

**TRAFFIC**

**BRIEFING**

JULY 2019

# TIGER PRODUCT CONSUMERS

Suggested demand reduction messaging

*TRAFFIC – Viet Nam Office*





# BACKGROUND AND OVERVIEW

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**5** Viet Nam's maximum number of wild tigers, according to IUCN

*Asia's wild Tiger Panthera tigris populations are under threat. According to the International Union for Conservation of Nature (IUCN), Viet Nam's own tiger population is less than five animals, although there may no longer be any tigers left in Viet Nam.*

Driving this decline is the demand for tiger products in Asia, especially in Viet Nam and China. In Viet Nam, the demand is motivated by belief in their supposed medical and talismanic properties. A systematic approach to reduce this demand, informed by research, is needed urgently.

In 2017, TRAFFIC performed an online assessment of Viet Nam's tiger market and conducted quantitative and qualitative tiger-focused consumer surveys in Hanoi and Ho Chi Minh City. After analysing the results, TRAFFIC segmented the consumer data and created a target archetype and guidelines for effective messaging that could serve as the foundation of a demand reduction campaign.



## MEDICINAL

products such as bones and blood are consumed for their supposed medicinal properties



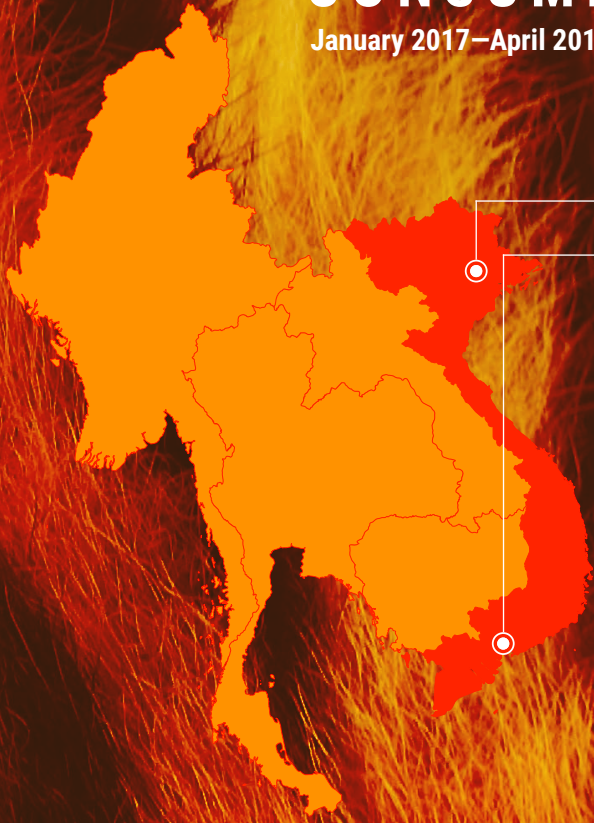
## TALISMANIC

skulls, skins, claws, and teeth are often used as ornaments or jewellery



# CONSUMER SURVEY

January 2017–April 2017



HANOI

HO CHI MINH CITY

**6%**

OF RESPONDENTS

reported ever having bought or used tiger products

**83%**

OF TIGER PRODUCT BUYERS

had bought tiger bone glue

# ONLINE MARKET SURVEY

27th March–28th April 2017

**187**

ONLINE ADVERTS

were observed on social media and eCommerce sites

# SURVEY RESULTS



## ONLINE SURVEY

27TH MARCH-8TH APRIL 2017

TRAFFIC carried out online market monitoring for one month, from 27th March to 28th April 2018.

The survey identified a total of 187 online advertisements, offering 1,095 items (including claws, teeth, and skin), 8 grams of tiger bone glue and an unidentifiable quantity of tiger meat.

# 187

## ONLINE ADVERTS

were observed on social media and eCommerce sites

# 1,095

## TIGER ITEMS

including claws, teeth, and skin were found for sale

# 8

 GRAMS OF

## TIGER BONE GLUE

and an unidentifiable amount of tiger meat were also found



an online advert for a tiger tooth on an eCommerce site in Viet Nam



an ornamental tiger claw for sale from a retailer in Hanoi





## CONSUMER SURVEY

JANUARY-APRIL 2017

TRAFFIC conducted the quantitative survey from January 2017 to April 2017 and included a sample size of 1,120 people from Hanoi and Ho Chi Minh City. Respondents were interviewed about their motivations, values, and attitudes towards buying, using, gifting, and consuming tiger products. The survey targeted respondents that were at least 18 years old, with the sample size meant to be representative of the urban population in Viet Nam.

The qualitative study was conducted from June to the beginning of August 2017 in Hanoi and Ho Chi Minh City. TRAFFIC interviewed 40 people for the study, including 30 consumers of tiger products and 10 non-users. The study aimed at investigating the relationships between user groups, examining their usage habits, and identifying effective ways to impact their beliefs and behaviour.

