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**USAID Wildlife Asia**

A collage of four images: an elephant, a pangolin, a rhino, and a tiger.

# WEBINAR: WHAT DRIVES DEMAND FOR WILDLIFE ?

A SITUATION ANALYSIS OF CONSUMER DEMAND  
FOR WILDLIFE PARTS AND PRODUCTS IN

CHINA, VIETNAM, THAILAND

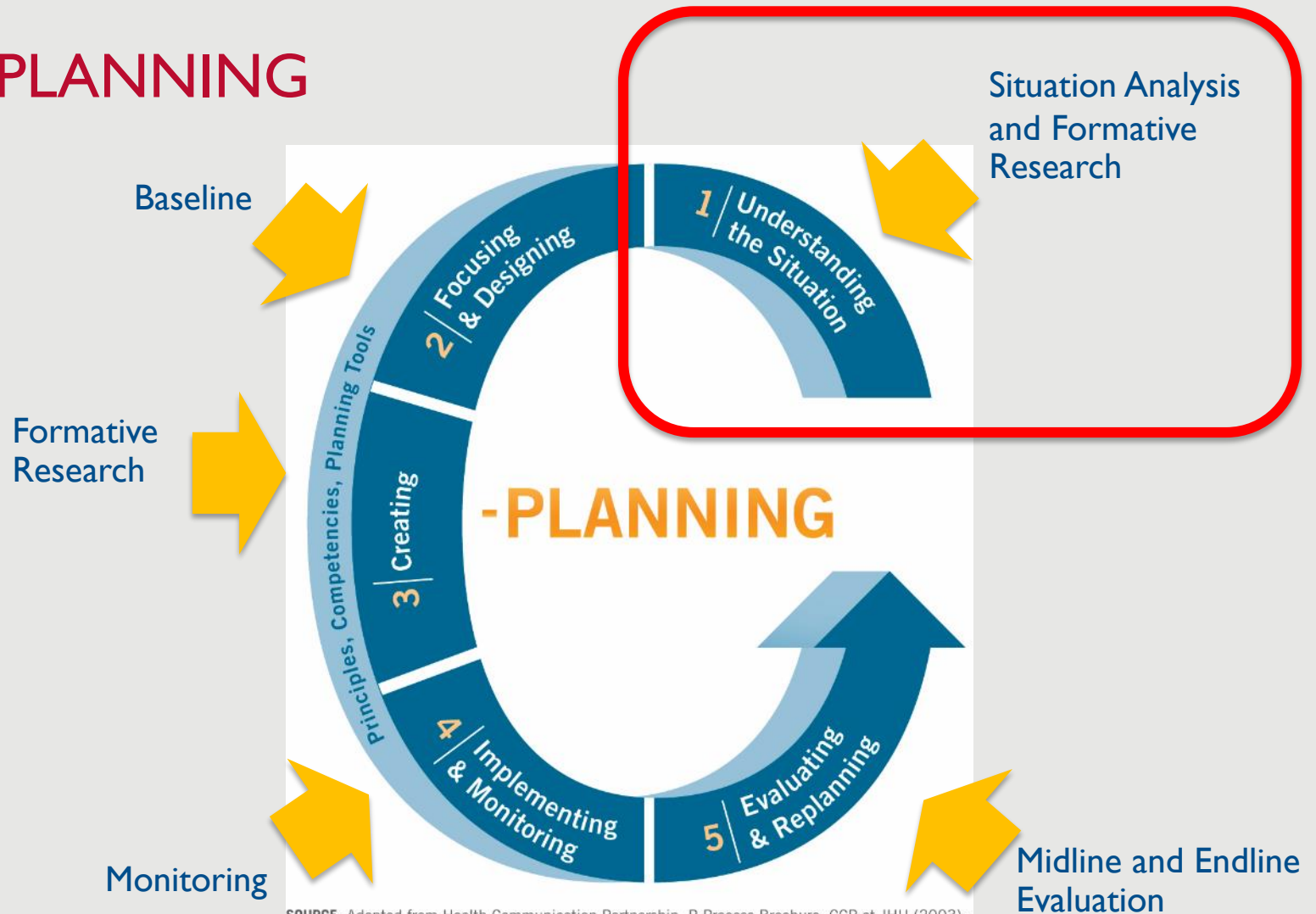
BASED ON A LITERATURE REVIEW

*(ELEPHANT – PANGOLIN – RHINO – TIGER)*

# OBJECTIVES OF SITUATION ANALYSIS

1. Summarize the current **evidence** or “state-of-the-art knowledge” on consumer behaviors and demand reduction activities
2. Synthesize and analyze to:
  - Define **key consumer segments**
  - Determine **significant drivers** underlying purchase and consumption
  - Identify **commonalities** of drivers and barriers across species and/or consumer segments and/or countries
  - Identify **gaps** in consumer research

# C-PLANNING



**SOURCE:** Adapted from Health Communication Partnership, P-Process Brochure, CCP at JHU (2003); McKee, Manoncourt, Chin, Carnegie, ACADA Model (2000); Parker, Dalrymple, and Durden, The Integrated Strategy Wheel (1998); AED, Tool Box for Building Health Communication Capacity (1995); National Cancer Institute: Health Communication Program Cycle (1989).

