Our Panellists and Presenters today

Anny Liang
Project
Coordinator
WWF

Karen Xue
Global Director
for WWF's Ivory
High Impact
Initiative

Jin Zhonghao
WWF Director for
Eliminate Illegal
Trade of Endangered
Flagship Species

Wander Meijer
Director Asia
Pacific
GlobeScan

Daniel Bergin
Senior Project
Manager
GlobeScan

GLOBESCAN

Agenda

1. Introduction (by WWF) – 10 minutes

2. Research Presentation (by GlobeScan) – 30 minutes
- Research description and methodology
- Consumer segments and purchase patterns
- Awareness of and Attitudes toward the Ivory Ban (on Ivory Purchase behavior)
- Campaign recall, recognition and effectiveness
- Recommendations

3. Q&A and panel discussion– 20 minutes

GLOBESCAN

Research description and methodology

Supported by the

WWF

Federal Ministry
for Economic Cooperation
and Development

GLOBESCAN

Methodology Overview – General Survey

Methodology and Sample

- Conducted online; respondents invited via email
- Questionnaire median length 17 minutes
- Fieldwork from October 2020 to January 2021
- Sample size n=2,200 over 16 cities
- Margin of error of 2.1 percent (for the total sample)
- NEW: deep dive amongst **Diehard Buyers** (n=487)

Comparison with other surveys

- Key metrics cannot be compared 1-on-1 with other surveys.
- This **2020 Survey** follows the **2017 Pre-ban Survey** conducted in Sept - Oct 2017, the **2018 Post-ban survey** conducted in May – July 2018 and the **2019 survey** (conducted June – July 2019) with the same methodology and the same sampling plan, making these three surveys comparable.
- While the data/key metrics are specific for the 16 cities, the underlying patterns on segmentation, purchase behavior and communications are relevant for the ivory buyers, and the results are crucial input for campaigns.

GLOBESCAN

Geographic Scope

Definition: City layers

Cities were divided into layers 1, 2, and 3 per WWF_TRAFFIC's definition to reflect the ivory trade and consumption in major cities in China. Grouping cities by layers allows for comparisons on the dynamics of ivory trade to be made between types of markets (cities).

WWF nominated these cities as being strategic and active centers of the ivory trade in China, **rather than being representative of China as a whole.**

Hangzhou was added to the survey with $n = 200$ respondents. To keep the results comparable to previous years Hangzhou data were analyzed separately.

■ Layer 1 cities
■ Layer 2 cities
■ Layer 3 cities
⬢ Hangzhou

Shenyang
Beijing
Tianjin
Jinan
Xi'an
Nanjing
Shanghai
Hangzhou
Chengdu
Chongqing
Fuzhou
Xiamen
Kunming
Guangzhou
Nanning
Shenzhen

Coverage by city

- n=920 in **Layer 1** cities
- n=460 in **Layer 2** cities
- n=620 in **Layer 3** cities
- n=200 in 2019 and 2020 in Hangzhou

GLOBESCAN

We are starting to build up multi-year longitudinal knowledge

Consumer segments and Purchase patterns

Market Segmentation

- Market segmentation identifies similarities in the **behaviors, intentions, attitudes and motives of consumers**, and divides the population into natural groups based on these similarities.

- Market segmentation allows organizations to identify groups for strategic communications and to track the segments over time to see how public perception shifts between years.

- For the 2017 Pre-ban survey, we developed a customized segmentation that we have continued to employ in our surveys since, in 2018, in 2019 and in 2020 again.

- We identified segments of the population that share similar patterns of responses to the questions on **past purchase, intention to purchase, barriers to purchase, attitudes towards the ivory ban, and advocacy for ivory consumption**.

- We used **this modeling to separate the population** into three distinct groups:

Diehard Buyers   Ban Influenced Citizens   Rejectors

GLOBESCAN

Segmenting the Market

Diehard Buyers

- Diehard Buyers are those who are least likely to be swayed from purchasing ivory in 2020

- More likely to be female, have a middle-higher income and education, and travel more regularly

- Intention to purchase ivory in the future is high, despite the ivory ban

- Strong opinions about ivory relate to its artistic value & cultural heritage and they are less concerned with price.

