QUANTITATIVE AND QUALITATIVE STUDY OF CONSUMER DEMAND FOR WILDLIFE PRODUCTS IN THAILAND

USAID WILDLIFE ASIA
JUNE 5, 2018
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BANGKOK, THAILAND
OUTLINE

• STUDY OBJECTIVES & APPROACH
• GENERAL POPULATION – QUANTITATIVE
  – USAGE & OWNERSHIP (INCIDENCE)
• WILDLIFE PRODUCT USERS/CONSUMERS – QUANT & QUAL
  – ELEPHANT IVORY
  – TIGER
• ATTITUDE & COMMUNICATIONS (CONSUMERS)
• SUMMARY
OBJECTIVES

1. To identify user profiles and motivations associated with ivory and tiger products
2. To determine usage incidence and future purchase tendency
3. To obtain baseline data to serve as tracking indication for demand reduction initiatives
4. To evaluate campaign and communications exposure
APPROVALS

This study is the first consumer demand study with ethical approval from Chulalongkorn University (local approval) and FHI 360 (international approval).

USAID Wildlife Asia guided development and approved the following:

- Study protocol and Informed Consent forms and procedures
- Study instruments (survey questionnaire, FGD and IDI guides)
- Translations
- Data analysis plan
- Data tables
- Research Reports

USAID Wildlife Asia monitored data collection (surveys, FGDs, IDIs).
## Glossary of Terms

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>B2B</td>
<td>Bottom two boxes</td>
</tr>
<tr>
<td>CAPI</td>
<td>Computer-assisted personal interview</td>
</tr>
<tr>
<td>F2F</td>
<td>Face to face</td>
</tr>
<tr>
<td>FGD</td>
<td>Focus group discussion</td>
</tr>
<tr>
<td>IDI</td>
<td>In-depth interview</td>
</tr>
<tr>
<td>P3Y</td>
<td>Past three years</td>
</tr>
<tr>
<td>QL</td>
<td>Qualitative</td>
</tr>
<tr>
<td>QT</td>
<td>Quantitative</td>
</tr>
<tr>
<td>SES</td>
<td>Socioeconomic status</td>
</tr>
<tr>
<td>T2B</td>
<td>Top two boxes</td>
</tr>
<tr>
<td>UPC</td>
<td>Upcountry (any other provinces apart from Greater Bangkok)</td>
</tr>
</tbody>
</table>
# METHODOLOGY - QUALITATIVE

<table>
<thead>
<tr>
<th></th>
<th>IVORY</th>
<th>TIGER</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Methodology</strong></td>
<td>Focus group Discussions (FGDs)</td>
<td>In-Depth Interviews (IDIs)</td>
</tr>
<tr>
<td><strong>Coverage</strong></td>
<td>Bangkok, Chiang Mai, Surin</td>
<td>Bangkok, Chiang Mai, Surin</td>
</tr>
<tr>
<td><strong>Respondent</strong></td>
<td>• 50% male and 50% female aged 25-45 years old</td>
<td>• Mix of men &amp; women aged 25-45 years old</td>
</tr>
<tr>
<td></td>
<td>• Mix income level ABC</td>
<td>• Mix of income levels within SEC ABC</td>
</tr>
<tr>
<td></td>
<td>• In Chiang Mai and Bangkok, there were 1-2 online purchasers in each purchaser group.</td>
<td>• Potential or current purchasers of products made of tiger parts</td>
</tr>
<tr>
<td></td>
<td>• Purchased ivory in past 3 years (5 FGDs)</td>
<td>• Must be purchase decision makers</td>
</tr>
<tr>
<td></td>
<td>• Been gifted with ivory products in past 3 years (1 FGD)</td>
<td>• Believers of tiger’s spiritual; benefits (n=6)</td>
</tr>
<tr>
<td></td>
<td>• Believers of tiger’s medicinal benefits (n=3)</td>
<td>• Believers of tiger’s medicinal benefits (n=3)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Online (potential) purchasers (n=5)</td>
</tr>
</tbody>
</table>
**METHODOLOGY - QUANTITATIVE**

<table>
<thead>
<tr>
<th>MAIN SAMPLE</th>
<th>BOOSTER OF CONSUMERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>(GENERAL POPULATION)</td>
<td>(n=550)</td>
</tr>
<tr>
<td>(n=1,000)</td>
<td></td>
</tr>
</tbody>
</table>

**Methodology**
- Online – mobile panel
- Self-completed CAPI, Referrals, F2F

**Coverage**
- Nationwide (Greater Bangkok + 12 Urban UPC)*
- Nationwide (Greater Bangkok + 12 Urban UPC)*

**Respondent classification**
- 18-64 years old
- SES ABC
- Purchased ivory in past 3 years
- Been gifted with ivory products in past 3 years
- Would like to buy ivory products
- Purchased/used tiger parts and products in past 3 years

