

# Preparing for a Post-COVID-19 Travel Boom: **Research on the Ivory Consumption Behavior of Chinese Travelers**

A presentation from GlobeScan

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# Presenters and Panellists today



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# Agenda

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1. Introduction (WWF) – 5 minutes

2. Research Presentation (GlobeScan) – 25 minutes

- Research Description and Specifications / Typical Travel Behavior
- Ivory Purchase Outside of Mainland China
- Comparison of Destinations
- Key Findings

3. Recommendations (WWF) – 5 minutes

4. Q&A (with all participants) – 25 minutes

## Context: Traveling overseas for ivory – desk research

Experts caution that some of the trade in ivory may have been displaced to surrounding counties after it was made illegal in China.

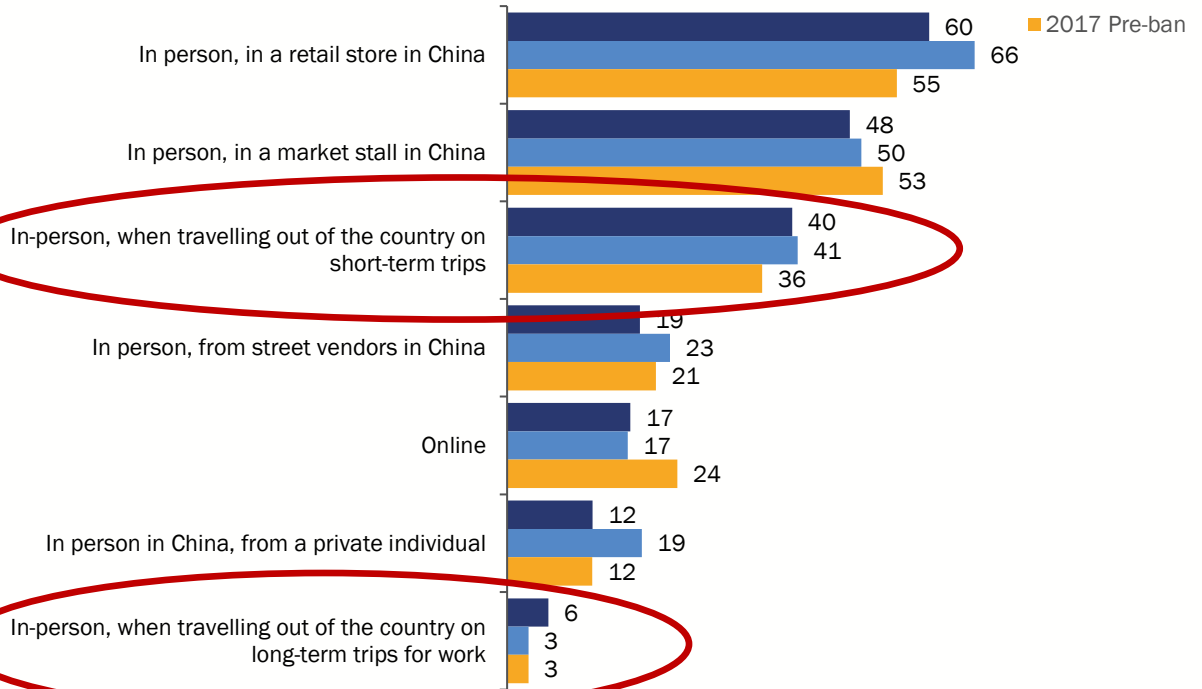


# Context: Traveling overseas for ivory – consumer research

Research from GlobeScan shows that despite a general decreasing trend for ivory purchase among Chinese consumers, Regular Overseas Travelers have been increasing in their ivory purchasing habits

### Ivory Purchase Channels

■ 2019 Post-ban  
 ■ 2018 Post-ban  
 ■ 2017 Pre-ban

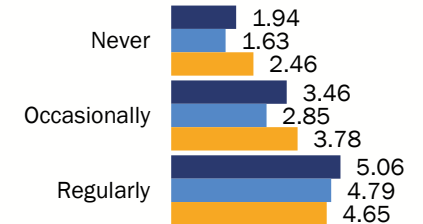


### Ivory Purchase Index

#### Index (Total Sample)



#### Index by Overseas Travelers





# Research Description and Specifications Travel Behavior

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# How We Did It: Research Design and Specifications



## Qualitative Phase – Aug – Sep 2019

- 2 Focus Groups in each of Beijing and Guangzhou (32 participants in total)
- All had bought ivory or rhino horn abroad in the past 12 months. Each group had: 4 male, 4 female; 4 planned, 4 unplanned; 4 likely to buy again, 4 unlikely.

