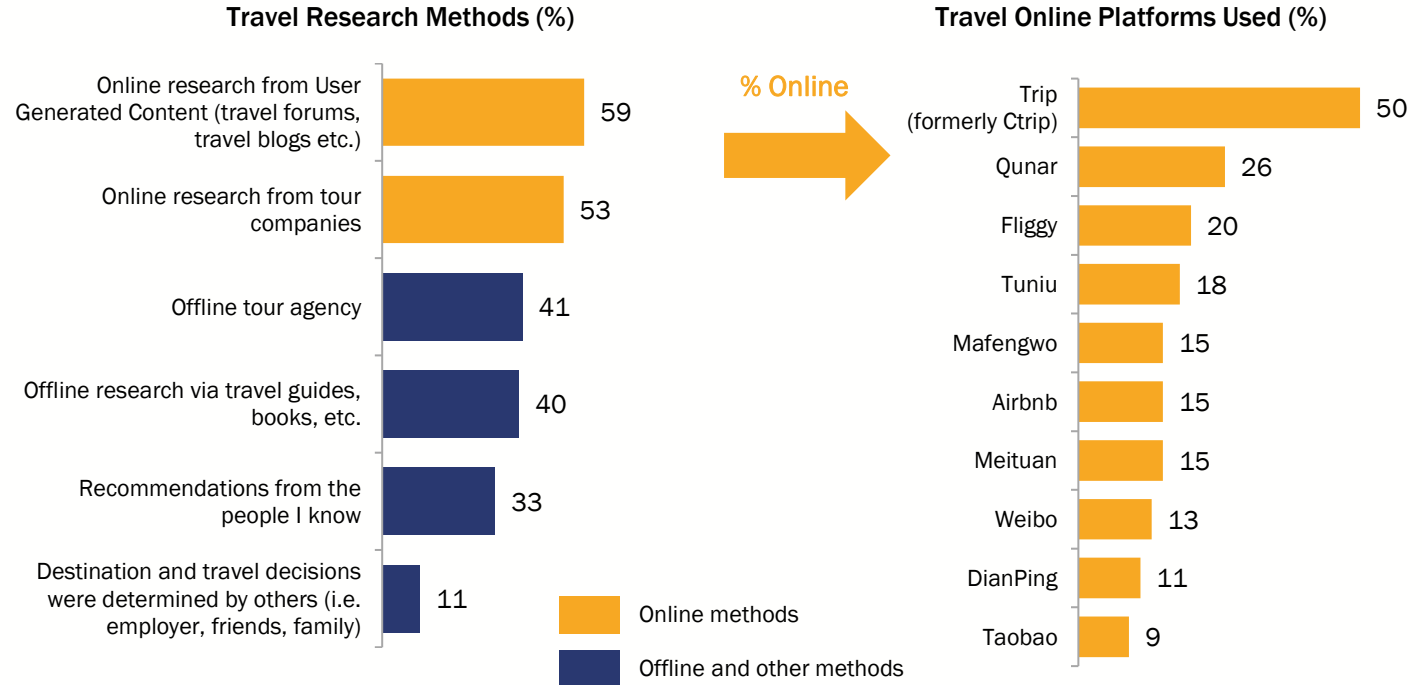
Travel behavior: Sources of Travel Information

People are more likely to search for information about their trip online, with Trip (previously called Ctrip) being the most popular platform.

Three-quarters of people researched their trip online through tour company websites, user-generated content websites (forums, blogs), or both (data not shown). Trip is the largest online travel agency in China, and half of those who researched their travel plans online used this site.

Offline methods of planning a trip are still popular; tour agencies and travel guides still influence people's travel despite all respondents having access to the internet.

Travelers intending to buy ivory used Trip, Figgy and Tuniu significantly more than those who did not plan to buy ivory (data not shown)



Q8. How did you research your trip to [assigned destination]? Please select all that apply. Base: Travelers total, n=3011

Q9. You mentioned you planned your trip online. Which of the following are your most used online platforms? Please select up to 3.

Base: Travelers researched online, n=2258



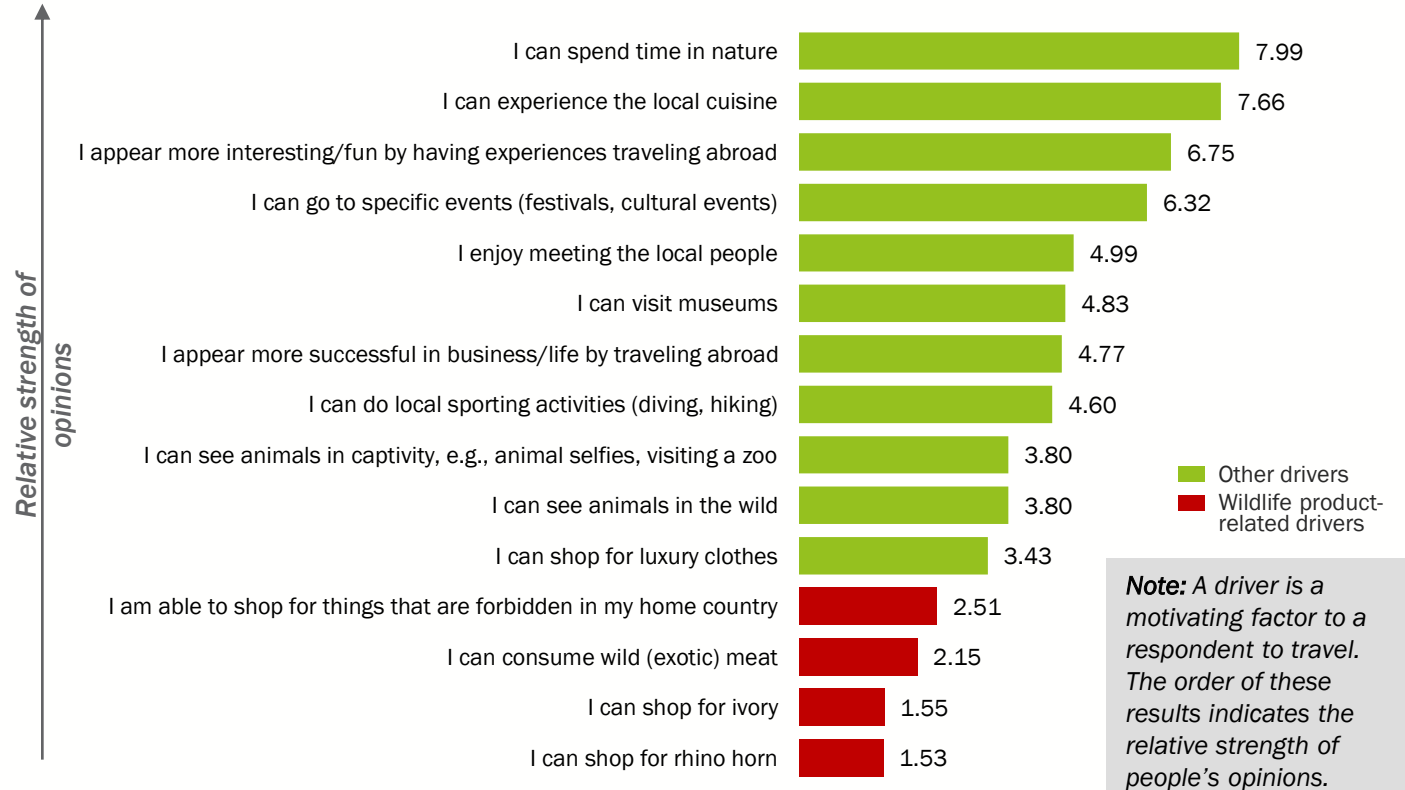
Travel behavior: Reasons to Travel

Purchasing wildlife products while abroad is not a primary driver of travel for most travelers.

Travelers report that spending time in nature and experiencing the local cuisine are the strongest influences on their motivation to travel.

Purchasing wildlife products was reportedly not a strong reason to travel among most people, falling below the consumption of exotic meat and purchasing things that are generally forbidden. Even among travelers planning to purchase ivory or rhino horn, these were not the primary reasons to travel.

Seeing live animals in zoos or in the wild ranked relatively low in driving people to travel abroad.



Q10. Which of the following has the most influence and the least influence on your motivation to travel?

Base: Travelers total, n=3011



3. Analysis of Travelers

3.2 Before Traveling: Planning Wildlife Purchases





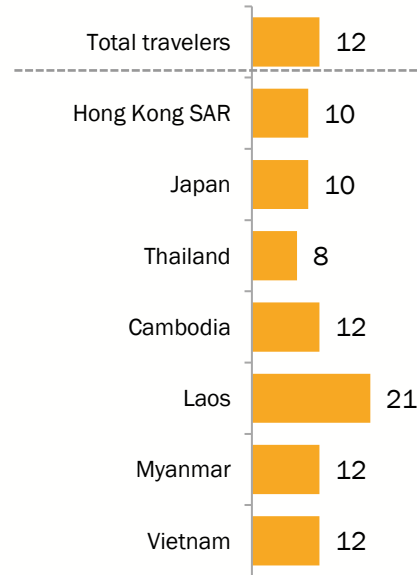
Before traveling: Research About Wildlife Products and Exotic Meat

Travelers from different destinations were relatively similar in their research of purchasing wildlife prior to their trip, with a greater number of visitors to Laos searching for this information.

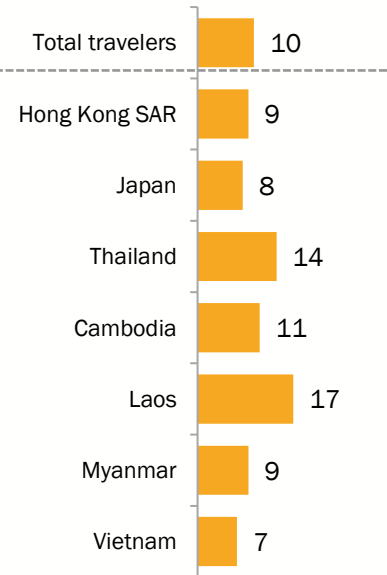
Overall rates of searching for information on purchasing wildlife products and consuming exotic meat are low, with only 12 percent and 10 percent of respondents searching for information on this topic, respectively.

When travelers go to Laos, they are more likely to research purchasing wildlife and consuming exotic meat than they are when traveling to other destinations.

Research on Purchasing Wildlife Products Prior to Trip (%)



Research on Consuming Exotic Meat Prior to Trip (%)



Q11. Did you research any of the following prior to your trip to [assigned destination]? Please select all that apply.

Base: Travelers total, n=3011 (Assigned destination: Cambodia, n=370, Hong Kong SAR, n=457, Japan, n=422, Laos, n=389, Myanmar, n=375, Thailand, n=407, Vietnam, n=591)



Before traveling: Source of Information on Purchasing Wildlife Products

Among travelers who searched for wildlife products prior to their trip, 96 percent searched for information online (data not shown). The majority of people used user-generated content such as forums or blogs to find the information.

People traveling to Hong Kong SAR, Japan, and Vietnam did not use offline tour agencies to research the purchase of wildlife as often as those going to other destinations.

Sources of information for wildlife products	Total travelers researched wildlife products (n=366)* (%)	Hong Kong SAR (n=45) (%)	Japan (n=42) (%)	Thailand (n=34) (%)	Cambodia (n=46) (%)	Laos (n=83) (%)	Myanmar (n=45) (%)	Vietnam (n=72) (%)
Online research from tour companies	65	62	87	61	53	64	68	61
Online research from User Generated Content (travel forums, travel blogs etc.)	75	69	85	73	67	75	78	76
Offline tour agency	49	35	40	50	60	62	60	35
Offline research via travel guides, books, etc.	36	43	43	45	44	34	23	29
Recommendations from the people I know	20	31	29	26	13	18	14	15

 Top 3 Sources

***Caution: Small sample size for respondents under each assigned destination.**

Q12. Where did you get information on purchasing wildlife products? Please select all that apply.

Base: Travelers researched wildlife products prior to trip, n=366 (by assigned destination: Cambodia, n=46, Hong Kong SAR, n=45, Japan, n=42, Laos, n=83, Myanmar, n=45, Thailand, n=34, Vietnam, n=72)



Before Traveling: Travelers Who Plan to Buy Ivory

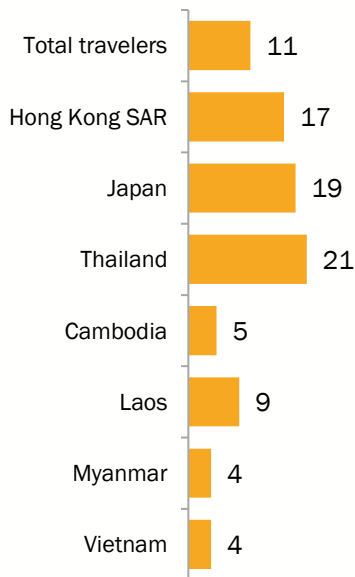
One in ten travelers reported that they planned to buy ivory on their trip. Of these, the highest number were those planning to visit Thailand, Japan, and Hong Kong SAR.

The destinations in which there is some legal ivory trade exhibited the highest levels of planned purchase among travelers.

Among participants of the qualitative focus group discussions, most of them only located popular shopping areas at their destinations without identifying specific stores that sell ivory or rhino horn products prior their departures. Some respondents would also ask their friends who have bought these products in the past for recommendations.

Note: Legal ivory purchase is possible in Hong Kong SAR, Japan and Thailand under certain circumstances.

Planned to Buy Ivory Prior to Trip (%)



Sources of Information on Where to Buy Ivory
(% Among Travelers Planning to Buy Ivory) (n=335)*

Online	From people I know	From a tour guide company
61	59	51
72	64	45
75	44	44
52	64	55
76	53	63
31	64	56
60	66	61
48	71	59

 Top Source

*Caution: Small sample size for respondents under each assigned destination.

Q17. Did you make a plan to buy ivory before your trip to [assigned destination]?

Base: Travelers total, n=3011 (Assigned destination: Cambodia, n=370, Hong Kong SAR, n=457, Japan, n=422, Laos, n=389, Myanmar, n=375, Thailand, n=407, Vietnam, n=591)

Q18. Where did you find information on where to buy ivory before your trip? Please select all that apply.

Base: Travelers planned to buy ivory, n=335 (Assigned destination: Cambodia, n=20, Hong Kong SAR, n=76, Japan, n=80, Laos, n=37, Myanmar, n=15, Thailand, n=83, Vietnam, n=25)



Before Traveling: Perceived Best Destinations to Buy Ivory and Why They Are Attractive

Travelers who planned to buy ivory before their trip chose at least one destination as being good to buy ivory in almost every case, while 37 per cent of general travelers did not know the best destination to buy it.

Thailand was ranked highest as a destination to purchase ivory among travelers who planned to purchase, followed by Myanmar.

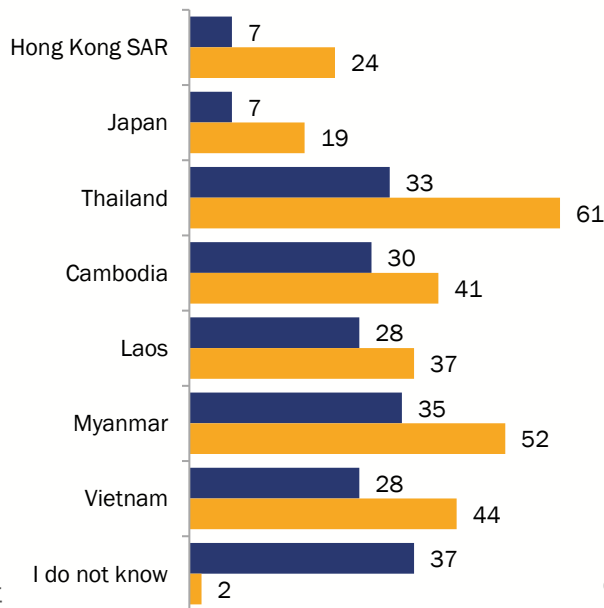
Those who planned to buy ivory valued all qualities more highly than general travelers, with the biggest discrepancies in the ease of getting it out of the destination, the uniqueness and the quality.

Participants of the qualitative focus group discussions believed ivory or rhino horn products from Southeast Asia are cheaper, among which Thailand and Vietnam have the best quality and authenticity. Thailand is also perceived to have the most ivory stock available for sale. Hong Kong SAR and Japan are considered to be more trustworthy but more expensive.

