

IVORY DEMAND IN CHINA

2012–2014

WILDAID



ABOUT WILDAID

WildAid's mission is to end the illegal wildlife trade in our lifetimes by reducing demand through public awareness campaigns and providing comprehensive marine protection.

The illegal wildlife trade is estimated to be worth over \$10 billion (USD) per year and has drastically reduced many wildlife populations around the world. Just like the drug trade, law and enforcement efforts have not been able to resolve the problem. Every year, hundreds of millions of dollars are spent protecting animals in the wild, yet virtually nothing is spent on stemming the demand for wildlife parts and products. WildAid is the only organization focused on reducing the demand for these products, with the strong and simple message: when the buying stops, the killing can too.

Via public service announcements and short form documentary pieces, WildAid partners with Save the Elephants, African Wildlife Foundation, Virgin Unite, and The Yao Ming Foundation to educate consumers and reduce the demand for ivory products worldwide. Through our highly leveraged pro-bono media distribution outlets, our message reaches hundreds of millions of people each year in China alone.

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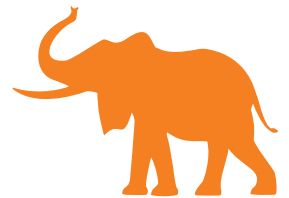
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EVERY YEAR UP TO



33,000 ELEPHANTS
ARE KILLED FOR THEIR IVORY

EXECUTIVE SUMMARY

In late 2012, WildAid interviewed residents in three major Chinese cities—Beijing, Shanghai, and Guangzhou—to better understand awareness and attitudes toward elephant conservation, and to identify the behavior and beliefs of ivory consumers. In 2013, WildAid, Save the Elephants and African Wildlife Foundation launched a campaign to reduce the demand for elephant ivory in China. Using the survey findings to inform the campaign strategy, the partners began working to raise awareness of the elephant poaching crisis, support lawmakers in banning ivory sales, and ultimately reduce demand for elephant ivory. Two years later in October 2014, the survey was replicated to assess changes in awareness, attitudes and behavior regarding ivory consumption and the poaching crisis, and to ascertain the reach of campaign messages in Beijing, Shanghai, and Guangzhou.

Scientists released alarming reports in the past year recognizing the impact of rampant poaching on Africa's elephant population. More than 100,000 elephants were illegally killed for their ivory in the three-year period between 2010-2012¹, and at

least 65% of all of Africa's forest elephants were poached between 2002 and 2013, leaving 95% of the forests of the Democratic Republic of Congo devoid of elephants.² In the face of a seemingly interminable crisis, there is hope that residents of the world's largest ivory-consuming nation are changing their attitudes and beliefs about ivory.

The 2014 China survey shows significant improvement in overall knowledge and recognition of today's poaching crisis, as well as awareness of how ivory is obtained. Ninety-five percent of residents agree that the Chinese government should impose a ban on the ivory trade as a way to stop poaching. Of those who had seen WildAid's elephant PSAs featuring ambassadors Yao Ming or Li Bingbing, 90% said they would not buy ivory after watching them.

The results of the 2014 survey are promising and demonstrate that demand reduction campaigns are having an impact on awareness, attitudes and behaviors toward elephants and the ivory trade. However, much work remains to be done to reach and educate millions more about the ivory trade and poaching crisis before we are able to stop the killing.

1. Wittemyer, G., Northrup, J. M., Douglas-Hamilton, I., et al. "Illegal killing for ivory drives global decline in African elephants." *Proceedings of the National Academy of Sciences*, 2014.

2. Maisels, Fiona; Strindberg, Samantha, et al. "Massive loss of forest elephants in Central Africa." *WCS*, 2014.



THREATS TO ELEPHANTS

Elephants are primarily poached for their ivory, which comes from the tusks of all African and male Asian elephants, and is used for carvings, ornaments, jewelry, chopsticks, and other crafts. While the use of ivory dates back hundreds of years, scientists believe ivory has been processed on an industrial scale in the last century to supply markets in the U.S. and Europe, and recently Asia.

In 2007, estimated African elephant populations were 500,000-700,000, while the estimated global Asian elephant population was 30,000-50,000.

