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

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.
Research Description and Specifications
Travel Behavior
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)
- Short business trip: 13%
- Working: 8%
- Study / school visits: 5%
- Visiting family / friends: 5%

Travel Arrangements

- % Leisure: 54%
- Independent: 25%
- Agency: 9%
- Tailored tour: 13%
- Semi-independent: 9%

Travel Period

- Lunar New Year: 36%
- National Day Holidays: 33%
- Summer Vacation: 22%
- Another public holiday: 15%
- Other time: 15%
Know the travelers: Drivers of travel and research methods

Drivers of Travel

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

Travel Information Research Methods

- Online - travel forums, blogs etc.: 59
- Online - tour companies: 53
- Offline - tour agency: 41
- Offline - travel guides, books, etc.: 40
Path to Purchase:
Travelers Purchasing Ivory
Outside of Mainland China
Before traveling: Ivory purchase plans

Travelers Planning to Buy Ivory Before Their Trip

- Hong Kong SAR: 17%
- Japan: 19%
- Thailand: 21%
- Cambodia: 5%
- Laos: 9%
- Myanmar: 4%
- Vietnam: 4%

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.

Some legal trade

Tour guide company

"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

Ivory Was Recommended

- 88% Someone suggested buying ivory
- 22% Nobody suggested buying ivory

Who Suggested It?

- Local tour guides: 60%
- Staff at a tourist information center: 37%
- Chinese tour guides: 30%
- Staff from my accommodation: 30%
- Other travelers: 29%
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?

- The sellers provided authenticating documents: 47%
- This shop was recommended to me: 39%
- I know how to identify the products: 34%
- I trusted the tour guide: 23%
- I trusted the seller(s): 18%
- I am not sure if the product is real: 16%

Travelers who identified some of the ivory they saw as real

Travelers who planned to buy ivory and identified some of the ivory they saw as 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**

- **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%

**Top Reasons for Gifting**

- For a personal relationship: 50%
- For a business relationship: 36%
- For a birthday: 24%
- To celebrate new business: 24%
- For a wedding anniversary: 21%
- For Lunar New Year: 20%
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 (%)

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

Awareness of illegality of bringing ivory back (%)

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

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

1. Shop mailed it (34%)
2. By plane (28%)
3. Buyer mailed it (10%)
4. By road (7%)
5. By ferry (6%)

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
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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