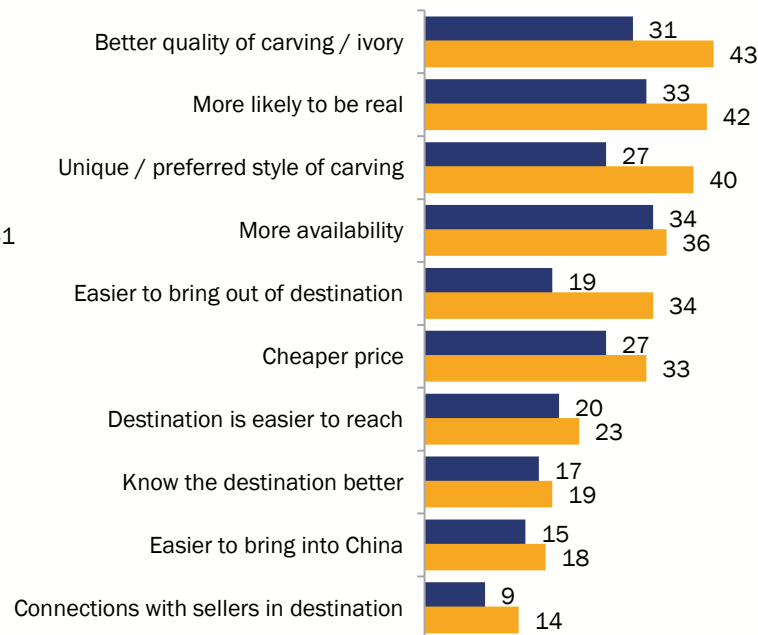
Travelers who selected a best destination to buy ivory (n=1912)

Travelers who planned to buy ivory and who selected a best destination to buy ivory (n=329)

Perceived Best Destinations to Buy Ivory
(Total Mentions) (%)



Attributes Making Destinations Attractive for Buying Ivory
(Total mentions) (%)



Q13. Which of these destinations do you believe are the best to buy ivory? Please rank up to 3 options. Base: Travelers total, n=3011; Planned to buy ivory, n=335

Q14. What makes these destinations attractive to buy ivory? Please select all that apply.

Base: Travelers who selected best destinations for ivory, n=1912; Travelers who planned to buy ivory and selected a best destination to buy it, n=329



Before Traveling: Travelers Planning to Buy Ivory – Segmentation*

The most distinct segment of travelers in this study was found to be those who planned to purchase ivory.

Travelers who planned to buy ivory were more likely to be female and have a high education and income. Regular overseas travelers planned to purchase ivory at a higher rate than infrequent travelers.

Almost all travelers who intended to purchase ivory visited a shop that sold it and eight out of ten people who planned to purchase ivory had someone in their group (themselves or another group member) buy ivory.

Demographics	Travel Behavior
Age: 25–34 years old (41%) Gender: Female (62%) Regions: Guangdong (18%), Shanghai (14%), Beijing (13%) Monthly personal income: High (RMB20,000 or more) (55%) Education level: University or above (72%)	Travel frequency: Regular / frequent travelers⁺ (74%) Assigned travel destination: 1. Thailand (25%) 2. Japan (24%) 3. Hong Kong SAR (23%) Repeated travels: 60% traveled two times or more to the destination in the past 24 months Top online platforms used (85% researched the trip online): 1. Trip (59%) 2. Qunar.com (29%) 3. Fliggy (28%) 4. Tuniu (24%)
Ivory shopping behavior	
92% visited a shop that sold ivory	81% had someone in their group (themselves or another group member) buy ivory while traveling

*A typical planner profile indicates the demographics that are more likely to be represented. See slide 75

⁺ Over the past three years (2017–2019): Regular is 2–3 times per year; Frequent is more than 3 times per year

Q17. Did you make a plan to buy ivory before your trip to [assigned destination]?

S1. City S2. Age; S3. Gender; S4. Monthly personal income; S5. Education; Q1. Travel behavior; X1. For the questions in this survey, please consider your most recent trip to [assigned destination]; Q4. How many times have you visited [assigned destination] in the past 24 months?; Q8. How did you research your trip to [assigned destination]?; Q9. You mentioned you planned your trip online. Which of the following are your most used online platforms? Please select up to 3. Q21. While traveling in [assigned destination], did you visit a shop / market that sold ivory? Q33. Considering yourself and people you were travelling with, how many people do you know for sure bought ivory? Base: Planned to buy ivory, n=335



Before Traveling: Travelers Who Plan to Buy Rhino Horn

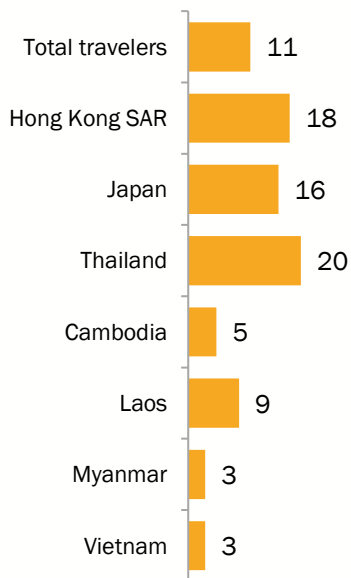
One in ten travelers reported that they planned to buy rhino horn on their trip. Of these, the highest number were those planning to visit Thailand, Japan, and Hong Kong SAR.

For most of the destinations, online research was the primary method that travelers used to plan where to buy rhino horn products.

According to one participant of the qualitative focus group discussions:

“I first searched on an online auction site to find a seller of wildlife products. I then contacted the owner via WeChat video call to make sure he got what I want and met him when I arrived at my destination.”

Planned to Buy Rhino Horn Prior to Trip (%)



*Caution: Small sample size for respondents under each assigned destination.

Q55. Did you make a plan to buy rhino horn before your trip to [assigned destination]?

Base: Travelers total, n=3011 (Assigned destination: Cambodia, n=370, Hong Kong SAR, n=457, Japan, n=422, Laos, n=389, Myanmar, n=375, Thailand, n=407, Vietnam, n=591)

Q56. Where did you find information on where to buy rhino horn before your trip? Please select all that apply.

Base: Travelers planned to buy rhino horn, n=318 (Assigned destination: Cambodia, n=20, Hong Kong SAR, n=81, Japan, n=69, Laos, n=35, Myanmar, n=10, Thailand, n=83, Vietnam, n=20)

Sources of Information on Where to Buy Rhino Horn
(% Among Travelers Planning to Buy Rhino Horn) (n=318)*

Online	From people I know	From a tour guide company
65	59	48
73	63	39
74	54	43
61	53	59
64	44	66
51	58	49
84	89	49
37	82	42

Top Source



Before Traveling: Perceived Best Destinations to Buy Rhino Horn and Why They Are Attractive

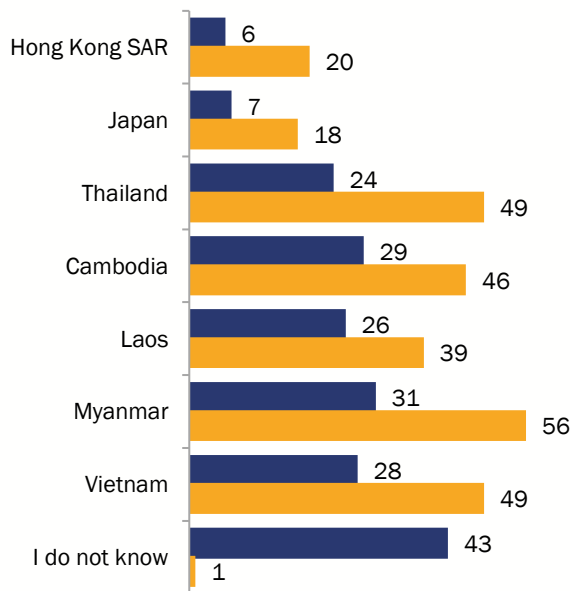
Many general travelers were unsure of the best destination to buy rhino horn, but those who planned to buy it were confident enough to choose a destination.

Myanmar, Vietnam and Thailand were perceived as the best destinations to buy rhino horn.

Those who planned to buy rhino horn valued all qualities more highly than general travelers, with the biggest discrepancies in the ease of bringing it out of the destination, the quality and the price.

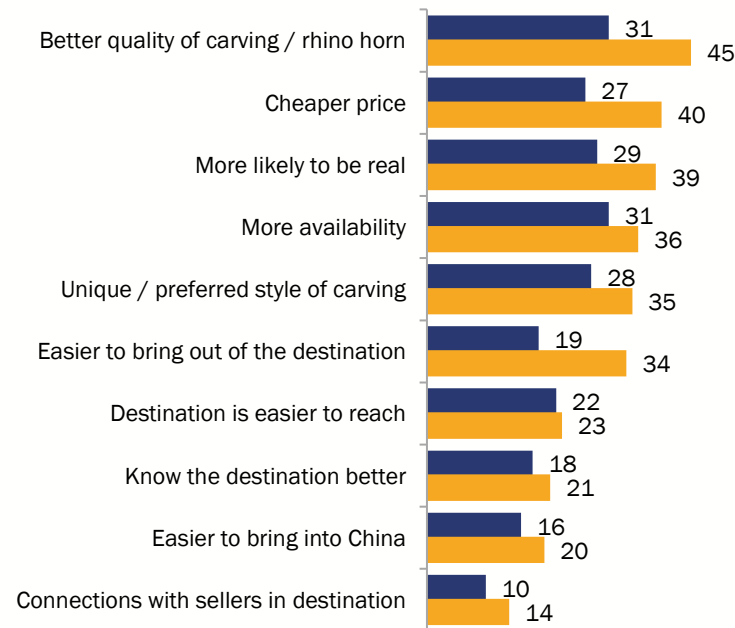
Travelers who selected a best destination to buy rhino horn (n=1720)

Perceived Best destinations to Buy Rhino Horn
(Total Mentions) (%)



Travelers who planned to buy rhino horn and who selected a best destination to buy rhino horn (n=316)

Attributes Making Destinations Attractive for Buying Ivory
(Total mentions) (%)



Q15. Which of these destinations do you believe are the best to buy rhino horn? Please rank up to 3 options.

Base: Travelers total, n=3011; Planned to buy rhino horn, n=318

Q16. What makes these destinations attractive to buy rhino horn? Please select all that apply.

Base: Travelers who selected best destinations for rhino horn, n=1720; Travelers who planned to buy rhino horn and selected a best destination to buy it, n=316



3. Analysis of Travelers

3.3 While Traveling: Wildlife Shopping While Abroad



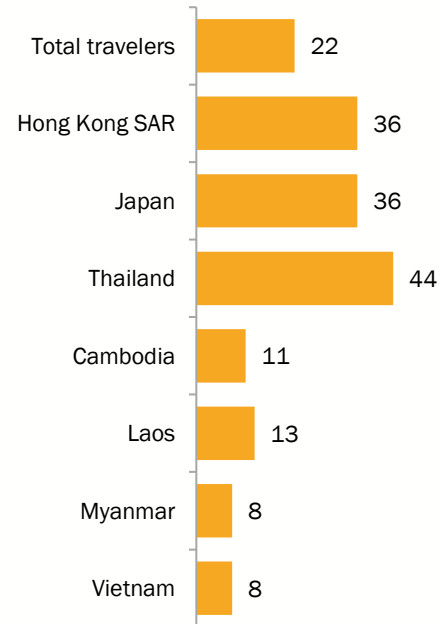
While traveling: Suggestions to Purchase Ivory While Abroad

The number of travelers who received suggestions to purchase ivory was twice as high as the number of people who planned to purchase it (Slide 34).

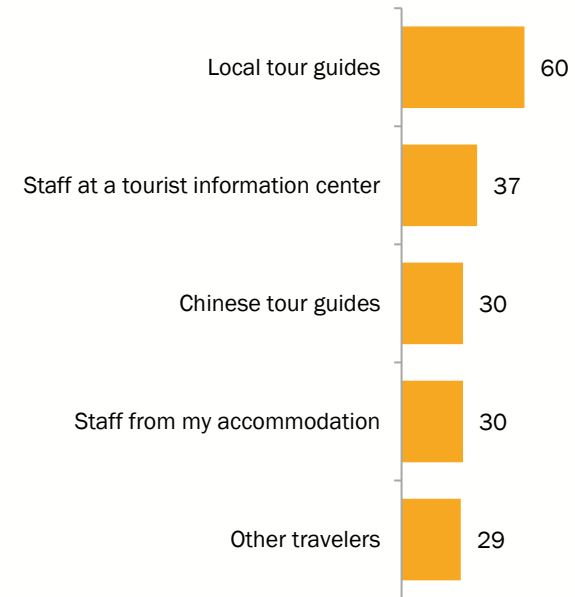
Local tour guides and staff at tourist information centers in the destination were most likely to suggest visiting an ivory shop.

Travelers who went to Thailand were most likely to have ivory recommended to them, with the other Mekong destinations receiving lower rates of recommendation.

Did Anyone Suggest Buying Ivory While Travelling: Yes (%)



Who Suggested It (% Among Travelers to Whom it was Suggested) (n=666)



Q19. Did anyone suggest visiting a shop that sold ivory while you were traveling in [assigned destination]?

Q20. Who was/were the person/people suggesting this to you while you were traveling? Please select all that apply.

Base: Travelers total, n=3011; Travelers being suggested for ivory shops, n=666



While Traveling: Visits to a Shop that Sold Ivory

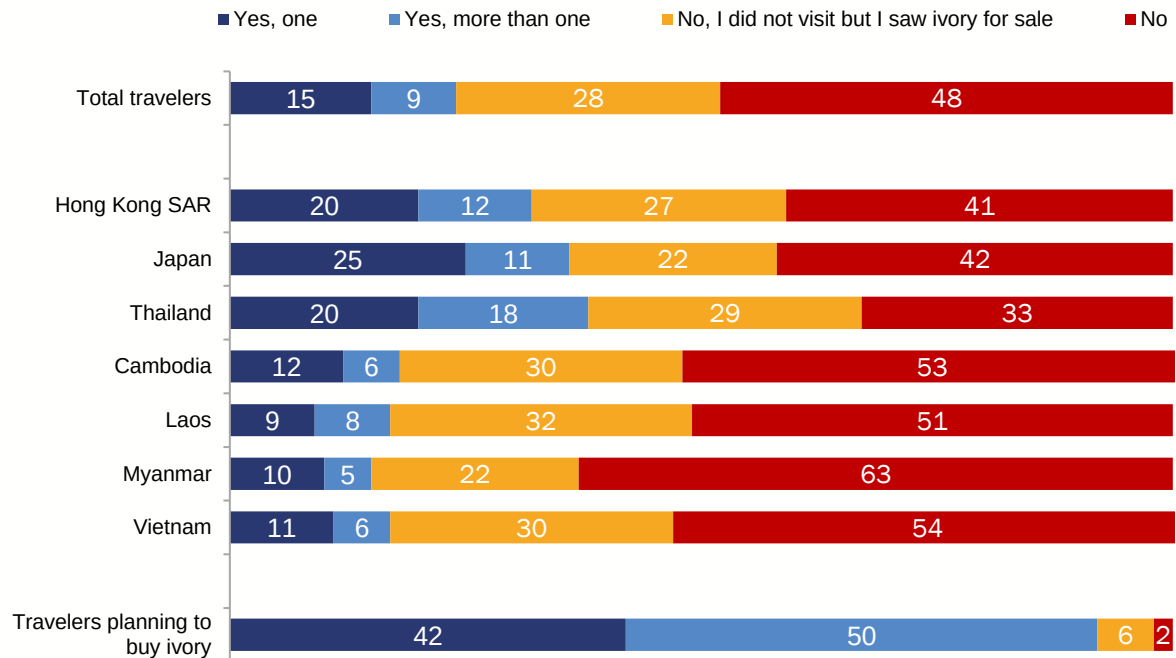
Over half of the total travelers claim to have seen at least one shop with ivory for sale, with 24 percent of travelers saying that they went into one or more ivory shops.

Over 90 per cent of travelers who planned to buy ivory visited at least one shop that sold it.

The destinations in which legal ivory sales are possible under certain circumstances – Thailand, Japan, and Hong Kong SAR – had the highest rates of ivory seen.

Thailand had the highest combined rate of visiting shops with, or seeing, ivory for sale, while there were similar rates of visiting at least one ivory shop in Japan.

Visits to a Shop / Market that Sold Ivory (%)



Q21. While traveling in [assigned destination], did you visit a shop / market that sold ivory?

Base: Travelers total, n=3011; Assigned destination: Cambodia, n=370, Hong Kong SAR, n=457, Japan, n=422, Laos, n=389, Myanmar, n=375, Thailand, n=407, Vietnam, n=591; Travelers planned to buy ivory, n=335



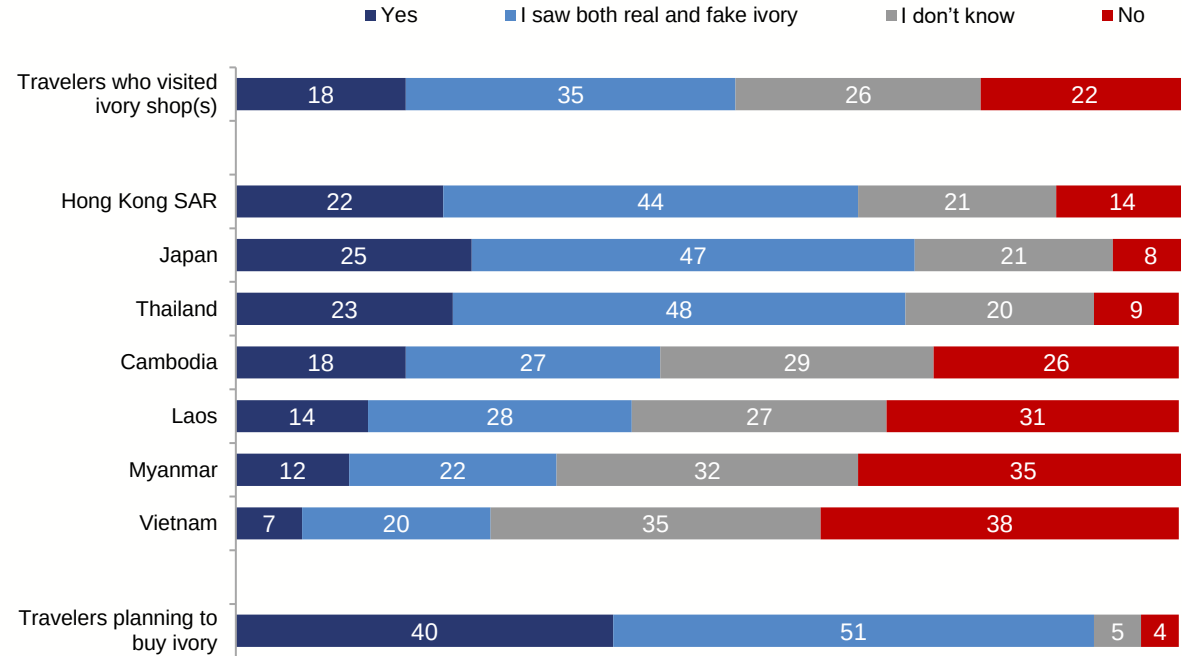
While Traveling: Perceived Realness of Ivory Products Seen in Shops

Travelers had a high degree of confidence that they were able to identify whether the ivory they saw was real or fake, especially those who had planned to buy ivory.