In 1976, the African elephant was listed under Appendix II of the UN Convention on International Trade in Endangered Species (CITES), designed to control and limit trade, while in 1975 the Asian elephant was listed on CITES Appendix I, prohibiting international trade. However, the CITES regulatory system was subject to widespread abuse and African elephant populations fell from more than 1.2 million to roughly 600,000 by 1989. During the 1980s, a decade referred to as the “Ivory Wars”, at least 700,000 elephants were slaughtered throughout Africa as legal

trade enabled large-scale laundering of ivory from poached elephants.³

In response to this poaching epidemic, CITES banned the international trade in elephant ivory in 1989, but domestic ivory sales continued to be legal in some countries. The 1989 international ivory ban was initially a huge success; ivory prices were drastically cut, almost eliminating markets in the U.S. and Europe. Poaching was greatly reduced and elephant populations started to recover.

However, new markets emerged by 2008 as business ties between Asia and Africa increased; economies grew rapidly in countries including China and created a new class of potential ivory consumers. Expanding markets have increased poaching dramatically in West, Central, and East Africa and the impacts on elephant populations continue to steadily worsen. A study published in July 2014 found that more than 100,000 elephants were illegally killed in Africa between 2010 and 2012 – a staggering ~33,630 each year⁴. The African forest elephant in particular, has suffered a drastic decline in its population: in February 2014, scientists announced that

65% of forest elephants were poached between 2002 and 2013, leaving 95% of the forests of the Democratic Republic of Congo devoid of elephants.⁵

In addition, CITES allowed ‘one-off’ sales of ivory from natural mortality, culls, and seizures. The first ‘one-off’ sale occurred in 1999 with ivory from Botswana, Namibia, and Zimbabwe sold exclusively to Japan. In 2008, a second sale to Japan included South Africa’s stockpile and allowed China to purchase 62 tons of ivory^{6,7}.

IVORY TRADE IN CHINA

China is the largest market for legal and illegal ivory with Thailand identified as another important destination⁸. In 2004, China’s State Administration of Forestry and State Administration for Industry and Commerce began requiring ivory carving factories and retailers to secure a “Certificate of Ivory Products Collection” to accompany each finished piece. By March 2013, the government had approved 182 processing factories and retail outlets⁹. Since 2009, when China received 62 tons of ivory from the 2008 sale, the government

3. Walsh, Bryan. “African Nations Move to ‘Downlist’ the Elephant.” Time Magazine Online, 2010.

4. Wittemyer, G., Northrup, J. M., Douglas-Hamilton, I., et al. “Illegal killing for ivory drives global decline in African elephants.” Proceedings of the National Academy of Sciences, 2014.

5. Maisels, Fiona; Strindberg, Samantha, et al. “Massive loss of forest elephants in Central Africa.” WCS, 2014.

6. “Experts report highest elephant poaching and ivory smuggling rates in a decade.” www.Traffic.org, 2012.

7. Gabriel, G. G., Hua, N., and Wang, J. “Making a Killing: A 2011 Survey of Ivory Markets in China.” International Fund for Animal Welfare, 2012.

8. “Experts report highest elephant poaching and ivory smuggling rates in a decade.” www.Traffic.org, 2012.

9. Levin, Dan. “The Price of Ivory: From Elephants’ Mouths, an Illicit Trail to China.” The New York Times, 2013.

has strictly regulated its stockpiled ivory in order to extend its supply. Only five tons can be sold for processing annually¹⁰. The price of raw ivory in China has tripled since 2010¹¹.

Unfortunately, there are many ways to easily acquire and sell ivory illegally using legal channels. Experts say that as much as 70% of illegal ivory goes to China¹². In 2011, the International Fund for Animal Welfare (IFAW) discovered widespread abuse of regulations in 158 ivory retail shops and carving factories in China. Their investigation found only 57 retailers and factories possessed ivory trade licenses and even those businesses ran illegal operations. Among licensed facilities, 59.6% laundered illegal ivory in some way¹³. One factory owner complained that the 120kg annual government ration of ivory would last only two months and smuggled ivory was necessary to keep the factory profitable¹⁴. 'A Chinese factory owner admitted that the 330 pounds of legal ivory he acquires annually lasts just one month'; the rest is bought on the black market¹⁵. Unlicensed and non-compliant ivory facilities outnumbered legal ones—nearly six to one. For consumers, legal ivory can be indistinguishable from "new" ivory smuggled in from Africa. Most retailers did not have identification cards matching the ivory products, and staff in 14 licensed shops discouraged customers from taking the cards so they could be used to represent numerous illegal ivory items.