# CONSUMER RESEARCH STUDIES GATHERED

CONSUMER RESEARCH STUDIES																
COUNTRY	IVORY			RHINO HORN			PANGOLIN			TIGER			MULTI-SPECIES			TOTAL
	Q1	Q2	C	Q1	Q2	C	Q1	Q2	C	Q1	Q2	C	Q1	Q2	C	
China	1	-	3	-	1	1	2	-	-	-	-	1	1	-	-	10
Vietnam	-	-	-	-	-	2	1	1	-	-	-	-	1	1	-	6
Thailand	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Multi-country	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	1
<b>Total</b>	<b>1</b>	<b>-</b>	<b>4</b>	<b>-</b>	<b>1</b>	<b>3</b>	<b>3</b>	<b>1</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>-</b>	<b>17</b>

Note: Q1 = quantitative; Q2 = qualitative; C = combined quantitative and qualitative methods

# CAMPAIGN EVALUATION STUDIES COLLECTED

## CONSUMER RESEARCH STUDIES

COUNTRY	IVORY	RHINO HORN	PANGOLIN	TIGER	MULTI- SPECIES	TOTAL
China	2	1	-	-	-	3
Vietnam	-	-	-	-	1	1
Thailand	-	-	-	-	1	1
Total	2	1	-	-	2	5

# LIMITATIONS OF SITUATION ANALYSIS

1. Only reports written in English or Vietnamese included
2. Few studies in Thailand collected and mainly on ivory
3. Only one study on tiger consumers (dated 2008)
4. Studies done in urban areas only, data for rural areas lacking
5. Basically a desk review of written reports and documents, no interviews with researchers to probe methodologies, data analysis; questionnaires or research instruments not accessed
6. Most recent studies dated 2016 before Domestic Ivory Trade Ban in China announced

**THIS PRESENTATION FOCUSES ON  
FINDINGS FROM CONSUMER RESEARCH STUDIES.**

# FINDINGS - IVORY



# 4 CONSUMER RESEARCH STUDIES + I CAMPAIGN EVALUATION ON IVORY

RESEARCH STUDY	COUNTRY	LOCATION	SAMPLE SIZE
<ul style="list-style-type: none"> <li>• CMR China Market Research Group for IFAW, 2016</li> </ul>	<ul style="list-style-type: none"> <li>• China</li> </ul>	<ul style="list-style-type: none"> <li>• Shanghai and Beijing</li> </ul>	<ul style="list-style-type: none"> <li>• 400 Survey and 100 In-depth interviews</li> </ul>
<ul style="list-style-type: none"> <li>• National Geographic, "Reducing Demand for Ivory: Country Summaries." National Geographic, 2015</li> </ul>	<ul style="list-style-type: none"> <li>• China</li> </ul>	<ul style="list-style-type: none"> <li>• Beijing, Shanghai and Chengdu (3)</li> </ul>	<ul style="list-style-type: none"> <li>• 15 In-depth interviews (Beijing and Shanghai)</li> <li>• 4 focus groups (Beijing and Chengdu)</li> <li>• 1,039 Survey (nationwide)</li> </ul>
	<ul style="list-style-type: none"> <li>• Thailand</li> </ul>	<ul style="list-style-type: none"> <li>• Bangkok, Chiang Mai, Chon Buri, Khon Kaen and Surat Thani (5)</li> </ul>	<ul style="list-style-type: none"> <li>• 2 focus groups (Bangkok)</li> <li>• 1018 (5 locations)</li> </ul>
	<ul style="list-style-type: none"> <li>• Vietnam</li> </ul>	<ul style="list-style-type: none"> <li>• Hanoi, HCMC, Da Nang and Can Tho (4)</li> </ul>	<ul style="list-style-type: none"> <li>• 15 In-depth interviews (HCMC)</li> <li>• 1,000 Survey (Hanoi, HCMC, Da Nang and Can Tho)</li> </ul>
<ul style="list-style-type: none"> <li>• WildAid, "Ivory Demand in China, 2012-2014, 2014"</li> </ul>	<ul style="list-style-type: none"> <li>• China</li> </ul>	<ul style="list-style-type: none"> <li>• Beijing, Shanghai and Guangzhou (3)</li> </ul>	<ul style="list-style-type: none"> <li>• 1,500 (500 / city)</li> </ul>
<ul style="list-style-type: none"> <li>• WildAid, "Ivory Demand in Thailand, 2015"</li> </ul>	<ul style="list-style-type: none"> <li>• Thailand</li> </ul>	<ul style="list-style-type: none"> <li>• NA</li> </ul>	<ul style="list-style-type: none"> <li>• 1,000</li> </ul>
<ul style="list-style-type: none"> <li>• Rapid Asia, 2015</li> </ul>	<ul style="list-style-type: none"> <li>• China</li> </ul>	<ul style="list-style-type: none"> <li>• NA</li> </ul>	<ul style="list-style-type: none"> <li>• 500+ (half male, half female)</li> </ul>