Travelers who answered affirmatively or negatively indicated that they were able to tell or were convinced that the ivory was real or fake. With only 5 per cent answering, “I don’t know”, 95 per cent of travelers who planned to purchase ivory felt that they were able to identify the ivory as real or fake, compared to 75 per cent of travelers overall.

Travelers to Vietnam believed the ivory was fake or were unsure if it was real at higher rates than in other destinations.

Perceptions of Whether the Ivory Products Were Real
(% Among Respondents Visited Ivory Shop(s)) (n=1568)



Q25. Do you believe the ivory products you saw while traveling were real?

Base: Those who visited ivory shop(s), n=1568; Assigned destination: Cambodia, n=175, Hong Kong SAR, n=268, Japan, n=245, Laos, n=192, Myanmar, n=140, Thailand, n=273, Vietnam, n=275; Travelers planned to buy ivory, n=330



While Traveling: How Travelers Claim to Identify Real Ivory Products

When assessing the ivory as real, travelers, and especially those who planned to buy ivory, relied on authenticating documents provided by the sellers.

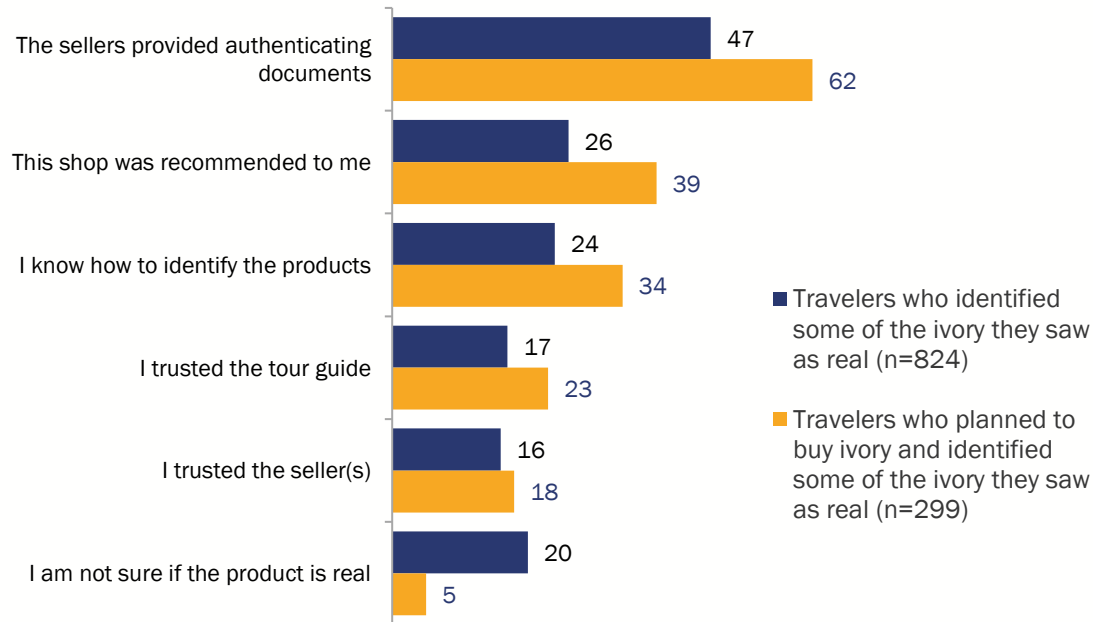
Tour guides were not seen as a trusted source of information for real ivory and sellers were trusted the least.

One quarter of travelers believe they can identify ivory themselves. Respondents in GlobeScan and WWF's survey "Demand under the Ban – China Ivory Consumption Research 2019" (p33) did not correctly identify real ivory vs substitutes at a very high rate.

Significantly more travelers who planned to buy ivory relied on authenticating documents, recommendations, and on their own ability to identify the ivory.

Participants of the qualitative focus group discussions reported that certifications were very important to them, while some believed that shops in a shopping mall were more likely to be legitimate

How Travelers Could Identify Real Ivory (%)



Note: Authenticating documents may be available in destinations such as Hong Kong SAR, Japan, and Thailand in which there is some legal ivory trade, but would not be legitimate in others. Although travellers strongly trust these documents, that does not necessarily imply that they are legitimate, even in destinations with legal ivory trade.

Q26. How did you know the product / products were real? Please select all that apply.

Base: Travelers who saw real or both real and fake ivory in shops visited, n=824, Travelers planned to buy ivory, n=299

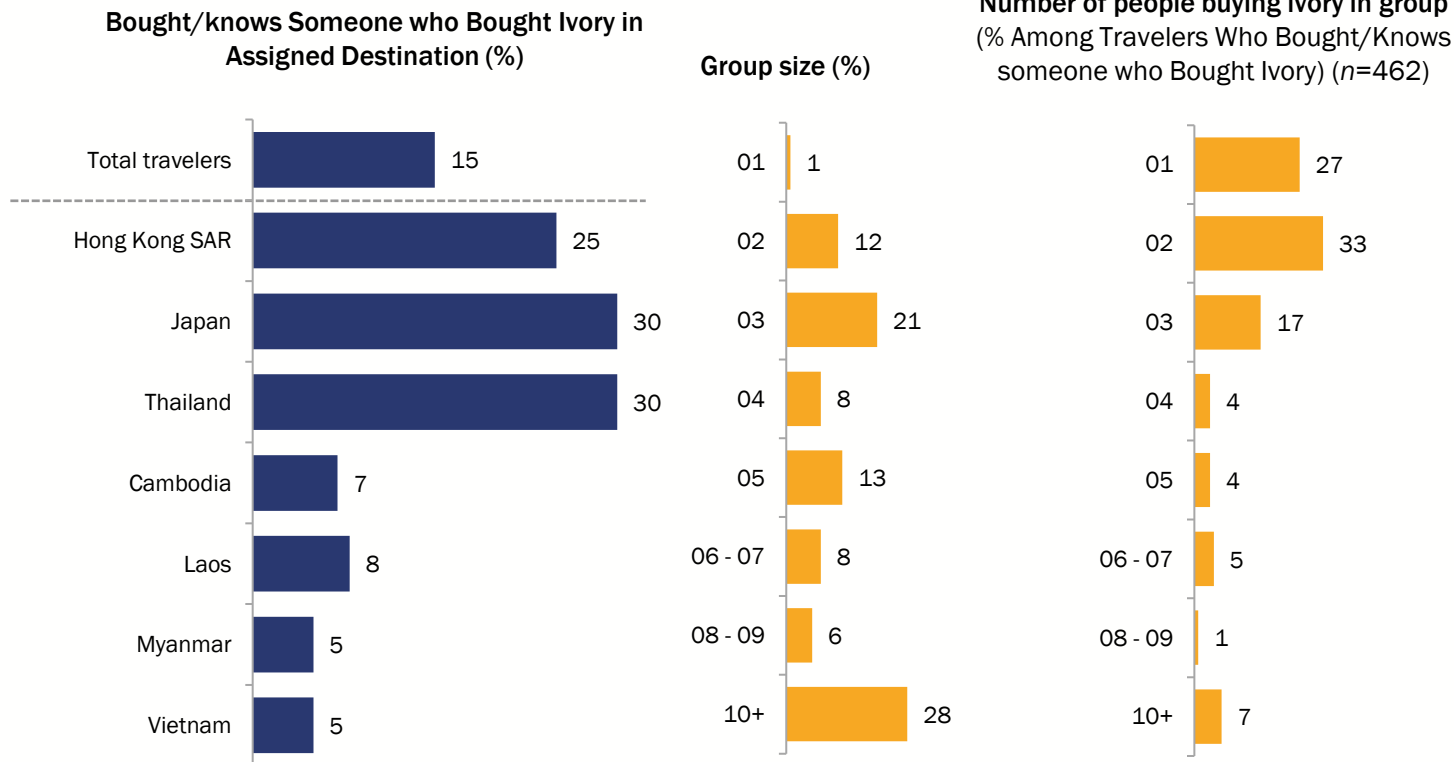
While Traveling: In-group Purchases of Ivory



Nearly one-third of travelers to Thailand or Japan knew of at least one person in their group who bought ivory, followed closely by visitors to Hong Kong SAR.

In most groups, only one or two people bought ivory. 77 per cent had fewer than 4 people buy ivory from their group.

In some groups a large number of people purchased ivory: 7 per cent of people stated that more than 10 people bought ivory in their group.



Q30. During your most recent travel in [Assigned destination], did you or anyone in your group / anyone you were with buy ivory while traveling?

Q32. Considering yourself and people you were travelling with, what is the total number of people travelling?

Q33. Considering yourself and people you were travelling with, how many people do you know for sure bought ivory?

Base: Travelers total, n=3011; Assigned destination: Cambodia, n=370, Hong Kong SAR, n=457, Japan, n=422, Laos, n=389, Myanmar, n=375, Thailand, n=407, Vietnam, n=591;

Travelers who knew someone in their group had bought ivory n=462



While Traveling: The Number of Travelers Who Purchased Ivory*

The incidence rate for ivory purchase while traveling was estimated at:

6.8%

(See Note or Slide 75 for explanation of incidence rate calculation)

The table to the right shows different population segments with estimated incidence rates for ivory purchase. Because these incidence rates are derived from indirect questioning, they should be treated with caution.

Note: The incidence rate was calculated using the following questions:

- 1) During your most recent travel in [destination], did you or anyone in your group / anyone you were with buy ivory while traveling?
- 2) Considering yourself and people you were travelling with, what is the total number of people travelling?
- 3) Considering yourself and people you were travelling with, how many people do you know for sure bought ivory?

Demographics	Sample Size	Incidence%	Travel Behavior	Sample Size	Incidence%
Age: 25 – 34	n=693	12.0	Travel frequency: Regular travelers Frequent travelers Assigned travel destination: 1. Hong Kong SAR 2. Japan 3. Thailand 4. Cambodia 5. Laos 6. Myanmar 7. Vietnam Purpose of Trip: Study / School visits Visiting family/friends Short business trips	n=1331 n=325 n=457 n=422 n=407 n=370 n=389 n=375 n=591 n=140 n=151 n=549	7.6 15.2 11.3 12.0 13.5 3.1 4.3 2.2 1.9 19.5 14.2 14.1
Gender: Female	n=1415	8.9			
Monthly personal income: RMB 40,000 – 49,999	n=120	18.9			
RMB 50,000 – 59,999	n=60	20.4			
Education level: College or University Graduate	n=1114	12.4			
Completed Postgraduate Degree	n=120	13.9			
Ivory shopping behavior	Sample Size	Incidence%			
Planned to purchase ivory	n=335	42.8			
Didn't plan to purchase ivory	n=2676	2.3			
Visited one shop	n=452	18.4			
Visited more than one shop	n=271	34.8			
Believe it is legal to bring all ivory into China	n=120	40.3			
Believe it's legal to bring small pieces	n=391	23.8			
Believe it is illegal	n=2116	1.6			

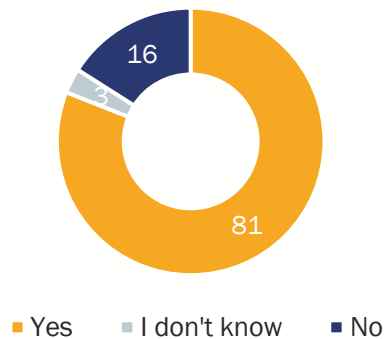


While Traveling: Following Through on Plans to Purchase Ivory

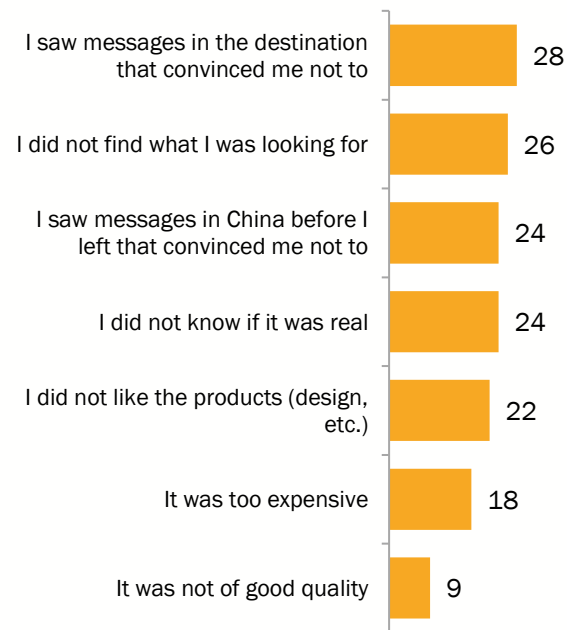
11 per cent of travelers planned to buy ivory before their trip (Slide 34). Of these 335 travelers, over 80 per cent knew someone in their group (themselves or another traveler) who had purchased ivory.

The reasons those who planned to buy ivory but did not are varied with campaign messages featuring prominently among people's reasoning.

Bought/knows someone who bought ivory products in assigned destination
(% of Travelers Planned to Buy) (n=335)



Reasons Not to Buy Ivory / Rhino Horn Products
(% of Travelers Planned to Buy But Did Not) (n=94)



Q30. During your most recent travel in [assigned destination], did you or anyone in your group / anyone you were with buy **ivory** while traveling?

Q48. You mentioned that you planned to buy ivory or rhino horn before your trip, but that you did not buy it. Why was this? Please select all that apply.

Base: Travelers planned to buy ivory, n=335; Travelers planned to buy ivory/rhino horn but did not make any purchase in the trip, n=94



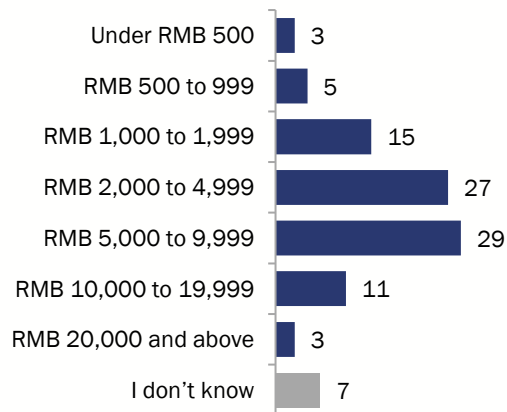
While Traveling: Amount spent on Ivory Purchases

Spending between RMB 2,000 and RMB 10,000 was the most common bracket.

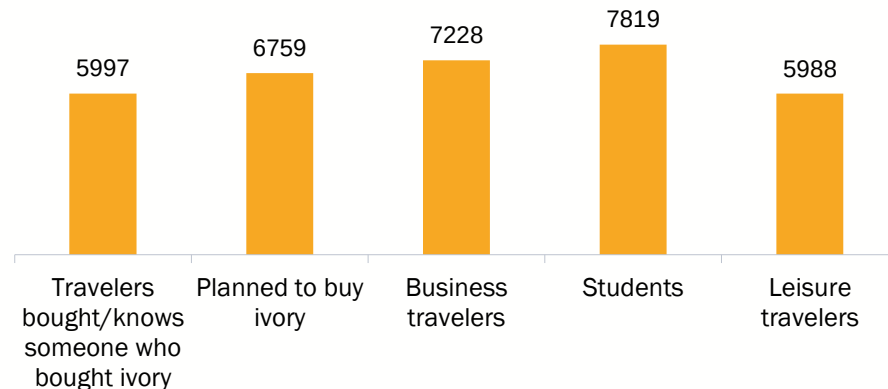
Students purchased more expensive ivory than either business or leisure travelers but were significantly more likely to buy ivory to sell in China and were also significantly more likely to buy ivory at the request of someone else (51 per cent).

Travelers who bought ivory spent the most per transaction in Hong Kong SAR and Japan, and the least in Vietnam and Cambodia.

Approximate Spend on Ivory in Transaction
(% Among Travelers Bought/Knows someone who bought ivory) (n=462)*



Mean Spend on Ivory in Transaction
(RMB)



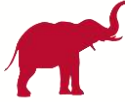
Mean Spend on Ivory in Transaction by Destination

Market	Total	Hong Kong SAR	Japan	Thailand	Cambodia	Laos	Myanmar	Vietnam
Average spend (USD)	854	1025	945	835	420	740	850	490
Average spend (RMB)	5997	7166	6598	5835	2940	5173	5955	3426

***Caution: Small sample size for respondents under each assigned destination.**

Q57. Please indicate the amount of money this person spent on all ivory products in total within that purchase?