The Chinese government also banned the online ivory trade. However, IFAW reports the total number of ivory items auctioned online in mainland China in 2011 more than doubled from the previous year and increased the total sale volume by 170%.



Poor regulation of government stockpiles in Africa led to corruption as poached ivory entered domestic markets as 'pre-convention' or from 'one-off' sales. Increased demand from a stimulated class of wealthy Chinese consumers fueled these domestic markets and resulted in tens of thousands of slaughtered African elephants. In August 2012, Meng Xianlin, a Chinese wildlife trade official, wrote to CITES Secretary General John Scanlon, stating "The current wild population of African elephant could sustain a regular international trade in legally obtained and/or confiscated ivory and meet the Asian demand by supplying 200 tons raw ivory every year." This request coupled with the allotted 5 tons sold each

year from China's stockpile, suggests the country needs at least 205 tons of ivory annually to meet demand¹⁶. Preliminary raw data from the past year indicates that 2014 may have seen the greatest quantity of ivory confiscated in large-scale seizures—more than 55 tonnes—since the ban in 1989. If poaching rates continue at current levels, Africa could lose one fifth of its elephants in the next decade¹⁷.

The ivory crush in January 2014 by the State Forestry Administration indicates the promising possibility of a new policy on ivory trade in China.

10. "Control of Trade in Ivory in China. Sixty-second meeting of the Standing Committee, Geneva." CITES, 2012.

11. Martin, Esmond, Vigne, Lucy. "China Faces a Conservation Challenge: The Expanding Elephant and Mammoth Ivory Trade in Beijing and Shanghai." Save the Elephants, The Aspinall Foundation, 2014.

12. Gettleman, Jeffrey. "Elephants Dying in Epic Frenzy as Ivory Fuels Wars and Profits." The New York Times, 2012.

13. Gabriel, G. G., Hua, N., and Wang, J. "Making a Killing: A 2011 Survey of Ivory Markets in China." International Fund for Animal Welfare, 2012.

14. Ibid.

15. Levin, Dan. "The Price of Ivory: From Elephants' Mouths, an Illicit Trail to China." The New York Times, 2013.

16. "Comments from Specified Stakeholders on 'Decision-making Mechanisms and Necessary Conditions for a Future Trade in African Elephant Ivory.' Sixteenth meeting of the Conference of the Parties, Bangkok." CITES, 2013.

17. "New figures reveal poaching for the illegal ivory trade could wipe out a fifth of Africa's Elephants over the next decade." TRAFFIC, 2013.

18. Ibid.

2012 & 2014 CHINA SURVEYS

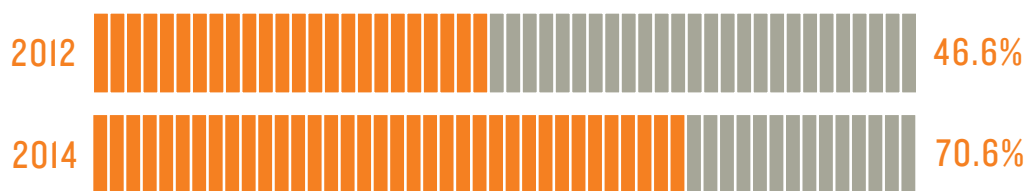
In November 2012, WildAid and Horizonkey Research Consultancy Group interviewed 961 residents in Beijing, Shanghai, and Guangzhou to better understand awareness of elephant conservation status, China's ivory consumers, and possibilities to deter consumption.

Two years later, in October 2014, WildAid, Save the Elephants, the African Wildlife Foundation and Horizonkey Research¹⁹ replicated this survey, interviewing 935 residents to assess any change in awareness, attitudes and behavior regarding ivory consumption and the elephant poaching crisis, and to ascertain the reach of campaign messages in the same three cities.