# BUY OR OWN IVORY

## CHINA

- 9 % bought ivory
- 14 % own ivory

## THAILAND

- 1 % bought ivory
- 5 % own ivory

## VIETNAM

- 1 % bought ivory
  - 2 % own ivory
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National Geographic, 2015

# LIKELY TO BUY IVORY IN FUTURE

**CHINA**

▪ 36 %

**THAILAND**

▪ 14 %

**VIETNAM**

▪ 14 %

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National Geographic, 2015

# DRIVERS/MOTIVATIONS TO BUY IVORY

## CHINA\*

- **Home décor:** 39 % current buyers and 37 % potential buyers.; both sexes, moderately affluent, willing to pay more for an item; 1/3 considered themselves collectors, bought ivory to “show good taste and connect with cultural heritage
- **Gift giving:** : 31% current buyers and 23% of potential buyers.; mostly males, 35-50 years old, and moderately affluent; purchased for friends and business relations; ivory seen as showing respect for the recipient and reflected the status and wealth of the giver
- **Jewelry:** 24 % current buyers and 24% potential buyers; mostly female and younger, less affluent than other buyers; purchased ivory once or twice in their lives to “show their good taste”, concerned about being judged about their choices

## THAILAND\*\*

- Ivory conveys financial and social status and considered suitable for gift-giving
- 1/3 said ivory is sacred, sublime, noble and exotic (tied to use in religious carvings and its whiteness, purity)

## VIETNAM\*\*

- Ivory considered as valuable gift; projects status on both recipient and giver; gives happiness

\*CMR for IFAW, 2016

\*\*National Geographic, 2015

# PERCEIVED SOURCE OF IVORY (Consumers and Non-Consumers)

## CHINA\*

- 29% from poached elephants
- 37% from both legal sources and illegally poached elephants

## THAILAND\*\*

- 48% from wild elephants poached in Thailand
- 30% from poached wild elephants in Africa.
- 23% from domesticated Thai elephants
- 19% from elephants that died naturally
- 19% don't know

\* WildAid, 2014

\*\* WildAid, 2015

# PERCEIVED LEGALITY & CONCERN (CONSUMERS AND NON-CONSUMERS)

## CHINA\*

- **Home Décor:** Not worried about legality; Consider conservation important but don't see link to their purchase; will not purchase ivory if their friends disapproved
- **Gift Givers:** Most aware of illegality; Willing to buy from authorized stores
- **Jewelry Buyers:** Little awareness about link to the killing elephants.; Concerned about animal cruelty but 30% felt elephants were too far away from their lives to think much about; Most not aware of illegality; Those aware did not think there was much risk of enforcement

## THAILAND\*\*

- 25 % concerned about illegal killing of elephants for ivory, illegal smuggling, or danger of elephant extinction
- 54 % believe governments around the world are doing a good job protecting nature. They also support a ban on all buying, selling, importing, and exporting of ivory.

## VIETNAM\*\*

- Buyers believe African elephants were declining and most ivory sold illegal. Because some governments intentionally destroy ivory, feel it was urgent to purchase ivory before it becomes unavailable
- 76% believe in ability of governments around the world to protect nature
- 91% say they would support a governmental ban on all trading of ivory in the country

\*CMR for IFAW, 2016

\*\*National Geographic, 2015

# FINDINGS – RHINO HORN

### 3 CONSUMER RESEARCH STUDIES ON RHINO HORN

RESEARCH STUDY	COUNTRY	LOCATION	SAMPLE SIZE
• Kennaugh, Alex.. "Rhino Rage: What is driving illegal consumer demand for rhino horn.", 2016	• China	• Beijing, Shanghai, Guangzhou, Kunming and Harbin (5)	• 2000 (400 / city)
• TRAFFIC / IPSOS. "Rhino Horn Consumers, Who Are They?", 2013	• Vietnam	• Hanoi and HCMC	• 720
• Truong, V. Dao et al., The marketplace management of illegal elixirs: illicit consumption of rhino horn. Consumption Markets & Culture, 2015	• Vietnam	• Hanoi and HCMC	• 608 • Consumers: 142 in Hanoi and 145 in HCMC