## Qualitative Phase – Oct 2019 – Jan 2020

- Conducted online; respondents invited via email and could answer on any device
- Sample representative for the online populations in China from 31 provinces. Natural demographic fallout for destinations
- Questionnaire median length 14 minutes for travelers and 4 minutes for non-travelers
- Total sample size n=5291, including 3011 travelers

# Know the travelers: Why, how and when are people traveling?



## Travel Purpose



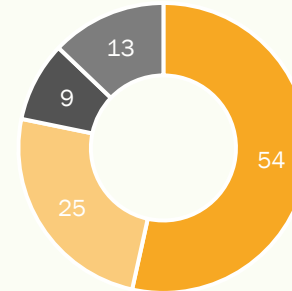
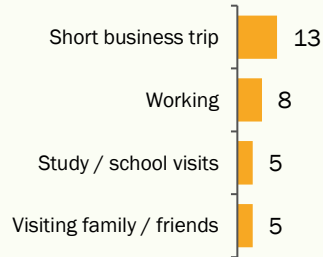
92%

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

% Leisure

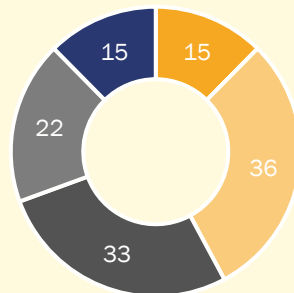


## Travel Arrangements



- Independent
- Agency
- Tailored tour
- Semi-independent

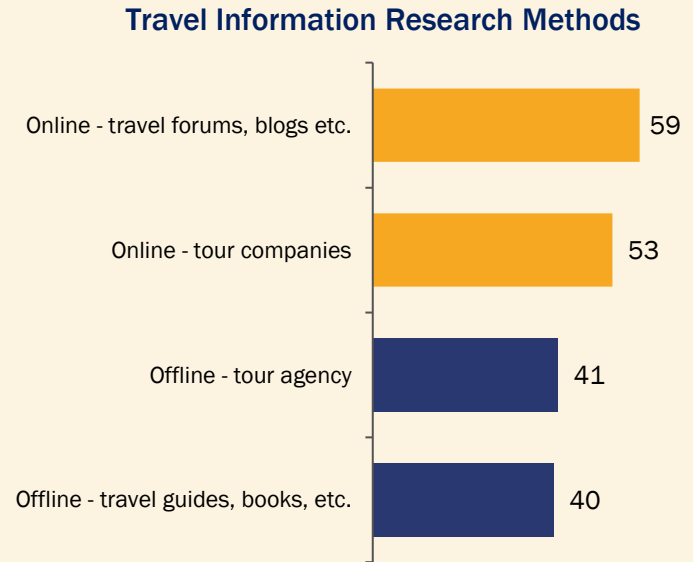
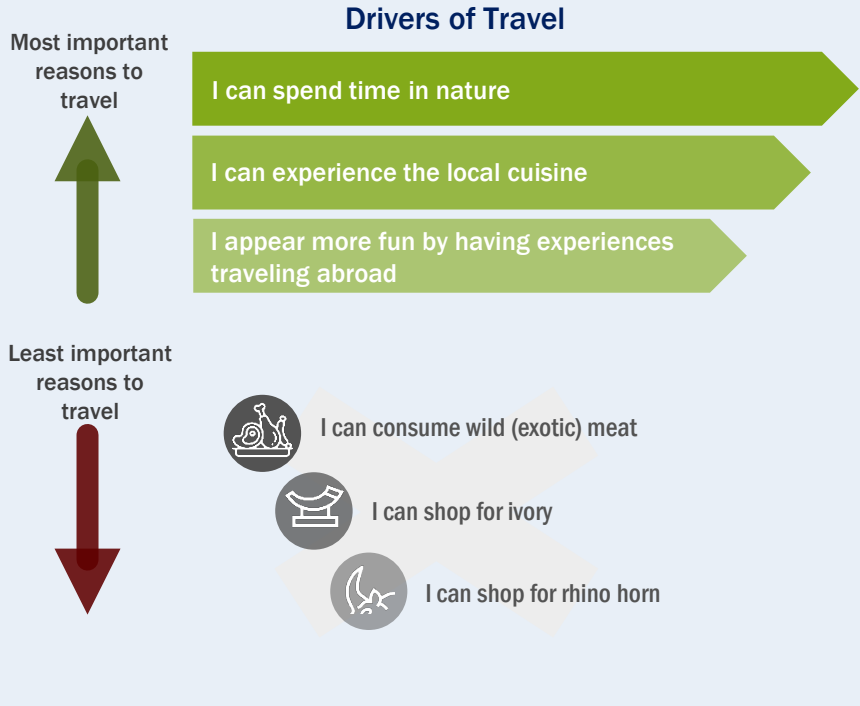
## Travel Period



