Fact Sheet:
Demand under the Ban – China Ivory Consumption Research

Conducted by GlobeScan, commissioned by WWF and TRAFFIC

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The results provide insight into the consumption of ivory, which is widespread among Chinese consumers. A ban on commercial processing and trade in elephant ivory was announced by the State Council, China's cabinet, on 30 December 2016. According to the ban, commercial processing and trade in ivory will gradually be phased out and will totally halt by the end of 2017.

This research identifies those target consumer groups, products and drivers of consumption that need to be addressed as a priority to ensure the ban is effective and provides data for designing, developing and delivering consumer campaigns.

Key Findings

Perception of the Ivory Ban
Most Chinese consumers surveyed support a ban on ivory trade, but awareness of the pending ban is low.

- Just 19% of participants can recall current or upcoming regulations controlling the sale of ivory in China without being prompted
- When prompted, fewer than half (46%) of participants recall having heard of the pending ban
- After viewing the announcement of the ban, 86% of participants say they would support the pending government ban on ivory trade

Implications for Ivory Sales
Overall, the ban is likely to induce ivory buyers to reduce or stop purchasing ivory in all cities surveyed.

- More than half (55%) of past ivory buyers have already stopped, with a third (33%) of those having ceased buying in the last three years
- Before hearing of the ban, 43% of participants said they intend to purchase ivory in the future. After hearing of the ban, that number dropped to 18%.

Who is still buying ivory?
The most persistent ivory buyers are inclined to purchase both before and after the ban is implemented and will likely most drive future demand.

- 19% of survey respondents classify as a "Diehard Buyer," the most persistent buyer

- o Diehard Buyers are more likely to be female, live in Layer 3 cities, are more likely to be employed full time and have slightly more medium-high income vs the general population
- o Six in ten Diehard Buyers say that they are likely to reconsider their purchases after implementation of the ban. This indicates that not all Diehard Buyers are unpersuadable.
- Regular overseas travellers are also more likely to be Diehard Buyers; 62% of them recall having heard of the ban when prompted and 25% of them intend to buy ivory post-ban
- 51% of millennials (born between 1980 and 1995) are aware of the ban when prompted and 21% intend to buy ivory post-ban

What drives Chinese consumers to purchase ivory?
There are four primary drivers of ivory purchase, but the strength of those drivers differs across consumer segments and sub-groups.

- Artistic value & beauty
- Uniqueness
- Cultural heritage
- Gifting (a symbol of social status)
- Males, those over 51 years of age, those who live in Layer 3 cities, and those classified as Diehard Buyers are most likely to purchase ivory for gifting and social status
- Females, millennials, those who live in Layer 1 cities are most likely to purchase ivory for its uniqueness, beauty, and artistic value

What will deter Chinese consumers from purchasing ivory?
There are four primary deterrents of ivory purchase, but the strength of those messages differs across consumer segments and sub-groups.

- Endangered elephants
- Animal cruelty
- Illegality
- Strong penalties

The price of ivory is not a key deterrent to purchase.

Males, those over 51 years of age, those who live in Layer 3 cities, those classified as Diehard Buyers are most likely to not purchase ivory due to concerns about investment risks and counterfeit items

Females, millennials, those who live in Layer 1 cities, and those classified as Rejectors are most likely to not purchase ivory due to concerns about endangered elephants and animal cruelty

Per sub-groups, the strength of drivers differs:

Artistic Value / Beauty — Uniqueness — Gifting — Social Status

Females | Males
Millennials | 51+
Layer 1 cities | Layer 3 cities
Rejectors | Diehard Buyers
| Regular travelers

Per sub-groups, the strength of deterrents differs:

Endangered Elephants / Cruelty — Illegality — Investment risk / Counterfeit

Females | Males
Millennials | 51+
Layer 1 cities | Layer 3 cities
Rejectors | Diehard Buyers

Shift in Purchase from Layer 1 to Layer 3 Cities

Ivory purchase is moving from metropolitan Layer 1 cities to provincial Layer 3 cities, due to a growing conversion of consumers who have ever bought ivory into repeat buyers over the past three years. Initially, cities in Layer 1 were the most active ivory markets, cities in Layer 2 were moderately active markets, and cities in Layer 3 were the least active markets.