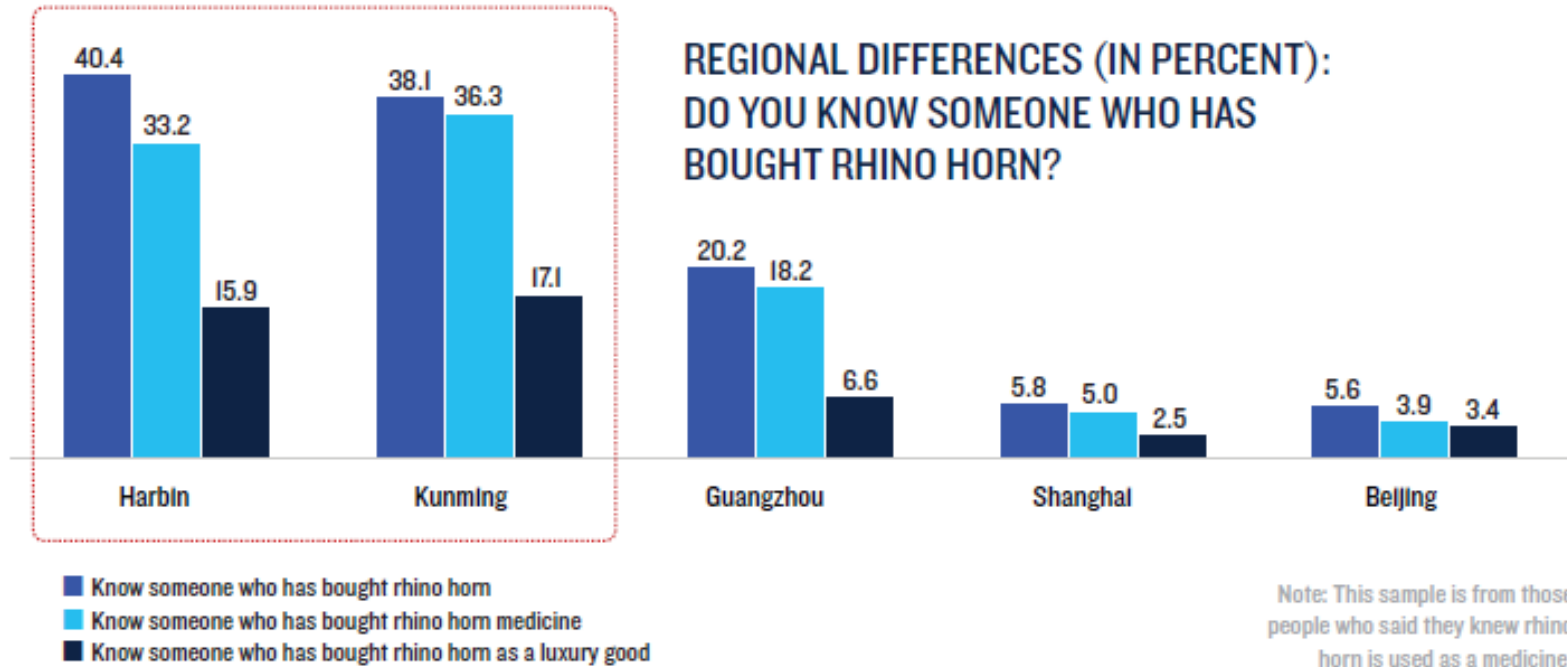


# BUY AND USE RHINO HORN - VIETNAM

- 41% buyers only
- 39% consumers only
- 16% purchased as gift for their boss, friends, colleagues, government
- 16% - “intenders” or likely buyers

TRAFFIC / IPSOS, 2013

# BUY RHINO HORN - CHINA



Kennaugh, 2016

# KEY DRIVERS TO CONSUME RHINO HORN

## CHINA\*

- 48.3 % medicinal beliefs
- 12.2 % luxury status
- 21.3 % both luxury and medicinal reasons
- 18.2 % don't know

## VIETNAM\*\*

- 87.8 % medicinal beliefs

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\* Kennaugh, 2016

\*\* Truong, 2015

# PROFILE - RHINO HORN BUYERS & USERS

## CHINA\*

- **Buyers for own use** - middle aged (aged 36-45), well-educated, wealthy. Favor Chinese medicine for rheumatism and erectile dysfunction. Believe Chinese medicine has fewer side effects than Western medicine. Choose Western medicine to treat common conditions such as fever, rash, and hangover
- **Gift buyers** - young (aged 18-45), well-educated males from the growing middle and upper classes. Buy to “give as a gift” to friends, family members, and associates because rhino horn is “unique,” “rare,” traditional,” associated with prestige, and a sign of success

