









Curbing Ivory Consumption

Messaging Research

Research Objectives

-  Provide an overview of the opinion landscape on the issue of ivory in China;
-  Explore current perceptions and attitudes towards ivory to uncover any gaps in knowledge;
-  Develop and assess messaging to compel long-term behavioral and perception changes;
-  Isolate the language and messages that are powerful and should be used and what should be avoided;
-  Identify the key segments of the population most receptive to key messages; and
-  Identify the best messengers and sources for outreach.

Research Methodology

RESEARCH AUDIENCE: General Public Influencers: These are the informed and engaged segment of the Chinese general population known for their “opinion influencing” behavior. Minimum income requirement: 5000 yuan per month.

Step 1: Qualitative Research

Exploratory Focus Groups (5 Focus Groups)



11 In-Depth Interviews



Step 2: Quantitative Survey (n=1000)

Computer-assisted web interviews with adults age 18+ in Beijing, Shanghai, and Guangzhou; random sample obtained from an online panel. Data weighted by age and gender to reflect population of China. Data also weighted to ensure equal split across the three cities. Data Collection: August 6 – 19, 2015

Step 3: Message Assessment



Strategic Implications: Opinion Environment

Prevalence of Ivory Buyers is high

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

Ivory Buyers: Millennials

- Likely ivory buyers are more likely to be young (under 40) and living in Shanghai or Guangzhou. 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 and high income brackets.)

Divorcing ivory from tradition or 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.

Current brutality/cruelty messages are breaking through

- The environment is saturated with messages about ivory and the ivory trade. Roughly three-in-four General Public Influencers report hearing/reading/seeing something 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.

Strategic Implications: Opinion Environment

Awareness of the laws governing the ivory trade is low

- Majority 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.

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), two-thirds support a full ban on the buying and selling of all ivory products.

Ten-year moratorium on ivory acceptable compromise for those wanting access to ivory products

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

Strategic Implications: Campaign Target

Zeroing in on a campaign target

- APCO's analysis identified three distinctive groups and classified them on how they responded to the messaging batteries.
 - Ivory Rejectors: (42%) – **Unlikely** to buy ivory
 - Persuadables: (40%) – Exposure to key messages **lowers** respondent likelihood to buy ivory
 - Unconvinced Likely Buyers: (12%) – Exposure to messages **has no impact** on likelihood to buy ivory

Suggested target for campaign: Persuadables

- Persuadables tend to be young (18-40), sit in the upper middle income bracket, have a least one child, and are largely found in Guangzhou (but do have a presence in Shanghai and Beijing). Notably, this group is most likely to be active on social media.

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?

- Roughly four-in-ten or more Persuadables prefer to receive information about the ivory trade from online news portals, websites, CCTV, internet advertisements and documentaries. Slightly fewer (37%) prefer social media platforms such as WeChat.

Strategic Implications: Identifying Effective Messages and Positioning

DO...

- Use messages containing facts and figures.
- Educate the public on the basic facts of where ivory comes from (elephants are killed for their tusks) and the future implications of the illegal ivory trade (overall elephant extinction).
- Connect environmental protection and the prevention of elephant extinction.
- Emphasize the blurry line between legal and illegal ivory and communicate on the difficulty of ensuring one is always buying legal ivory.

DON'T...

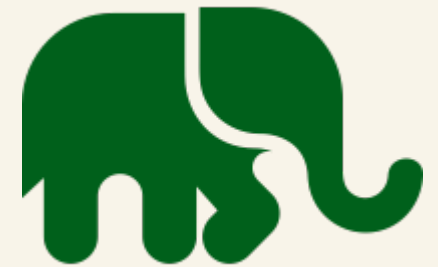
- Use messages emphasizing the illegality of ivory – this only encourages people to buy now while they still can.
- Talk about immorality and shame the public for buying ivory – this only turns them off when you need to start a conversation.

CONSIDER...

- Connecting the reduction of the legal and illegal ivory trade to the reduction of government corruption in China. Research identified this issue as an impactful message. Use this information internally to generate support for top-down engagement efforts.
- The tightening of government restrictions on the buying and selling of ivory products is also identified as a message that moves the needle. Another point to use to generate support internally for top-down engagement efforts.
- Strategies to divorce ivory from tradition and to debunk the myth of ivory as a wise financial investment.

Ivory Consumption Opinion Environment

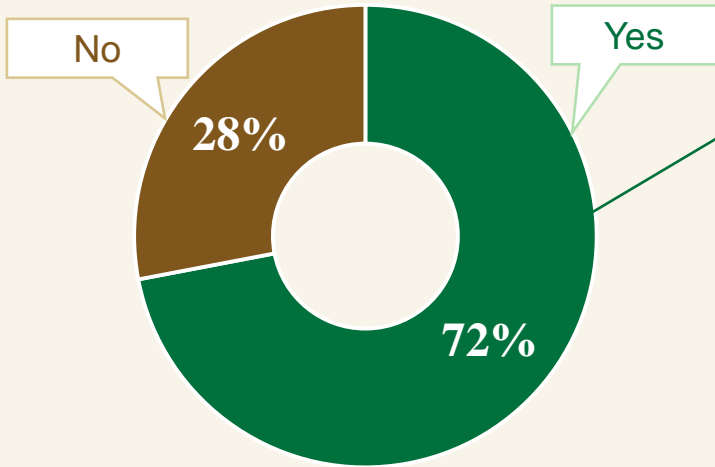
Likelihood to Purchase, Motivations to Purchase...



Awareness of Ivory Products in the News

News about ivory is saturating the air waves – brutality faced by elephants a top mention

In the past year, have you seen, read or heard anything in the news related to ivory products?



Messages emphasizing the harm the ivory trade is inflicting on the elephant population is breaking through to the public

What have you seen, read or heard?

Elephants are cruelly and brutally killed for their ivory	12%
Poaching or hunting elephants is illegal	12%
No trading, no killing/No sale, no killing (campaign slogan)	11%
Ivory trade or sale is illegal	8%
Wildlife conservation	8%
Smuggling or trafficking ivory	7%
Ivory is rare, luxurious, and highly collectible	7%
Legislation prohibiting sale or trade of ivory	7%
Ivory products (general)	6%
Seizing of ivory	6%
Government destruction of ivory	6%
Extinction of elephants (specific)	5%
Public Service Announcements (general)	4%

Q6a: In the past year, have you seen, read or heard anything in the news media related to ivory products?
 Q6b: [IF Q6A=1] Please indicate below what you have seen, read or heard.

Current Likelihood to Buy Ivory

One-in-Four General Public Influencers Likely to Buy Ivory in the Future

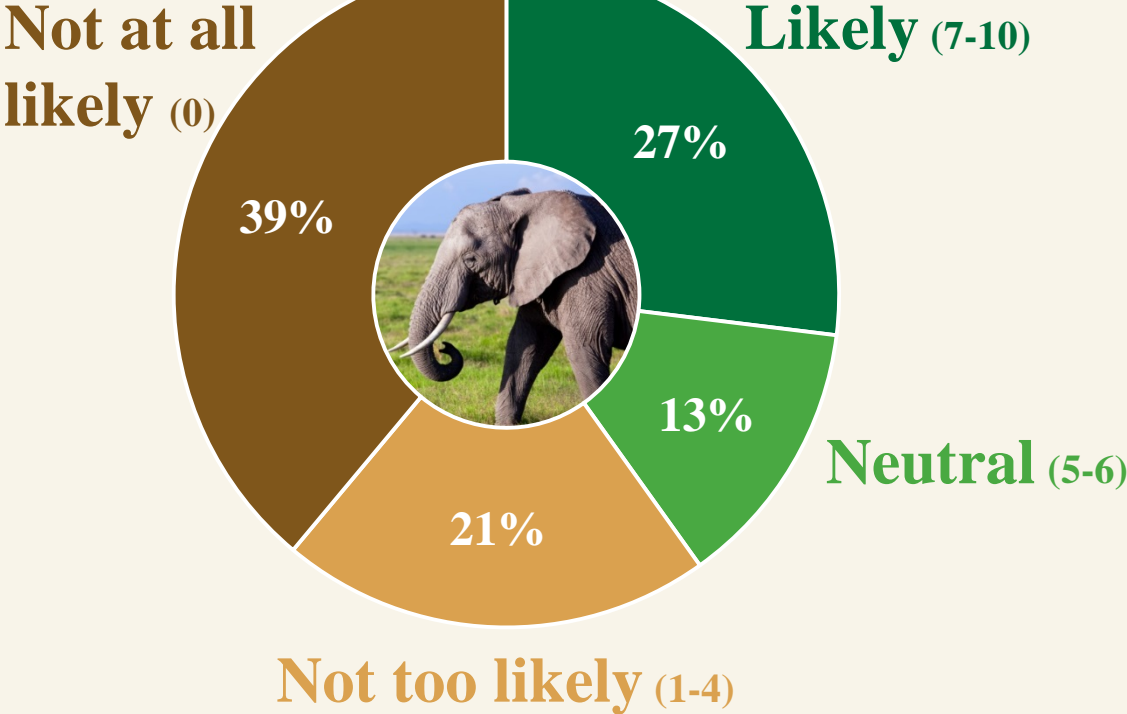
How likely are you to purchase products made from ivory?