**Collection period**
- 15 Jan – 11 Feb 2018
- 19 Jan – 18 Feb 2018

* Provinces covered:

**Greater Bangkok**
- Bangkok
- Samut Prakarn
- Nontaburi
- Pathumthani

**Central**
- Rayong
- Samutsakorn
- Chonburi

**North**
- Chiang Mai
- Phitsanuloke
- Nakorn Sawan

**Northeast**
- Khon Kaen
- Nakorn Ratchasima
- Ubon Ratchathani

**South**
- Suratthani
- Songkhla
- Nakorn Sri Thammarat

Remark: P3Y was used as the criteria because of its balance between the limitation due to low incidence for a shorter timeframe and less precise recall for a longer one.
ANALYSIS

QUALITATIVE

Qualitative

QUANTITATIVE

QT General Population

QT Boosters Consumers
General Population – Quantitative (QT)
PRODUCT USAGE AND OWNERSHIP

The incidence of use of ivory products and tiger products among the Thai population is 2% and 1% respectively.

2% Own or use ivory products

1% Own or use tiger products

B1. Do you own or use any ivory products?
C1. Do you own or use any tiger products?

Base: Main Sample – All respondents n=1,000
IVORY PRODUCTS - PURCHASE TENDENCIES

Only 10 percent of Thais perceive the purchase/trade in ivory products as acceptable while 22% are neutral. Three percent say they will probably or definitely buy ivory in the future. Key barriers to future purchase are animal welfare followed by the threat of penalties.

Acceptability
All respondents n=1,000

<table>
<thead>
<tr>
<th>T2B%</th>
<th>B2B%</th>
<th>Acceptability</th>
</tr>
</thead>
</table>
| 10   | 68   | 5) Extremely acceptable 3  B2B% 22  4) Quite acceptable 19  33 Neutral 49  2) Quite unacceptable 7  1) Extremely unacceptable 0

Purchase Intention
All respondents n=1,000

<table>
<thead>
<tr>
<th>T2B%</th>
<th>B2B%</th>
<th>Purchase Intention</th>
</tr>
</thead>
</table>
| 3    | 90   | 5) Definitely will buy 81  B2B% 9  4) Will probably buy 17  3) May or may not buy 9  2) Will probably not buy 7  1) Definitely won't buy 0

D1. Personally, do you think buying the following products is acceptable among your friends and family or not?
D2. How likely would you be to buy the following products in the future?
**TIGER PRODUCTS - PURCHASE TENDINGENCIES**

Only 7% think that purchasing tiger products is acceptable (T2B 7%) while 22% are neutral. Three percent say they will probably or definitely buy tiger products in the future. Key barriers to future purchase are tiger extinction, cruelty to tigers, and the law/penalties.

<table>
<thead>
<tr>
<th>Acceptability</th>
<th>All respondents n=1,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>T2B% 7</td>
<td>B2B% 71</td>
</tr>
</tbody>
</table>

- 5) Extremely acceptable
- 4) Quote acceptable
- 3) Neutral
- 2) Quite unacceptable
- 1) Extremely unacceptable

<table>
<thead>
<tr>
<th>Purchasing Intention</th>
<th>All respondents n=1,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>T2B% 3</td>
<td>B2B% 90</td>
</tr>
</tbody>
</table>

- 5) Definitely will buy
- 4) Will probably buy
- 3) May or may not buy
- 2) Will probably not buy
- 1) Definitely won't buy

D1. Personally, do you think buying the following products is acceptable among your friends and family or not?
D2. How likely would you be to buy the following products in the future?
PURCHASE TENDENCIES – Age Breakdown

While the incidence of buying/owning ivory or tiger parts is relatively low among the youngsters, there is evidence that some hold an open mind towards the trade. Must ensure that new generation don’t turn in to the future buyer/traders.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>5) Definitely will buy</th>
<th>4) Will probably buy</th>
<th>3) May or may not buy</th>
<th>2) Will probably not buy</th>
<th>1) Definitely won’t buy</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>90</td>
<td>86</td>
<td>90</td>
<td>94E</td>
<td>91</td>
</tr>
<tr>
<td>25-29</td>
<td>78</td>
<td>78</td>
<td>82</td>
<td>87</td>
<td>85</td>
</tr>
<tr>
<td>30-39</td>
<td>82</td>
<td>82</td>
<td>82</td>
<td>87</td>
<td>85</td>
</tr>
<tr>
<td>40-49</td>
<td>91</td>
<td>91</td>
<td>91</td>
<td>91</td>
<td>91</td>
</tr>
<tr>
<td>50-64</td>
<td>85</td>
<td>85</td>
<td>85</td>
<td>85</td>
<td>85</td>
</tr>
</tbody>
</table>