SURVEY KEY FINDINGS

1. *Two years after we began our ivory campaign, participants are more aware of elephant poaching:*

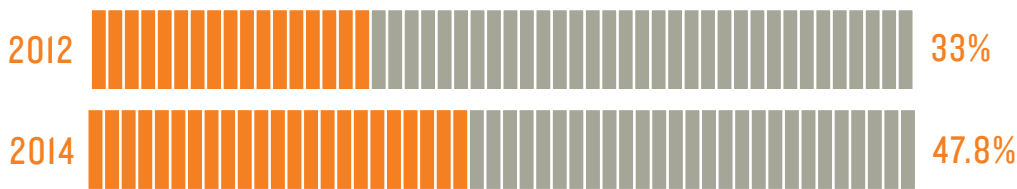
In 2014, 70.6% of participants think elephant poaching is a problem, compared to just 46.6% in 2012, an increase of 51.5%. Poaching has reached epidemic levels in West, Central, and East Africa. An estimated 100,000 elephants were slaughtered in a three-year period, between 2010-2012¹⁸.



51.5%
INCREASE

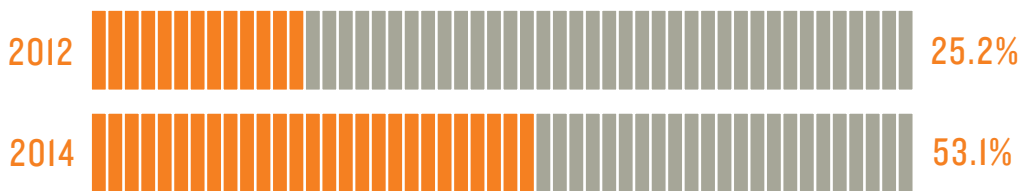
19. *Horizonkey survey:* Sample size: 935 participants; samples are weighed according to the Yearbook of Statistics of Chinese Cities in 2013 • Type: In-person, questionnaire. • Requirements: Participants are urban residents who have lived in Beijing, Shanghai, or Guangzhou for over one year. • Age: Participants 18 years old and older where 18-35 year olds accounted for 40.2%, 36-50 year olds accounted for 37.8%, and those above 50 years old accounted for 22%. • Income: Monthly income between RMB 0 to over RMB 10001.

2. *The number of respondents who believed elephants were poached for their tusks increased by 44.8% in 2014 to 47.8% from only 33% in 2012, demonstrating an increase in awareness on how ivory is obtained.*



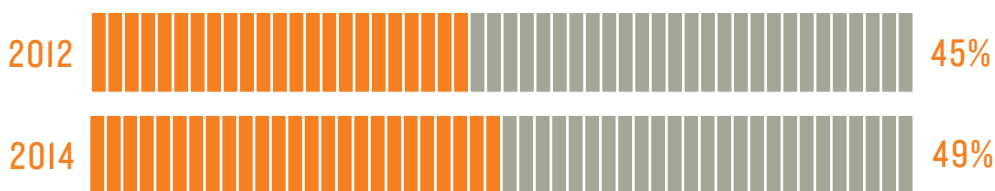
44.8%
INCREASE

3. *Awareness among Beijing residents who know that ivory comes from poached elephants increased by 110.7% to 53.1% over the 25.2% in 2012.*



110.7%
INCREASE

4. *Forty-nine percent of interviewees in 2014 said they could not distinguish legal ivory from ivory obtained illegally, compared to 45% in 2012. The 2014 survey did show an overall improvement (24% increase) in consumers' knowledge that they should check for a certificate of collection to ensure an item is legal.*