Who are least likely to buy ivory

- Older people (55+)
- Upper middle income
- Lives in Beijing
- Supports government ban on all ivory products
- No previous ivory purchases

Who are most likely to buy ivory?

- Young people (18-29)
- High income & Low middle income
- Lives in Shanghai or Guangzhou
- Supports deregulation of ivory trade (all products should be available)
- Luxury product buyers
- Previously purchased ivory products
- Confident most recent ivory purchase was legal

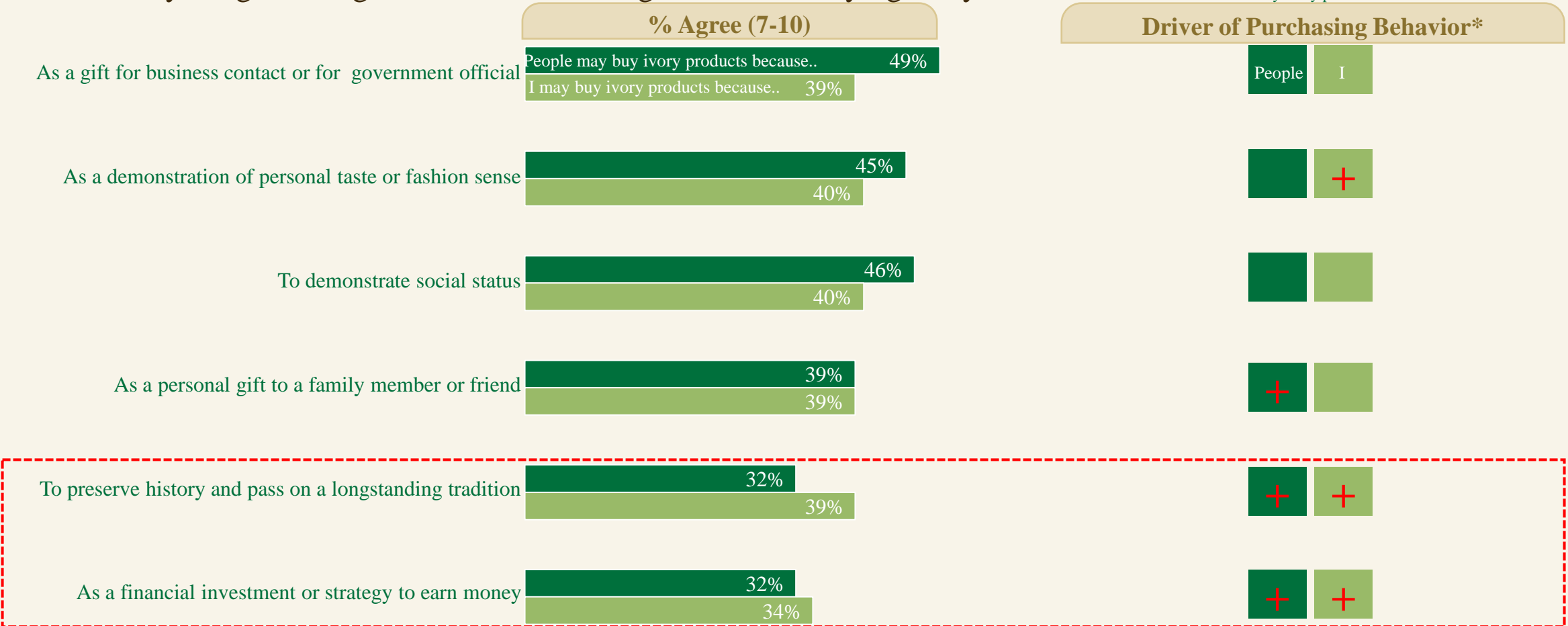


Q2_4: How likely are you to purchase any of the following products in the future? Please use a scale from zero to ten where a 0 means you are not at all likely to purchase it and a 10 means you are extremely likely to purchase it, where you intend to do it.

Purchasing Motives

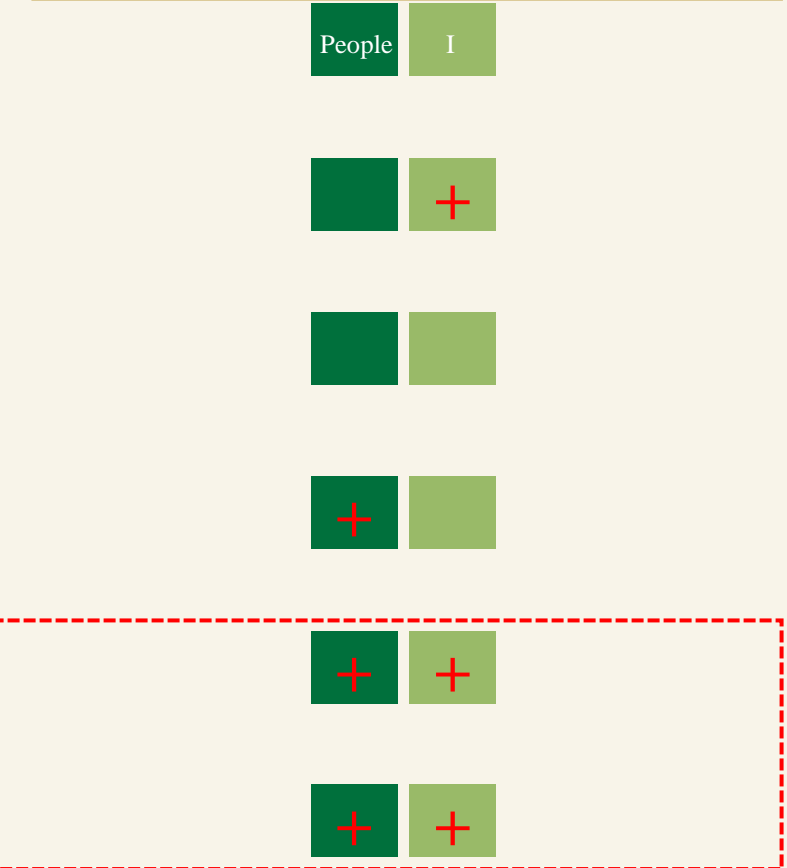
Belief of ivory as a longstanding tradition and financial investment are drivers of purchasing behavior

How much do you agree/disagree with the following reasons for buying ivory?



+ indicates a statistically significant impact on increasing likelihood to buy ivory products

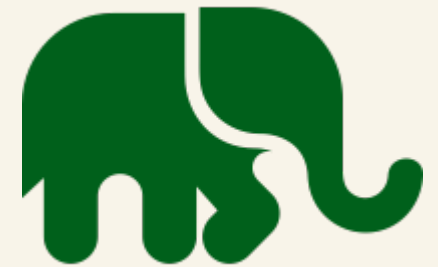
Driver of Purchasing Behavior*



* Regression analysis used to identify which reasons drive purchasing behavior.
 Dependent variable: Q2D – likelihood to buy ivory
 Independent variable: Q4A/B – reasons for buying ivory

Q4A/B: Below is a list of reasons some people/you may have for purchasing an ivory product. Please indicate how much you agree or disagree with each statement on the following scale from 0 to 10.