## VIETNAM\*\*

- **Buyers** - often middle-aged or older women, wealthy business owners, and well-educated people also buying for their parents
- Both **buyers and users** tend to have health problems (e.g., bone and joint issues, stroke, cancer) and be conscious of maintaining good health to continue enjoying life
- Rhino horn also bought as a gift for others e.g., family members, business associates, or those in position of authority
- **Owning rhino horn or giving it as a gift affirms social status and strengthened bonds within a social network**

\* Kennaugh, 2016

\*\*TRAFFIC / IPSOS, 2013

# PERCEIVED LEGALITY AND CONCERN – RHINO HORN USERS

## CHINA\*

- 25 % know that purchasing rhino horn was illegal
- Over 70 % of those surveyed think it difficult to buy rhino horn, but most believe the risk of arrest for buying rhino horn was average or low

## VIETNAM\*\*

- Those using rhino horn knew animals were killed for horn but felt disconnected from this. Some felt that even if the species were to be lost forever, they personally would not be affected
- There is a strong sense of trust within the social networks of consumers, and they are not generally concerned about engaging in an illegal activity

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\* Kennaugh, 2016

\*\*TRAFFIC / IPSOS, 2013

# PERCEIVED LEGALITY (Consumers & Non-Consumers)

## CHINA\*

- 75 % believe consuming is illegal

## VIETNAM\*\*

- 10% believe consuming is illegal
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\* Kennaugh, 2016

\*\* Truong, 2015

# FINDINGS – PANGOLIN

# 3 RESEARCH STUDIES ON PANGOLIN CONSUMPTION

RESEARCH STUDY	COUNTRY	LOCATION	SAMPLE SIZE
<ul style="list-style-type: none"> <li>Pangolins on the Brink. Report by WildAid, 2015</li> </ul>	<ul style="list-style-type: none"> <li>China</li> <li>Vietnam</li> </ul>	<ul style="list-style-type: none"> <li>Beijing, Shanghai, Guangzhou, Hangzhou, Nanning, Kunming (6)</li> <li>Hanoi, Ho Chi Minh City, Da Nang (3)</li> </ul>	<ul style="list-style-type: none"> <li>3,000 ; 500/city</li> <li>815</li> </ul>
<ul style="list-style-type: none"> <li>Chinese Public Attitude to Consumption of Pangolins and Relevant Products. Horizon China for AITA Foundation, 2016</li> </ul>	<ul style="list-style-type: none"> <li>China</li> </ul>	<ul style="list-style-type: none"> <li>Beijing, Shanghai, Guangzhou, Harbin, Fuzhou, Wuhan, Chengdu, Xi'an, Taiyuan, Kunming (10)</li> </ul>	<ul style="list-style-type: none"> <li>1,800 ; 180/city</li> </ul>
<ul style="list-style-type: none"> <li>Pangolin Consumer Crime in Vietnam: The Results of ENV surveys and enforcement campaigns, 2011-2015. ENV, 2016</li> </ul>	<ul style="list-style-type: none"> <li>Vietnam</li> </ul>	<ul style="list-style-type: none"> <li>Ho Chi Minh City</li> </ul>	<ul style="list-style-type: none"> <li>≈1,000</li> </ul>