8%

20%

72%
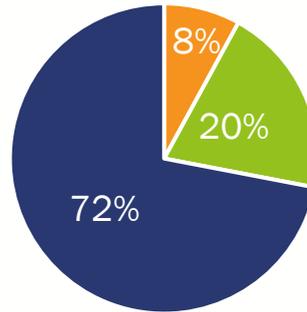
Ban Influenced Citizens

- The ban on ivory trade is the main deterrent for Ban Influenced Citizens

- They tend to be female, have a middle-higher education, and have a medium income

- Before being prompted about the ivory ban, 40 percent (60 last year) of this segment said they were likely to purchase ivory in the future. After being prompted about the ban, this percentage dropped to 0

Rejectors

- Rejectors are those who are least likely to purchase ivory

- They tend to have a mid-level of education, a lower income, and tend not to travel

- Rejectors are strongly concerned about the extinction of elephants and animal cruelty

- Rejectors have a lower rate of campaign awareness but a more positive response to the campaigns

GLOBESCAN

Buyer Segments Distribution – Four-year Comparison

Implementation of the ivory ban

(% of Respondents)

Diehard Buyers
Ban Influenced Citizens
Rejectors

	2017	2018	2019	2020
Diehard Buyers	19	14	14	8
Ban Influenced Citizens	31	14	22	20
Rejectors	50	72	64	72

11

GLOBESCAN
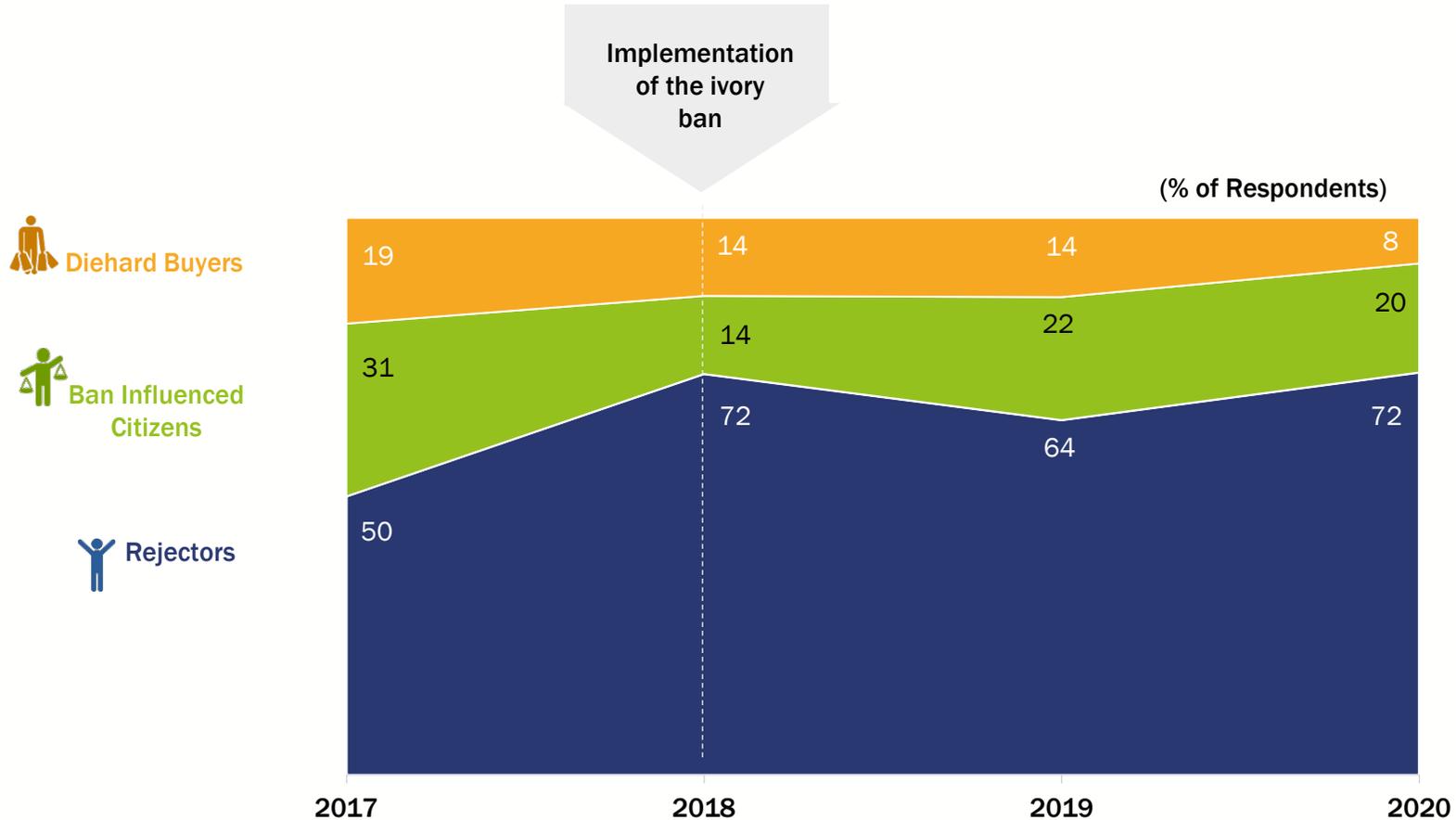
Purchase of Ivory *in Past 12 Months* - *Four-year Comparison (Total and Segments)*