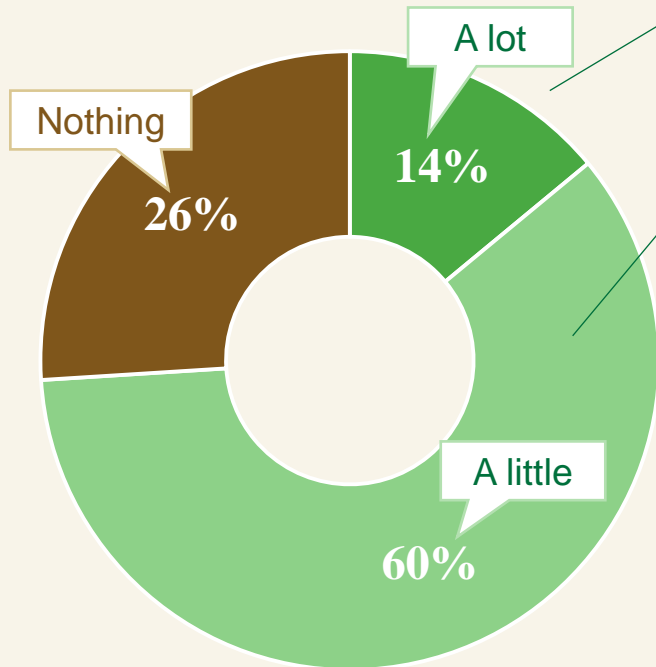
Ivory Consumption Perceptions of Regulation



Awareness of Ivory Regulation

Three-quarters profess having some knowledge of China's ivory regulations

How much, if anything, do you know about China's regulations of the ivory trade?



What do you know about China's regulations?

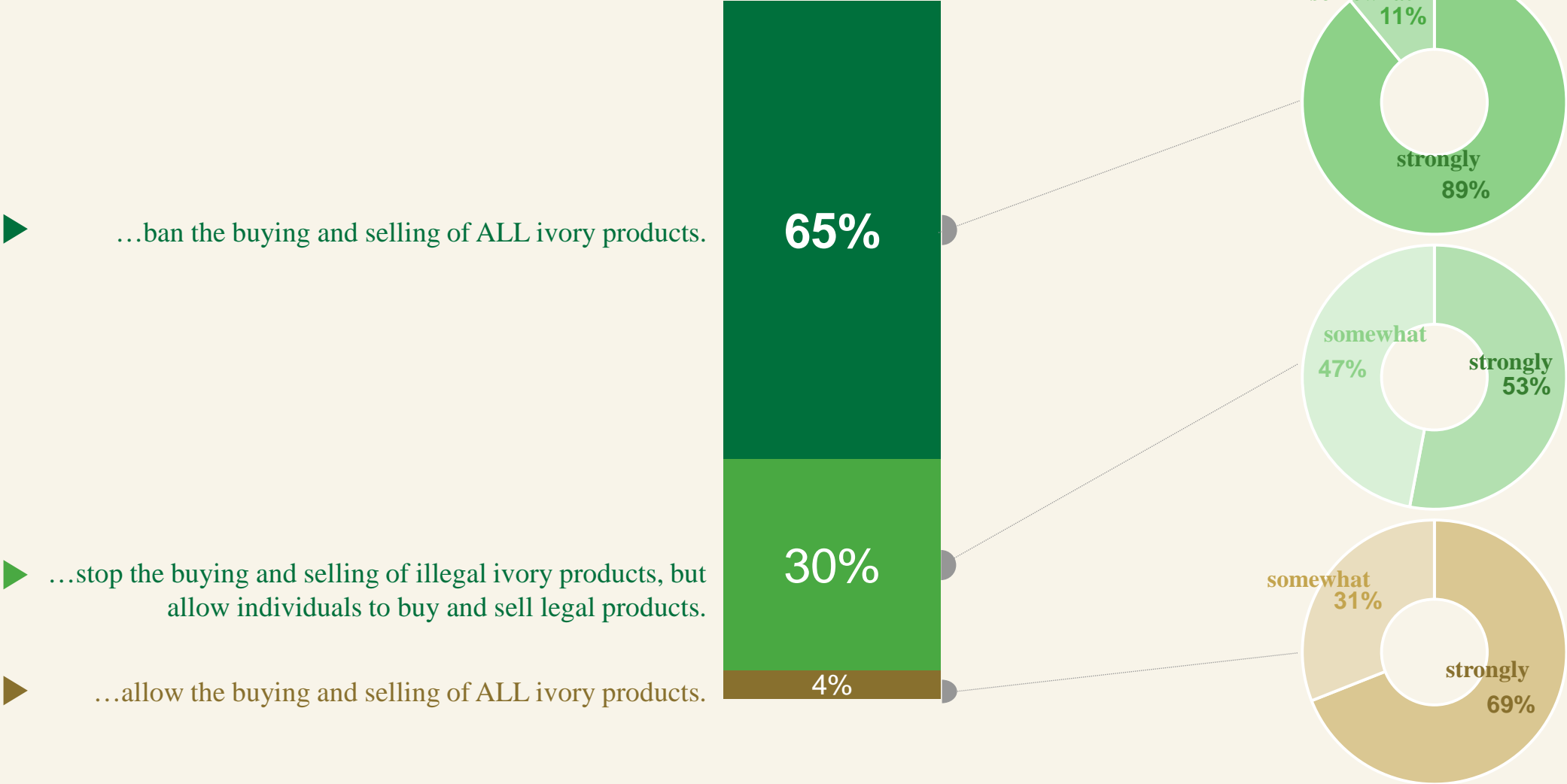


Q7a: How much, if anything, do you know about China's regulations of the ivory trade?
 Q7b: [IF Q7A=1] Please indicate below what you know about China's regulations of the ivory trade.

Chinese Government Regulation

Majority support a full ban on all ivory products

The Chinese government should... (% agree)



Q17_1: Here are some opinions about ivory products in China. Please indicate which opinion is most like your own.

Ten-Year Moratorium vs. Full Ban

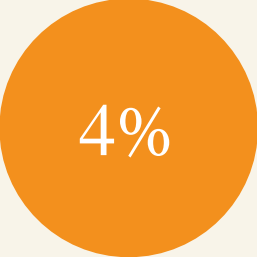
A ten-year moratorium is an acceptable compromise for those who want access to ivory

The Chinese government should... (% agree)

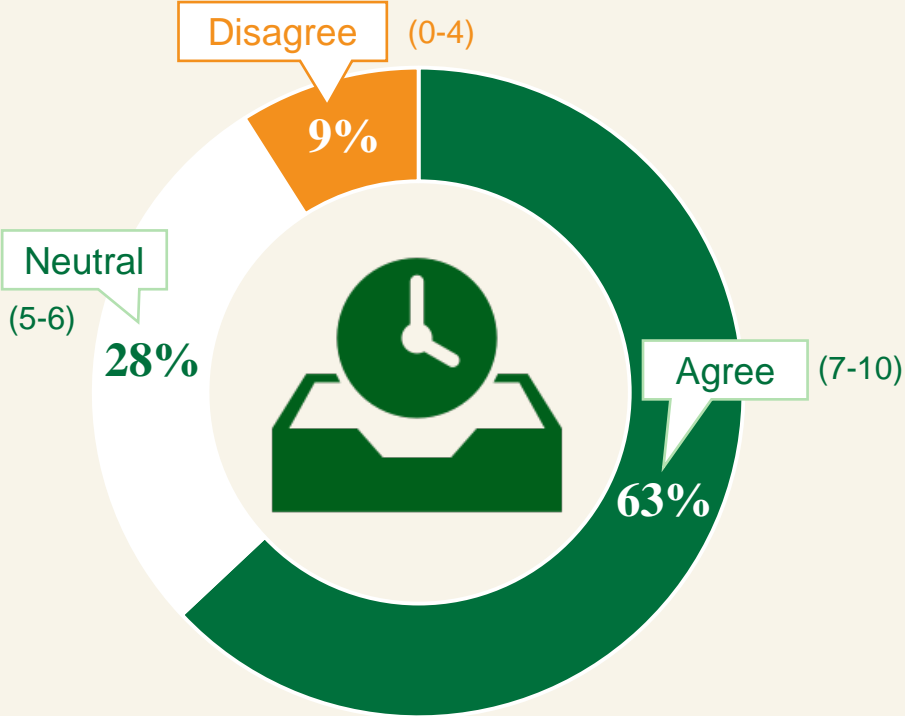
...stop the buying and selling of illegal ivory products, but allow individuals to buy and sell legal products.