Base: Bought/knows someone who bought ivory while traveling in assigned destination, n=462; Cambodia, n=27, Hong Kong SAR, n=115, Japan, n=125, Laos, n=31, Myanmar, n=17, Thailand, n=124, Vietnam, n=27; Travelers planned to buy ivory, n=271; Business travelers, n=137; Students, n=53; Leisure travelers, n=2777



While Traveling: Ivory Products Purchased

Pendants are the most popular product for ivory purchase, followed by sculptures and necklaces.

Examples of purchasers of these products taken from the qualitative phase of this study are shown here.

Ivory Sculpture (From Qualitative Findings)

Price: RMB 10,000

Location: Thailand

Reasons to buy: Religion, for decoration

Remarks: Believe it is real as Thailand has a good reputation and the shop is inside a shopping mall

Buyer's profile: Male, age 49, income RMB 30-35k per month, independent travel



Ivory Necklace (From Qualitative Findings)

Price: RMB 3,380

Location: Hong Kong SAR

Reasons to buy:
Like this necklace

Remarks: Believe it is real as she has been using ivory products since childhood

Buyer's profile: Female, age 56, income RMB 15-20k per month, independent travel



Ivory Pendant (From Qualitative Findings)

Price: RMB 1,300

Location: Cambodia

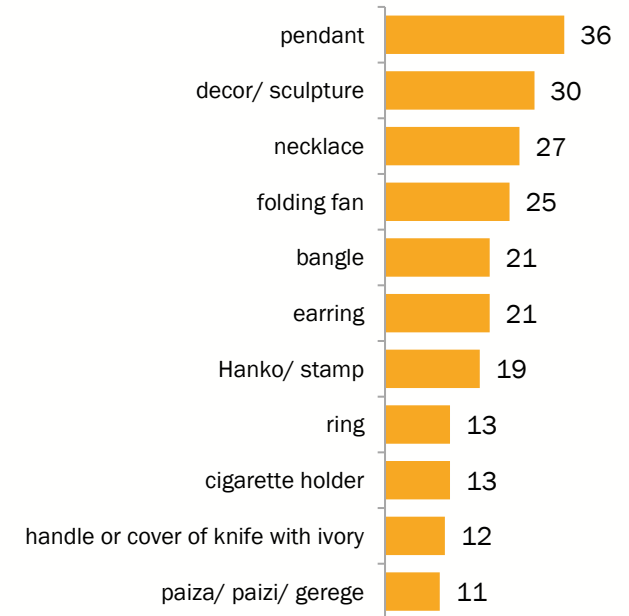
Reasons to buy:
Like the crafting, good value for money

Remarks: Believe ivory quality in Cambodia is good; The salesperson knew Chinese

Buyer's profile: Female, age 45, income RMB 50k+ per month, group tour



Types of Ivory Products Bought (% Among Travelers Bought/Knows someone who bought ivory) (n=462)



Q35. What ivory products did this person (you or someone else) buy?



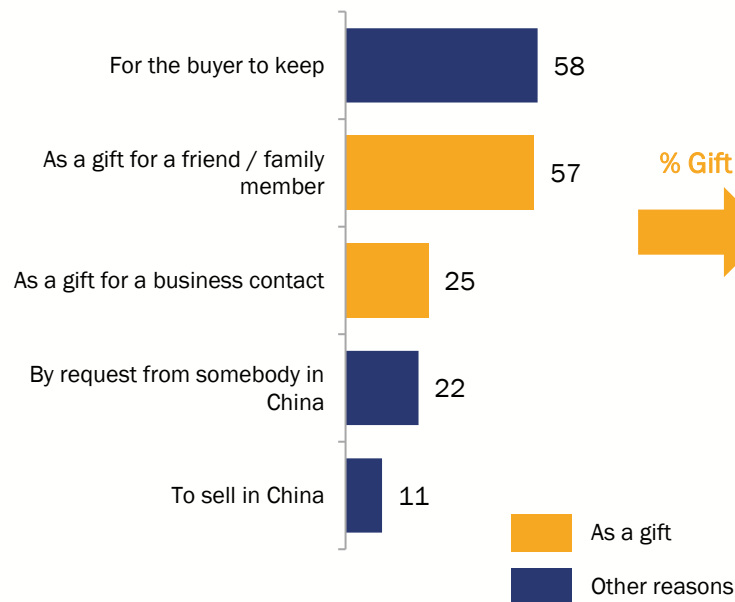
While Traveling: Reasons and Occasions to Purchase Ivory

Travelers purchase ivory primarily as a gift for a friend / family member / business contact, closely followed by those that kept the items for themselves.

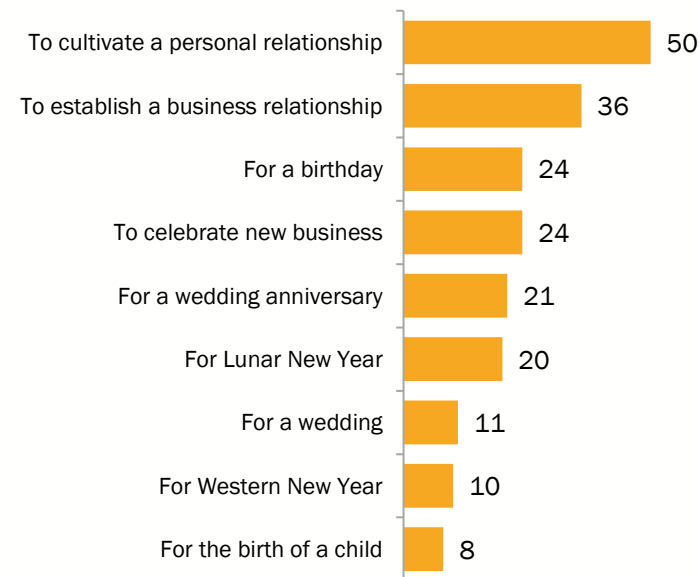
Over ten per cent of ivory purchases are reported to be to resell the ivory in China.

Half of the respondents who purchased ivory as a gift reported that it was to cultivate a personal relationship.

Primary Reasons to Purchase Ivory
(% Among Travelers Bought/Knows Someone Who Bought Ivory) (n=462)



Occasion for Purchasing Ivory as a Gift
(% Among Travelers Bought/Knows Someone Who Bought Ivory as A Gift) (n=310)



Note: the purchaser may have bought multiple pieces of ivory and may therefore have had multiple reasons to buy them.

Q36. What were the primary reasons for this person to purchase ivory? Please select all that apply.

Base: Bought/knows someone who bought ivory while traveling in assigned destination, n=462

Q37. You said Ivory was bought as a gift for a friend/ family member/ business contact. What was the occasion for purchasing the gift for this person? Please select all that apply.

Base: Purchased ivory as a gift, n=310

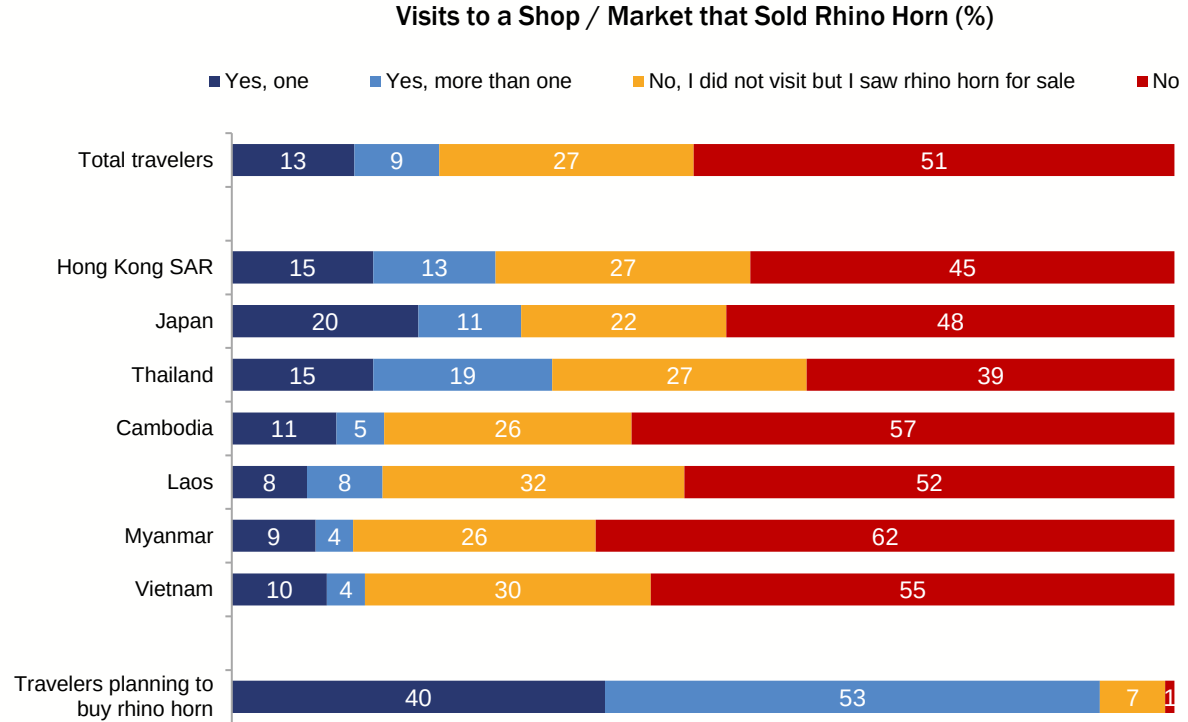
While Traveling: Visits to a Shop that Sold Rhino Horn



Almost half of the total travelers claim to have seen at least one shop with rhino horn for sale, with 22 per cent of travelers saying that they went into one or more ivory shops.

Over 90 per cent of travelers who planned to buy rhino horn visited at least one shop that sold it.

Travelers to Thailand claimed to visit shops that sold rhino horn at over twice the rate of travelers to Cambodia, Laos, Myanmar and Vietnam.



Q22. While traveling in [assigned destination], did you visit a shop / market that sold rhino horn?

Base: Travelers total, n=3011; Assigned destination: Cambodia, n=370, Hong Kong SAR, n=457, Japan, n=422, Laos, n=389, Myanmar, n=375, Thailand, n=407, Vietnam, n=591; Travelers planned to buy rhino horn, n=318

While Traveling: Rhino Horn Purchase Incidence rate



Using the travelers group size and the number of people in the group (including the traveler) that the traveler knew for certain purchased rhino horn, the incidence rate for rhino horn purchase while traveling was estimated at:

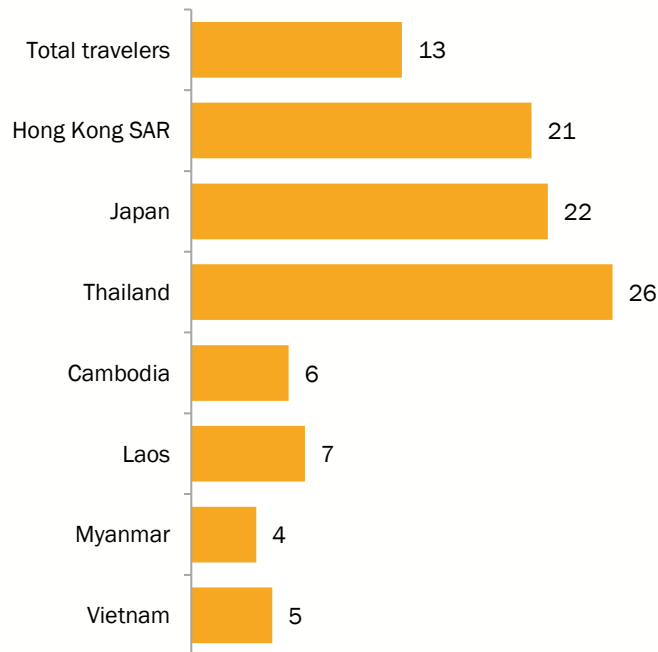
5.5%

One quarter of travelers to Thailand knew of at least one person in their group who bought rhino horn, followed closely by visitors to Japan and Hong Kong SAR.

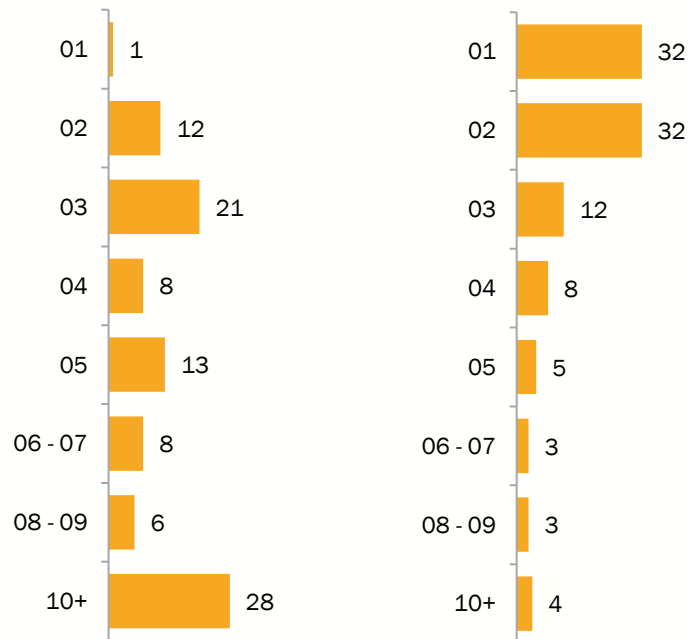
Note: The incidence rate was calculated using the following questions:

- 1) During your most recent travel in [destination], did you or anyone in your group / anyone you were with buy rhino horn while traveling?
- 2) Considering yourself and people you were travelling with, what is the total number of people travelling?
- 3) Considering yourself and people you were travelling with, how many people do you know for sure bought rhino horn?

Bought/knows Someone who Bought Rhino Horn in Assigned Destination (%)



Number of People Buying Rhino Horn in Group
(% Among Travelers Who Bought/Knows someone who Bought Rhino Horn) (n=389)



Base: Travelers total, n=3011; Assigned destination: Cambodia, n=370, Hong Kong SAR, n=457, Japan, n=422, Laos, n=389, Myanmar, n=375, Thailand, n=407, Vietnam, n=591; Travelers who knew someone in their group had bought ivory or rhino horn n=506; Travelers who knew someone in their group had bought rhino horn, n=389

While Traveling: Language Capabilities of Sellers



Of those travelers who saw ivory for sale and interacted with the seller, the majority were able to interact with the seller in Chinese.

Language capabilities between markets varied, with the more popular tourist destinations having higher rates of Chinese-speaking staff.

Most respondents in the qualitative study bought Ivory or Rhino horn products from shopping malls or local stores that were catered specifically to Chinese tourists:

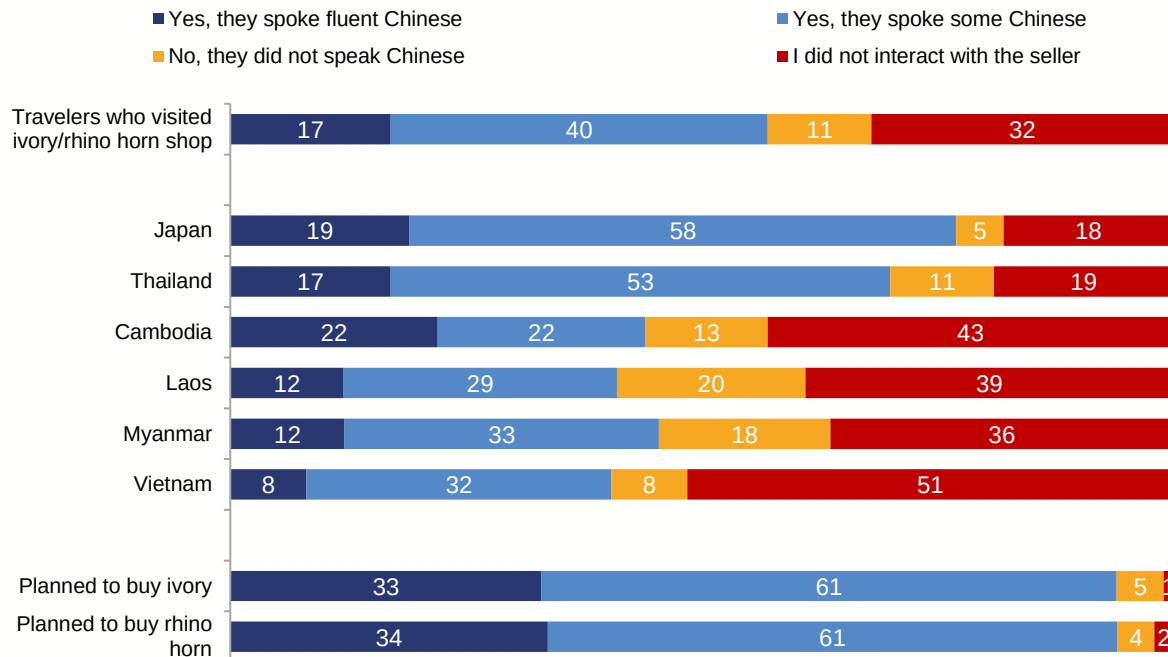
"I was at Ho Chi Minh City and Danang in Vietnam with a tour group and was brought to a shopping mall that sells ivory and rhino horn products. I looked around and only Chinese tour groups were there. The staff knew how to speak Chinese too."

"I was visiting Sisavangvong Road (洋人街) in Laos with my tour group and there were stores selling all kinds of ivory products with Chinese speaking locals. Most people visiting were from Chinese tour groups; I don't think I saw a lot of tourists from other countries."