Past 12 Months Purchase of Ivory
(% of Respondents)

Implementation of the ivory ban

Diehard Buyers 61
Ban Influenced Citizens 54

Total Sample 31

Rejectors 5

	2017	2018	2019	2020
Diehard Buyers	61	49	48	58
Ban Influenced Citizens	54	43	34	22
Total Sample	31	14	17	12
Rejectors	5	2	4	5

Widening gap between Diehard Buyers and other participants

By City Layers

	2017	2018	2019	2020
City Layer 1	30	20	20	14
City Layer 2	28	11	14	10
City Layer 3	34	7	14	10

Ivory Purchase Frequency (%) - 2020

Only one time	Every 6-10 years	Every 3-5 years	Every 1-2 years	>1 per year
35	12	19	28	6

12

GLOBESCAN

Intention to Purchase Ivory Ever in the Future

Asked *before* Mentioning the Ivory Ban, with 2017–2020 Comparison

"Very likely" + "Likely" to Purchase Ivory (BEFORE Mentioning the Ivory Ban)
(% of Respondents)

Implementation of the
ivory ban

Ban Influenced Citizens
Diehard Buyers

82   86   82
81   70   76

59

40

Widening purchase intention gap between Diehard Buyers and other participants

Total Sample

43
26   27   19

Rejectors

4   5   3   6

2017   2018   2019   2020
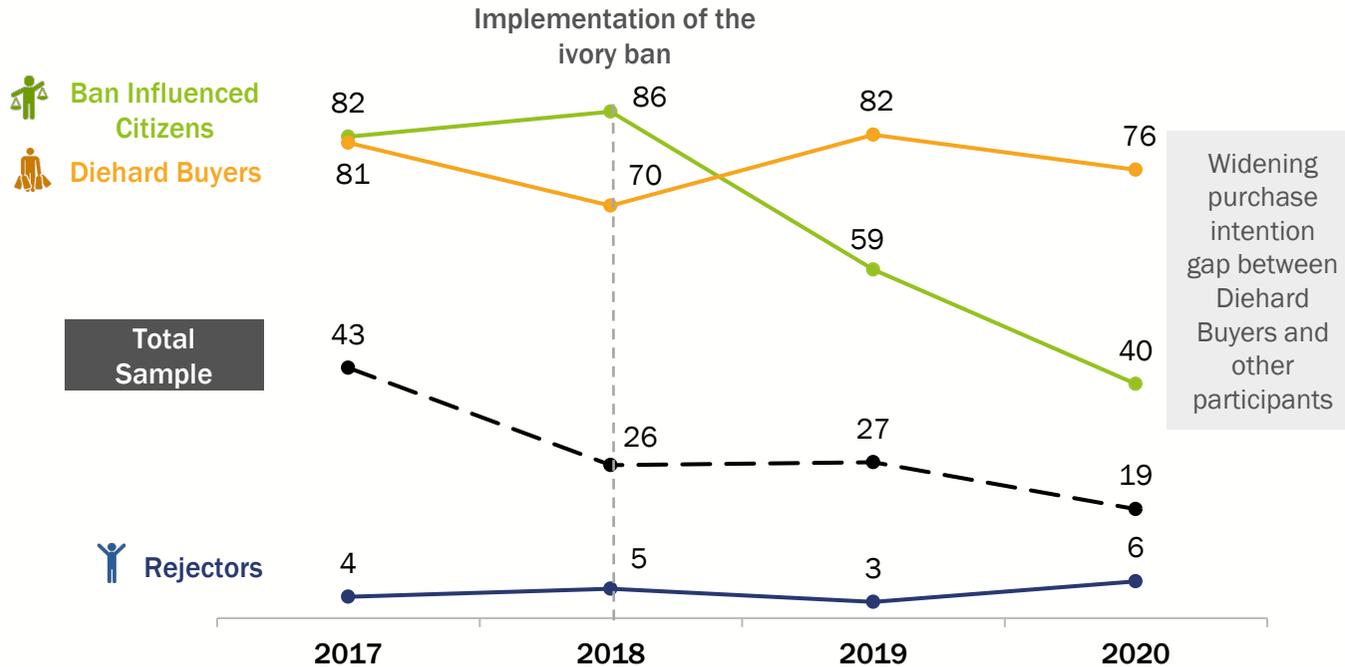
Future Purchase Intention (Total %)

