Introduction

From the 31st of December 2017, China banned the commercial processing and trade of elephant ivory, which has inevitably altered the way in which ivory is purchased in the region.

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 traveling in the area.

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 came into effect, a substantial percentage of people who travel outside Mainland China at least twice per year were found to have high intentions of persistently purchasing ivory, despite the ban.

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 can be developed to influence this important group of consumers.

Methodology

In this survey, we seek to better understand the motivations and potential influencing factors of outbound Chinese national travelers, specifically about their purchases of wildlife parts and products while abroad, 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. This study was focused on travelers to 7 target destinations – Cambodia, Hong Kong SAR, Japan, Laos, Myanmar, Thailand, or Vietnam.

Data were collected in both qualitative and quantitative phases. The quantitative phase took place in August 2019. Four groups of 8 travelers who had purchased ivory or rhino horn products while traveling outside of Mainland China were interviewed for approximately 2 hours in Guangzhou and Beijing.

The quantitative phase took place from October 2019 to January 2020. Respondents who had traveled outside of Mainland China to any of the target destinations 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.
Sample Profile and Overview

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

### Demographics (%)

- **Gender**
  - Female: 49%
  - Male: 51%

- **Age**
  - 18-20: 9%
  - 21-30: 23%
  - 31-40: 24%
  - 41-50: 24%
  - 51-60: 15%
  - 61+: 4%

- **Region**
  - East: 30%
  - North: 15%
  - North East: 8%
  - North West: 5%
  - South Central: 28%
  - South West: 13%

### Travel and Household Profile (%)

- **Marital Status**
  - Single: 24%
  - Married: 74%
  - Divorced/widowed: 1%

- **Household Composition**
  - With entire family: 51%
  - With parents (+ siblings if any): 17%
  - With spouse/family (with children): 12%
  - With spouse/partner (no children): 12%
  - Myself: 6%

### Socio-economic Status (%)

- **Education**
  - High school or below: 29%
  - Vocational school: 27%
  - University or above: 43%

- **Monthly Personal Income**
  - Low (<RMB 8,000): 39%
  - Middle (RMB 8,000-19,999): 33%
  - High (RMB 20,000+): 23%
  - Not answered: 4%

- **Employment**
  - Full-time employment: 76%
  - Part-time employment: 3%
  - Freelancer / Business owner: 7%
  - Full-time student: 5%
  - Unemployed / retired: 7%

### Travel Overseas*

- None: 43%
- Occasional: 26%
- Regular: 25%
- Frequent: 6%

### Sample Profile and Overview

43% Non-travelers (n=2120): respondents who have not traveled anywhere outside of Mainland China in the past three years.

57% Travelers (n=3011): respondents who have traveled anywhere outside of Mainland China in the past three years.

Surveyed about their perceptions of ivory and rhino horn trade outside of Mainland China.

Surveyed about their travel habits and knowledge of and interactions with ivory and rhino horn while traveling, and answer questions about a previous destination.

### Assigned Travel Destination

<table>
<thead>
<tr>
<th>Assigned Travel Destination</th>
<th>Weighted Sample Size</th>
<th>% of Total Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cambodia</td>
<td>370</td>
<td>12</td>
</tr>
<tr>
<td>Hong Kong SAR</td>
<td>457</td>
<td>15</td>
</tr>
<tr>
<td>Japan</td>
<td>422</td>
<td>14</td>
</tr>
<tr>
<td>Laos</td>
<td>389</td>
<td>13</td>
</tr>
<tr>
<td>Myanmar</td>
<td>375</td>
<td>12</td>
</tr>
<tr>
<td>Thailand</td>
<td>407</td>
<td>14</td>
</tr>
<tr>
<td>Vietnam</td>
<td>591</td>
<td>20</td>
</tr>
<tr>
<td><strong>Total travelers</strong></td>
<td><strong>3011</strong></td>
<td></td>
</tr>
</tbody>
</table>

* 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
Overall Travel Behavior

92% of travelers are traveling for leisure (e.g. vacation, festivals, shopping)

Travel Arrangements
Base: Leisure Travelers (%)
- Independent
- Agency
- Tailored tour
- Semi-independent

Travel Research Methods
Base: All Travelers (%)
- Online - travel forums, blogs etc.: 59%
- Online - tour companies: 53%
- Offline - tour agency: 41%
- Offline - travel guides, books, etc.: 40%

Travel Period
Base: All Travelers (%)
- Lunar New Year: 36%
- National Day Holidays: 15%
- Summer Vacation: 33%
- Another public holiday: 15%
- Other time: 22%