Q29. Did any of the seller(s) of Ivory/ Rhino horn speak Chinese?

Base: Those who visited ivory and/or rhino horn shop(s), n=1674; Assigned destination: Cambodia, n=189, Hong Kong SAR, n=278, Japan, n=250, Laos, n=213, Myanmar, n=161, Thailand, n=282, Vietnam, n=300; Travelers planned to buy ivory, n=331; Travelers planned to buy rhino horn, n=317

Ivory and/or Rhino Horn Sellers Speaking Chinese (%)



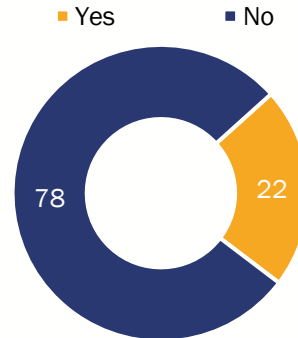
While Traveling: Advice Received About Carrying Ivory / Rhino Horn Products into Mainland China



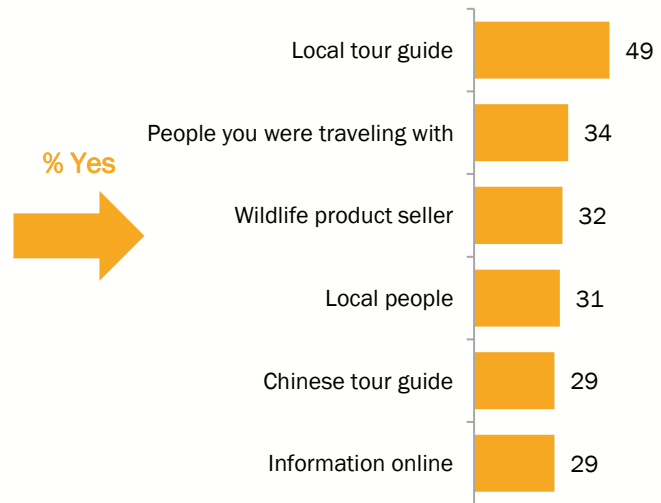
52 per cent of travelers report seeing ivory for sale in at least one shop (Slide 41) and 49 per cent reported that they saw rhino horn (slide 50). Of these combined 1,567 travelers, 22 percent were given advice on how best to illegally transport it across the border into Mainland China.

Local tour guides were the most likely people to recommend methods of transporting wildlife across borders.

Was given Advice on Carrying Ivory / Rhino Horn into China
(% Among Respondents Who Saw/Visited a Shop Selling Ivory)
(n=1567)



Who Suggested the Advice
(% Among Respondents Who Got Advice) (n=350)



Q49. Did anyone advise you how to carry ivory or rhino horn across the border into Mainland China?

Q50. Who suggested it to you? Please select all that apply.

While Traveling: Recommendations to Carry Ivory / Rhino Horn Products into Mainland China



Travelers received advice that reflected the actual methods of transporting wildlife products across the border: mail was the most commonly advised method, followed by small products that were hard to detect.

Some travelers received assurances that it was ok to bring or that certification letters would legitimize the pieces.

Participants of the qualitative focus group discussions reported that local sellers and tour guides would offer tips to getting ivory across the borders, such as:

- (1) Separating ivory products into different places
- (2) Hide it in their shoes
- (3) Put it in luggage to get checked less
- (4) Unwrapping the packaging
- (5) Make an excuse saying that you brought it to keep yourself safe (保平安)
- (6) Just wear it when crossing customs
- (7) Females and elderlies will get checked less.

Advice about Carrying Ivory / Rhino Horn Products
(% Among Respondents Who Were Given Advice) (n=350)



“

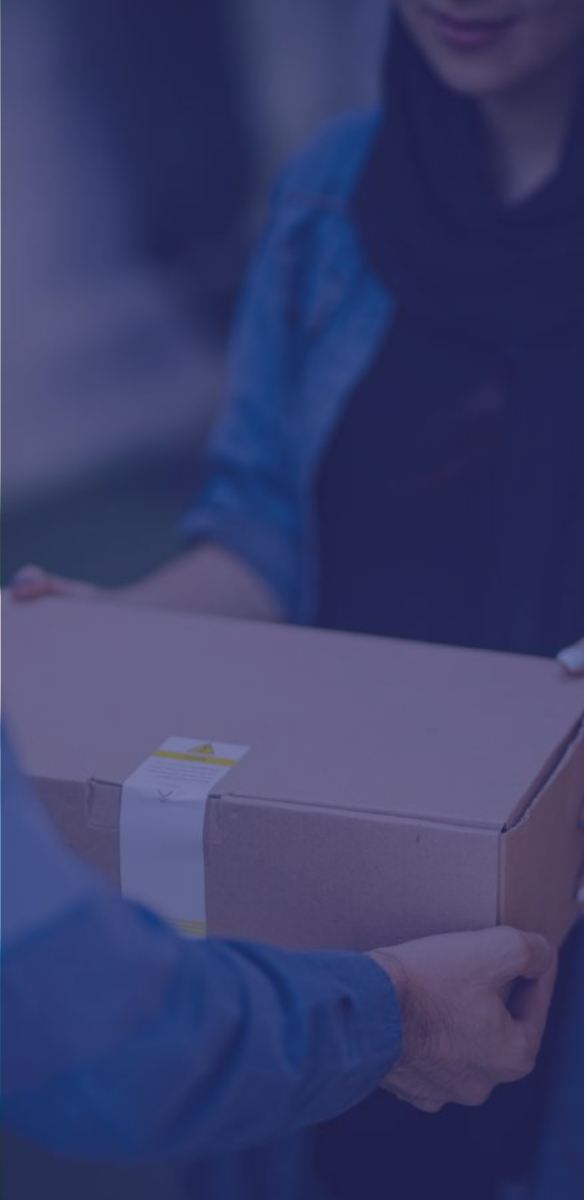
Other tourists recommended to buy cheap and small items. Just try your luck across the border, even if the goods are confiscated you will not be losing too much money.

“

Hide the small pieces among the items in your luggage, the customs are unable to detect them. For large pieces like bracelet or accessories you can just wear it on yourself.

Q51. What did they suggest? [to bring ivory or rhino horn products across the border]

Base: Travelers who were given advice on how to carry ivory / rhino horn into China, n=350



3. Analysis of Travelers

3.4 Post Travel: Transporting Wildlife Products Back to Mainland China

Post Travel: Perceived Difficulty of Transporting Ivory / Rhino Horn Products into Mainland China

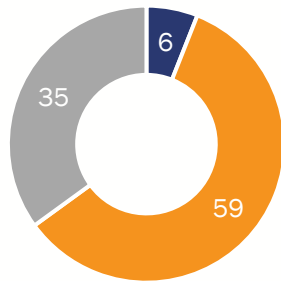


Few travelers carried the ivory through another destination before returning to China, and travelers generally perceived this as being difficult.

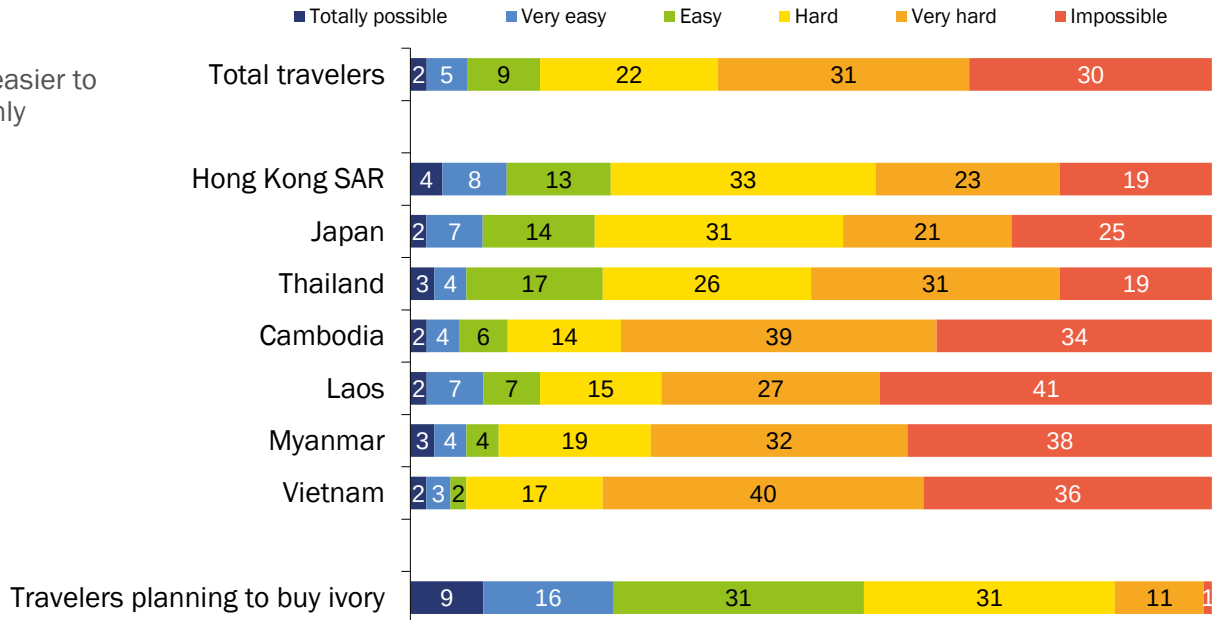
Travelers who had planned to buy ivory perceived it as being easier to bring back into mainland China than general travelers, with only 1 percent of this group thinking it was not possible.

Transport through another country
(% Among Travelers Bought/Knows Someone Who Bought Ivory/Rhino Horn) (n=506)

■ Yes ■ No ■ I don't know



Perceived difficulty to Bring into Mainland China (%)



Q39. Did this person bring these goods through a destination other than [assigned destination] before entering China? Base: Bought/knows someone who bought ivory or rhino horn while traveling in assigned destination, n=506

Q41. From your travel experience, how difficult do you think it would be to bring ivory products into Mainland China from other countries or territories? Travelers total, n=3011; Assigned destination: Cambodia, n=370, Hong Kong SAR, n=457, Japan, n=422, Laos, n=389, Myanmar, n=375, Thailand, n=407, Vietnam, n=591

Post Travel: Methods of Bringing Ivory / Rhino Horn Products Back into Mainland China



Sending ivory or rhino horn products back to Mainland China by mail is the most commonly used method of transporting these products across the border. Nearly half of all travelers who had bought / knew someone who had bought these wildlife products reported that the person used this method.

More people had the shop send the ivory than mailed it themselves.

Planes were the second most popular form of transport overall for bringing ivory back into Mainland China.

Top Method

	Total travelers bought/knows someone bought ivory/rhino horn (n=506)* (%)	Hong Kong SAR (n=123) (%)	Japan (n=134) (%)	Thailand (n=133) (%)	Cambodia (n=29) (%)	Laos (n=36) (%)	Myanmar (n=17) (%)	Vietnam (n=35) (%)
By plane	28	26	35	30	32	11	14	22
By road	7	4	7	3	3	18	18	22
By ferry	6	5	5	2	7	12	13	11
By cruise ship	4	6	3	3	5	4	0	3
By train	1	4	0	1	3	0	0	0
By mail (sent from the shop)	34	39	32	38	20	40	14	30
By mail (sent by the person)	10	6	10	9	26	14	32	5

*Caution: Small sample size for respondents under each assigned destination.

Q38. How did this person bring these ivory / rhino horn products back into China?

Base: Bought / knows someone who bought ivory / rhino horn while traveling in assigned destination, n=506 (Assigned destination: Cambodia, n=29, Hong Kong SAR, n=123, Japan, n=134, Laos, n=36, Myanmar, n=17, Thailand, n=133, Vietnam, n=35)

Post Travel: Perceptions of How to Bring Ivory / Rhino Horn Products Across Borders



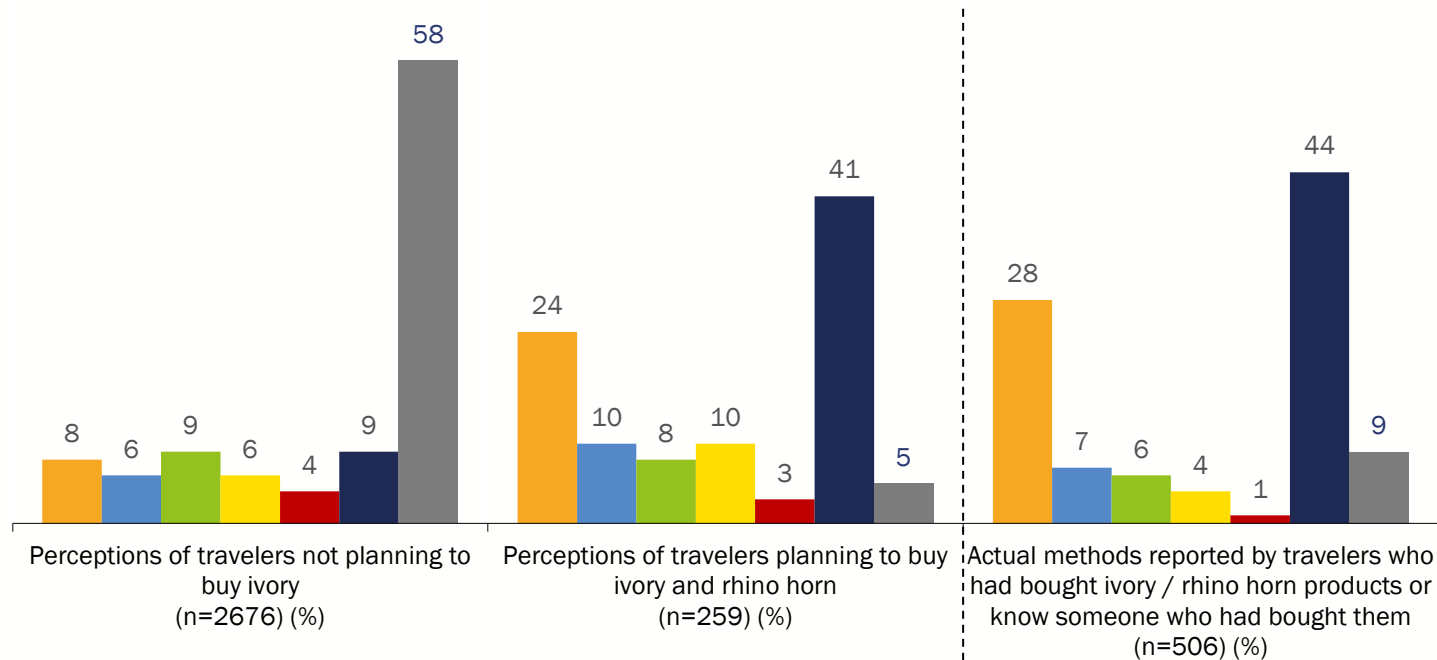
Most travelers who did not see anyone purchase illegal wildlife products did not know the easiest methods for transporting them into Mainland China.

Almost 60 percent of travelers who did not plan on buying ivory did not feel confident in answering what they thought was the easiest way to transport ivory or rhino horn across borders.

Of those travelers not planning to buy ivory who did answer, the actual methods were not well reflected in their answers.

Perceptions of travelers planning to buy ivory closely represented the reality – mail was the most common method, followed by transporting the items on a plane.

By plane By road By ferry By cruise ship By train By mail I don't know



Q38. How did this person bring these ivory / rhino horn products back into China?

Base: Bought/know someone who bought ivory or rhino horn while traveling in assigned destination, n=506

Q40. What do you perceive as the easiest method of bringing ivory or rhino horn across borders?

Base: Travelers total, n=3011; Travelers planned to buy ivory, n=335



3. Analysis of Travelers

3.5 Awareness and Attitudes Toward the Legality of Purchasing and Transporting of Wildlife



Legality: Perceptions of Illegality of Ivory Purchase in Travel Destinations



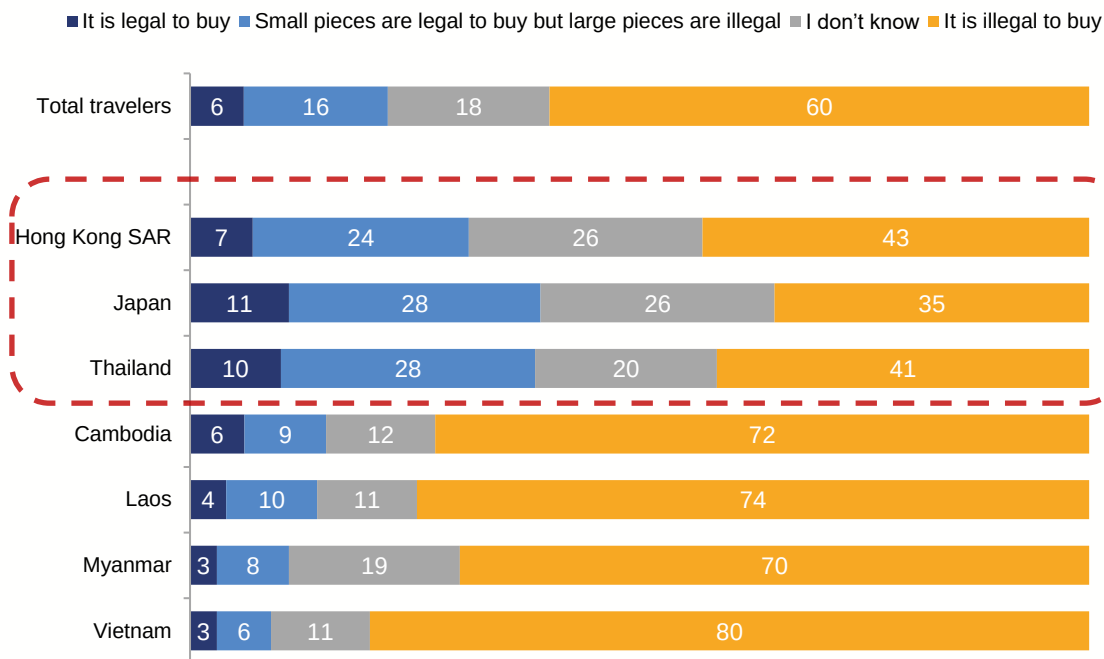
On average, 60 percent of Chinese outbound travelers believe it is illegal to buy ivory in the target destinations. Even in countries where legal sales of ivory are possible, 35 percent or more believe that it is not legal.