Base: 1000

D2. How likely would you be to buy the following products in the future?
WILDLIFE PRODUCT USERS/CONSUMERS
**USER DEFINITIONS**

<table>
<thead>
<tr>
<th>User Group</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>P3Y Ivory Purchasers:</td>
<td>Those who have purchased ivory products within the past 3 years</td>
</tr>
<tr>
<td>P3Y Ivory Receivers:</td>
<td>Those who have received ivory products within the past 3 years</td>
</tr>
<tr>
<td>Ivory Purchase Intenders:</td>
<td>Those who claimed that they probably/definitely would buy ivory products</td>
</tr>
<tr>
<td>Tiger Purchasers/Users:</td>
<td>Those who have purchased tiger products within the past 3 years or use/own tiger products</td>
</tr>
<tr>
<td>Non-Users</td>
<td>Those who are not in any of the above</td>
</tr>
</tbody>
</table>
### USER PROFILES

<table>
<thead>
<tr>
<th>Commonalities</th>
<th>Ivory Purchasers</th>
<th>Ivory Receivers</th>
<th>Ivory Purchase Intenders</th>
<th>Tiger Purchaser/users</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AGE</strong></td>
<td>30-49 yo.</td>
<td>Married with kids</td>
<td>SES AB</td>
<td>Merchants Business Owners</td>
</tr>
<tr>
<td><strong>Differentiators</strong></td>
<td>Female</td>
<td>Female</td>
<td>Female</td>
<td>Male</td>
</tr>
</tbody>
</table>
IVORY PRODUCT CONSUMPTION
IVORY PRODUCTS (CONSUMERS):
Common Themes from the FGDs and Findings from Consumers (Booster)
ELEPHANTS ARE SPECIAL

• **Elevated** above other animals
  – Referred to as a third person (‘Kow’ or he/she)
• Associated with the **Monarchy**
  – Ridden by Thai kings in war
  – Present in royal ceremonies
• **Symbol of Thailand**
  – Was on Siam flag
IVORY-RELATED BELIEFS

• Ivory is believed to
  – provide **protection**
  – enhance one’s power and **popularity**

• Source of beliefs
  – Passed down in the **family**
  – **Internet search** which is triggered by curiosity
  – Online **discussions and articles**
**IVORY PURCHASERS – PRODUCTS**

Accessories/jewelry is the most popular format to own, followed by amulets and spiritual items. Price ranges are wide, especially for decorative items.

<table>
<thead>
<tr>
<th>Products</th>
<th>Currently use/own</th>
<th>Latest Purchase</th>
<th>Price (THB)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>P3Y ivory purchasers n=179</td>
<td>P3Y ivory purchasers n=179</td>
<td>Based on price from latest purchase</td>
</tr>
<tr>
<td>Accessories/jewelry</td>
<td>50</td>
<td>44</td>
<td>Min 500</td>
</tr>
<tr>
<td>Amulet and sacred statues/images</td>
<td>32</td>
<td>27</td>
<td>Min 500</td>
</tr>
<tr>
<td>Spiritual items (e.g. small carvings, etc.)</td>
<td>27</td>
<td>23</td>
<td>Min 800</td>
</tr>
<tr>
<td>Decorative item</td>
<td>3</td>
<td>7</td>
<td>Min 800</td>
</tr>
</tbody>
</table>

B2. Which formats of ivory products do you use/own?
B5. Please think about your latest purchase, which format of ivory product did you buy
B7. How much did you pay for it? If you cannot remember the exact amount, please give an approximate price.

*Caution: small base
IVORY AS AN ACCESSORY

• **Aesthetic Value:**
  – Texturally beautiful
  – White and shiny

• **Possessed Power:**
  – Provide Protection
  – Positive Influence

• **Rings** are the most popular items, partly because they are relatively small and therefore more affordable
IVORY AS AN AMULET

• Spiritual anchor
• Ivory items make the owner feel more lucky, confident, and safe
• Although not proven, users believe that ivory products have positive influences on their lives
IVORY PURCHASERS - REASONS

While ivory’s **supernatural benefits** are the reason that the majority of the users to purchase, half of them were also triggered by the products’ **aesthetic values**.