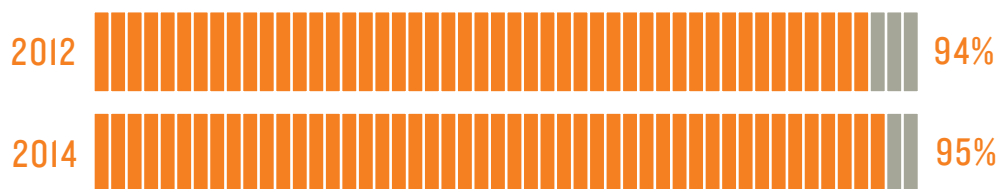
NEARLY,

50%

CANNOT TELL THE
DIFFERENCE BETWEEN
LEGAL & ILLEGAL IVORY



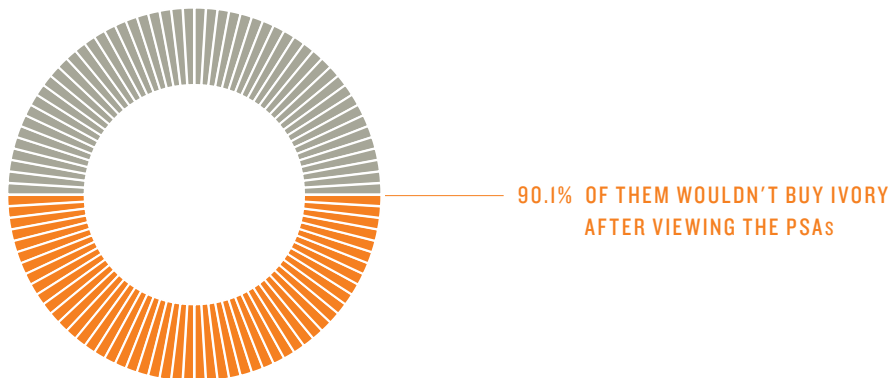
5. *Residents overwhelmingly agree (95% in 2014, 94% in 2012) that the “Chinese government should impose a ban on ivory trade to help stop poaching elephants in Africa.”*



6. *Nearly all (99.2% in 2012, 98.4% in 2014) interviewees agree that “we should ensure elephants exist on earth.”*

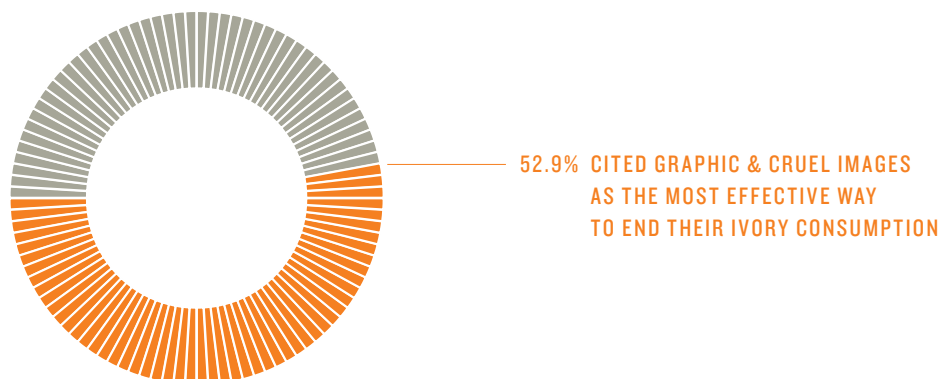


7. *56.1% of participants surveyed in 2014 had seen WildAid PSAs featuring ambassadors Yao Ming or Li Bingbing and 90.1% of those said they wouldn’t buy ivory after viewing the PSAs.*



56.1%
SAW WILDAD PSAs

8. *In 2014, 52.9% of residents interviewed cited graphic and cruel images of poached elephants as the most effective way to persuade consumers to end their ivory consumption.*



ONLINE SURVEY

We also conducted an online survey²⁰ in December 2014 of 1,500 residents of Beijing, Shanghai, and Guangzhou with market research group Intage, China. The online survey findings are similar to those of the Horizonkey survey, but there are noted differences that likely reflect the online demographic:

1. 95% OF PARTICIPANTS THINK POACHING IS A SERIOUS PROBLEM
2. YET, ONLY 29% BELIEVE IVORY COMES FROM POACHED ELEPHANTS, WHILE 37% THINK IVORY COMES FROM BOTH LEGAL SOURCES AND ILLEGALLY POACHED ELEPHANTS.
3. 81% OF PARTICIPANTS HAVE WATCHED WILDAID'S ELEPHANT PSAS; OF THOSE WHO HAVE SEEN THE PSAS, 82% HAVE WATCHED PSAS WITH YAO MING
4. 98% OF PARTICIPANTS WHO HAVE VIEWED THE PSAS BELIEVE PUBLIC SERVICE ANNOUNCEMENTS PLAY A ROLE IN PERSUADING PEOPLE TO REFUSE TO BUY IVORY – 45% THINK PSAS "PLAY A GREAT ROLE", WHILE 53% SAY THEY "PLAY A ROLE"

20. *Online survey:* Sample size: A total of 1500 participants: 500 from Beijing, 500 from Shanghai, 500 from Guangzhou. • Requirements: Participants are local residents or residents who have lived/studied in the city for over two years. • Age: Participants ranged from 18-55 years old, in which 18-29 year olds accounted for at least 40%, 30-40 year olds accounted for at least 40%, and 51-55 year olds accounted for no less than 10%. • Income: Monthly salary above RMB 6000.