Before mentioning the ivory ban
After mentioning the ivory ban

43
18   26   27   19
14   14   8

2017   2018   2019   2020

GLOBESCAN

Purpose of Last Ivory Purchase *in Past 12 Months*
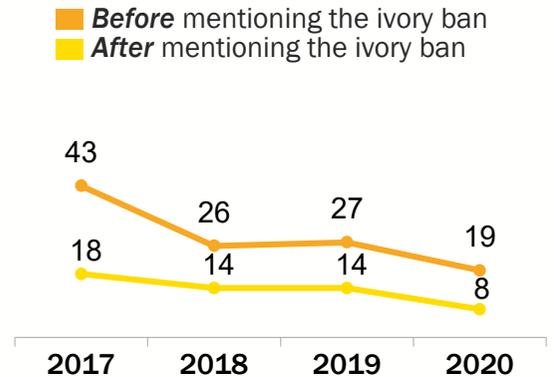
Top 5 Ivory Purchase Channels - Among ivory purchasers (%)

Purpose of Last Ivory Purchase in Past 12 Months – 2020
(% of Past 12 Months Ivory Buyers)
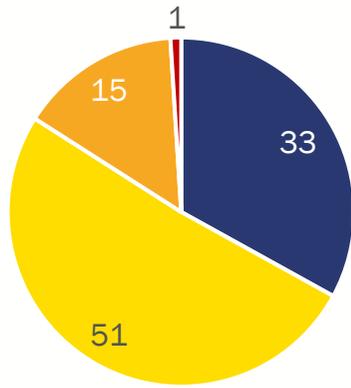
- ■ For myself to keep / use
- ■ As a gift for a friend / family member
- ■ As a gift for a business contact
- ■ For reselling

Pie chart values: 33, 51, 15, 1

Line chart — years: 2017, 2018, 2019, 2020

- In person, in a retail store in China: 55, 66, 60, 68
- In-person, when travelling out of the country on short-term trips: 36, 41, 40, 46
- In person, in a market stall in China: 53, 50, 48, 45
- Online: 24, 17, 17, 25
- In person, from street vendors in China: 21, 23, 19, 12

Online Channels for Ivory purchase
Among online buyers (%)

E-commerce	75% ▼
Artifact collection website	73% ▲
Second-hand trade apps	36% ▲
Social media	21% ▼

GLOBESCAN

Deterrents and Drivers of Ivory Purchase

Relative strength of opinions

Statement	Value
I am concerned about the possible extinction of elephants	6.86
I share information about animal protection on social media	6.68
Purchasing ivory participates in animal cruelty	6.66
If I saw someone selling ivory I would report to the authorities	6.60
I try to convince my friends and family not to buy ivory	6.01
I am concerned about the legal consequences of buying ivory	4.53
My friends or family asked me not to buy ivory	3.76
Ivory that comes from a killed elephant brings bad luck	3.38
Ivory has great artistic value	2.18
Ivory is unique	2.07
Only a strong law and penalties will prevent me from buying ivory	1.91
I cannot afford ivory	1.87
Ivory increases its value over time	1.64
I can easily buy ivory abroad	1.59
Ivory connects me to my cultural heritage	1.58
I'm afraid to buy counterfeit ivory	1.56
Ivory is a gift to mark special life events	1.29
Ivory is a souvenir to buy when I'm on holiday abroad	1.11
Ivory is ideal to pass on to future generations	1.06
Ivory brings luck and fortune	1.04
Ivory indicates wealth, power and social status	1.00
Ivory gifts help to build business relationships	0.94
Ivory has healing powers and brings good health	0.93
I always want to buy ivory	0.74

Deterrents
Drivers

GLOBESCAN

15

Deterrents and Drivers of Ivory Purchase – Top Influencing Factors Diehards

In green: Deterrents
In red: Drivers

Top 3 Beliefs About Ivory
(among sub-groups)

Among All Diehard Buyers

1. Ivory has great artistic value

2. I share information about animal protection on social media

3. I am concerned about the possible extinction of elephants

Among Diehard Buyers who Have High Education (University Graduate or above) or Have High Income (Monthly RMB >20K)

1. Ivory has great artistic value

2. Ivory is unique

3. I share information about animal protection on social media

Why Core Diehard Buyers want ivory?
Top drivers Among Diehard Buyers who Live in **Layer 1 Cities / Age 31-40 / Regular Travelers**