- Lunar New Year
- National Day Holidays
- Summer Vacation
- Another public holiday
- Other time



# Know the travelers: Drivers of travel and research methods





# Path to Purchase: Travelers Purchasing Ivory Outside of Mainland China

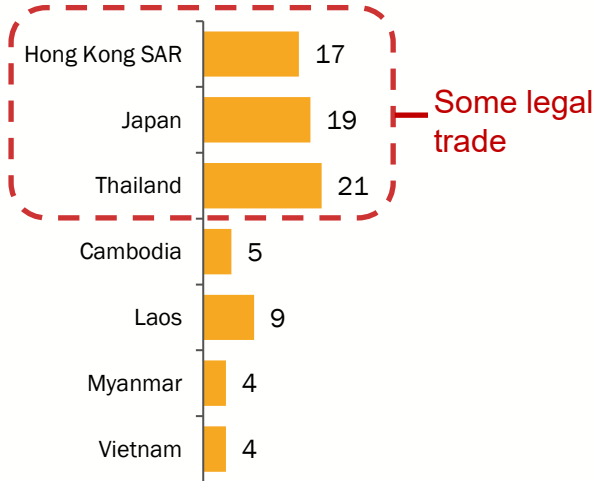
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# Before traveling: Ivory purchase plans

## Travelers Planning to Buy Ivory Before Their Trip



### By Destination



## Where Are Travelers Finding their Ivory Information?

Online 61%



From people I know 59%



Tour guide company 51%

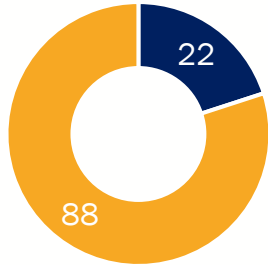


Thailand was perceived as the best destination to buy ivory by those planning to buy it



*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 had what I want and met him when I arrived at my destination.*