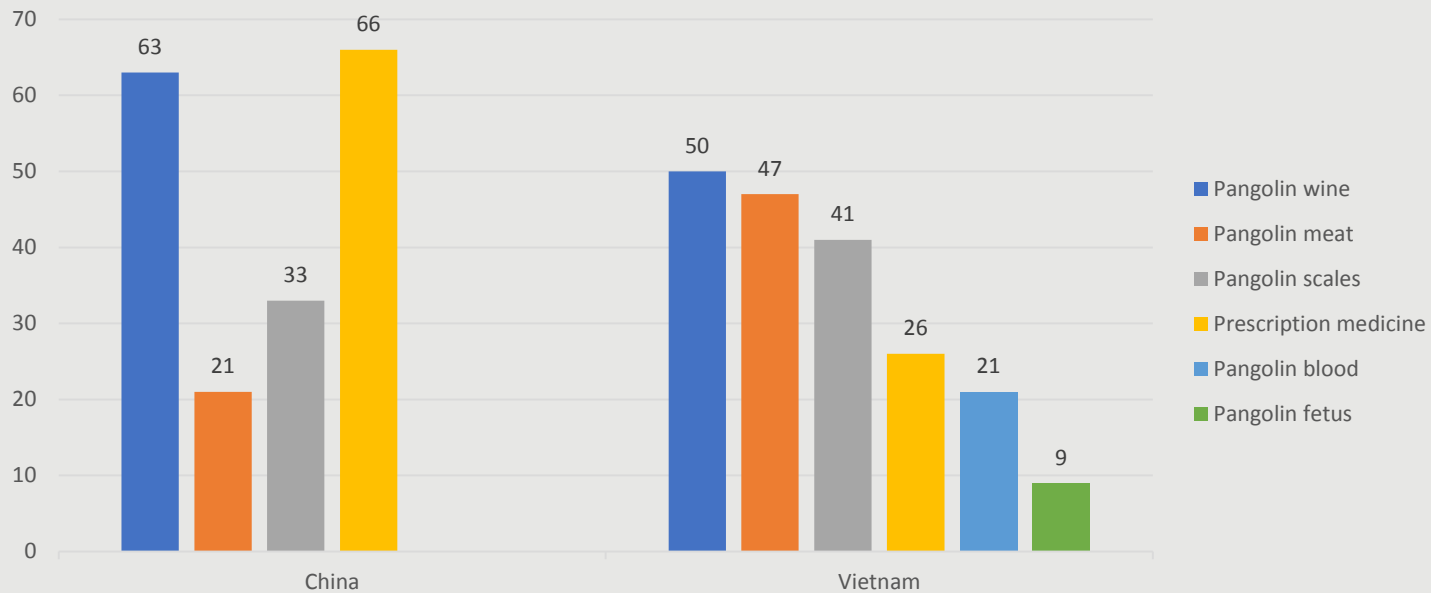
# BUY PANGOLIN

CHINA

VIETNAM

▪ 10 % bought pangolin\*

▪ 4 % bought pangolin\*



\* WildAid, 2015

# CONSUME PANGOLIN

## CHINA

- 9 % ate pangolin\*\*
- 14 % used medicine with pangolin\*\*

## VIETNAM

- 10 % ate pangolin meat\*

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\* WildAid, 2015

\*\* Horizon China for AITA Foundation, 2016

# LIKELY TO CONSUME PANGOLIN

## CHINA

- 18 % thinking of eating pangolin\*

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- 12 % will eat pangolin next year\*\*

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- 18 % will use pangolin for medication next year\*\*

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## VIETNAM

- 7 % thinking of buying pangolin\*

\* WildAid, 2015

\*\* Horizon China for AITA Foundation, 2016

# BELIEFS HELD ABOUT PANGOLIN (Consumers and Non-Consumers)

CHINA	VIETNAM
<ul style="list-style-type: none"><li>• 70 % - medicinal value e.g., scales for rheumatism, skin disorders, wound infections</li><li>• Meat is “expensive status symbol” and “exotic wild animal”</li></ul>	<ul style="list-style-type: none"><li>• 8 % - medicinal value</li><li>• Remedies - increased libido, rheumatism, asthma, detoxification</li><li>• Re. pangolin meat, “It’s a rare, wild meat”, “Has medicinal value”, “it’s expensive and shows prestige”</li></ul>

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\* WildAid, 2015

# PERCEIVED SOURCE OF PANGOLIN (Consumers and Non-Consumers)

CHINA	VIETNAM
<ul style="list-style-type: none"><li>• 50 % from poached animals*</li><li>• 63 % from farmed pangolins*</li></ul>	<ul style="list-style-type: none"><li>• 75 % from poached animals*</li><li>• 33 % from farmed pangolins.*</li></ul>
<hr/> <ul style="list-style-type: none"><li>• 55 % from wild Chinese pangolins**</li><li>• 53 % human bred**</li><li>• 43 % smuggled**</li></ul> <hr/>	

\* WildAid, 2015

\*\* Horizon China for AITA Foundation, 2016

# PERCEIVED LEGALITY (Consumers and Non-consumers)

## CHINA

- 74 % believe consuming is illegal

## VIETNAM

- 93% believe selling is illegal
  - 90% believe purchasing is illegal
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WildAid, 2015

# VIETNAM

## TRADITIONAL CHINESE MEDICINE PRACTITIONERS BELIEFS ABOUT PANGOLIN

- 86 % - scales improve breast milk quality & quantity (70 % Hanoi, 94 % HCMC)
- 70 % - scales purge toxins from the body. (46 % Hanoi, 84 % HCMC)
- Others cited:
  - Reduce body heat (30 %)
  - Reduce fever (29 %)
  - Reduce inflammation (26 %)
- Less frequently cited (scales) - improves blood circulation, treats acne, boils, measles, malaria, cancer