Destinations in which there are legal sales of ivory – Hong Kong SAR, Japan, and Thailand (only Asian elephant ivory is legal to purchase in Thailand) – had the highest rates of knowledge that it was legal, however a majority of people either did not know that it was legal or believed it to be illegal.

Only one in ten respondents believed that ivory purchase was legal in Vietnam, with most of these believing that this only applied to smaller pieces.

Participants of the qualitative focus group discussions did not observe messages about the illegality of purchasing ivory or rhino horn throughout their purchasing process and reported that local sellers / guides told them it was not a problem

Perceptions of Illegality of Buying Ivory in Travel Destinations (%)



Note: ivory purchase is legal under certain circumstances in these three destinations

Q42. Is it legal to buy ivory in [assigned destination]?

60 Base: Travelers total, n=3011; Assigned destination: Cambodia, n=370, Hong Kong SAR, n=457, Japan, n=422, Laos, n=389, Myanmar, n=375, Thailand, n=407, Vietnam, n=591

Legality: Awareness of Illegality of Bringing Ivory into Mainland China



Most travelers recognized that transporting ivory across borders was illegal, but 17 percent still claimed that taking some ivory pieces back to Mainland China was legal.

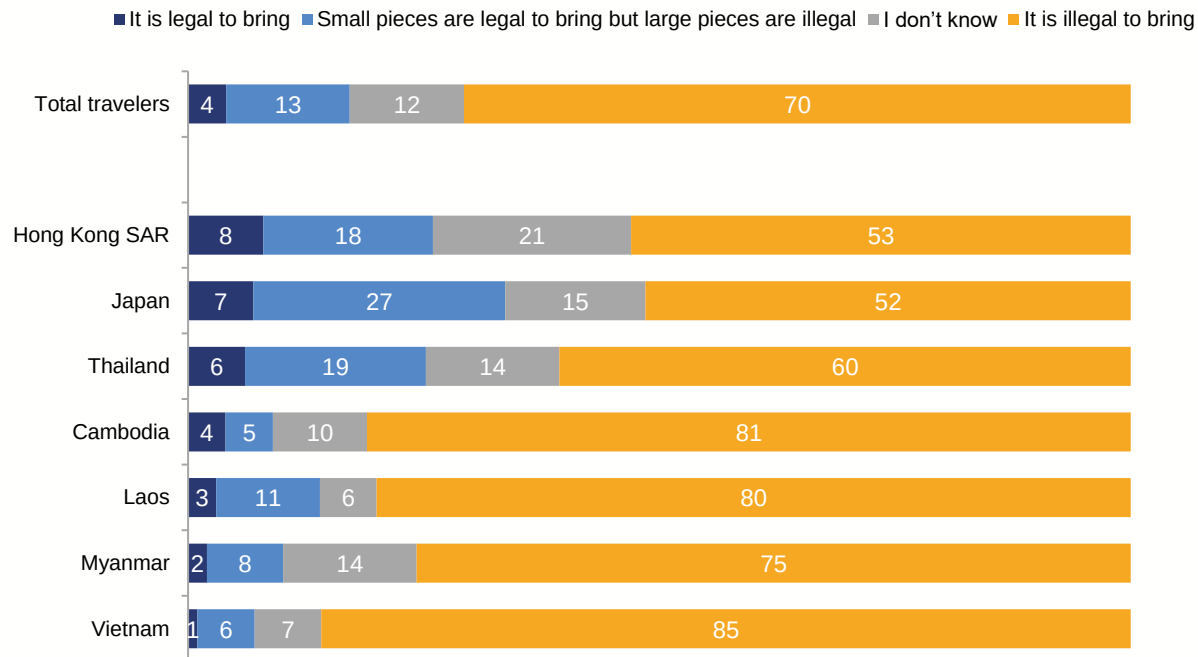
Respondents were less likely to choose “I don’t know” than they were for the question about the legality of ivory purchase in their assigned destination.

Travelers in Vietnam, Cambodia, and Laos show the highest rates of knowledge of the illegality of transporting ivory into China.

Participants of the qualitative focus group discussions were aware of some kind of legislation imposed by Chinese customs. However, their general attitude toward carrying ivory or rhino horn products past customs was that they would not be caught or arrested because:

- (1) Their purchased products were small
- (2) They never saw anyone being caught/ arrested
- (3) They never saw materials explicitly stating what is illegal
- (4) They believed their purchase were legal at the destination and will also probably be legal at the customs.

Awareness of Illegality of Bringing Ivory to China (%)



Q43. Is it legal to bring ivory back into China from [assigned destination]?

Base: Travelers total, n=3011; Assigned destination: Cambodia, n=370, Hong Kong SAR, n=457, Japan, n=422, Laos, n=389, Myanmar, n=375, Thailand, n=407, Vietnam, n=591

Legality: Sources of Knowledge and Why the Laws Are Flouted



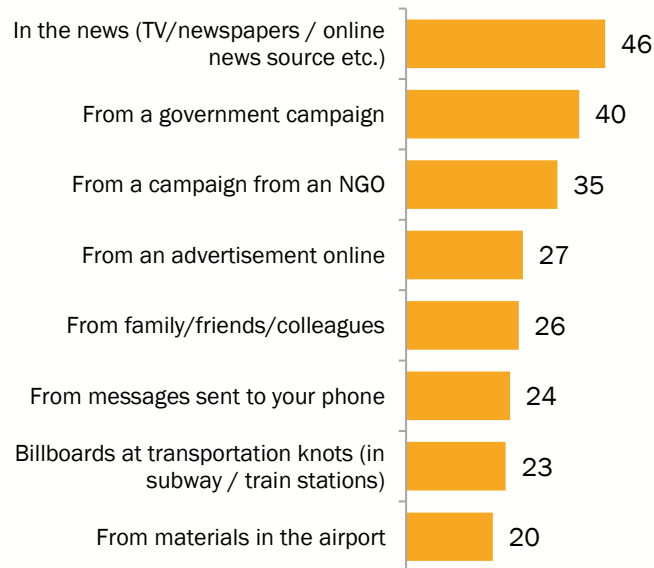
NGO campaigns ranked third in the sources of information about the illegality of ivory purchase, after the news and government campaigns.

General travelers believed that people circumvented the law because there was no serious penalty and the products are easy to hide.

Travelers planning to purchase ivory believed that ivory products were easier to hide, and that law enforcement was not as strong in the destination country compared to general travelers who knew of the illegality.

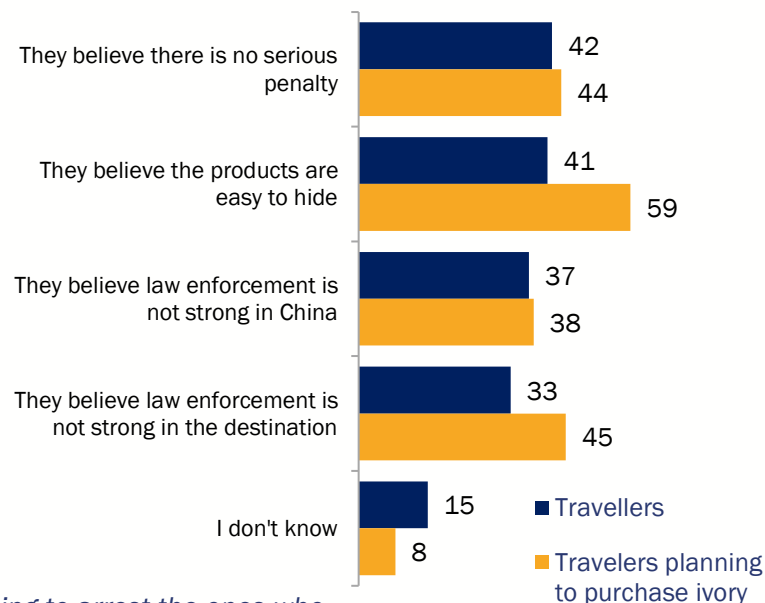
Participants of the qualitative focus group discussions did not believe that the customs officials in China would impose a severe penalty on those who brought ivory or rhino horn across the border:

Sources of Learning about the Illegality
(% Among Travelers Knowing Illegality) (n=2116)



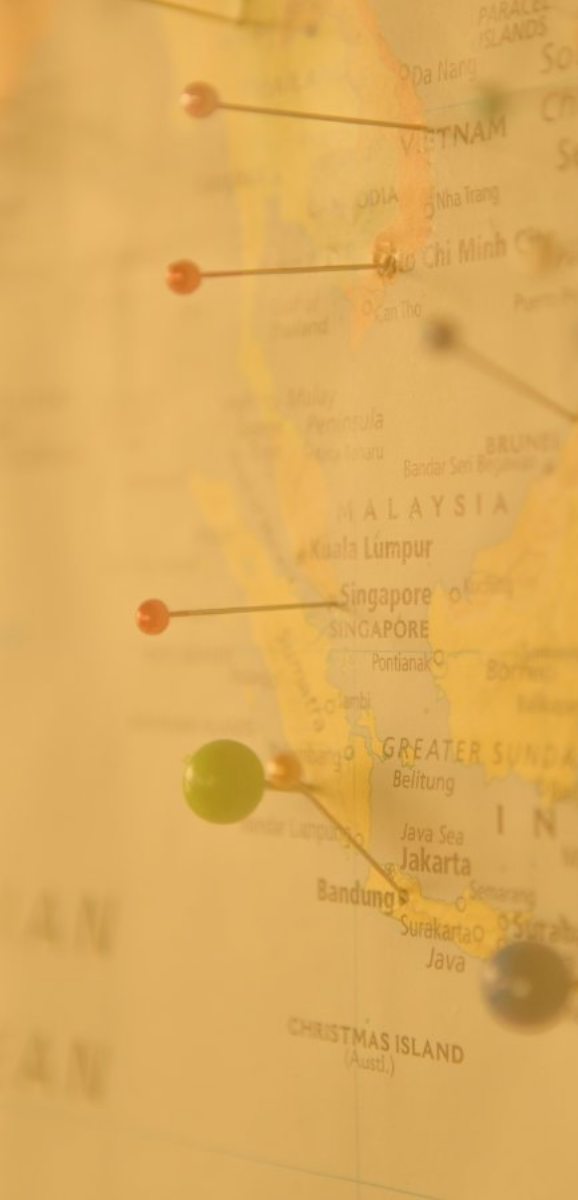
The custom officers are probably only going to arrest the ones who deliberately smuggle large amount of animal products out of the border; small and tiny pieces of ivory or rhino horn should be fine."

Reasons for Bringing Ivory / Rhino Horn Products to China
(% Among Travelers Knowing Illegality) (n=2116)



Q47. Where did you learn about the illegality of bringing this product into China? Please select all that apply.

Q46. Some people still bring ivory or rhino horn back to China even if they know it's illegal, what do you think are the reasons?



4. Analysis of Non-travelers

4.1 Planned Travel Behavior



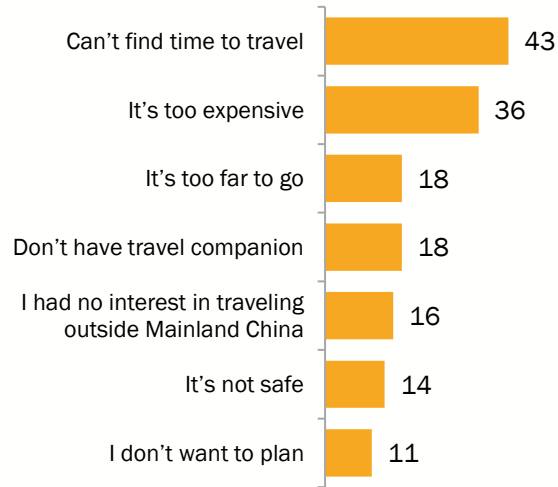
Non-travelers: Travel Desires Outside Mainland China

Most people who did not travel outside of Mainland China could not find the time or money to travel but are considering it in the next 12 months.

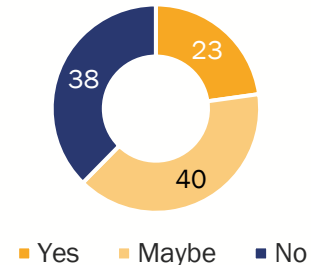
The most popular destinations visited by travelers – Hong Kong SAR, Japan, and Thailand – were also the most desirable destinations for non-travelers.

Cambodia was the only other destination to be included in the top 10 destinations, with Myanmar, Laos, and Vietnam being stated 11th, 14th, and 17th, respectively.

Reasons for Not Traveling outside China in the Past Three Years (%)

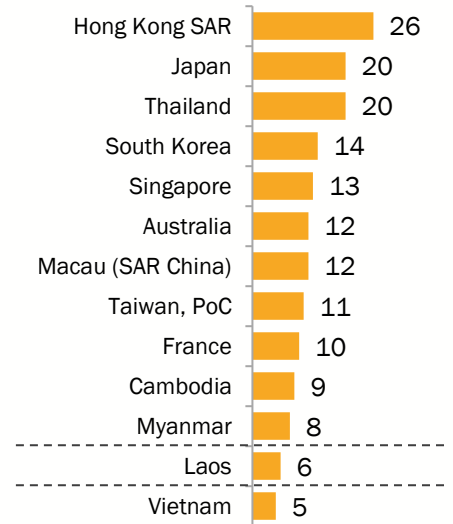


Travel outside China in Next 12 Months (%)



Intended Travel Destinations (Top 10 + Target Destinations)

(% Among Respondents Who Will or May Travel Outside Mainland China)(n=1319)



NT1. What is the reason that you have not traveled outside Mainland China in the past three years? Please select all that apply.

Base: Non-travelers total, n=2120

NT2. Do you plan to travel outside Mainland China in the next 12 months?

Base: Non-travelers total, n=2120

NT3. Which destinations do you plan to visit in the next 12 months? Please select all that apply.

Base: Non-travelers who will or "maybe" travelling outside, n=1319



4. Analysis of Non-travelers

4.2 Attitudes and Perceptions Towards Ivory Purchase Behavior



Non-travelers: Items Non-travelers Would Like to Buy outside Mainland China

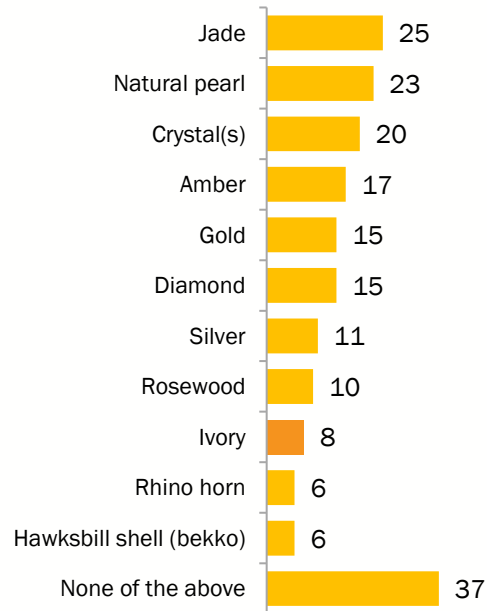


Ivory and rhino horn rank low on the list of items that non-travelers want to purchase.

Almost 40 percent of travelers did not desire to purchase any of the listed items while traveling outside Mainland China.

Amongst non-travelers who are interested in purchasing ivory, Hong Kong SAR is the top destination for ivory purchase, followed by Thailand and Cambodia.

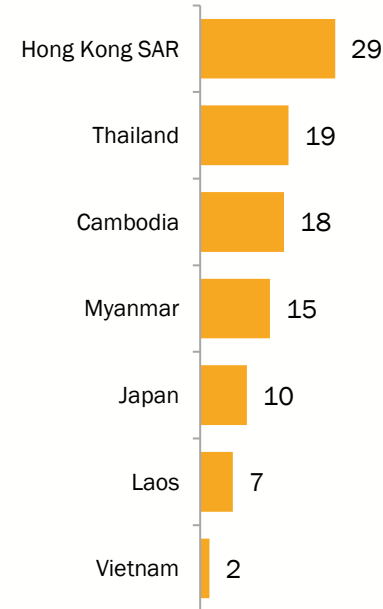
Items of Interest to Buy outside China (%)



% Interested in ivory



Top Perceived Destinations for Ivory (First Mentioned)
(% Among Non-travelers Interested in Buying Ivory) (n=177)



NT4. Below are some items that people bought while traveling outside Mainland China. Please select the items that you would be interested to buy if you traveled outside Mainland China.

Base: Non-travelers total, n=2120

NT5. You mentioned you would be interested in buying ivory products in Asia while traveling outside Mainland China, where would your top destinations be? Please rank up to 3 destinations.