- **Net: Spiritual**
  - It brings good luck: 53
  - It is spiritual: 41
  - It wards off harm/Provides protection: 35
  - It enhances owner’s power: 30
  - It is good for health: 9

- **Net: Aesthetic**
  - It is beautiful/decorative: 32
  - It looks pure and noble: 31

- **Net: Value**
  - It is a rare item and worth collection: 28
  - It is a valuable gift: 16
  - It is a good investment: 9

- **Net: Social Image**
  - It shows my success, affluence: 31
  - It improves my status, prestige: 14

- **Net: Thai-ness**
  - It represents Thai heritage and culture: 16

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*B9. What made you buy the ivory product?  Base: P3Y ivory purchasers n=179*
### IVORY GIFT RECEIVERS

Half of the receivers had at one point purchased ivory products themselves. Accessories/jewelry and spiritual items were the most popular gift items. Almost all cases were received for a special occasion, especially birthdays.

<table>
<thead>
<tr>
<th>Purchase Incidence</th>
<th>Currently use/own</th>
<th>Special Occasions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base: P3Y ivory gift receivers n=55</td>
<td>Base: P3Y ivory gift receivers n=55</td>
<td>Base: P3Y ivory gift receivers n=55</td>
</tr>
<tr>
<td><strong>52%</strong></td>
<td><strong>Accessories/ jewelries</strong> 44%</td>
<td><strong>90%</strong></td>
</tr>
<tr>
<td>Of those who received ivory as gifts have at one point purchased ivory products</td>
<td><strong>Spiritual items (e.g. small carvings, etc.)</strong> 42%</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Amulet and sacred statues/images</strong> 32%</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Decorative item</strong> 27%</td>
<td></td>
</tr>
</tbody>
</table>

B2. Which formats of ivory products do you use/own?
B3. How did you have them in your possession?
B11. Was there any special occasion when you bought/received as gift the ivory product?

*Caution: small base*
IVORY PURCHASE INTENDERS
4 in 10 purchase intenders already own items of ivory – the most popular format being accessories/jewelry.

Usage/Ownership Incidence
Base: Ivory Purchase Intenders n=488

40%
Of those ivory purchase intenders use or own some ivory products

Currently use/own
Base: Ivory Purchase Intenders who use/own ivory product n=193

- Accessories/jewelry: 48
- Amulet and sacred statues/images: 33
- Spiritual items (e.g. small carvings, etc.): 23
- Decorative item: 17

B1. Do you own or use any ivory products?
B2. Which formats of ivory products do you use/own?
PURCHASING CHANNELS
(IVORY CONSUMERS)
ROUTES TO AMULET ACQUISITION

The need of Ivory-specific amulet

- Influenced by the belief in ivory power, whether it is through information from the internet or told by family.
- Triggered by suggestions from someone they trust i.e. parents, senior colleague, a neighbor who has knowledge about amulets, uncle.
- Or simply the need to grow amulet collection.

Facebook or google search “ivory product” “sell ivory” etc.

Usually lead to Facebook pages of shops that sell ivory

Ask for place of purchase from someone knowledgeable

This can lead to physical shops/area or online shops.

Purchase spontaneously either offline or online (i.e. the Facebook groups they joined)

As rare items, some always look to own ivory amulets.
IVORY PURCHASERS - PURCHASING BEHAVIOR

Jewelry stores, amulet markets/temples, relatives/friends/acquaintances are key purchase channels. The majority of respondents have purchased only once, although there is a sizable group that are repeat buyers. 4 out of 10 purchases were for a special occasion.

**Purchasing Channels**
- Jewelry stores: 25
- Amulet Markets / temples: 25
- Relatives / Friends / Acquaintances: 23
- Large bazaars: 15
- Border markets: 4
- Malls popular among tourists: 2
- OTOP centers: 2
- Hotel gift/souvenir shops: 1
- Online Shops / Web board: 1
- Social media: 1
- Other places in Thailand: 1

**Purchasing Frequency**
- I only bought it once: 35
- I bought it a few times: 59
- I buy it regularly: 7

**Special Occasions**
- Birthdays: 44%
- Other occasions: 21%
### CONCERNS WHEN PURCHASING IVORY PRODUCTS

<table>
<thead>
<tr>
<th>Authenticity</th>
<th>Curse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most respondents <strong>cannot tell the difference</strong> between ivory, elephant bone, bones of other animals and etc.</td>
<td>• If an elephant has been killed, its tusks are believed to have <strong>malevolent power</strong> because a curse has been put on them</td>
</tr>
<tr>
<td>So they base the product’s <strong>“genuineness”</strong> on the place/person buy it from</td>
<td>• It will bring <strong>damnation</strong> to the user.</td>
</tr>
<tr>
<td>• Familiar sellers</td>
<td>• <strong>All believe, or choose to believe,</strong> that their ivory products came <strong>from elephants that have died of natural causes,</strong> or from tusks that have been trimmed.</td>
</tr>
<tr>
<td>• Monks</td>
<td></td>
</tr>
</tbody>
</table>
PERCEPTION
(IVORY CONSUMERS)
**IVORY PRODUCTS – BENEFITS**

Ivory users and intenders regard ivory products as much more beneficial than non-users. Of these three groups, ivory purchase intenders hold a stronger perception of the potential benefits of ivory.