1. Ivory has great artistic value

2. Ivory connects me to my cultural heritage

3. Ivory is unique / is a gift to mark special life events

GLOBESCAN

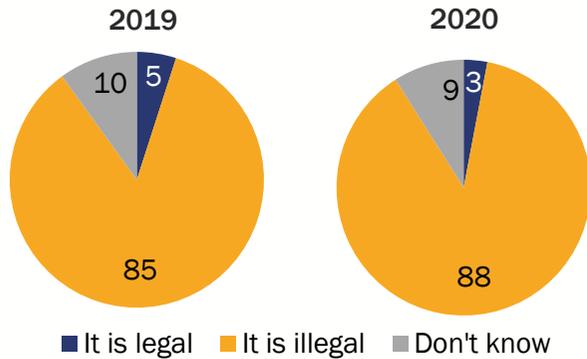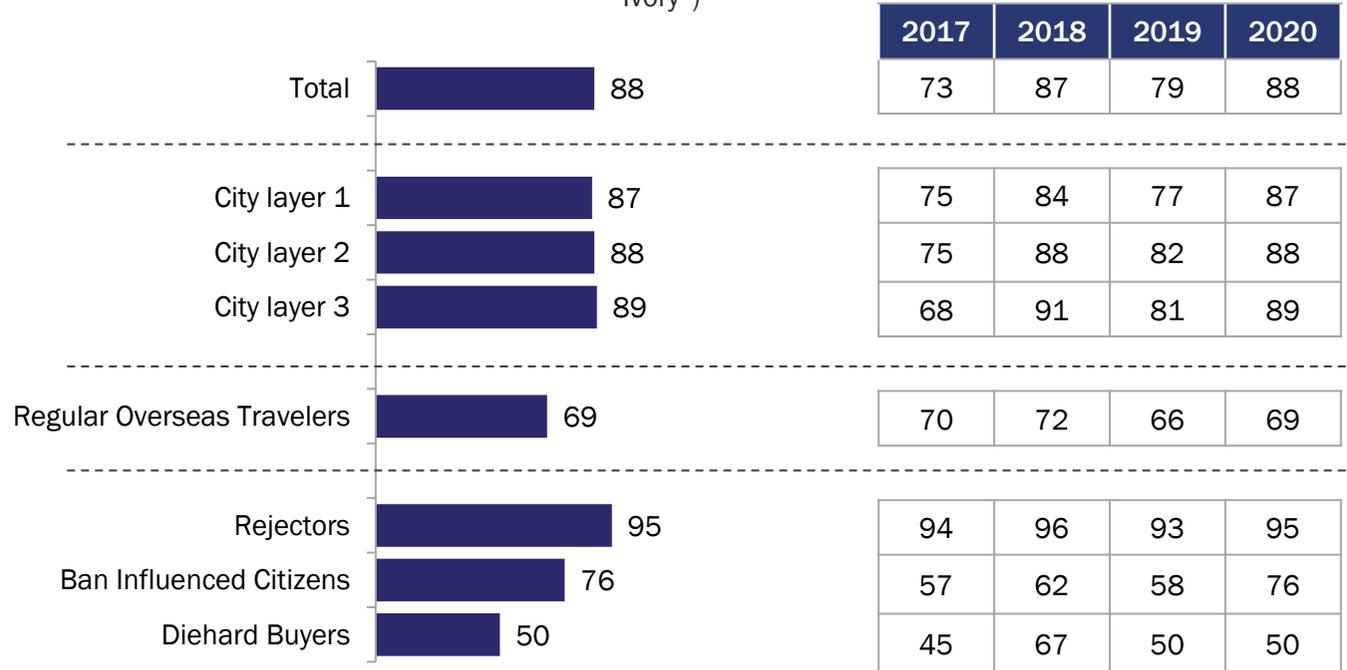# Awareness of and Attitudes toward the Ivory Ban (on Ivory Purchase behavior)

[Necessity of] Legal Control over the Trade of Ivory

Do You Know Whether Buying/Trading Ivory within China Is Legal or Not?

2019

2020

- It is legal
- It is illegal
- Don't know

Agree on Legal Control over the Trade of Ivory – 2020*
(% Top-2-Box, 4+5: "I Would Support a Total Ban on All Buying, Selling, Importing, and Exporting of Ivory")

	2017	2018	2019	2020
Total — 88	73	87	79	88
City layer 1 — 87	75	84	77	87
City layer 2 — 88	75	88	82	88
City layer 3 — 89	68	91	81	89
Regular Overseas Travelers — 69	70	72	66	69
Rejectors — 95	94	96	93	95
Ban Influenced Citizens — 76	57	62	58	76
Diehard Buyers — 50	45	67	50	50

Note: These results reflect the opinion of consumers before they were asked to read the ivory ban notice