...allow the buying and selling of ALL ivory products.



“Instead of a permanent ban, I would support a ten-year moratorium on the buying and selling of ivory products”



Q17_1: Here are some opinions about ivory products in China. Please indicate which opinion is most like your own.
 Q18: Instead of a permanent ban, I would support a ten-year moratorium on the buying and selling of ivory products.

Defining Key Audiences

Isolating key demographic groups



Defining Key Audience Segments

Suggested campaign target: “Persuadables”


- Analysis isolates three distinctive groups and classifies them on how they respond to message batteries.
- Not only provides more information on the positioning landscape; also serves as an aid to message targeting.



**Ivory
Rejectors**

42%

Unlikely to buy
ivory



Persuadables

40%

After exposure to
messages, become
less likely to buy
ivory

Campaign
target



**Unconvinced
Likely Buyers**

12%

After exposure to
messages, *remain
likely* to buy ivory

Key Audience Segment Demographics



Ivory Rejectors

- 55% Male, 45% Female
- Upper middle income
- No children (Notably, just as likely to be married as the other segments.)
- Largely found in Beijing
- Social media: WeChat & Weibo
- No previous purchases of ivory

Campaign target



Persuadables

- 48% Male, 52% Female
- Young people (18-40)
- Upper middle income
- Has at least one child
- Largely found in Guangzhou
- Most likely to be on social media (WeChat, Qzone, Weibo, Renren, Douban)
- 1-in-4 previously purchased an ivory product



Unconvinced Likely Buyers

- 65% Male
- Low middle to upper middle income
- Has at least one child
- Largely found in Shanghai
- Social media: majority use either WeChat or Qzone
- Luxury product buyers
- 3-in-4 previously purchased an ivory product
- Confident most recent ivory purchase was legal

Opinion Environment by Audience Segments



Ivory Rejectors

Recollection of Ivory in the news

- 71% heard about something in the media related to ivory
- 16% heard about no trading, no killing (NGO slogan)

Purchase Decisions

- 28% say the most important reason for purchasing ivory is to demonstrate social status

Government Regulation

- 11% know a lot about China's regulations
- **↑** 79% support the Chinese government banning all ivory products
- 61% support 10-year moratorium instead of full ban

Campaign target



Persuadables

Recollection of Ivory in the news

- 75% heard about something in the media related to ivory
- 11% heard about how elephants cruelty

Purchase Decisions

- 31% say the most important reason for purchasing ivory is to demonstrate personal taste or fashion sense
- Top drivers of purchase behavior: Ivory as a tradition, financial investment, personal gift and demonstration of personal/fashion taste.

Government Regulation

- 14% know a lot about China's regulations
- 62% support the Chinese government banning all ivory products
- 59% support 10-year moratorium instead of full ban



Unconvinced Likely Buyers

Recollection of Ivory in the News

- 68% heard about something in the media related to ivory
- 15% heard about an ivory product

Purchase Decisions

- 36% say the most important reason for purchasing ivory is to demonstrate social status
- Top driver of purchase behavior: gift for business contact or gov't official

Government Regulation

- **↑** 30% know a lot about China's regulations
- 65% want the Chinese government to ensure access to ivory
 - 37% support allowing legal ivory only
 - 28% support allowing both legal/illegal ivory
- **↑** 86% support 10-year moratorium instead of full ban

Message Testing

Emotional and Logic Trigger Assessment

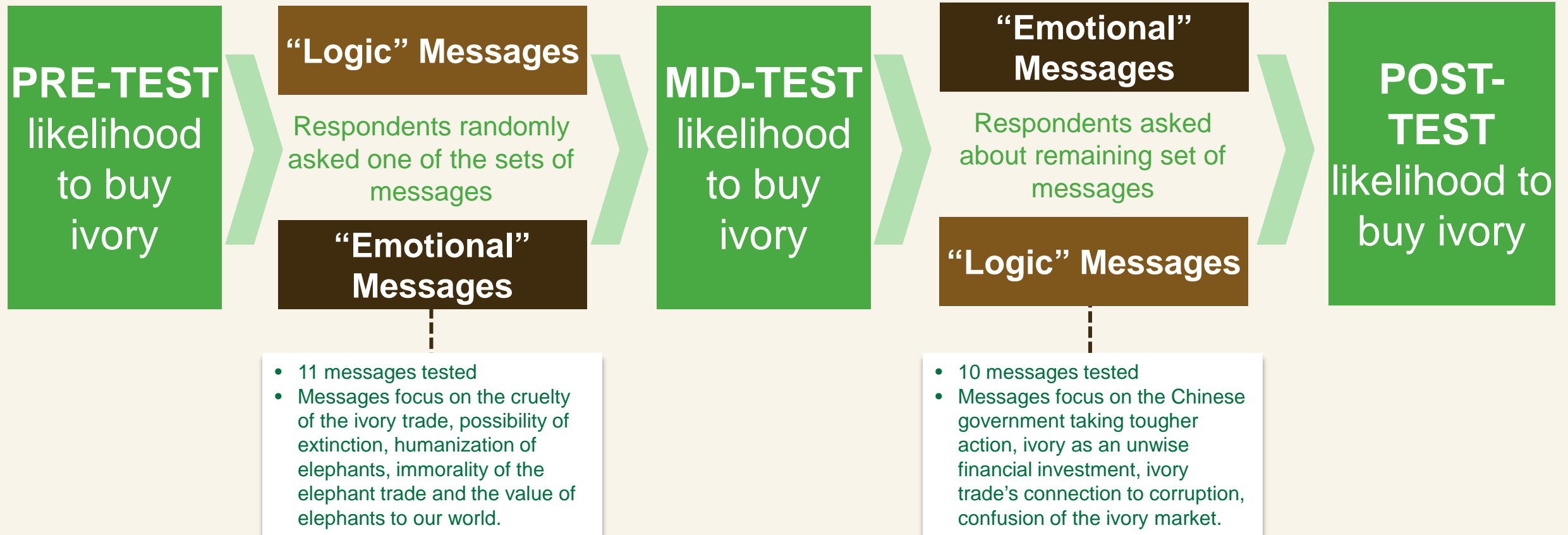


Message Testing Process:

Identifying the Messages that Move Opinion

Step One: Assess the effectiveness of the messages by measuring shifts of opinion between the pre-, mid- and post- measurements of the likelihood to buy ivory