<table>
<thead>
<tr>
<th>spiritual</th>
<th>ivory brings luck/good fortune.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ivory helps people feel more powerful.</td>
</tr>
<tr>
<td></td>
<td>ivory provides protection from evil/wards off harm</td>
</tr>
<tr>
<td></td>
<td>ivory brings good health.</td>
</tr>
<tr>
<td>aesthetic</td>
<td>ivory projects image of purity.</td>
</tr>
<tr>
<td></td>
<td>ivory makes people feel beautiful, well-dressed and shows good taste.</td>
</tr>
<tr>
<td>monetary value</td>
<td>ivory is rare and of high value.</td>
</tr>
<tr>
<td></td>
<td>ivory is worth giving/Ivory is a perfect gift.</td>
</tr>
<tr>
<td></td>
<td>ivory is good for investment.</td>
</tr>
<tr>
<td>social image</td>
<td>ivory projects image of high status/ranking/nobility.</td>
</tr>
<tr>
<td></td>
<td>ivory projects image of wealth.</td>
</tr>
<tr>
<td>thai-ness</td>
<td>ivory represents Thai cultural heritage.</td>
</tr>
</tbody>
</table>

E2. What are the **benefits** for people to own ivory products?
What are the concerns that people might have for purchasing ivory products?

- Purchasers have a stronger perception towards the spiritual power of ivory than Receivers.
- Among all groups engaged with the ivory trade, there is awareness of the illegality of some items as well as concerns surrounding fake products.
- Ivory is associated with cruelty and extinction of elephants.
- Ivory’s spiritual power is unfounded.
- Ivory Seems old-fashioned.
- Some ivory products are not legal in Thailand.
- People can’t tell which ivory products are illegal.
- There are many fake ivory products in the market.

Source: Qualitative
TIGER PRODUCT
CONSUMPTION
TIGER PRODUCTS (CONSUMERS): Common Themes from IDIs and Findings from Consumers (Booster)
King of the Jungle

TIGERS ARE ALL ABOUT POWER AND STRENGTH.

• Respondents believe that tigers are elusive and mysterious.
• The aura of the tiger is dark and dreadful.
• Tigers’ ferocity inspires fear and awe.
• It is believed that the souls of great beasts live on in their parts, and those who own such parts also own the animal’s essence.
**TIGER USERS/PURCHASERS**

The majority of those who use/own tiger products made the purchase themselves. Spiritual items are most popular, followed by amulets. Very few respondents own tiger parts or products for medicinal purposes. Tiger products have a narrower price range than ivory.

**Currently use/own**

| Spiritual items | 59 |
| Formatted: Tiger users/purchasers n=116 |
| Amulet | 37 |
| Accessories/jewelries | 13 |
| Decorative item | 7 |
| Traditional medicine | 2 |
| Tiger wine | 2 |
| Tiger ointment | 2 |

**Latest Purchase**

| Spiritual items | 51 |
| Formatted: Tiger purchasers n=91 |
| Amulet | 27 |
| Accessories/jewelries | 11 |
| Decorative item | 3 |
| Traditional medicine | 2 |
| Tiger wine | 3 |
| Tiger ointment | 2 |