GLOBESCAN

Awareness of and Attitude toward the Ivory Ban

Awareness of the Ban

The ivory ban

46   41   48   40   **When prompted**

4   8   7   3   **Spontaneous**

2017   2018   2019   2020 (%)
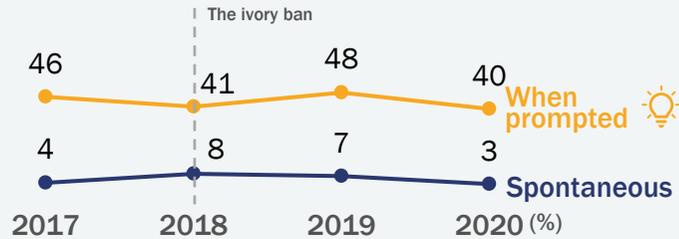
Top Sources of Awareness

■ *Offline* channel
■ *Online* channel

1   News portal 37%

2   Social media 34%

3   Mobile news apps 34%

4   TV/ Screen 28%

Impact of the Ivory Ban

Make me completely stop buying ivory — **79%**

Make me avoid buying any wildlife products — **78%**

Make me buy less ivory — **57%**

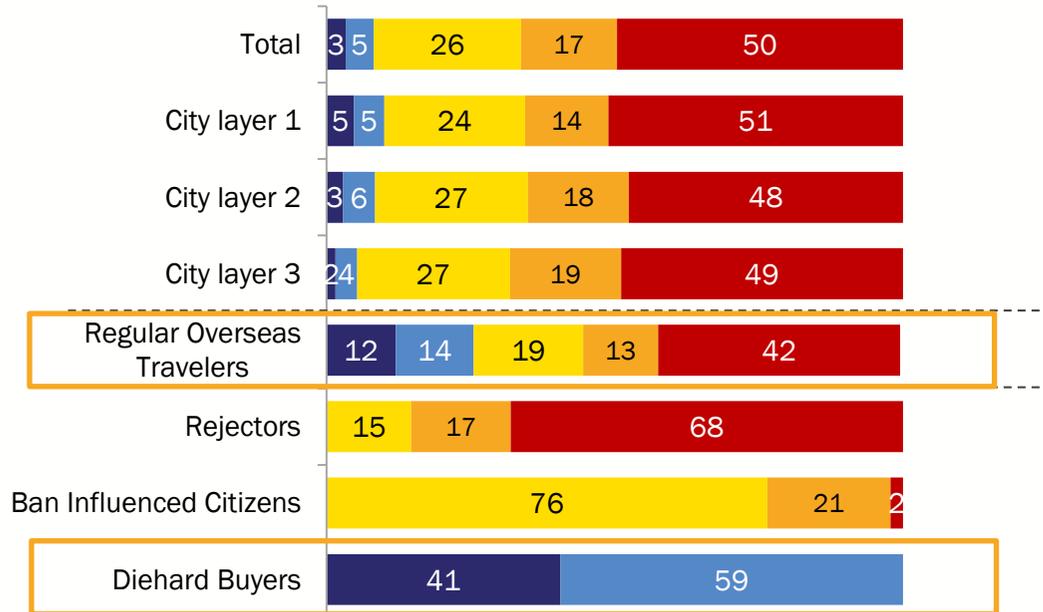Make me buy other materials (non-wildlife products) — **48%**

Top alternatives to ivory: **Gold (39%)** and **silver (33%)**

GLOBESCAN

Intention to Purchase Ivory after Mentioning the Ivory Ban

Top-2-Box Comparison of Past Four Years

### Intention to Purchase Ivory (After Mentioning the Ivory Ban) – 2019 (%)

Legend:
- ■ 5 Very likely
- ■ 4 Likely
- ■ 3 Neither likely/unlikely
- ■ 2 Unlikely
- ■ 1 Very unlikely

Segment	5 Very likely	4 Likely	3 Neither likely/unlikely	2 Unlikely	1 Very unlikely
Total	3	5	26	17	50
City layer 1	5	5	24	14	51
City layer 2	3	6	27	18	48
City layer 3	2	4	27	19	49
Regular Overseas Travelers	12	14	19	13	42
Rejectors			15	17	68
Ban Influenced Citizens			76	21	2
Diehard Buyers	41	59			

"Very likely" + "Likely" to Purchase Ivory after Mentioning the Ivory Ban – Four-year Comparison (%)

2017	2018	2019	2020
18	14	14	8
18	14	15	10
15	19	14	8
20	10	13	5
25	37	27	26
As per segments definition, there are no Rejectors and no Ban Influenced Citizens likely to purchase in the future.			
98	100	100	100