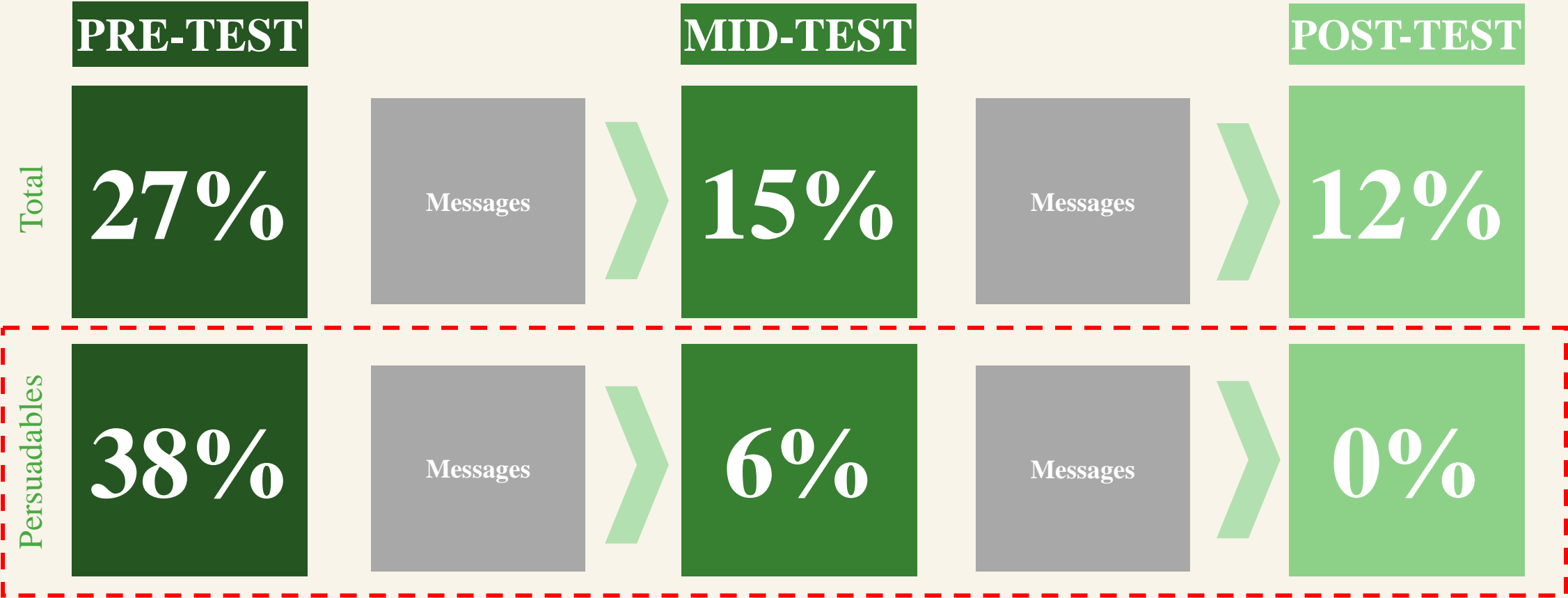
Step Two: Identify the messages that have the greatest impact on reducing likelihood to buy ivory using a regression analysis



Assessing Message Effectiveness

Messages are effective in dissuading likelihood to buy ivory products – and most impactful among Persuadables

Percentage LIKELY to buy ivory (7-10)

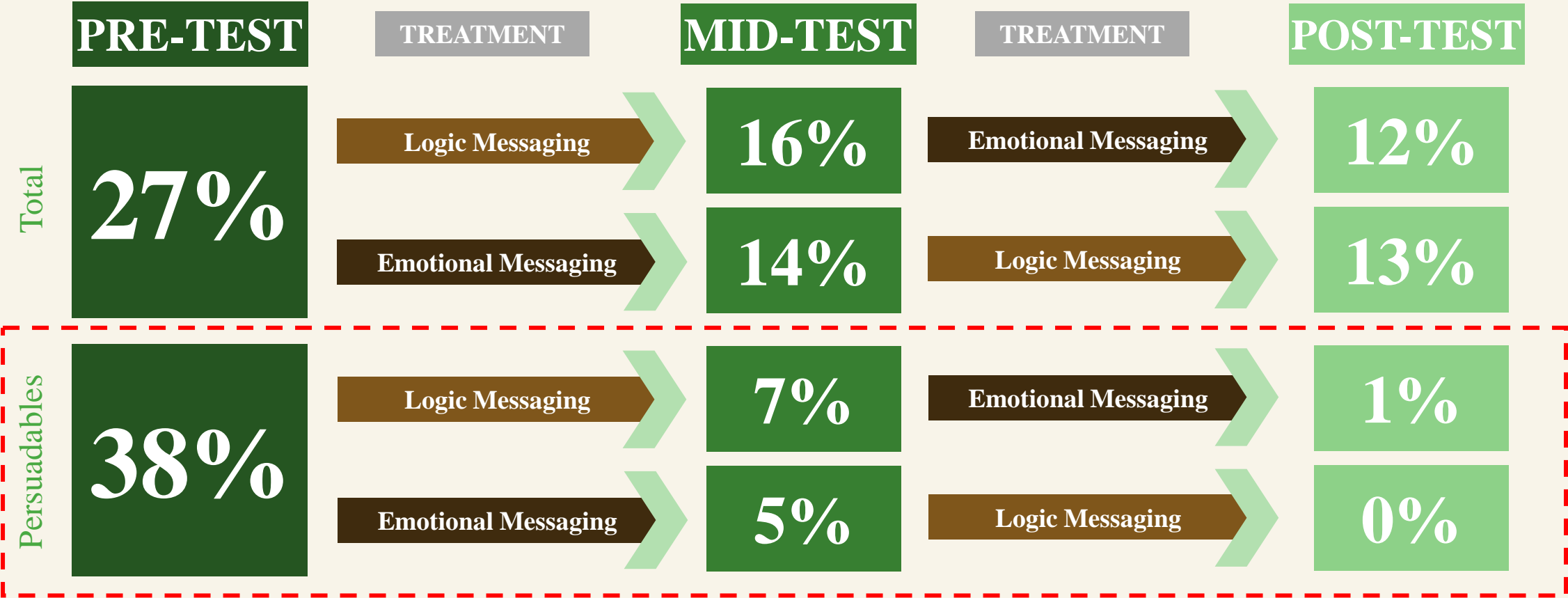


Q2: How likely are you to purchase any of the following products in the future? Please use a scale from zero to ten where a 0 means you are not at all likely to purchase it and a 10 means you are extremely likely to purchase it, where you intend to do it.
 Q10: Now that you have heard more about ivory, how likely are you to...
 Q13: Now that you have heard more about ivory, how likely are you to...

Assessing Message Effectiveness:

“Logic” and “Emotional” Messages have similar impacts on likelihood to buy ivory – even among Persuadables

Percentage LIKELY to buy ivory (7-10)



Q2: How likely are you to purchase any of the following products in the future? Please use a scale from zero to ten where a 0 means you are not at all likely to purchase it and a 10 means you are extremely likely to purchase it, where you intend to do it.

Q10: Now that you have heard more about ivory, how likely are you to...

Q13: Now that you have heard more about ivory, how likely are you to...

Identifying Key Messages



= Impact on **Decreasing** Likelihood to Buy Ivory



= Impact on **Increasing** Likelihood to Buy Ivory

✓ = Top 3 (% Convincing)

Impact of “Logic” themed messages on reducing likelihood to buy ivory

ALL RESPONDENTS

PERSUADABLES

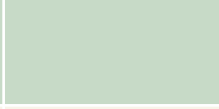
CONVINCING

IMPACT

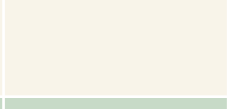
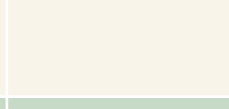
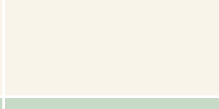
CONVINCING

IMPACT

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.



The poaching of elephants is illegal.



The Chinese government is taking tougher actions against those who buy or sell illegal ivory including mandated jail sentences for anyone caught.



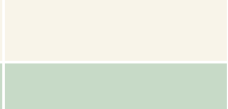
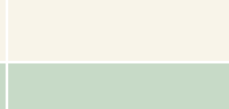
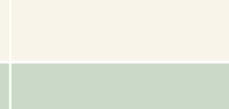
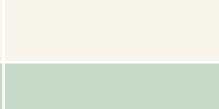
The Chinese government is taking stronger actions to restrict the ivory trade, such as the recent announcement of plans to gradually end the processing and sale of ivory.



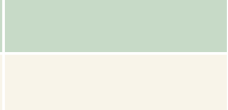
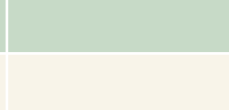
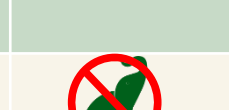
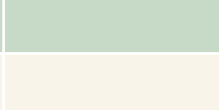
For investment purposes, elephant ivory is an unwise option as ivory products will not appreciate in value. There are smarter investments out there that will yield better results.