# While traveling: Suggestions to Purchase Ivory While Abroad

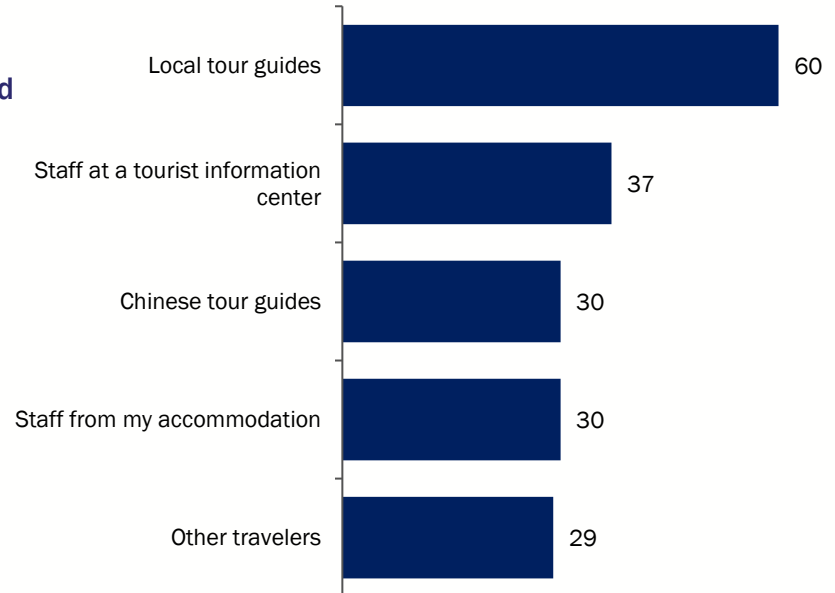


- Someone suggested buying ivory
- Nobody suggested buying ivory

Ivory Was Recommended



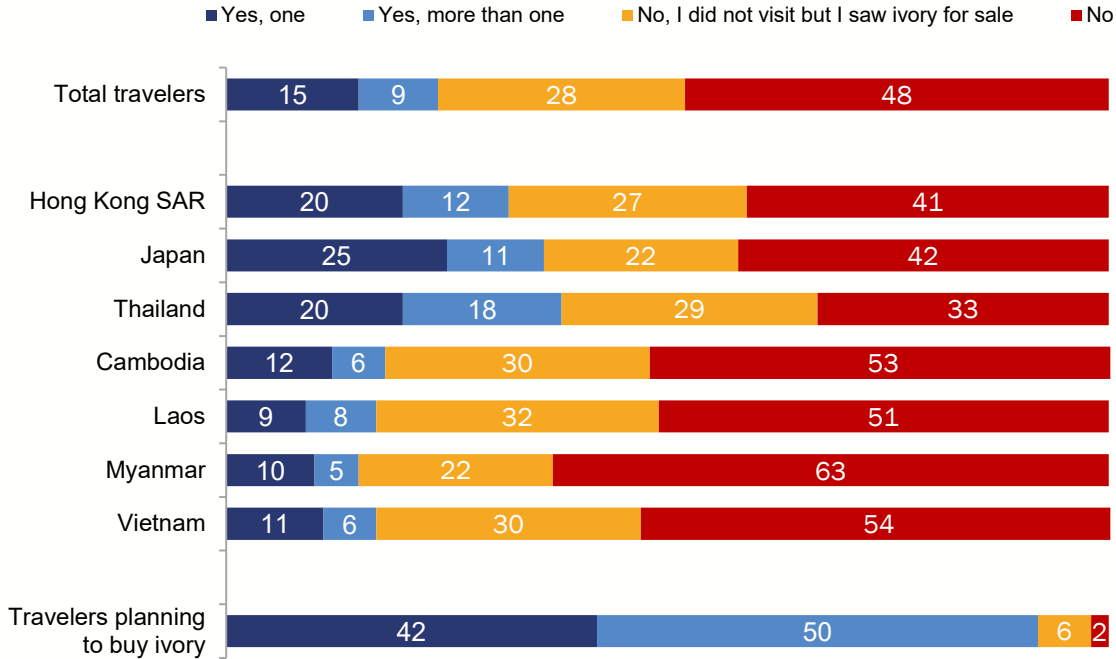
Who Suggested It?



# While traveling: Visiting ivory shops



Visits to a Shop / Market That Sold Ivory



At minimum **57%**  
of the sellers spoke Chinese



*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.*

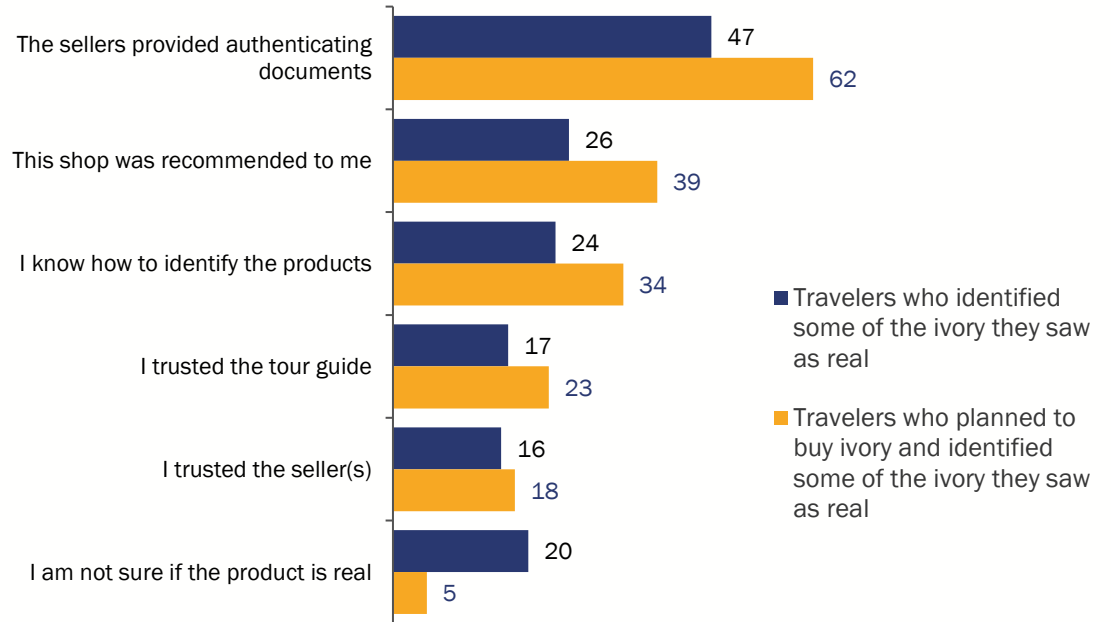
# While traveling: Identifying real ivory