Reasons to Travel
Base: All Travelers

Most important reasons to travel
- I can spend time in nature
- I can experience the local cuisine
- I appear more fun by having experiences traveling abroad

Least important reasons to travel
- I can consume wild (exotic) meat
- I can shop for ivory
- I can shop for rhino horn
Path to Purchase
Travelers Purchasing Ivory Outside of Mainland China

1. 11% Travelers planning to buy ivory before trip
   Base: All Travelers (%)

2. 22% Travelers to whom visiting ivory shops was suggested
   Base: All Travelers (%)

   - Online: 61%
   - From people I know: 59%
   - Tour guide company: 51%
   - Local tour guide: 60%
   - Staff at tourist information center: 37%
   - Staff from accommodation / Chinese tour guide: 30%

3. 24% Travelers visiting an ivory shop
   Base: All Travelers (%)

4. 6.8% Estimated travelers buying an ivory product
   Base: All Travelers (%)

   Typical buyer profile:
   - Popular items: Pendants, sculptures, necklaces
   - Average spend: RMB 5,997
   - Travel: Frequent^ 
   - Age: 25-34
   - Income: High (RMB 40K-60K per month)
   - Education: High (University or above)
   - Gender: Female

   *Note: Ivory purchase is legal under certain circumstances in Hong Kong SAR, Japan, and Thailand

57% of the sellers speak Chinese

Why travelers believe ivory is real
- Shop provides authenticating documents (47%)
- Shop was recommended (26%)
- Travelers claim to identify products (24%)

^Travel outside Mainland China four times per year or more.
Post Purchase
Transporting Ivory back to Mainland China

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

- By mail (sent by shop): 34%
- By plane: 28%
- By mail (by person buying): 10%
- By road: 7%
- By ferry: 6%

Perceptions of illegality of buying ivory in destinations

- Illegal: 60%
- Legal: 18%
- Don’t know: 22%

Perceptions of illegality of bringing ivory back

- Illegal: 70%
- Legal: 17%
- Don’t know: 12%

**TOP 5** reasons to buy ivory

- For the buyer to keep: 58%
- As a gift for a friend/family: 57%
- As a gift for a business contact: 25%
- By request from someone in China: 22%
- To sell in China: 11%
Destination Snapshot on Purchasing Ivory – Cambodia

Typical Cambodia Traveler Profile* (n=370)

- **Age:** 45-54 (30%)
- **Gender:** Male (60%)
- **Education:** Low to middle* (84%)
- **Trip arrangement:** Independent (53%)
- **Income:** Low to middle (RMB 20,000 or less per month) (75%)

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?**
  - 11%

- Did any of the sellers of ivory speak Chinese? (n=189) (%)
  - No Chinese: 43%
  - Did not interact: 13%
  - Some Chinese: 22%
  - Fluent Chinese: 22%

- Who suggested visiting as shop to you?
  - Local tour guides (67%)
  - Staff at tourist information center (41%)

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

- Is it legal to buy ivory in this destination? (%)
  - Illegal: 72%
  - I don’t know: 12%
  - Only small pieces are legal: 9%
  - Legal: 6%

- How did this person bring these wildlife products back into China? (n=29)
  - By plane (32%)
  - Mail (sent by person buying) (26%)
  - Mail (sent by shop) (20%)

*A typical traveler profile indicates the demographics that are more likely to be represented.
* Completed vocational school / high school
### Destination Snapshot on Purchasing Ivory – Hong Kong SAR

**Typical Hong Kong SAR Traveler Profile** *(n=457)*

- **Age:** 25-34 (31%)
- **Gender:** Female (61%)
- **Education:** High^ (74%)
- **Income:** Middle to high (RMB 8,000 or more per month) (79%)
- **Trip arrangement:** Independent (67%)

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**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?**
  - 36%

**Who suggested visiting as shop to you?**

- Local tour guides (55%)
- Staff at tourist information center (43%)

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**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

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

- Illegal (43)
- I don't know (26)
- Only small pieces are legal (24)
- Legal (7)

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

- Mail (sent by shop) (39%)
- By plane (26%)
- By cruise ship / By mail (by person) (6%)

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

^ University or above
**Destination Snapshot on Purchasing Ivory – Japan**

### Typical Japan Traveler Profile*  
(n=422)

- **Age**: 25-34 (34%)
- **Education**: High^ (83%)
- **Gender**: Female (54%)
- **Trip arrangement**: Independent (49%)
- **Income**: Middle to high (RMB 8,000 or more per month) (87%)

### 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?**
- 36%

### Did any of the sellers of ivory speak Chinese?  
(n=250) (%)
- No Chinese
- Did not interact
- Some Chinese
- Fluent Chinese

**Who suggested visiting as shop to you?**
- Local tour guides (61%)
- Staff at tourist information center (38%)

### 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

**Is it legal to buy ivory in this destination? (%)**
- Illegal
- I don't know
- Only small pieces are legal
- Legal

**How did this person bring these wildlife products back into China?**  
(n=134)
- By plane (35%)
- Mail (sent by shop) (32%)
- Mail (sent by person buying) (10%)

*Typical traveler profile indicates the demographics that are more likely to be represented.