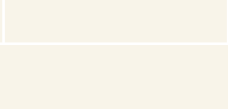
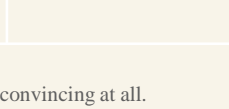
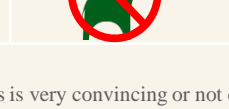
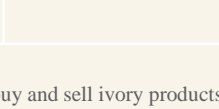
Elephants are killed for their ivory in the illegal ivory trade. A majority of the ivory in China is illegal and it is impossible to tell the difference between legal and illegal ivory. This makes it very difficult for the average consumer to ensure they are not violating the law by buying illegal ivory.



Telling the difference between illegal and legal ivory is not easy. When you give a gift of ivory, the chances are high that you are gifting illegal ivory, potentially insulting both you and the recipient.



It is illegal to purchase ivory products.




Dependent Variable: full scale movement between pre and mid measure on each issue, excluding those who do not change positions

Independent Variable: Q8: Some people are against the buying and selling of ivory products. For each, please indicate if the statement about prohibiting to buy and sell ivory products is very convincing or not convincing at all.

Message Assessment

Impact of “Emotional” themed messages on reducing likelihood to buy ivory

 = Impact on **Decreasing** Likelihood to Buy Ivory

 = Impact on **Increasing** Likelihood to Buy Ivory

✓ = Top 3 (% Convincing)

ALL RESPONDENTS

PERSUADABLES

CONVINCING

IMPACT

CONVINCING

IMPACT


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.	✓		✓	
Elephant poaching hurts not only the adult elephants who are killed, but the orphaned young calves in need of a mother. Baby elephants cannot survive if the mother is killed.	✓		✓	
The number of elephants being killed for ivory is at a historical high. About 25,000 elephants are killed per year for their ivory. At this rate, elephants may be extinct in our lifetime.	✓		✓	
Elephants are worth more alive than the products and crafts they are killed for to make.				
By choosing not to buy an ivory product, we are helping to ensure our children live in a world with elephants.				
Giving or receiving ivory products as gifts is immoral.				
The purchase of small ivory products, such as chopsticks or bracelets contribute more to the poaching of elephants than the purchase of large pieces of ivory, such as a carved tusk.				
The buying or selling of any ivory product is immoral.				
The killing of elephants for ivory is brutal and cruel. When you buy an ivory product you are an accomplice to the killing of an elephant.				

Dependent Variable: full scale movement between pre and mid measure on each issue, excluding those who do not change positions

Independent Variable: Q11: Some people are against the buying and selling of ivory products. For each, please indicate if the statement is very convincing or not convincing at all.

Messages Assessment

Summary of Impactful Messages

 = Impact on **Decreasing** Likelihood to Buy Ivory

✓ = Top 3 (% Convincing)

ALL RESPONDENTS

PERSUADABLES

CONVINCING

IMPACT

CONVINCING





IMPACT

LOGIC 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.






		✓	
			
			

EMOTIONAL MESSAGES

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.

			
			
✓		✓	




Dependent Variable: full scale movement between pre and mid measure on each issue, excluding those who do not change positions

Independent Variable: Q8: Some people are against the buying and selling of ivory products. Below is a list of statements that you might hear from these types of people. For each, please indicate if the statement about prohibiting to buy and sell ivory products is very convincing or not convincing at all.

Where they receive their information...

 = Top 5

✓ = Top 1




Prefer to receive information about ivory...	Total	Ivory Rejectors 	Persuadables 	Unconvinced Likely Buyers 
Online news portal	47% ✓	52% ✓	53% ✓	18%
Website	36%	35%	44%	18%
CCTV	36%	39%	41%	24%
Documentary	35%	39%	39%	14%
Television advertisement	32%	34%	30%	21%
Internet advertisement/Search engine ad	31%	29%	41%	17%
Social media (WeChat)	29%	29%	37%	11%
Newspaper/magazine advertisement	26%	21%	32%	18%
From a friend, family member	22%	20%	24%	24%
Mobile news apps	22%	22%	26%	12%
Online blog or weibo	20%	20%	27%	6%
Cinema advertising	13%	11%	9%	34% ✓
Billboard	10%	8%	9%	16%
Movie theater commercial	7%	4%	7%	17%
Other, please specify _____	-	-	-	-
None of the above	3%	4%	4%	1%

Q14: Which of the following methods, if any, would you prefer to receive this information about ivory products and the ivory trade? Please select all that apply.

Who they are likely to agree with...

 = Top 5

✓ = Top 1




Likely to agree with the following...	Total	Ivory Rejectors 	Persuadables 	Unconvinced Likely Buyers 
Scholar/Expert/Scientist	72% ✓	74%	67% ✓	86%
International NGO	71%	75%	65%	86%
Chinese NGO	71%	76% ✓	63%	92% ✓
Media/Journalists	69%	76% ✓	62%	88%
Your friends and family	69%	71%	66%	87%
High ranking central government official	66%	67%	62%	89%
Your Children	65%	70%	59%	84%
Athlete	64%	68%	57%	88%
Business leader	64%	64%	60%	89%
Entertainer (Actress/Actor/Singer)	63%	66%	56%	89%
Foreign governments	63%	67%	56%	84%
Wealthy trend-setters	62%	65%	56%	84%
Local government official	57%	56%	53%	87%
Ivory carving master	55%	47%	57%	83%
Well-known ivory collectors	55%	45%	59%	85%
Wealth Advisors/Financial Planners	50%	46%	46%	85%

Q15: Many things might affect whether or not we decide to buy an ivory product. Sometimes the opinions of others are important. Below is a list of some people or groups who might have an opinion on this issue.

What social media sites they are on...


 = Top 3

✓ = Top 1

Belong to the following...	Total	Ivory Rejectors 	Persuadables 	Unconvinced Likely Buyers 
WeChat	85% ✓	86% ✓	91% ✓	63%
Qzone	65%	59%	73%	66% ✓
Weibo	64%	62%	76%	39%
RenRen	31%	22%	39%	40%
Douban	19%	15%	25%	14%
LinkedIn	13%	10%	16%	15%
WhatsApp	7%	3%	10%	7%
I do not belong to any social networking sites	3%	5%	0%	0%


D19: Please indicate to which of the following social media sites you belong, if any. (Multi-response permitted, responses may not add up to 100%)

Profile of Ivory Rejectors


 <p>Ivory Rejectors</p>	<p>I'm on:</p> <ul style="list-style-type: none"> • WeChat • Weibo 	<p>My position on government regulation:</p> <ul style="list-style-type: none"> • 11% know a lot about China's regulations • 79% support the Chinese government banning all ivory products
<p>Demographics:</p> <ul style="list-style-type: none"> • 55% Male, 45% Female • Upper middle income • No children (Notably, just as likely to be married as the other segments.) • Largely found in Beijing 	<p>Messages that convince* me:</p> <ul style="list-style-type: none"> • Logic <ul style="list-style-type: none"> • Reducing availability of ivory can help to reduce government corruption • Blurry line between legal/illegal ivory – easy to buy illegal ivory and not know • Gifting of ivory is potentially an insult to the recipient • Emotional <ul style="list-style-type: none"> • 25,000 elephants die each year (extinction message - yearly impact) • Elephants will be extinct in 20 years (extinction message – overall impact) • Baby elephants cannot survive without their mothers 	
<p>Sources of information:</p> <ul style="list-style-type: none"> • Online news portal • Documentaries • CCTV • Websites • Television advertisements 	<p>Top influencers:</p> <ul style="list-style-type: none"> • Media/Journalists • Chinese NGO • International NGO • Scholar/Expert/Scientist • Your friends and family 	<p>What I've heard in the past year about ivory:</p> <ul style="list-style-type: none"> • No trading, no killing/No sale, no killing (campaign slogan) • Elephants are cruelly and brutally killed for their ivory • Poaching or hunting elephants is illegal • Government destruction of ivory • Ivory trade or sale is illegal

*Messages are the top three messages based upon the percentage who say it is convincing (7-10). No messages were identified as impactful.