Note: Green indicates the lowest point at which a "preferable" result is observed
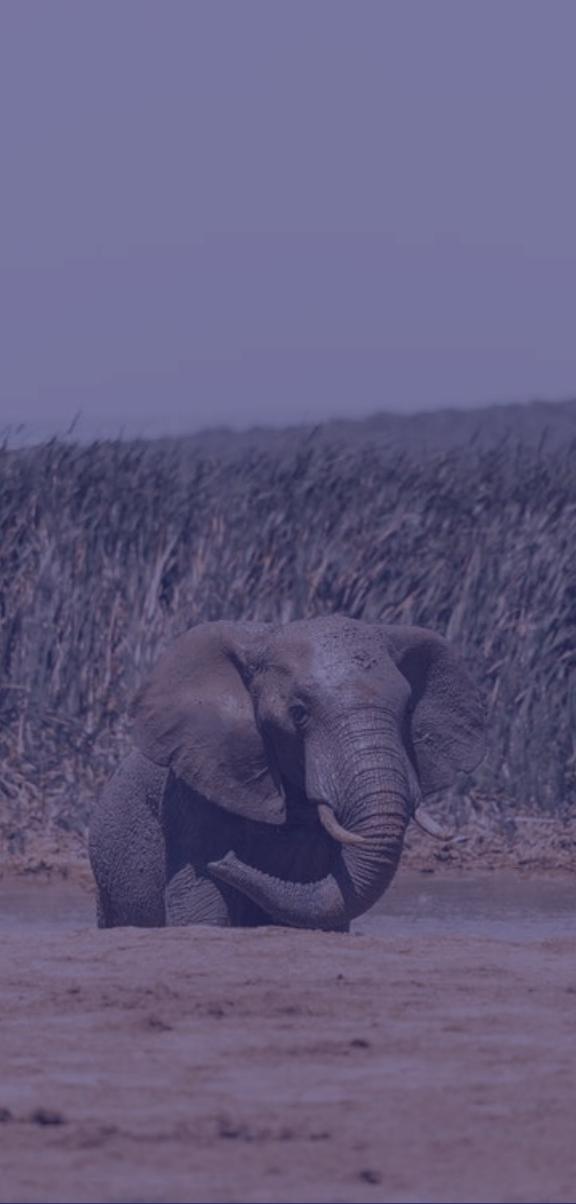
GLOBESCAN

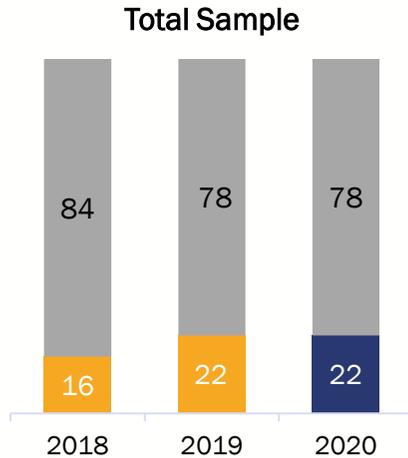20

Campaign Recall, Recognition and Effectiveness

WWF

GLOBESCAN

Awareness of any Ivory Campaigns (Spontaneous)

Have You Ever Seen and/or Heard Any Campaigns or Advertisements Against Ivory Trade and/or About Elephant Protection?

Total Sample

Year	Gray	Colored
2018	84	16
2019	78	22
2020	78	22

% Yes (2020)

	Layer 1	Layer 2	Layer 3	Regular Overseas Travelers	Rejectors	Ban Influenced Citizens	Diehard Buyers
	n=920	*n=460*	*n=620*	*n=181*	*n=1446*	*n=391*	*n=164*
	23	20	23	38	23	20	21

Awareness of and Attitude toward Campaigns

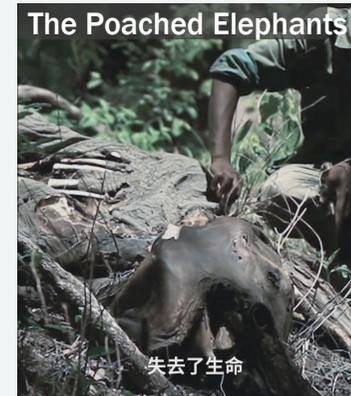## Spontaneous Campaign Awareness of Elephant Protection General Public