Source: https://www.travelchinaguide.com/map/

- 30% of participants in in Layer 1 cities claim that they bought ivory in the past year
- 34% of participants in Layer 3 cities claim that they have bought ivory in the past year
- In Layer 1 cities, 30% claim they have bought ivory in the past year
- In Layer 2 cities, 28% claim they have bought ivory in the past year
- In Layer 3 cities, 34% claim they have bought ivory in the past year

Recommendations

Identifying Target Audiences
Based on this study's findings, the sample was classified into three unique consumer segments.

- Diehard Buyers (19%)
    - Most inclined to buy ivory before and after the ban is implemented
    - More driven than other buyers by traditional beliefs (e.g. "Ivory brings luck and fortune") and the social role of ivory
    - More deterred from purchasing by risks related to investment or counterfeit items
    - Less deterred from purchasing by concerns for about endangered elephants and legality

- Rejectors (50%)
    - Reject the idea of purchasing ivory in the future
    - 24% are past buyers of ivory, but only a few have made repeat purchases, and none intend to buy ivory in the future
    - Most deterred from purchasing by the environmental consequences, e.g. endangered elephants and animal cruelty

- Ban Influenced Citizens (31%)
    - 7 in 10 are past buyers of ivory, and they demonstrate a desire to purchase in the future, but none intend to buy ivory after the ban is implemented
    - Strongly deterred from purchasing by law enforcement and strong penalties
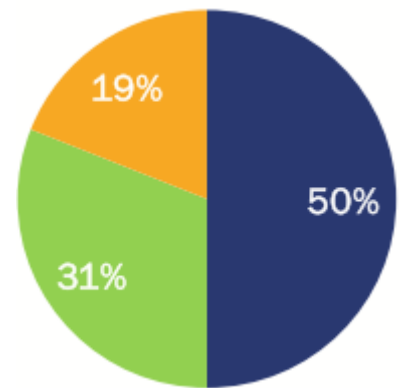
Effective Messages
Of six messages tested, two were found to be most effective.

- 36% of participants find messages related to elephant poaching and the illegal wildlife trade with an emotional connection most affect their intention to purchase ivory, with this message being most impactful for Rejectors (39%), those who live in Layer 1 cities (39%) and millennials (35%)
- 27% of participants find messages related to severe penalties for wildlife crime and great personal loss most affect their intention to purchase ivory, with this message being most impactful for regular overseas travellers (30%), Ban Influenced Citizens (29%), and those living in Layer 2 and 3 cities (28%, 28%)

Effective Messengers
Consumers expect to receive messages about ivory from the government and from NGOs. Buyers should be exposed to messages both online and offline.

- Messages from the government and NGOs are believed to be the most trusted and influential about ivory
- There are opportunities for NGOs and law enforcement agencies to take the lead in delivering messages on the ivory ban and on the consequences of ivory purchase

Methodology

This report presents the results from an extensive and comprehensive market research study conducted amongst consumers in Mainland China between June – November 2017 on the topic of reducing demand for ivory. The report is a synthesis of a three-phased research approach (see appendix for details):

1. Desk research of relevant studies conducted earlier on this topic

2. Qualitative phase, which included 8 in-depth interviews in total with Chinese consumers in Beijing, Shanghai, Guangzhou and Chengdu, and 8 focus group discussions (total) with Chinese consumers in the same cities

3. Quantitative survey: (a) 2027 structured on-line interviews of Chinese consumers in 15 major cities (divided over 3 layers) in China, followed by (b) a post-ban quantitative survey mid-2018.

The total sample size achieved is n=2027 (unweighted). This robust sample size has a margin of error of 2.1% (see page 100 for a detailed overview). The survey covers 15 major cities with a total metropolitan population of 227 million inhabitants, according to the latest update (25 April 2017) from www.worldatlas.com. For this survey, the cities have been reclassified into layers based on the activeness of its ivory market as per TRAFFIC's definition, in order to reflect the trade of ivory in China adequately. The city layers in this report are:

- n=1008 in Layer 1 cities (Beijing, Shanghai, Guangzhou, Chengdu)

- n= 511 in Layer 2 cities (Xiamen, Kunming, Fuzhou, Xi'an, Shenyang, Tianjin)

- n=508 in Layer 3 cities (Nanning, Chongqing, Nanjing, Jinan, Shenzhen)