Profile of Persuadables

 <p>Persuadables</p>	<p>I'm on:</p> <ul style="list-style-type: none"> • WeChat • Weibo • Qzone • Renren • Douban 	<p>My position on government regulation:</p> <ul style="list-style-type: none"> • 14% know a lot about China's regulations • 62% support the Chinese government banning all ivory products 	
<p>Demographics:</p> <ul style="list-style-type: none"> • 48% Male, 52% Female • Young people (18-40) • Upper middle income • Has at least one child • Largely found in Guangzhou 		<p>Messages that IMPACT me:</p> <ul style="list-style-type: none"> • Logic <ul style="list-style-type: none"> • Reducing availability of ivory can help to reduce government corruption • Emotional <ul style="list-style-type: none"> • Prevention of elephant extinction goes hand-in-hand with environmental conservation. • Origins of ivory (ivory comes from elephants/elephants are killed for their tusks) 	
<p>Sources of information:</p> <ul style="list-style-type: none"> • Online news portal • Websites • Internet advertisement/Search engine ad • CCTV • Documentaries 	<p>Top influencers:</p> <ul style="list-style-type: none"> • Scholar/Expert/Scientist • Friends and family • International NGOs • Chinese NGOs • Media/Journalists 	<p>What I've heard in the past year about ivory:</p> <ul style="list-style-type: none"> • Elephants are cruelly and brutally killed for their ivory • Ivory is rare, luxurious, and highly collectible • Smuggling or trafficking of ivory • Legislation prohibiting sale or trade of ivory • Wildlife conservation 	

Profile of Unconvinced Likely Buyers

 <p>Unconvinced Likely Buyers</p>	<p>I'm on:</p> <ul style="list-style-type: none"> • Qzone • WeChat 	<p>My position on government regulation:</p> <ul style="list-style-type: none"> • 30% know a lot about China's regulations • 65% want the Chinese government to ensure access to ivory <ul style="list-style-type: none"> • 37% support allowing legal ivory only • 28% support allowing both legal/illegal ivory • 86% support 10-year moratorium instead of full ban
<p>Demographics:</p> <ul style="list-style-type: none"> • 65% Male • Middle income (low side) • Has at least one child • Largely found in Shanghai 		<p>Messages that impact me:</p> <ul style="list-style-type: none"> • Emotional <ul style="list-style-type: none"> • Elephants will be extinct in 20 years (extinction message – overall impact)
<p>Sources of information:</p> <ul style="list-style-type: none"> • Cinema advertising • Friends, family members • CCTV • Television advertisements • Online news portal • Website • Newspaper/magazine 	<p>Top influencers:</p> <ul style="list-style-type: none"> • Chinese NGOs • Entertainers • High ranking central government officials • Business leaders • Media/Journalists • Athletes 	<p>What I've heard in the past year about ivory:</p> <ul style="list-style-type: none"> • Ivory products (general) • Ivory is rare, luxurious, and highly collectible • Ivory in the news (general) • Poaching or hunting elephants is illegal • Elephants are endangered and going extinct

Appendix



Message Assessment

Testing impact of “Logic” themed messages



= Impact on **Decreasing** Likelihood to Buy Ivory



= Impact on **Increasing** Likelihood to Buy Ivory

	<u>ALL RESPONDENTS</u>			<u>PERSUADABLES</u>		
	CONVINCING	IMPACT	BETA	CONVINCING	IMPACT	BETA
The poaching of elephants is illegal.	85%			87%		
The Chinese government is taking tougher actions against those who buy or sell illegal ivory including mandated jail sentences for anyone caught.	85%			86%		
The Chinese government is taking stronger actions to restrict the ivory trade, such as the recent announcement of plans to gradually end the processing and sale of ivory.	82%			80%		
The Chinese government will gradually ban the buying and selling of all ivory products.	79%		-0.115	76%		
China has become the largest illegal ivory consumer market in the world and participation in the ivory trade hurts China’s image abroad. Bringing an end to the illegal ivory trade would help China build a good international image.	78%			77%		
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.	77%		-0.206	80%		-0.234
It is illegal to purchase ivory products.	76%		0.173	72%		
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.	74%		-0.113	76%		
Telling the difference between illegal and legal ivory is not easy. When you give a gift of ivory, the chances are high that you are gifting illegal ivory, potentially insulting both you and the recipient.	70%			73%		
For investment purposes, elephant ivory is an unwise option as ivory products will not appreciate in value. There are smarter investments out there that will yield better results.	67%			67%		

Dependent Variable: full scale movement between pre and mid measure on each issue, excluding those who do not change positions

Independent Variable: Q8: Some people are against the buying and selling of ivory products. Below is a list of statements that you might hear from these types of people. For each, please indicate if the statement about prohibiting to buy and sell ivory products is very convincing or not convincing at all.

Message Assessment

Testing impact of “Emotional” themed messages



= Impact on **Decreasing** Likelihood to Buy Ivory



= Impact on **Increasing** Likelihood to Buy Ivory

ALL RESPONDENTS

PERSUADABLES

CONVINCING IMPACT BETA CONVINCING IMPACT BETA

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.	88%		-0.129	89%		
Elephant poaching hurts not only the adult elephants who are killed, but the orphaned young calves in need of a mother. Baby elephants cannot survive if the mother is killed.	87%			86%		
The number of elephants being killed for ivory is at a historical high. About 25,000 elephants are killed per year for their ivory. At this rate, elephants may be extinct in our lifetime.	87%			85%		
Saving elephants is part of protecting the environment. If the elephant is extinct in the future, our environment will be out of balance.	85%		-0.181	84%		-0.185
The killing of elephants for ivory is brutal and cruel. When you buy an ivory product you are an accomplice to the killing of an elephant.	82%		0.178	78%		0.304
Elephants are worth more alive than the products and crafts they are killed for to make.	80%			77%		
By choosing not to buy an ivory product, we are helping to ensure our children live in a world with elephants.	79%			78%		
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.	77%		-0.158	76%		-0.206
The buying or selling of any ivory product is immoral.	74%		0.112	69%		
Giving or receiving ivory products as gifts is immoral.	73%			69%		
The purchase of small ivory products, such as chopsticks or bracelets contribute more to the poaching of elephants than the purchase of large pieces of ivory, such as a carved tusk.	72%			68%		

Dependent Variable: full scale movement between pre and mid measure on each issue, excluding those who do not change positions

Independent Variable: Q11: Some people are against the buying and selling of ivory products. For each, please indicate if the statement is very convincing or not convincing at all.

Demographics: Purchase of Ivory Products

Have you ever purchased products made from ivory?

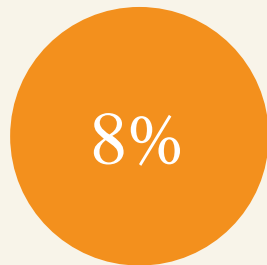
% Yes



Among those who haven't purchased ivory.....

Do you have products made from ivory in your household?

% Yes



D11. Please indicate the type of ivory product or products that you have previously purchased or received as a gift, if any? (n=289)

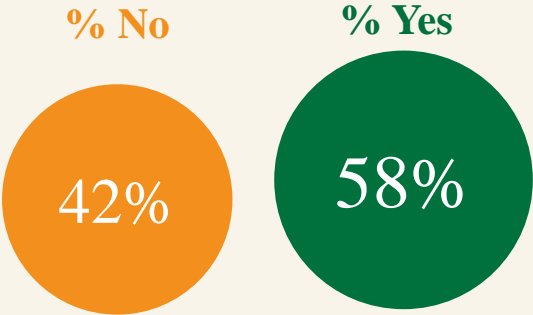
Chopsticks	39%
Jewelry	38%
Small sculpture	16%
Mobile phone case/charms	12%
Billiard balls	10%
Large sculpture	10%
Ivory powder for medicine	10%
Chess set	9%
Snuff bottle	9%
Letter opener	7%
Piano keys	7%
Raw ivory/unaltered tusk	5%

Demographics: Purchase of Ivory Products

Thinking about your most recent ivory purchase....