Base: Non-travelers interested in ivory (including those without a destination in mind), n=177



Non-travelers: Perceived Main Reasons for People Buying Ivory Abroad

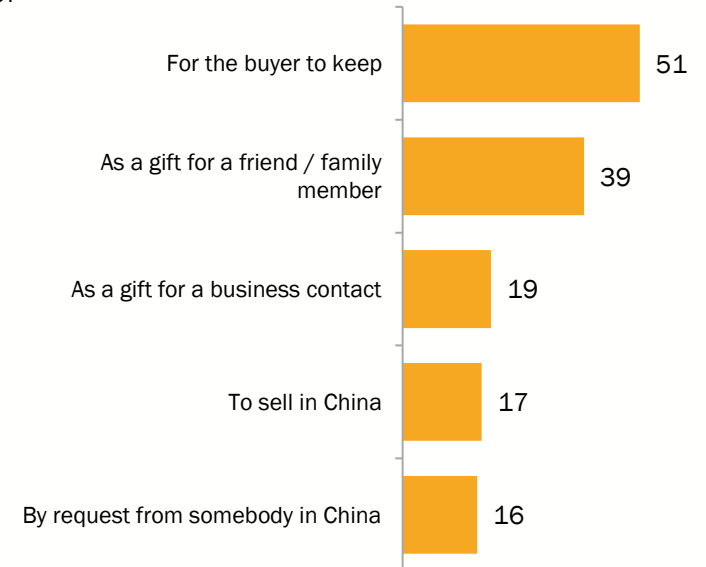
Non-travelers believed that ivory purchasers are price conscious. Travelers who planned to purchase ivory (Slide 34), however, valued the likelihood that the ivory is real more highly than non-travelers.

Non-travelers perceived reasons for purchasing ivory closely reflected the actual reasons for purchase (slide 49), though more non-travelers thought people would purchase ivory to sell in China.

Why Choose This Destination to Purchase Ivory
(% Among Non-travelers Interested in Ivory) (n=175)



Perceived Reasons for Buying Ivory Abroad (%)



NT6. Why do you choose [insert top destination from NT5] as your top destination to buy ivory? Please select all that apply.

Base: Non-travelers interested in ivory, n=175

NT9. What do you believe are the main reasons people buy ivory abroad? Please select up to 2.

Base: Non-travelers total, n=2120

Non-travelers: Perceived Top Destinations for Buying Rhino Horn Products

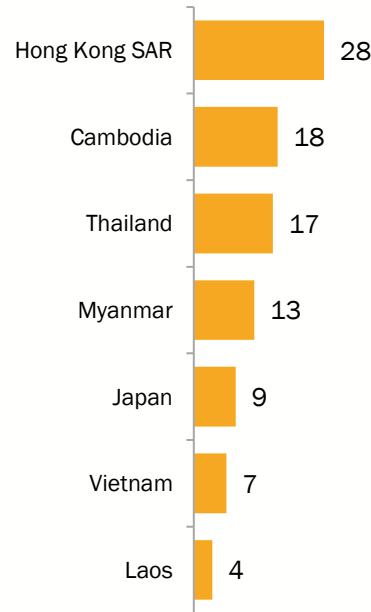


The perceptions of non-travelers as the best destinations to buy rhino horn closely reflect the perceived best destinations to buy ivory, with Hong Kong SAR, Thailand, and Cambodia seen as top destinations.

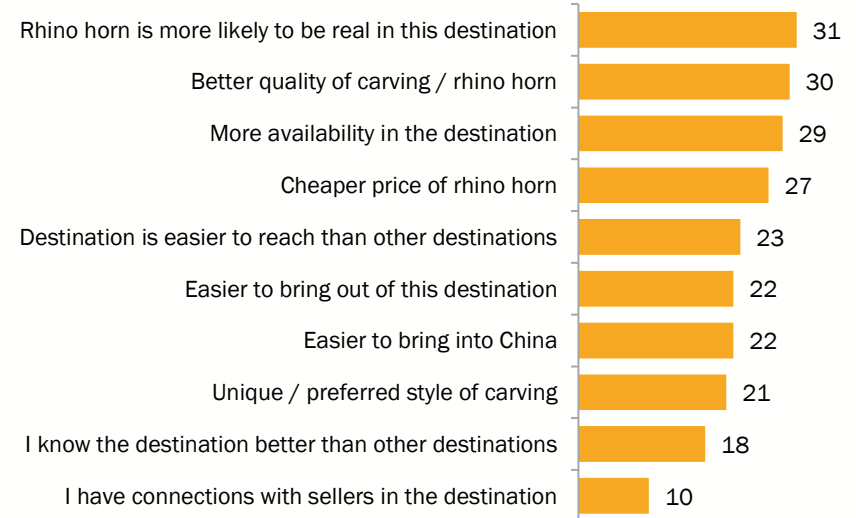
The likelihood that the rhino horn is real is perceived to be a stronger influence than it is for ivory (Slide 67).

The ease of transporting rhino horn across borders was not seen as a strong distinguishing factor for the best destinations in which to purchase it.

Top Perceived Destinations for Rhino Horn (First Mentioned)
(% Among Those Interested in Buying Rhino Horn) (n=134)



Why Choose This Destination to Purchase Rhino Horn
(% Among Non-travelers Interested in Rhino Horn) (n=130)



NT7. You mentioned you would be interested in buying rhino horn products in Asia while travelling outside Mainland China, where would your top destinations be? Please rank up to 3 destinations.

Base: Non-travelers interested in rhino horn (including those without a destination in mind), n=134

NT8. Why do you choose [insert top destination from NT7] as your top destination to buy rhino horn? Please select all that apply.

Base: Non-travelers interested in rhino horn, n=130

A close-up photograph of an elephant's trunk, which is thick and wrinkled, holding a piece of light-colored wood. The background is a warm, golden-yellow color.

4. Analysis of Non-travelers

4.3 Awareness and Attitudes toward Legality

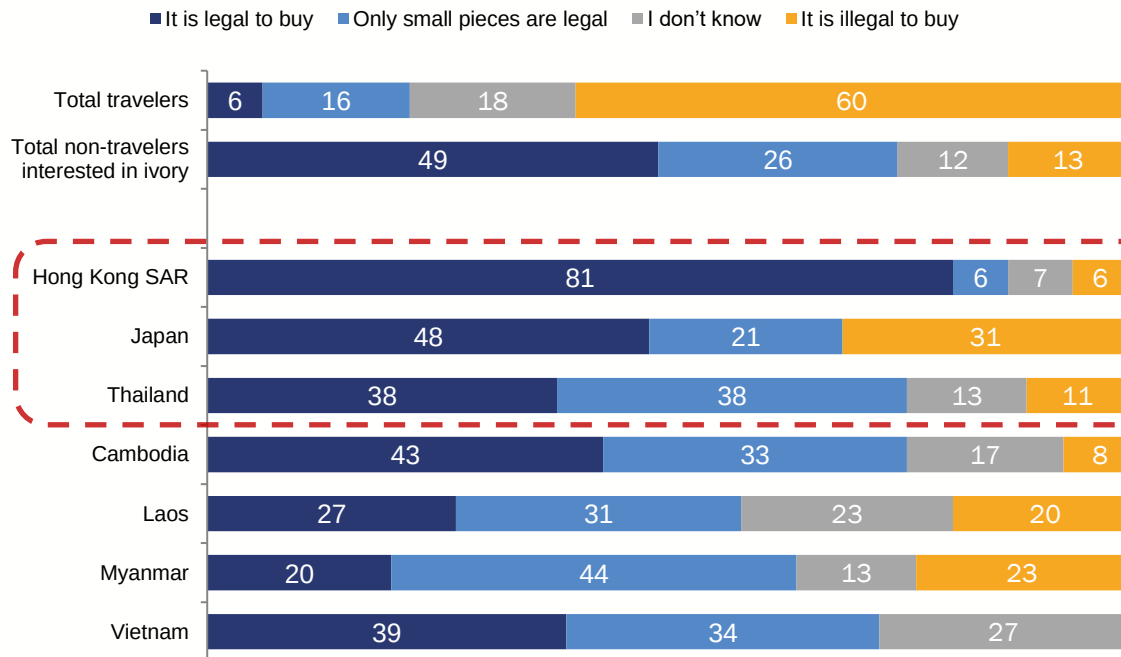
Non-travelers: Perceptions of the Legality of Buying Ivory in Destination They Would Like to Buy It.



Non-travelers who were interested in buying ivory believed that ivory purchase in destinations outside of Mainland China was legal at a higher rate than travelers.

Non-travelers were more likely to correctly identify Hong Kong SAR, Japan and Thailand as having legal ivory markets (under certain circumstances) compared to travelers (slide 60). However, they were also more likely to incorrectly identify other destinations as having legal ivory markets. However, it is important to note that these data may be skewed by small sample sizes.

Perceptions of Illegality of Buying Ivory in Travel Destinations
(% Among Those Interested in Buying Ivory) (n=175)*



Note: ivory purchase is legal under certain circumstances in these three destinations

*Caution: Small sample size for respondents under each top ranked destination.

NT11. Is it legal to buy ivory in [insert highest ranked destination from NT5]?

Base: Non-travelers interested in ivory, n=175 (Top destination for ivory: Cambodia, n=31, Hong Kong SAR, n=51, Japan, n=17, Laos, n=13, Myanmar, n=27, Thailand, n=34, Vietnam, n=3)

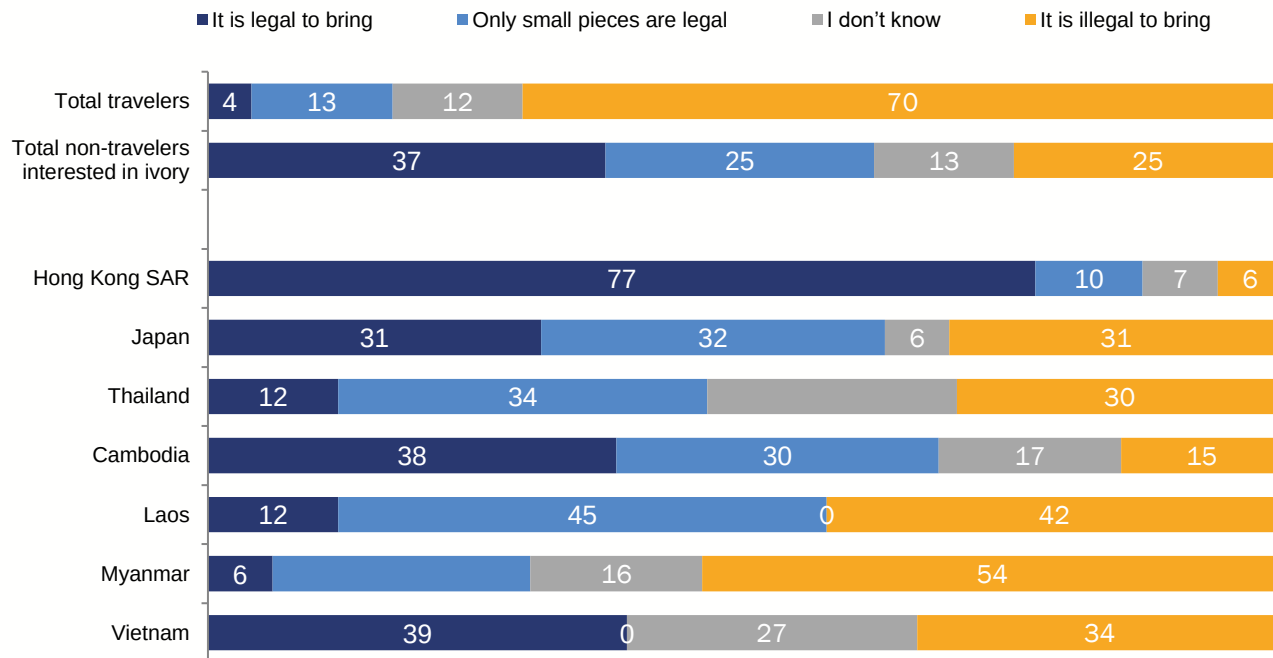


Non-travelers: Perceptions of the Legality of Bringing Ivory Back to Mainland China

Compared to travelers, non-travelers who were interested in buying ivory are less likely to know that transporting ivory across borders is illegal, with only one-quarter of the non-travelers in this study correctly identifying this.

As with perception of illegality (slide 70), non-travelers believe that transporting ivory back to Mainland China from Hong Kong SAR is legal at higher rates than other destinations. However, small sample sizes must again be accounted for.

Awareness of Illegality of Bringing Ivory Back to China
(% Among Those Interested in Buying Ivory) (n=175)*



*Caution: Small sample size for respondents under each top ranked destination.

NT12. Is it legal to bring ivory back into China from [insert highest ranked destination from NT5]?

Base: Non-travelers interested in ivory, n=175 (Top destination for ivory: Cambodia, n=31, Hong Kong SAR, n=51, Japan, n=17, Laos, n=13, Myanmar, n=27, Thailand, n=34, Vietnam, n=3)

Non-travelers: Perceptions of the Legality of Buying / Bringing Rhino Horn Back to Mainland China

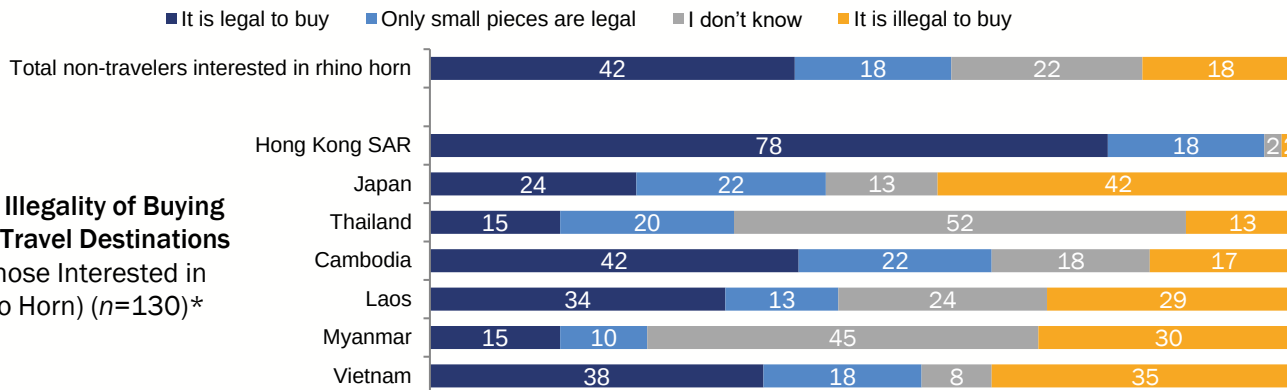


Non-travelers who were interested in buying rhino horn were less likely to believe that the purchase of rhino horn outside of Mainland China was legal compared to non-travelers who were interested in buying ivory (Slide 70).

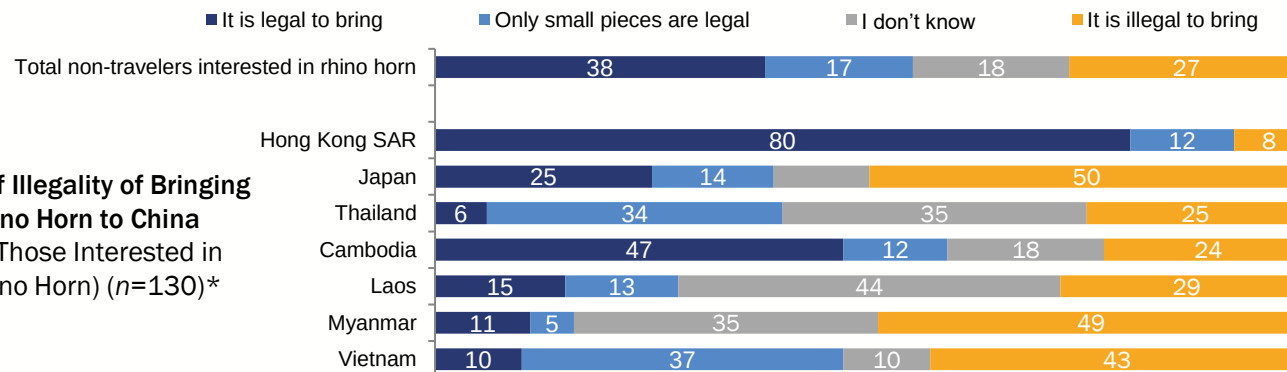
As with perceptions of buying ivory outside of China, non-travelers were less likely to believe that bringing rhino horn across borders was legal compared to bringing ivory across borders (Slide 71).

Perceptions of the legality of purchasing rhino horn outside of Mainland China and of bringing it back varied by destination that non-travelers wanted to visit, but small sample sizes are important to note.

Awareness of Illegality of Buying Rhino Horn in Travel Destinations
(% Among Those Interested in Buying Rhino Horn) (n=130)*



Awareness of Illegality of Bringing back Rhino Horn to China
(% Among Those Interested in Buying Rhino Horn) (n=130)*



*Caution: Small sample size for respondents under each top ranked destination.

NT13. Is it legal to buy rhino horn in [insert highest ranked destination from NT7]? NT14. Is it legal to bring rhino horn into China from [insert highest ranked destination from NT7]?