2018 16%

2019 22%

2020 22%

11% Recall of seeing the **Ma Weidu** Campaign video

Diehard Buyers	22
Ban Influenced Citizens	9
Rejectors	10
Regular travelers	29

82% Think that it is **memorable / persuasive**

81% **Liked** the video

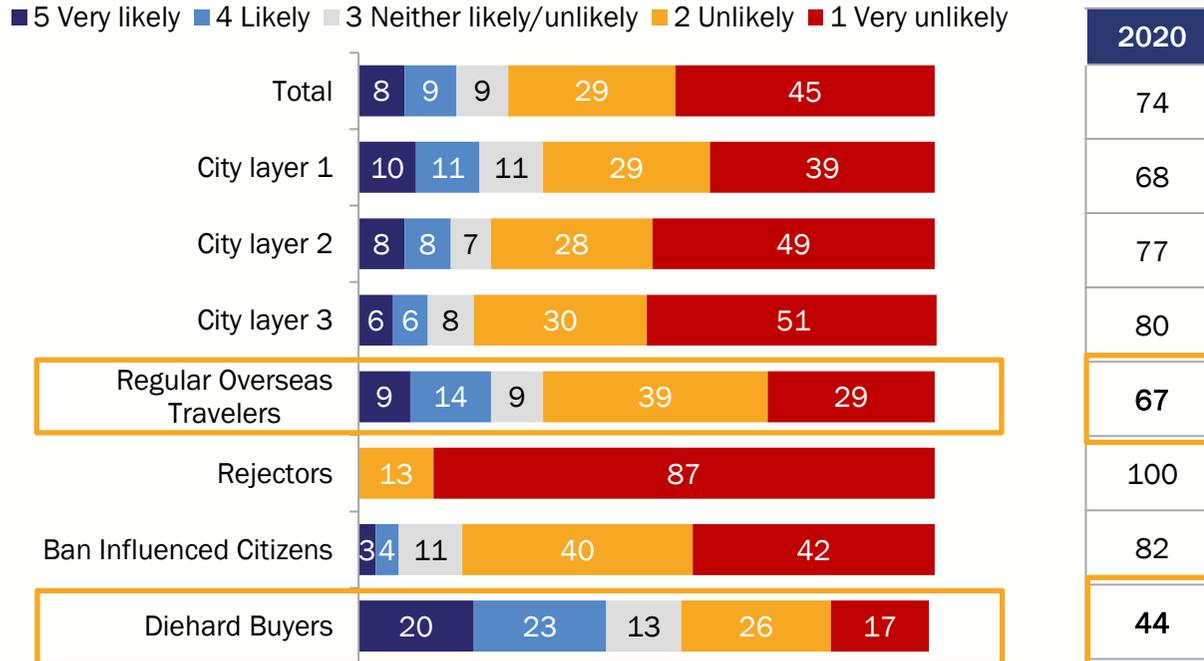## Most Impressive Element Of The Video

The Poached Elephants

失去了生命

Top 3 reactions to the Ma Weidu campaign:

- I will share information about animal protection (44%)
- I made a commitment to protect elephants and avoid ivory purchase (42%)
- I will convince others not to buy ivory (41%)

GLOBESCAN

Intention Change After Seeing the Video – Among Future Ivory Purchase Intenders

Intention to Purchase Ivory (After Seeing the Video)
(Base: % of those "Likely" or "Very likely" to purchase ivory in the future)

"Very unlikely" + "Unlikely" to Purchase Ivory after Seeing the Video (%)

Legend: ■ 5 Very likely ■ 4 Likely ■ 3 Neither likely/unlikely ■ 2 Unlikely ■ 1 Very unlikely

	5 Very likely	4 Likely	3 Neither likely/unlikely	2 Unlikely	1 Very unlikely	2020
Total	8	9	9	29	45	74
City layer 1	10	11	11	29	39	68
City layer 2	8	8	7	28	49	77
City layer 3	6	6	8	30	51	80
Regular Overseas Travelers	9	14	9	39	29	67
Rejectors				13	87	100
Ban Influenced Citizens	3	4	11	40	42	82
Diehard Buyers	20	23	13	26	17	44

GLOBESCAN

Recommendations

Recommendations (1)

Trends are mostly continuing from previous years

⇒ Many of the recommendations remain similar to 2019

⇒ Continue with campaigns as we are seeing declines in ivory purchase and purchase intention as well as increases in positive attitudes and this will continue to have benefits

Population segment

- Regular overseas travelers: Watch for a re-emergence

- Target layer 1, 2 and 3 cities with online campaigns

- Diehard Buyers: Keep focus on this group

- Ban Influenced Citizens: Continue to target this group

- Rejectors: Continue to aim for their participation in ivory campaigns

GLOBESCAN

Recommendations (2)

Communication

- Focus on luxury goods as alternatives
- Combine knowledge of the ban with campaign videos to create intention change
- Continue to broadcast the message that it's illegal to bring ivory back to China

Purchase channels

- Continue to put pressure on online trade
- Tailor campaigns for online sharing and TV/ Screen
- Most purchases are 'in person' – to further curb this, more law enforcement required

GLOBESCAN

Thank You

Q & A