^ University or above
**Destination Snapshot on Purchasing Ivory – Laos**

**Typical Laos Traveler Profile**
(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%)

**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?**
  - 13%

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

- No Chinese: 20
- Did not interact: 39
- Some Chinese: 29
- Fluent Chinese: 12

**Who suggested visiting as shop to you?**

- Chinese tour guides (48%)
- Local tour guides (40%)

**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

- **Is it legal to buy ivory in this destination? (%)**
  - Illegal: 74
  - I don't know: 11
  - Only small pieces are legal: 10
  - Legal: 4

- **How did this person bring these wildlife products back into China?**
  (n=36)
  - Mail (sent by shop) (40%)
  - By road (18%)
  - Mail (sent by person buying) (14%)

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

* Completed vocational school / high school
Destination Snapshot on Purchasing Ivory – Myanmar

**Typical Myanmar Traveler Profile**

- **Age**: 45-54 (38%)
- **Gender**: Male (58%)
- **Education**: Low to middle+ (85%)
- **Income**: Low to middle (RMB 20,000 or less per month) (74%)
- **Trip arrangement**: Independent (59%)

**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?**
  - **8%**

**Did any of the sellers of ivory speak Chinese?**

- **No Chinese**: 18 (11%)
- **Did not interact**: 36 (22%)
- **Some Chinese**: 33 (20%)
- **Fluent Chinese**: 12 (7%)

**Who suggested visiting as shop to you?**

- **Local tour guides (41%)**
- **Staff from my accommodation (36%)**

**After Purchase**

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

- **Illegal**: 70 (41%)
- **I don't know**: 19 (11%)
- **Only small pieces are legal**: 8 (5%)
- **Legal**: 3 (2%)

**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%)**

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

* Completed vocational school / high school
Destination Snapshot on Purchasing Ivory – Thailand

**Typical Thailand Traveler Profile**

- **Age:** 35-44 (33%)
- **Gender:** Female (55%)
- **Education:** High^ (79%)
- **Income:** Middle to high (RMB 8,000 or more per month) (78%)
- **Trip arrangement:** Independent (44%)

**Before Purchase**

- **Did you plan to buy ivory before your trip?**
  - Yes: 21%

- **Did you visit a shop / market that sold ivory?**
  - Yes: 38%

- **Did anyone suggest visiting a shop that sold ivory while you were traveling?**
  - Yes: 44%

**Did any of the sellers of ivory speak Chinese?**

- No Chinese: 11%
- Did not interact: 19%
- Some Chinese: 53%
- Fluent Chinese: 17%

**Who suggested visiting as shop to you?**

- Local tour guides: 71%
- Staff at tourist information center: 34%

**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

- **Is it legal to buy ivory in this destination? (%)**
  - Illegal: 41%
  - I don't know: 20%
  - Only small pieces are legal: 28%
  - Legal: 10%

- **How did this person bring these wildlife products back into China? (n=133)**
  - Mail (sent by shop) (38%)
  - By plane (30%)
  - Mail (sent by person buying) (9%)

*A typical traveler profile indicates the demographics that are more likely to be represented.
^ University or above
Destination Snapshot on Purchasing Ivory – Vietnam

**Typical Vietnam Traveler Profile** *(n=591)*

- **Age:** 45-54 (38%)
- **Gender:** Male (69%)
- **Education:** Low to middle+ (88%)
- **Trip arrangement:** Independent (57%)
- **Income:** Low to middle (RMB 20,000 or less per month) (85%)

**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? 8%

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

- No Chinese
- Did not interact
- Some Chinese
- Fluent Chinese

Who suggested visiting as shop to you?

- Local tour guides (59%)
- Other travelers (35%)

**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

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

- Illegal
- I don’t know
- Only small pieces are legal
- Legal

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

- Mail (sent by shop) (30%)
- By road / plane (22%)
- By ferry (11%)

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

* Completed vocational school / high school
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