\* ENV, 2016

# FINDINGS – TIGER



## 2 CONSUMER RESEARCH STUDIES ON TIGER

RESEARCH STUDY	COUNTRY	LOCATION	SAMPLE SIZE
<ul style="list-style-type: none"><li>• Attitudes Toward Consumption and Conservation of Tigers in China. Report by Plos ONE, 2008</li></ul>	<ul style="list-style-type: none"><li>• China</li></ul>	<ul style="list-style-type: none"><li>• Kunming (n=254); Guilin (n=278); Harbin (n=265); Chengdu (n=269); Guangzhou (n=273); Shanghai (n=270); and Beijing (n=271)</li></ul>	<ul style="list-style-type: none"><li>• 1,880</li></ul>
<ul style="list-style-type: none"><li>• Tiger bone TCM practitioner values. ENV, 2013</li></ul>	<ul style="list-style-type: none"><li>• Vietnam</li></ul>	<ul style="list-style-type: none"><li>• Hanoi and Ho Chi Minh City</li></ul>	<ul style="list-style-type: none"><li>• 74</li></ul>

# CHINA: CONSUMED TIGER/TIGER PARTS\*

- 43 % consumed product which contain tiger part
- 38 % consumed tiger bone plasters
- 6.4 % consumed tiger bone wine

\* Gratwichke et al., 2008

## CHINA: BELIEFS HELD RE. TIGER

- Use tiger parts as a medicine and/or tonic (Tiger bone wine & bone plaster most common products) > heal bone degeneration and improve joint-related conditions, like arthritis, rheumatism
- Tiger bone wine > improves male sexual prowess
- Large number of post-menopausal women - use tiger bone for rheumatoid arthritis, osteoporosis

\* Gratwiche et al., 2008

# CHINA: PREFERRED SOURCE OF TIGER

- 71 % preferred products from wild tigers over those captive-bred
- 78% said that wild tigers were more valuable than farmed

\* Gratwichke et al., 2008

# CHINA: PROFILE OF TIGER CONSUMERS

- Older people more likely to use tiger products than younger people
- Women more likely to use tiger-bone plasters than men
- Tiger-bone wine use prevalent among wealthier consumers possibly due to its high cost

\* Gratwichke et al., 2008

# CHINA: PERCEIVED LEGALITY & CONCERN (Consumers and Non-Consumers)

- 88% of respondents knew that it was illegal to buy or sell tiger products
- 93% agreed that a ban in trade of tiger parts was necessary to conserve wild tigers
- 96% believed it was important to protect wild tigers
- 60% understood that restricting trafficking and regulating tiger trade were important actions that the government should undertake to save wild tigers

\* Gratwichke et al., 2008

# VIETNAM : TRADITIONAL CHINESE MEDICINE PRACTITIONERS BELIEFS RE. TIGER

MEDICINAL / HEALTH RELATED	HANOI	HCMC
• Bone-related pain and arthritis/disease	• 58.3%	• 100.0%
• Improves general health/vitality	• 45.8%	• 40%
• Improves male sexual ability	• 8.3%	• 46.0%

- 
- Others:
    - Strengthen bones/good for bones (14.9%)
    - Prevent disease relating to bones (13.5%)
    - Release toxins (2.7 %)
  - Less frequently cited – Polio, Depression, Osteoporosis

\* ENV, 2013

# SUMMARY



# Two key drivers underlie purchase and consumption of wildlife parts and products.

1. Affirmation of status/wealth

2. Belief in medicinal value

- For ivory, status driver linked to:
  - ❖ cultural heritage (China)
  - ❖ religion (Thailand)

Rarity gives desire; high income affords expense; owning and gifting rare, expensive, exotic products give value to one's high social standing, wealth and status, cultural heritage.

**(1) STATUS-DRIVEN CONSUMERS**

*of ivory, rhino horn, pangolin in China, Vietnam and Thailand*

***Buy wildlife for themselves***  
*(investment, home décor, jewelry)*

***Buy wildlife to present as gifts***  
*(Gifting signifies the giver's respect for the receiver and the giver's wealth and status)*

- ✓ Live in cities, generally well-educated, higher income, mostly male with some female (businessmen/wives of businessmen or government officials).
- ✓ Jewelry buyers usually female, younger and less affluent

**Natural, no side effect, belief in traditional medicine for certain illnesses and Western medicine in others**

**(2) MEDICINAL VALUE-DRIVEN CONSUMERS**

*of tiger bone, wine and plaster, rhino horn, pangolin scales and meat in China and Vietnam*

*Those using tiger products, rhino horn, pangolin scales to alleviate pain, bone ailments, rheumatism*

*Post-menopausal women using tiger bone plaster for osteoporosis/rheumatoid arthritis*

*Those using rhino horn and pangolin for loss of libido*

*Those using rhino horn for hangover, cancer*

*Lactating mothers consuming pangolin scales to enhance breast milk*

✓ Generally older, male and female and tend to be status-driven consumers as well

# A desire to buy wildlife products in the future exists, also among non-users.

***In China, Vietnam and Thailand***, 22.1 % of those surveyed said they would likely buy ivory in the future (*National Geographic 2015*).