**Price (THB)**

<table>
<thead>
<tr>
<th></th>
<th>Min</th>
<th>Mean</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currently use/own</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spiritual items</td>
<td>100</td>
<td>11,237</td>
<td>50,000</td>
</tr>
<tr>
<td>Amulet</td>
<td>290</td>
<td>5,504*</td>
<td>20,000</td>
</tr>
<tr>
<td>Accessories/jewelries</td>
<td>1,000</td>
<td>11,220*</td>
<td>50,000</td>
</tr>
<tr>
<td>Decorative item</td>
<td>900</td>
<td>N/A*</td>
<td>80,000</td>
</tr>
<tr>
<td>Traditional medicine</td>
<td>800</td>
<td>N/A*</td>
<td>800</td>
</tr>
<tr>
<td>Tiger wine</td>
<td>2,000</td>
<td>N/A*</td>
<td>3,000</td>
</tr>
<tr>
<td>Tiger ointment</td>
<td>150</td>
<td>N/A*</td>
<td>200</td>
</tr>
<tr>
<td>Latest Purchase</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spiritual items</td>
<td>51</td>
<td>11,237</td>
<td>50,000</td>
</tr>
<tr>
<td>Amulet</td>
<td>27</td>
<td>5,504*</td>
<td>20,000</td>
</tr>
<tr>
<td>Accessories/jewelries</td>
<td>11</td>
<td>11,220*</td>
<td>50,000</td>
</tr>
<tr>
<td>Decorative item</td>
<td>3</td>
<td>N/A*</td>
<td>80,000</td>
</tr>
<tr>
<td>Traditional medicine</td>
<td>2</td>
<td>N/A*</td>
<td>800</td>
</tr>
<tr>
<td>Tiger wine</td>
<td>3</td>
<td>N/A*</td>
<td>3,000</td>
</tr>
<tr>
<td>Tiger ointment</td>
<td>2</td>
<td>N/A*</td>
<td>200</td>
</tr>
</tbody>
</table>

*Caution: small base

76% Of those who are tiger users purchased the products by themselves.

C1. Do you own or use any tiger products?

C2. Which formats of tiger products do you use/own?

C5. Please think about your latest purchase, which format of tiger product did you buy?

C7. How much did you pay for it? If you cannot remember the exact amount, please give an approximate price.
THE NEEDS LEADING TO TIGER PART AMULETS

• Protections:
  – From **physical** harm
    *E.g. car accidents*
  – From ‘**supernatural**’ harm
    *E.g. dark spirits when going to unfamiliar places/dark spirits disturbing infants*

• **Rare Items:**
  – To **collect** as rare amulets
What made you buy the ivory product?

The main reason to purchase tiger products is their spiritual benefits.

**Net: Spiritual**
- It wards off harm / provides protection: 65
- It is spiritual: 65
- It enhances owner’s power: 41
- It is good for health: 18
- It boosts masculinity / sexual prowess: 8

**Net: Social Image**
- It shows my success, affluence: 34
- It improves status, prestige: 18

**Net: Value**
- It is a rare item and worth collection: 20
- It is a valuable gift: 11
- It is a good investment: 8

**Net: Aesthetic**
- It is beautiful / decorative: 15
- It is a fashionable item: 11
‘SPIRIT’ ADDED TO AMULETS

- Amulets from unanimated materials only gain potency from chants and prayers.
- Tiger amulets are made from something that was once alive.
- When they go through rituals and incantations, the spirit of the dead animal is ‘awakened’ which makes the amulets and their spells even more powerful.
WILD TIGERS ARE MORE POWERFUL

- The senses of captivated tiger have been **blunted**.
- The aura of **invincibility** is lost.
- **Wild tigers** are believed to be more **ferocious**.
- Hence, amulets made from wild tigers are perceived as more **powerful**.
PURCHASE CHANNELS
(TIGER CONSUMERS)
ONLINE: A channel for information as well as trade

- Groups are either open or closed. To join a closed group, a person has to go through a vetting process before being allowed in. Closed groups are where the rare and/or illegal items can be found.
- One can also befriend a person in the group. Items may then be sold at very reasonable prices, leading to subsequent purchases.

Friends tag friends who share the same curiosity or interests via Facebook.

Many like to learn about amulets in general.

Tiger parts are one of several topics they Google.

This leads to joining a Facebook group or following a Facebook page related to amulets.

They come across tiger part amulets, leading to purchase.
OFFLINE CHANNELS

• Offline channels are found by recommendation or simply being stumbled across
• Tiger amulets can be bought at temples, amulet markets, markets, some specialized malls, and local fairs
• Tiger products are not openly displayed. Serious buyers are taken to the back room. Alternatively, they need to contact the shop owner beforehand
TIGER PURCHASERS - PURCHASING BEHAVIOR

Amulet markets/temple is the key purchase channel and to a lesser extent, from relatives/friends/acquaintances. The majority either buy it once or just a few times, typically not for a special occasion.

**Purchasing Channels**

- Amulet Markets / temples: 46
- Relatives / Friends / Acquaintances: 19
- Large bazaars: 10
- Border markets: 9
- Malls popular among tourists: 6
- Jewellery stores: 4
- Hotel gift/souvenir shops: 2
- Social media: 2
- Online Shops / Web board: 2

**Purchasing Frequency**

- I only bought it once: 3
- I bought it a few times: 33
- I buy it regularly: 64

**Special Occasions**

34% special occasions

B8. Where did you buy it?
B11. Was there any special occasion when you bought/received as gift the ivory product?
B12. How often do you buy ivory products?