**75%**

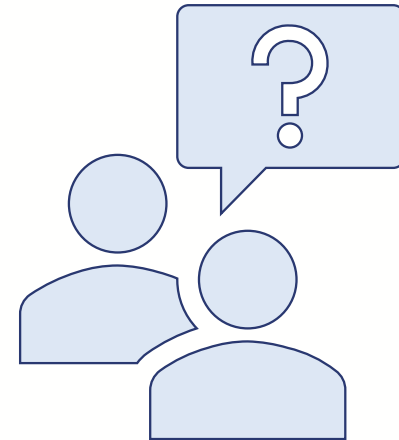
of travelers who visited ivory shops believed that they could tell real ivory from fake ivory

How Did You Know the Ivory Was Real?



## Ask the experts

- Jim Sano: In your opinion, what are the most significant findings? How can we best use this knowledge going forward?
- Audience question: What % of Chinese travelers do you think bought ivory while travelling internationally?



# While traveling: Ivory purchase rates

**15%** Someone in their travel group bought ivory

**6.8%** Estimated travelers buying an Ivory Product

## Ivory Pendant

**Price:** RMB 1,300

**Location:** Cambodia

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



## Ivory Necklace

**Price:** RMB 3,380

**Location:** Hong Kong SAR

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



## 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)

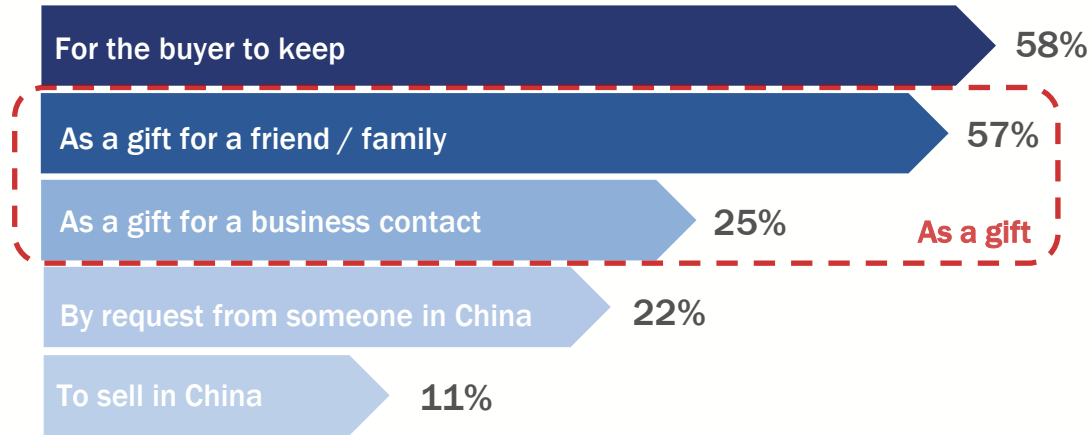


**Gender:** Female

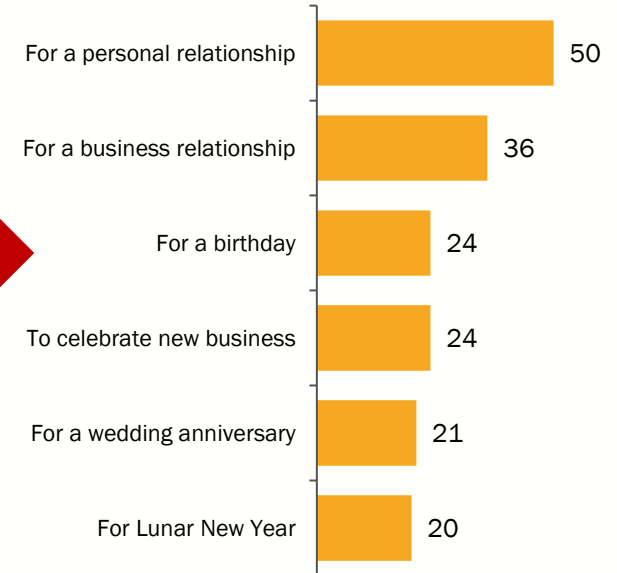


# While traveling: Ivory purchase reasons

## TOP 5 Reasons to Buy Ivory



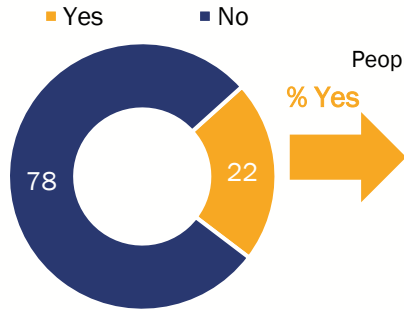
## Top Reasons for Gifting



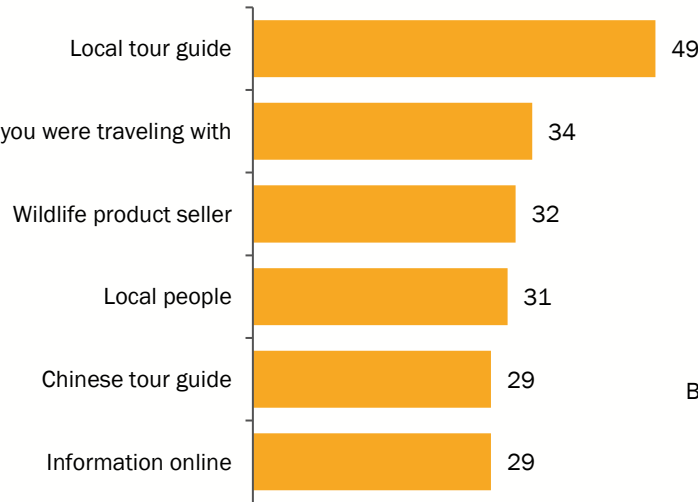
# While traveling: Advice on bringing ivory back to Mainland China



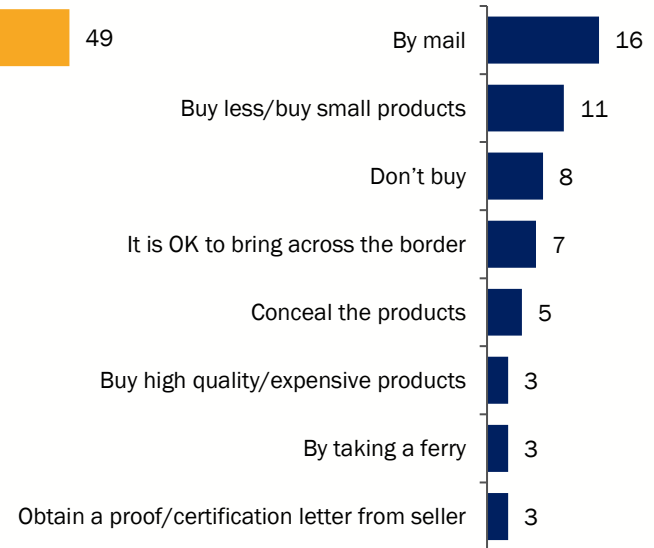
Given advice on how to bring ivory back to China



Who gave the advice?