- *Likely buyers of ivory* describe themselves as fashionable, social and religious, and would like to buy ivory for gifting.

***In Vietnam***, 60% of rhino horn users intend to purchase again, 16% of non-users intend to buy in the future (*TRAFFIC / IPSOS 2013*).

- *Likely buyers of rhino horn* want to enhance good health and continue to enjoy their wealthy lifestyle.

# Consumers are aware of illegality of purchase but perceive personal risk is low.

SPECIES	CHINA	Vietnam	Thailand
Ivory	Home décor buyers not worried about legal issues; 1/5 purchased from unlicensed sellers ( <i>China Market Research Group for IFAW 2016</i> )	Many believed most ivory sold was illegal and some governments have intentionally destroyed ivory ( <i>National Geographic 2015</i> )	From 60% to 70% of people surveyed have had some awareness about the illegal killing of wild elephants for their ivory, the smuggling of illegal ivory, or the possibility of elephant extinction; 44% claim to have heard a great deal about these issues. ( <i>National Geographic 2015</i> )
Rhino Horn	Over 70% thought buying rhino horn was difficult but most believed risk of arrest for buying was average to low ( <i>Kennaugh 2016</i> )	Those buying rhino horn were aware that they were engaging in an illegal activity ( <i>Ipsos 2013</i> )	
Pangolin	43% of users believed pangolins were illegally smuggled ( <i>Horizon China for HSI and AITA Foundation 2016</i> )	Users believed consuming was illegal ( <i>WildAid 2015</i> )	
Tiger	88% of users knew it was illegal to buy/sell tiger products ( <i>Gratwicke 2008</i> )		
Multi-species		HCMC residents surveyed do not know clearly about wild animal trade. They think that trading of any wild species is illegal ( <i>Do Thi Thanh Huyen, Bui Huu Manh et al 2011</i> )	

# Purchase is made in legal and illegal retail outlet. Online purchase is increasing.

- Ivory purchased in legal and illegal retail outlets (*Min, Shen, Wang Jin, Liu Lixia 2007*). Buyers of rhino horn, pangolin, tiger - acquire as an ingredient to TCM from multiple outlets, including public hospitals and clinics (*Kennaugh 2016*). Traditional medicine is sold all over in China, including public hospitals.
- One online Facebook survey in Vietnam (*Nguyen 2016*) over a 6-month period revealed elephants (ivory, foot stumps, whole tails, tail hairs), big cats (including tigers), and pangolin (meat and scales) advertised on Facebook accounts. Products also included pangolin scales carved into Buddha plates and sold as lucky charms, and bodies of pangolin with scales removed (sold as meat).
- Illegal wildlife trade via social media (Facebook, WeChat) is increasing in China and Vietnam and on smaller e-commerce websites (*TRAFFIC nd*). Online trade is unregulated, anonymous, open 24 hours a day, and has unlimited reach, so buyers perceive internet purchases to be low-risk.

# Peers, social networks and TCM practitioners influence consumers.

- **Status-driven users are affected by peer pressure** and say they won't buy if friends or associates disapprove (*CMR 2016*).
- **Social networks (among peers) are important for rhino horn users** (*TRAFFIC & WWF 2014, Ipsos 2013, TRAFFIC 2007*).
- **Medicinal users are influenced by TCM practitioners** (*Rapid Asia 2016, TRAFFIC & WWF 2014, Liu et al. 2016*).

# Some Research Gaps – to be answered by further research (partial list of questions)

- Where is consumption of specific products highest in the country? Which consumer segments or target audiences need to be targeted to achieve a significant reduction in consumer demand and where?
- Are there socio-psycho demographic differences among buyers, users and gift-recipients? Are gift-recipients also buyers, and what do they use wildlife products for?
- Where are specific products purchased? How much do they cost? How often are purchases made by consumers?
- What are the sources of beliefs/drivers underlying purchase and use of specific products? Are these sources markedly different for specific products? How strongly are beliefs/values held? Will alternative options or products be accepted?
- Have medicinal users themselves or someone they know actually experienced healing benefits? Are wildlife products used alone or with other traditional or modern medicines for a specific illness?
- Since the same drivers/motivations operate for specific products, is there an overlap among ivory, rhino horn, pangolin status users and rhino horn, pangolin and tiger medicinal users e.g. are ivory buyers also rhino horn buyers, etc.?
- Aside from peers and TCM practitioners, are there other influentials whom buyers and users will listen to? What would motivate buyers/consumers to stop buying and using?
- What are the effects of the China Domestic Ivory Trade Ban on purchase and use of ivory in China and outside China particularly in countries like Vietnam, Laos, Myanmar, Thailand? What are the ban's effects on purchase and use of rhino horn and pangolin products in China and outside of China?



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# THANK YOU!