Base: tiger purchasers n=91
PERCEPTIONS (TIGER CONSUMERS)
E2. What are the benefits for people to own tiger products?

**TIGER PRODUCTS – BENEFITS**

Compared to non-users, Users perceive more benefits to tiger products. Users strongly associate Tiger products with bringing good luck/fortune, providing protection from evil/harm, making people feel more powerful, and being rare and of high value.

<table>
<thead>
<tr>
<th>Spiritual</th>
<th>Tiger products provide protection from evil/harm.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Tiger products bring luck/good fortune.</td>
</tr>
<tr>
<td></td>
<td>Tiger products help people feel more powerful.</td>
</tr>
<tr>
<td></td>
<td>Tiger products enhance good physical health/cure illness.</td>
</tr>
<tr>
<td></td>
<td>Tiger products enhance masculinity/sexual prowess</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Social Image</th>
<th>Tiger products project image of high status/ranking and nobility.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Tiger products project image of wealth.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Monetary Value</th>
<th>Tiger parts and products are rare and of high value.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Tiger products are good for investment.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Aesthetic</th>
<th>Tiger products enhance charisma.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Tiger products are fashionable.</td>
</tr>
</tbody>
</table>

---

Non-Users vs. Tiger Purchasers/Users

- Non-Users N=932
- Tiger Purchasers/Users N=116
Some respondents consider tiger parts as an investment opportunity.

Rarity creates investment opportunities, and the curse may be perceived as increasing the potency of the amulet.

“In the future I might collect more and more... if I become more adept at it. It’s like buying land. The longer you have it, the more valuable talismans become.”

“One of the men I worked with... I saw him going out on his motorbike and coming back, and I asked him, where have you been? He said he’d taken some amulets to the post office. At first I didn’t think much about the belief itself, but then I saw that it can make money. Salaries of 30,000 to 40,000 Bath? Forget that. This can make a lot more money the more you learn about it.”
Users and non-Users have high awareness that the tiger trade is illegal in Thailand. Users are less concerned about potential illness and infection from the consumption of tiger parts but worry more about the prevalence of fake products.

- Tiger products are associated with cruelty and extinction of tigers.
- Tiger products are not legal in Thailand.
- There could be illness and infection from consuming tigers parts (e.g. tiger bone wine)
- Tiger products’ spiritual power is unfounded.
- There are many fake tiger products in the market.

E3. What are the concerns that people might have for purchasing tiger products?
ATTITUDE & COMMUNICATIONS
(CONSUMERS AND NON-CONSUMERS)
ATTITUDES TOWARDS WILDLIFE PRODUCTS

More Users and Purchase Intenders agree that more and more people have stopped buying ivory and tiger, and people are now more careful about buying or owning these products. More Ivory gift receivers agree that using these products can project the image of being ignorant about the wildlife crisis.

More and more people have stopped purchasing ivory and tiger products.

People now are careful about saying that they buy or own ivory and tiger products.

Using ivory/tiger products may give the image of being ignorant about wildlife crisis.

Buying or using ivory or tiger products is no longer acceptable among many celebrities, and influential members of Thai society.
SELF-JUSTIFICATION & LACK OF ACCOUNTABILITY

- I only own small items.
- The products have been blessed by monks. They are cleansed.
- These animals died of natural causes.
- The government should be the responsible party to control these products.
- They are sold in shops, they must be legal.
- It was passed down in my family. We’ve had it for a long time.
### UNCERTAINTY REGARDING THE LAW

<table>
<thead>
<tr>
<th>IVORY</th>
<th>TIGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Not sure if <strong>domestic</strong> ivory trade is legal</td>
<td>• Not sure if tiger product trade is legal.</td>
</tr>
<tr>
<td>• Not sure if <strong>imported</strong> ivory trade is legal</td>
<td>• Not sure if the law applies to <strong>small-sized</strong> tiger items</td>
</tr>
<tr>
<td>• Not sure if the law applies to <strong>small-sized</strong> ivory items</td>
<td>• Not sure if the law applies to the products they have had for a long time</td>
</tr>
</tbody>
</table>
### LEGAL PERCEPTION

Compared to Non-Users, more Users are unclear about certain legal issues regarding Ivory and Tiger. Both groups agree that Ivory from Wild Thai and African Elephants and Tiger from Wild Tigers from Thailand and Other Countries are illegal.