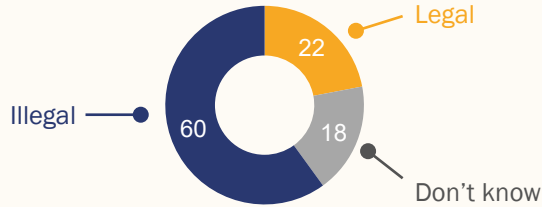
What did they advise?



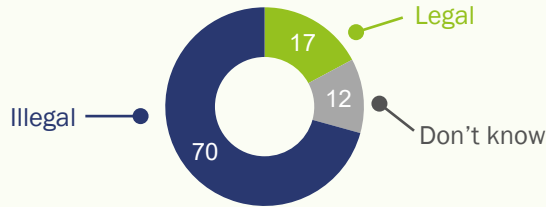
“Other tourists recommended to buy cheap and small items. Just try your luck across the border, even if the goods are confiscated you will not be losing too much money.”

# While traveling: Bringing ivory back to Mainland China

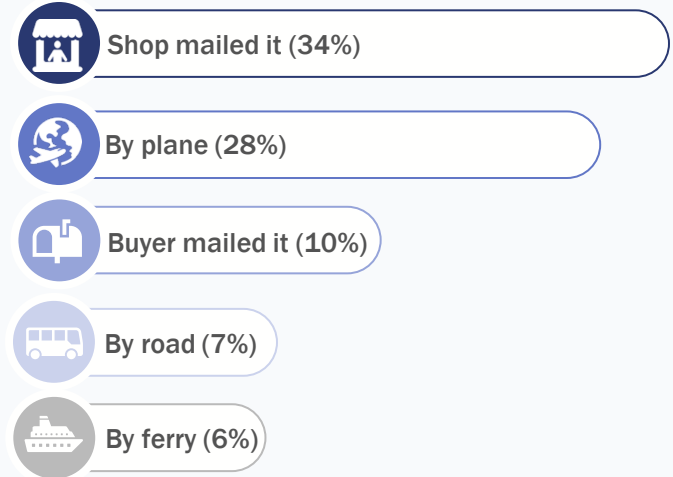
Perceptions of illegality of buying ivory in destinations (%)



Awareness of illegality of bringing ivory back (%)



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



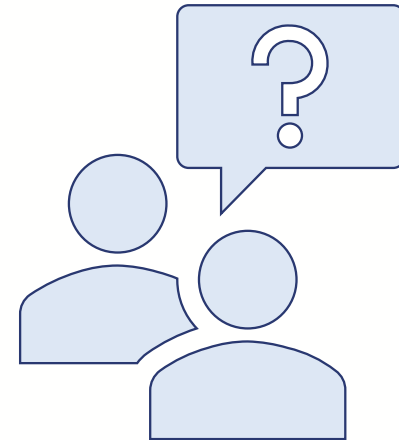
*Hide the small pieces among the items in your luggage, the customs are unable to detect them. For large pieces like bracelet or accessories you can just wear it on yourself.*

## Ask the experts

- Karen Xue: How do we deter Chinese outbound travelers from bringing ivory back to the Mainland?
- Jesse Taweekan: What kind of interventions could be enacted in destination countries?



- Audience question: What non-ivory, wildlife-friendly souvenirs do you think would be most popular as an alternative for travelers to buy?





# Key Findings, Conclusions and Recommendations

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## Key Findings

**11%**

of travelers report that they planned to buy ivory before their trip, particularly those going to Thailand, Japan and Hong Kong SAR.

**22%**

of travelers report that someone suggested to them that they should visit an ivory shop, particularly local tour guides.

**24%**

of travelers visited a shop that sold ivory while traveling. More than half of the sellers spoke Chinese

**6.8%**

Estimated incidence rate for ivory (purchased on their last trip over a period of 24 months)

**17%**

of travelers think it is legal to bring ivory back into Mainland China

# Recommendations

## Market

- Target mail deliveries of ivory and rhino horn
- Focus on the tour guides and tourist information centers
- Continue to target the Lunar New Year and Golden Week holiday

## Mind

- ❖ Continue with campaigns, as they are dissuading people who intend to purchase ivory and making the purchase less socially acceptable
- ❖ Gifting of ivory should be targeted for behavior change initiatives
- ❖ Erode trust in “authenticating” documentation

# Thank You! Questions?



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