



CURBING IVORY CONSUMPTION IN CHINA

Messaging Research Executive Summary

OPINION ENVIRONMENT

Prevalence of Likely Ivory Buyers High

- Roughly one-in-four (27%) General Public Influencers across Shanghai, Beijing and Guangzhou say they are highly likely to buy an ivory product in the future.

A Worrying Fact: 1/3 of Millennials are Likely Ivory Buyers

- With their ability to buy ivory only likely to increase as they age, currently 35% of young people ages 18 to 29 say they are very likely to buy ivory in the future.
- Interest in buying ivory is more common among residents in Guangzhou and Shanghai. Roughly one-third of residents in both cities say they are highly likely to consider buying an ivory product in the future.
- Notably, income does not appear to have a direct influence on likelihood to buy ivory – professed likely ivory buyers are found at both ends of the income scale (lower middle income and high income brackets.)

Messages on the Brutality & Cruelty of the Ivory Trade Reaching the Public

- The environment is saturated with messages about ivory and the ivory trade. Almost three-in-four (72%) General Public Influencers report hearing/reading/seeing something in the news about ivory in the past year.
- Messages about the brutality and cruelty of the ivory trade are reaching General Public Influencers in these three cities. About half (48%) of General Public Influencers reported hearing about something related to the consequences elephants face as a result of the ivory trade.

Awareness of Laws Governing Ivory is Low...

- A majority (60%) of General Public Influencers say they only know “a little” about China’s regulations of the ivory trade.
- Notably, likely buyers of ivory are significantly more likely to express deep knowledge of China’s regulations of the ivory trade than others.

...But There is Widespread Support for Full Government Ban of Ivory Trade

- When presented with three options for how the Chinese government should regulate ivory (a full ban, legal only, allowing all forms of ivory), roughly two-thirds (65%) support a full ban on the buying and selling of all ivory products.

...And Among Those Who Disagree With the Full Ban... Ten-Year Moratorium on the Ivory Trade is an Acceptable Compromise

- Among respondents who support the current regulation status quo (legal ivory only) or complete deregulation (allowing all forms of ivory), a solid majority (63%) agree that a ten-year moratorium on the buying and selling of ivory products is preferable to a full ban.

IDENTIFYING EFFECTIVE POSITIONING

Divorcing Ivory from Tradition and Debunking Ivory as a Wise Financial Investment Critical to Success

- Belief in ivory as a longstanding tradition and as a smart financial investment have the greatest impact on influencing likelihood to buy ivory. Tackling these two issues are critical to ensuring success.

Highlight Facts – Not Opinions – To Curb Consumption

- The results from APCO Insight’s analysis (a stepwise multiple linear regression) identifying messages that dissuade respondents from buying ivory indicates that successful messages contain clear facts and figures.

Educate On the Origins of Ivory Products

- Educating the public on the basic facts of where ivory comes from (ivory comes from elephants and elephants are killed for their tusks) has an impact on decreasing the likelihood to buy ivory.

Emphasize the Possibility of Extinction

- Elephant extinction messages should highlight the impact the ivory trade has had on the overall population of African elephants as well as the likelihood for extinction in the next 20 years.

Frame Issue in a Larger Story of Environmentalism

- Results suggest that connecting environmental protection and the prevention of elephant extinction help to dissuade General Public influencers from buying ivory.

Use the Confusion Over the Legal and Illegal Ivory Trade

- Dissuade individuals from buying ivory by emphasizing the blurry line between legal and illegal ivory and communicating on the difficulty of ensuring one is always buying legal ivory.

Encouraging Top-Down Change

- Connecting the reduction of the legal and illegal ivory trade to the reduction of government corruption in China identified as a persuasive theme.
- The tightening of government restrictions on the buying and selling of ivory products is also identified as a message that moves the needle.

Messages on the Illegality of Ivory Potentially Harmful to Efforts to Curb Consumption

- The findings from the research indicate that messages emphasizing the illegality of ivory *encourages* people to buy ivory while they still can.

We Can't Shame the Public

- Messages that talk about immorality or shame the public for buying ivory aren't effective in dissuading an individual from buying ivory.

IDENTIFYING A CAMPAIGN TARGET

The "Persuadables"

APCO's analysis identified three distinct groups:

- 1) Ivory Rejectors: (42%) who are unlikely to buy ivory
- 2) Unconvinced Likely Buyers: (12%) who are likely ivory buyers but remain unconvinced by messages
- 3) Persuadables: (40%) – exposure to messages reduces their likelihood to buy ivory. *Suggested Campaign Target*

Who are the Persuadables?

- Roughly half of Persuadables are under 40 (51%) and about two-thirds of this segment (68%) sit in the upper middle income bracket.
- Persuadables are largely found in Guangzhou (45%), but do have a presence in Shanghai (29%) and Beijing (26%).
- This segment is most likely to be active on social media. (91% of Persuadables are on WeChat, 76% are on Weibo and 73% are on Qzone.)

Who can Persuade the Persuadables?

- Scholars/Experts/Scientists, International NGOs, Chinese NGOs, Media/Journalists, friends/family stand out as the most credible spokespeople for this segment.

How do we Reach Persuadables?

- Persuadables prefer to receive information about the ivory trade from online news portals, websites, CCTV, internet advertisements, documentaries and social media platforms such as WeChat.

METHODOLOGY

APCO Insight, a global research firm that specializes in conducting messaging research for communication campaigns, conducted qualitative (focus groups in Beijing, Shanghai, Guangzhou and in-depth interviews) and quantitative research (survey) among General Public Influencers to develop and assess messaging to compel long-term behavioral and perception change. This executive memo summarizes the results from the quantitative survey among General Public Influencers – these are the informed and engaged segment of the Chinese general population known for their "opinion influencing" behavior. Minimum income requirement for participation in the survey: 5000 yuan per month. The survey was conducted using a high-quality online panel and respondents were pre-screened to ensure they met the criteria for a General Public Influencer. A total of 1,000 interviews (MOE +/- 3.1%) were completed targeting General Public Influencers in Shanghai, Beijing and Guangzhou between August 6 – 19, 2015. Data were weighted by age and gender to reflect the population parameters of China. Data also weighted to ensure equal split across the three cities.

IDENTIFIED EFFECTIVE MESSAGES

In the first phase of the project, qualitative research in the form of focus groups and in-depth interviews explored this issue and identified an array of key themes and messages for the second phase of research – the quantitative survey. The survey tested 21 messages designed to convince respondents to not buy ivory. Statistical analysis following the completion of the survey identified six messages that were most impactful in dissuading respondents from buying ivory.

Summary of Impactful Messages

It is important for our government to reduce corruption at all levels and many people give ivory products as gifts to build up or maintain relationships with government officials. The availability of legal and illegal ivory products encourages these corrupt practices to continue.

The Chinese government will gradually ban the buying and selling of all ivory products.

Elephants are killed for their ivory in the illegal ivory trade. A majority of the ivory in China is illegal and it is impossible to tell the difference between legal and illegal ivory. This makes it very difficult for the average consumer to ensure they are not violating the law by buying illegal ivory.

Saving elephants is part of protecting the environment. If the elephant is extinct in the future, our environment will be out of balance.

Ivory comes from elephants and is made from an elephant tusk. As tusks don't fall out on their own like teeth, people kill elephants to remove their tusks.

Illegal ivory is decimating the elephant population in Africa, 70 years ago there were between 3 and 5 million elephants. Today, there are only around 430,000 left. At this rate, some experts believe that elephants in Africa will be extinct in 20 years.