<table>
<thead>
<tr>
<th></th>
<th>Non-Users</th>
<th>Ivory Purchasers</th>
<th>Ivory Receivers</th>
<th>Ivory Purchase Intenders</th>
<th>Tiger Purchaser/users</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Legal</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Illegal</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domesticated Thai Elephants</td>
<td>19 (B)</td>
<td>81 CDDEF</td>
<td>54 (B) 46</td>
<td>59 (D) 41</td>
<td>55 (E) 45</td>
</tr>
<tr>
<td>Ivory from...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wild Thai Elephants</td>
<td>1 (B) 99</td>
<td>15 BD</td>
<td>4 CE</td>
<td>14 BD 86 (C)</td>
<td>9 BD 91</td>
</tr>
<tr>
<td>African Elephants</td>
<td>7 (C) 93</td>
<td>12 Bd 88 4 cEf</td>
<td>4 CE</td>
<td>14 Bd 86 (C)</td>
<td>13 Bd 87</td>
</tr>
<tr>
<td>Tiger Farms and Zoos in Thailand</td>
<td>27 (B) 73</td>
<td>44 BD 56 (C)</td>
<td>49 (D) 51 (E)</td>
<td>14 BD 86 (E) 50 (F)</td>
<td>50 50</td>
</tr>
<tr>
<td>Tiger from...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wild Tigers in Thailand</td>
<td>2 (B) 98</td>
<td>11 BD 89 (C)</td>
<td>2 CE</td>
<td>11 BD 89 (E)</td>
<td>7 BD 93</td>
</tr>
<tr>
<td>Tigers in Others Countries</td>
<td>7 (C) 93</td>
<td>13 Bd 87 4 cEF</td>
<td>4 CE</td>
<td>15 Bd 85 (D)</td>
<td>15 85</td>
</tr>
</tbody>
</table>

6/5/2018

**F1.** Do you think it is legal or illegal to buy or sell the following products?

Sig. Test A/B/C (95%), a/b/c (90%)
**F2. Have you seen or heard of any messages, news, announcements, that are against buying, selling and consuming ivory/tiger products?**

**COMMUNICATION AWARENESS**

Compared to Non-Users, fewer Purchasers/Intenders have seen or heard messages re. buying, selling or consuming Ivory/Tiger products.

<table>
<thead>
<tr>
<th></th>
<th>Non-Users</th>
<th>Ivory Purchasers</th>
<th>Ivory Receivers</th>
<th>Ivory Purchase Intenders</th>
<th>Tiger Purchaser/users</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Not Aware</strong></td>
<td>923 (B)</td>
<td>179 (C)</td>
<td>55 (D)</td>
<td>488 (E)</td>
<td>116 (F)</td>
</tr>
<tr>
<td><strong>Aware</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Against Ivory Products</strong></td>
<td>cEF 71</td>
<td>EF 63</td>
<td>CEF 80</td>
<td>54</td>
<td>50</td>
</tr>
<tr>
<td><strong>Against Tiger Products</strong></td>
<td>CEF 59</td>
<td>33</td>
<td>CEF 48</td>
<td>29</td>
<td>32</td>
</tr>
</tbody>
</table>

**Messages…**

**Base: Those aware of any communication against ivory/tiger trade**

- Ivory doesn’t bring good fortune
  - CE: 50
  - CE: 30
  - CEF: 30
  - EF: 31
  - CEF: 31

- Ivory is not beautiful
  - CE: 30
  - CEF: 29
  - CEF: 21
  - EF: 21
  - CEF: 21

- Ivory doesn’t bring power
  - CE: 30
  - CEF: 35
  - EF: 35
  - CEF: 35

- Ivory and wildlife trade linked to transnational crime
  - CE: 77
  - CEF: 82
  - CEF: 82
  - EF: 82
  - CEF: 82

- Buying of ivory or tiger is illegal
  - CE: 83
  - CEF: 82
  - CEF: 82
  - EF: 82
  - CEF: 82

- When you stop buying ivory, you stop the killing
  - CE: 83
  - CEF: 88
  - CEF: 84
  - EF: 88
  - CEF: 88
BAN ON ALL DOMESTIC IVORY TRADE

92%

Of Thai General Population said that the Government should ban all domestic trades of ivory products

F9. Do you think that the Government should ban all domestic trades of ivory products?  N=1,000
WHO
Mid-old age, affluent,
Business owners and merchants

WHERE
Jewelry stores
Amulet markets/Temperles
Relative/Friends

WHAT
Jewelry
Amulets

WHY
Spiritual anchor
Aesthetic value
WHO
Male, Mid-old age, affluent, Business owners and merchants

WHERE
Amulet markets/Temples Relative/Friends

WHAT
Spiritual items Amulets

WHY
Protective power Collectability
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eleanora.deguzman@usaidwildlifeasia.org