Base: Non-travelers interested in rhino horn, n=130 (Top destination for rhino horn: Cambodia, n=24, Hong Kong SAR, n=37, Japan, n=13, Laos, n=5, Myanmar, n=18, Thailand, n=22, Vietnam, n=10)



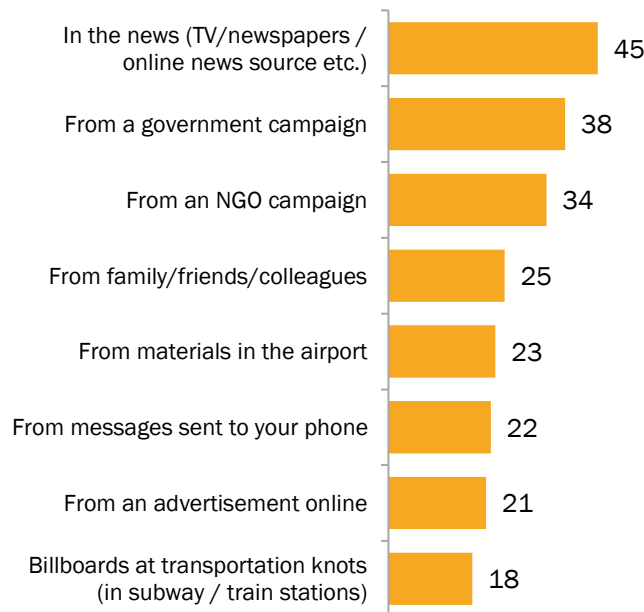
Non-travelers: Sources of Knowledge and Why the Laws Are Flouted

Non-travelers who knew that it was illegal to bring ivory or rhino horn across borders had learned from similar sources as travelers (slide 62).

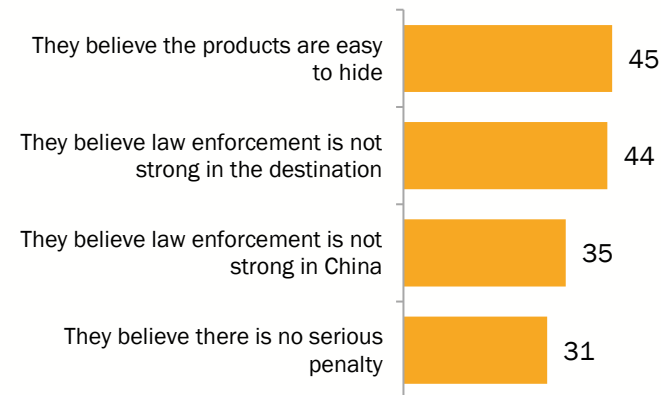
Non-travelers had primarily heard of the illegality of ivory and rhino horn transport across borders via news channels, with NGO campaigns coming third after government campaigns.

Non-travelers who know ivory is illegal to transport across borders believe that people do so because it is easily concealable and because the law enforcement is not strong.

Sources of Learning about Illegality of Bringing Ivory / Rhino Horn into China
(% Among Those Interested in Buying and Knew About the Illegality) (n=68)



Reasons of Bringing Ivory / Rhino Horn to China Despite Illegality
(% Among Those Interested in Buying and Knew About the Illegality) (n=68)



NT15. Where did you learn about the illegality of bringing ivory / rhino horn into China? Please select all that apply.

Base: Non-travelers interested in ivory / rhino horn and knew about the illegality, n=68

NT16. Some people still bring ivory or rhino horn back to China even if they know it's illegal. What do you think are the reasons?

Base: Non-travelers interested in ivory / rhino horn and knew about the illegality, n=68



5. Appendices

Definitions

Income*

- Low income: Monthly personal income (before taxes) under RMB8,000 (approx. USD1,200)
- Medium income: Monthly personal income (before taxes) between RMB8,000 and RMB20,000 (USD1,200–3,000)
- High income: Monthly personal income (before taxes) above RMB20,000 (>USD3,000)

Travel Behavior outside China

- Never: Haven't travelled outside Mainland China in the past three years
- Occasional: Travel outside Mainland China once per year / less frequent
- Regular: Travel outside Mainland China 2 – 3 times per year
- Frequent: Travel outside Mainland China four times per year or more

Typical buyer / planner / travel profile

A typical buyer / planner / travel profile indicates the demographics that are more likely to be represented for a given activity. It is a fictional representation of an archetypal consumer / traveler that is created using

the best fit demographics. The strength of the association varies and may not always be significant.

Incidence rate

Because asking directly about illegal activity is not possible in China, the incidence rate for ivory and rhino horn purchase was calculated using indirect methods. Travelers were asked the following questions:

- 1) During your most recent travel in [destination], did you or anyone in your group / anyone you were with buy ivory while traveling?
- 2) Considering yourself and people you were travelling with, what is the total number of people travelling?
- 3) Considering yourself and people you were travelling with, how many people do you know for sure bought ivory?

Questions 1 - 3 were also asked for rhino horn. By this method, respondents did not implicate themselves if they had bought these products.

By asking respondents to define their group size and the number of people in that group that had bought ivory or rhino horn (including if this was zero), we could estimate the purchase rate for these products.

*Income brackets were set based on the average salary of the internet population in the cities surveyed, i.e., higher than the China average salary (estimated to be approximately RMB7,000 per month); Source: Trading Economics, 27th of February 2020, <https://tradingeconomics.com/china/wages>

Methodology Overview: Sampling and Quotas

Sampling Plan

- The fieldwork was monitored daily and detailed checks of interim data were performed during fieldwork (at 10%, 40%, 55%, and 80% of sample completion) to ensure data quality and consistency.
- The census data from the National Bureau of Statistics of China was used to set these quotas: <http://www.stats.gov.cn/tjsj/ndsj/2016/indexeh.htm>

Quotas on Age (out of age 18+)	%
18-20	4.5
21-30	20.8
31-40	18.3
41-50	21.7
51-60	16.0
61 and over	18.7

Quotas on Gender	%
Female	48.8
Male	51.2

Soft Quotas on Education*	%
High	30
Middle / Low	70

Note: in order to reach a representative sample from each destination, the soft quota on education was revised to the above

The following quotas were used for this study:

Region	Quotas on Region	%
East	Anhui Fujian Jiangsu Jiangxi Shandong Shanghai Zhejiang	28.9
North	Beijing Hebei Inner Mongolia Shanxi Tianjin	12.4
North East	Heilongjiang Jilin Liaoning	8.2
North West	Gansu Ningxia Qinghai Shaanxi Xinjiang	7.3
South Central	Guangdong Guangxi Hainan Henan Hubei Hunan	28.8
South West	Chongqing Guizhou Sichuan Yunnan Tibet	14.5

Analysis Deployed: The MaxDiff Question (1)

MaxDiff Description: Using the MaxDiff Question

MaxDiff (Maximum Differentiation Scaling) builds upon a long-established theory about how people make choices. It assumes that respondents' choices are more relative/comparative than absolute.

MaxDiff is an approach for capturing relative scores (e.g., importance, preference, agreement, attitude) for a set of items.

With MaxDiff, respondents are shown a set of items and are asked to indicate the item that best describes their opinion, and the item that least describes their opinion, for example:

➡ Please consider how important different features are when selecting a fast food restaurant.

Considering only the features below, which is the Most Important and which is the Least Important?

Most Important		Least Important
☐	Reasonable prices	☐
☐	Healthy food choices	☐
☐	Has a play area	☐
☐	Clean bathrooms	☐

The items are grouped using MaxDiff algorithm in order to ensure that each item and each pair of items is shown an equal number of times. Usually, respondents see each pair of items at least two or three times. A list of 20 attributes typically requires 10 to 16 sets/screens.

Item scores are then estimated on a respondent level using a Hierarchical Bayes (HB) method, and transformed to a numeric scale, e.g., a 5- or 10-point scale. The larger the score, the higher the importance of the item for that respondent.



Analysis Deployed: The MaxDiff Technique (2)

Reasons for Using MaxDiff in this Research

Using MaxDiff provides a better differentiation between the item importance compared to rating scales, mainly because:

- With rating scales, there can be many straight-line answers, such as giving ratings of 3 to all 20 items on a 5-point scale;
- Cultural biases in the use of the scale. For example, respondents in China tend to use the top portion of the scale, while respondents in Germany tend to use the middle or bottom portions of the scale;
- Research has shown that importance scores obtained with MaxDiff range from 0 to 10 compared to the range from 5 to 8 obtained with stated importance ratings (e.g., everything is important).

MaxDiff scores, if they result from “most important” vs “least important” scales, could replace other predictive modeling, e.g., regression and path analyses which we normally use to extract derived importance scores. This is due to the fact that this method, in this particular case, already indicates importance in driving the desired outcome. MaxDiff scores allow for any kind of statistical analysis we could consider doing with responses obtained using rating scales.

What Can We Do with MaxDiff Scores?

MaxDiff scores could be reported in a similar way to reporting rating scales (e.g., averages, percentages, crosstabs, bar charts). With MaxDiff, we can measure importance, preference, performance, and many other variables.

Methodology Overview: Weighting and Rounding

Weighting

- After fieldwork was closed and the final data quality checks were performed (e.g., removal of bad records with incomplete answers), a weighting by age, gender, and education has been applied on the total sample in order to fully match the quotas and correct (small) deviations in the sample completion compared to the quota set.
- This report presents only weighted results/data, and all the sample sizes indicated are weighted samples.
- The final sample achieved was $n=5,291$
- The reason for weighting the data after fieldwork – even if the quotas have been well monitored – is to fully align the demographic sub-groups with the quotas in order for the total sample to be representative of the target population by age, gender, and education. Income has been monitored in order to align with the average income, but was not used as a hard quota.

Rounding

- Numbers and percentages shown at first decimal in tables and graphs in this report are the result of rounding.
- Rounding to the nearest integer has been applied and may add up to more or less than 100%.

Questionnaire and Respondents' Quality

- To assure that respondents answer honestly and “neutral” when they are qualified for the survey, it is important that the survey topic is not mentioned in the invitation.
- The email received by the potential respondents only mentions the general topic of “lifestyle and shopping practices.”

Margin of Error in Surveys

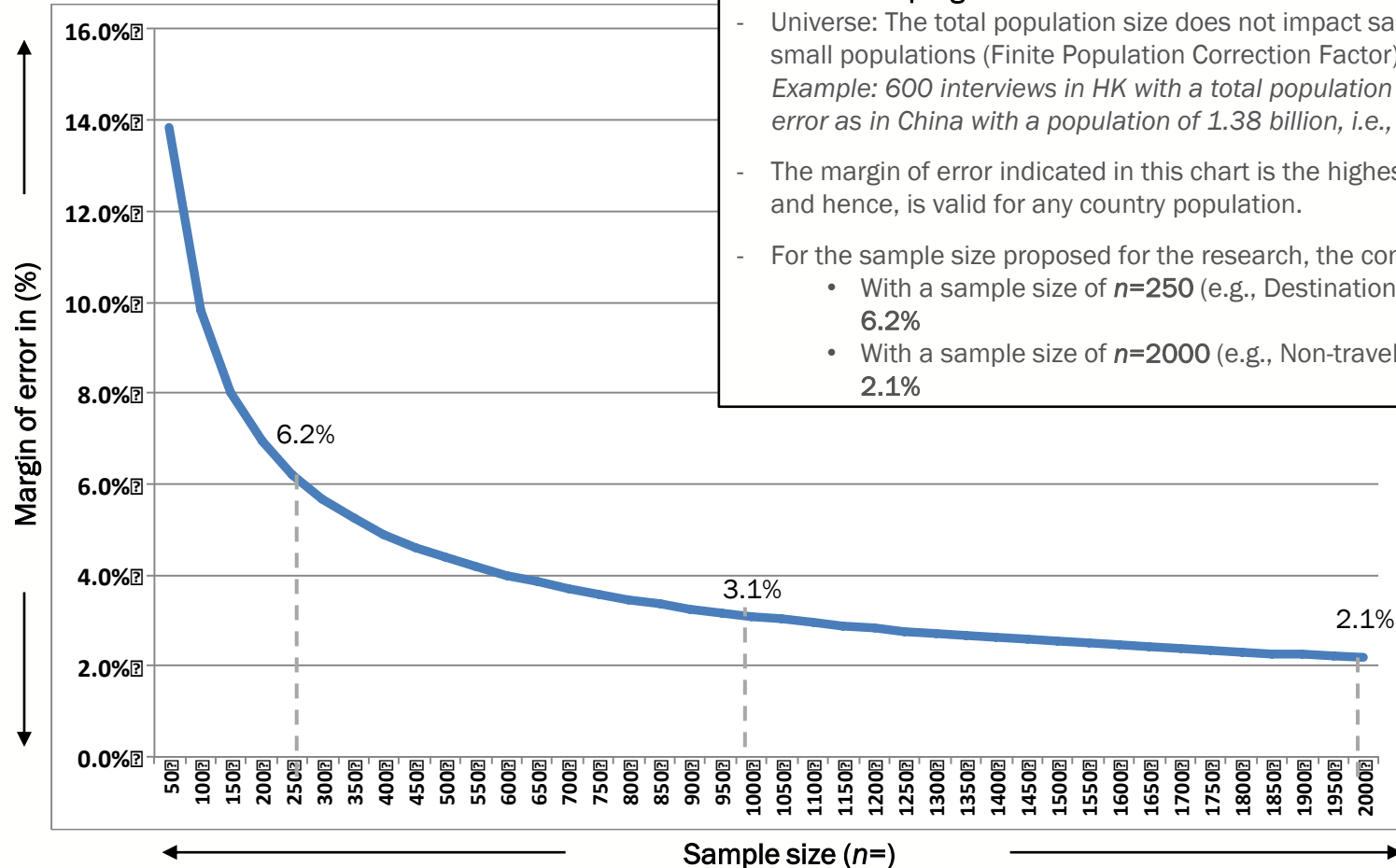
Margin of Error: Definition

In reports on public opinion polls, a “margin of error” is often stated. The margin of error estimates the accuracy of the sample compared with the entire population. A margin of error of plus or minus 3 percent at a 95 percent confidence interval would mean that if we examined 100 truly random samples of a particular size, in 95 of such samples the figures would be within three percentage points of the “true” answer that would result from interviewing the entire population. Generally speaking, the larger the sample, the lower the margin of error (see illustration in the next slide).

- However, calculated margin of error is valid only upon the assumption that the sample is truly random, with every member of the population having an equal chance of being included in the survey. This assumption is not met in the majority of contemporary opinion polls, because the samples are drawn using complex systems of stratification and quotas or are obtained from panels of volunteers, as in the case of this study.

- Even though margin of error is not applicable to nonrandom samples, it can be used as a rough tool to assess patterns in the collected data. For example, a 5-percentage point difference between males and females in a sample of 1,000 respondents may indicate a pattern, while a 10-point difference in opinion between smaller demographic groups may not.
- The sampling methodology for this study was tailored to the overall objective of understanding the awareness, knowledge, and perception of the consumption of ivory products. Industry standards and best practices suited to geographic realities have been applied throughout.

Margin of Error in Surveys



About the Sampling Error:

- Universe: The total population size does not impact sampling error, except for small populations (Finite Population Correction Factor).
Example: 600 interviews in HK with a total population of 7.2 million has the same error as in China with a population of 1.38 billion, i.e., 4.0%.
- The margin of error indicated in this chart is the highest for any population size, and hence, is valid for any country population.
- For the sample size proposed for the research, the confidence level is strong
 - With a sample size of $n=250$ (e.g., Destinations), the margin of error is 6.2%
 - With a sample size of $n=2000$ (e.g., Non-travelers), the margin of error is 2.1%

Acknowledgements



The authors thank WWF and TRAFFIC colleagues for their ongoing support to this project, especially with report review and publication, including but not limited to (in alphabetical order) Agkillah Maniam, Alison Harley, Anny Liang, Arnold Sitompul, Asnarith Tep, Benjamin Rawson, Cath Lawson, Cong Wang, David Olson, Denise Stilley, Duangkamol Wongworachan, Elizabeth Davis, Francois Guegan, Gayle Burgess, Grace Hwa, James Sano, Jan Vertefeuille, Jay Sherman, Jedsada Taweekan, Jovy Chan, Karen Xue, Kanitha Krishnasamy, Kitty TAM, Lei Wang, Ling Xu, Mark Drew, Marsden Momanyi, Maru Valdes, Mia Signs, Ryoko Nishino, Sarah Ferguson, Sofia Venturini, Steve Watson, Tomomi Kitade, Trinh Nguyen, Van Nguyen Dao Ngoc, Whitney Kent, Wilson Lau, Xiaojia Li, Yoganand Kandasamy, ZhenHan Lin and others.

Preparation and implementation of this project was made possible with funding from WWF-US, WWF-UK, and the WWF Ivory High Impact Initiative.



WWF is an independent conservation organization, with over 30 million followers and a global network active in nearly 100 countries. Our mission is to stop the degradation of the planet's natural environment and to build a future in which people live in harmony with nature, by conserving the world's biological diversity, ensuring that the use of renewable natural resources is sustainable, and promoting the reduction of pollution and wasteful consumption. Find out more at www.panda.org



GlobeScan is an insights and strategy consultancy, focused on helping our clients build long-term trusting relationships with their stakeholders. Offering a suite of specialist research and advisory services, we partner with business, NGOs and governmental organizations to meet strategic objectives across reputation, sustainability and purpose. Established in 1987, GlobeScan has offices in Cape Town, Hong Kong SAR, London, Paris, San Francisco, São Paulo and Toronto, and is a signatory to the UN Global Compact and a Certified B Corporation. www.globescan.com