2012 FOCUS GROUP MAJOR FINDINGS

WildAid and HorizonKey also conducted in-depth interviews with select focus group members to understand pre-existing attitudes, knowledge, and perceptions on ivory and its trade. Participants included media professionals, government officials of deputy department director level and above, customs officials responsible for law enforcement and legal action, and a ‘high-income group’ with an annual household income above 2 million RMB.

Consumers could not distinguish a poached tusk from one obtained from the natural death of an elephant.

“One is the tusk left after the natural death of elephant, which is not sold now, and the other is called bloody tusk, which might be extracted from a living elephant. The bloody tusk is a little hotter than the tusk left after the natural death of elephant. Many people are unwilling to buy the tusk left after the natural death of elephant, which is infelicitous, and is less hot when it is carved. The colour and the texture might be bad. But I cannot distinguish them so far.”

—Male Ivory Consumer, Beijing

The prices of small and simple ivory jewelry pieces can range from a couple hundred to a couple thousand RMB Yuan, while large ivory pendants can cost upwards of 200,000 RMB Yuan. Interviewees were less concerned about the certification of cheaper ivory products than the large and costly pieces. They also exhibited a general “trust” for the authenticity of pieces purchased at large-scale shopping malls.

“I would certainly care about the certificate if I buy a large ivory product, or if I buy an ivory collection because it is expensive. But there is no need to care about the certificate if I buy an ivory bracelet.”

—Female Ivory Consumer, Beijing

“The ivory product I bought has no certificate, because I bought from a large-scale shopping mall in Guangzhou. It might be reassuring, I think. Since it is sold in a large-scale shopping mall, it must be legal.”

—Male Ivory Consumer, Shanghai

Friends and acquaintances play important roles in the Chinese ivory trade.

“Some friends in my circle would bring some ivory products for me, and later, some other people also prefer these products, so we exchange with each other.”

—Female Ivory Consumer, Beijing

A major reason for purchasing ivory: private gift giving to friends, loved ones, and peers.

“I once bought ivory products as gifts, and the price of the cheaper ones might be more than 30,000 RMB yuan. In one year of the pig, I bought an ivory product just because a family member happened to be born that year.”

—Female Ivory Consumer, Beijing

“In addition to personal use, I also buy ivory products for friends as gifts. I just gave two gifts when I asked someone for help, because I knew he loved ivory. I have a friend who is specially engaged in the selling of jade ivory and the like in Guanyuan jewelry market. But he does not sell at the counter; he only sells to friends privately.”

—Female Ivory Consumer, Beijing

“Since the 1990s, ivory, like gold, is just a kind of value reflection. You can buy old ivory, but there is no need to buy new ivory. Furthermore, it is risky for you to buy new ivory. If you buy it, you have no way to resell it. If you resell it, you commit a crime.”

—Male Ivory Consumer, Shanghai



NEWS

February 6, 2014

FRANCE CRUSHED 3 TONNES OF STOCKPILED IVORY IN PARIS.

January 23, 2014

HONG KONG ANNOUNCED IT WILL BURN ~28 TONNES OF SEIZED IVORY OVER THE NEXT TWO YEARS.

January 6, 2014

CHINA CRUSHED 6.15 TONS OF STOCKPILED IVORY IN GUANGZHOU.

November 14, 2013

THE U.S. CRUSHED 6 TONS OF STOCKPILED IVORY IN DENVER.

GROWING EVIDENCE SUGGESTS THE IVORY TRADE IS FUNDING TERRORIST GROUPS INCLUDING JOSEPH KONY'S LORD'S RESISTANCE ARMY, SUDAN'S JANJAWEE, AND SOMALIA'S AL-SHABAAB.

WILDAID



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