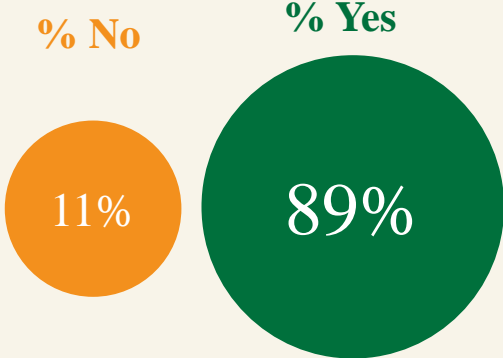
Among those who have purchased ivory/own ivory.....

D12....did the product include a certificate of authenticity? (n=289)



Among those who received a certificate of authenticity.....

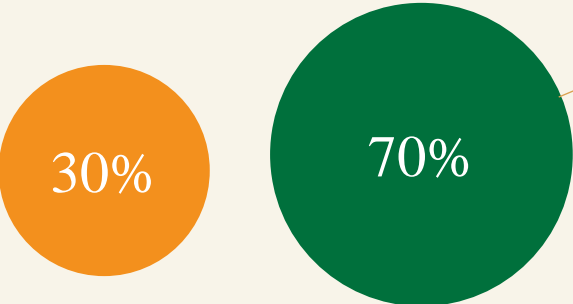
D13....were you permitted to take the certificate with you? (n=142)



Among those who have purchased ivory.....

D15...how confident are you that the item you purchased was legal? (n=206)

% Not confident % Confident



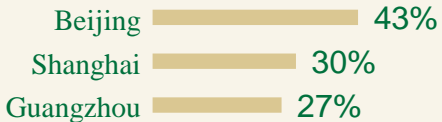
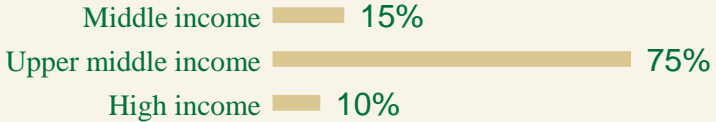
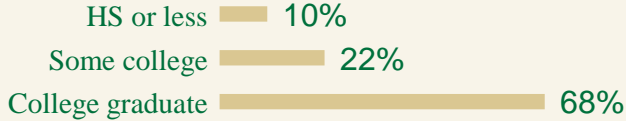
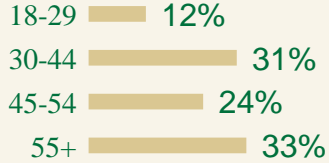
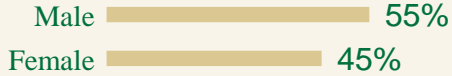
% Confident purchase was legal

		
<u>Ivory Rejecters</u>	<u>Persuadables</u>	<u>Unconvinced Likely Buyers</u>
n/a	52%	93%

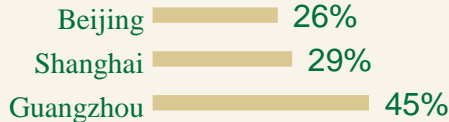
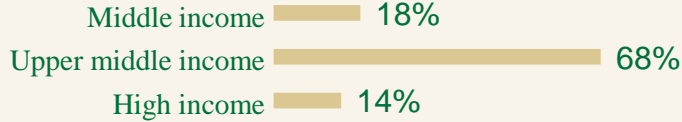
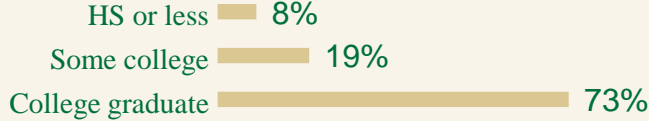
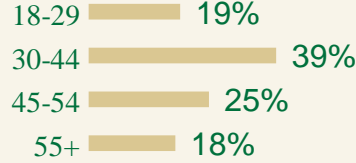
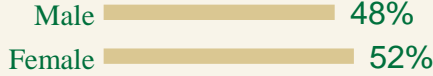
Segment dashboard/breakdown of key opinions



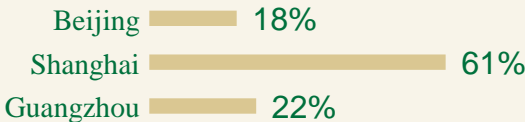
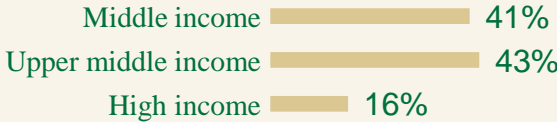
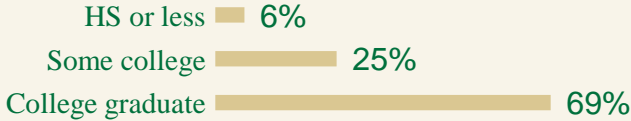
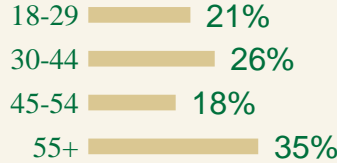
Ivory Rejectors



Persuadables



Unconvinced Likely Buyers



Gender

Age

Education

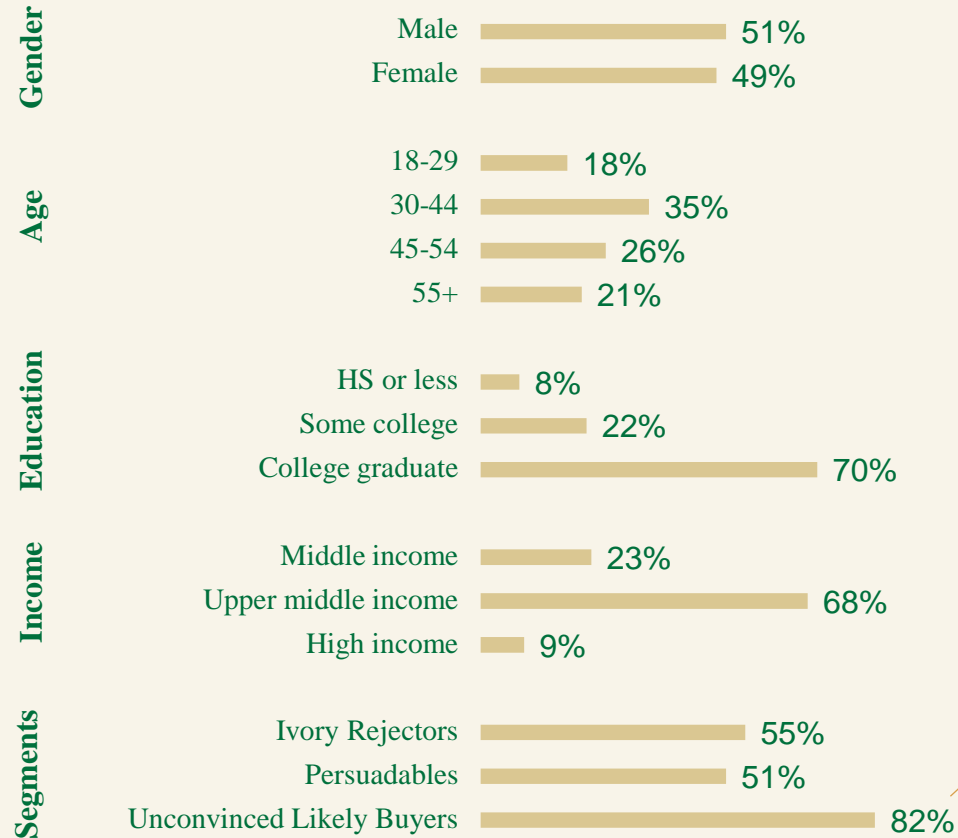
Income

Region

Demographics: Ivory is too expensive for me

55% Ivory is too expensive for me (7-10 Agree)

Demographics: % Agree (7-10)



The perceived high cost of ivory is not a deterrent for those who are likely to buy.

D16: Please indicate if you agree or disagree with the following statement: Ivory is too expensive for people like me.

APCO

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