# 6%

### OF RESPONDENTS

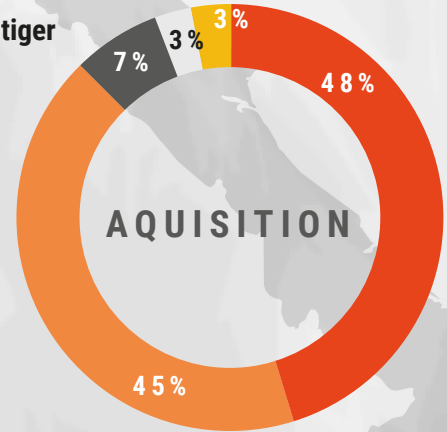
(n=72) reported having ever bought (n=29) and/or used (n=65) tiger products

Of those that had **BOUGHT** tiger products:

#### who did you buy the tiger product for?

- close family
- others
- managers
- myself
- friends

*Note: each consumer may have bought the product for more than one person*



# 28%

**PURCHASED** tiger products in the last 12 months (n=8)

# 38%

**PURCHASED** tiger products one to five years ago (n=11)

# 10%

**PURCHASED** tiger products five to 10 years ago (n=3)

# 24%

**PURCHASED** tiger products more than 10 years ago (n=7)

# 10%

**BOUGHT TIGER CLAWS** (n=3)

# 7%

**BOUGHT TIGER TEETH** (n=2)

# 83%

**BOUGHT (n=24) TIGER BONE GLUE**

# USER PROFILE

## 38%

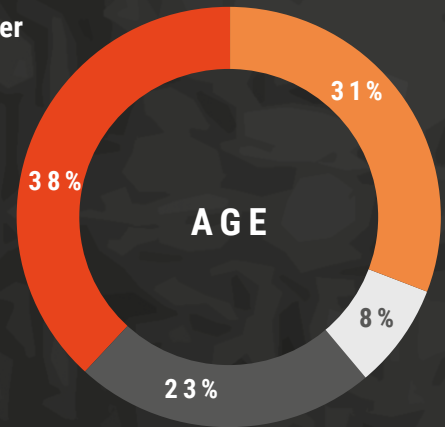
### OF USERS

were aged between 45-59 (n=25)

People over 60 comprised the next-largest age group at 31%. Nearly a quarter of users were between 30 and 44.

age groups of tiger product users

- 18-29
- 30-44
- 45-59
- 60+



## 35%

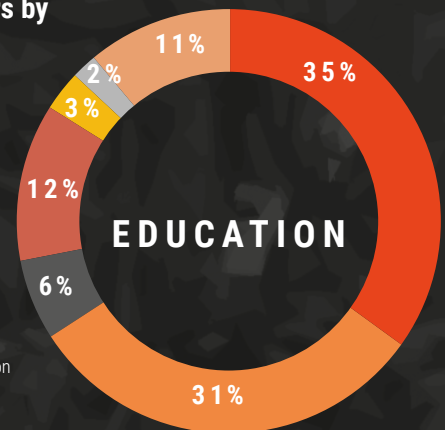
### OF USERS

had a middle-school education (n=23)

31% had completed high school. 18% had a higher education, having completed college or university.

tiger product users by education level

- none
- primary school
- secondary school
- high school
- college
- university
- postgraduate education



## 71%

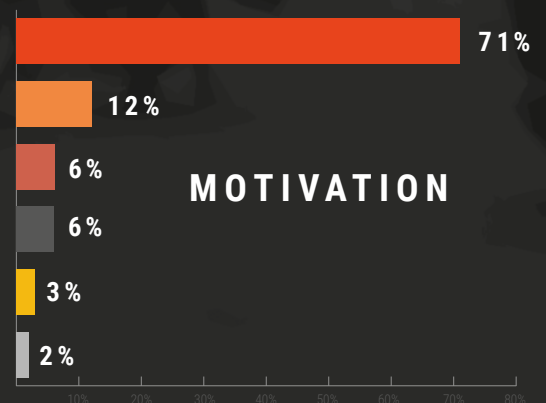
### OF USERS

consumed their last-used tiger product for medicinal purposes (n=46)

6% wore tiger claws and teeth because of spiritual beliefs, specifically to ward off evil spirits or protect children from "wind stroke".

motivations to consume last-used tiger product

- medicine
- use at social event
- give to others
- protect oneself and/or others
- display
- tradition



**64%**

**OF TIGER PRODUCT USERS**  
said they would recommend tiger  
products to others (n=41)

All of the recommendations would be made  
face-to-face, and most of them - 41% - would  
be made to family members (n=17)

**81%**

**OF TIGER PRODUCT USERS**  
reported their last-used  
product was tiger bone  
glue (n=53)

**45%** OF THOSE

**TIGER BONE GLUE USERS**  
(n=29) received it as a gift, while 40%  
(n=24) bought it for themselves and  
15% (n=9) had it offered to them

**23%**

**OF TIGER PRODUCT USERS**  
reported using traditional medicine more than  
western medicine in the past year (n=15), while  
just 6% (n=63) of non-users reported using  
traditional medicine more

**ONLY**

**17%**

**OF NON-USERS**  
said they did not consume  
tiger products because they  
are illegal (n=180)

# AUDIENCE SEGMENTATION

Based on the results of the qualitative survey, TRAFFIC decided to focus on **younger consumers of tiger products (45-59)**. This age group makes up the majority of the gifters of tiger products, and the qualitative data indicated younger consumers were more open to change. Users over 60, by comparison, revealed themselves to be less likely to change their behaviours and opinions and were more convinced of the efficacy of tiger products than other age groups.

As the most popular tiger product among consumers is tiger bone glue, **tiger bone glue users were selected as the target audience.**

TRAFFIC used the data from the consumer survey to develop the following tiger bone glue consumer archetypes:

## GROUP 01 URBAN MALE CONSUMER

### GENERAL DESCRIPTION

He is in his fifties, makes around VND20 million (USD860) per month, has a high school education, and lives in the city. He is social, extroverted, and wants to be respected by his family and peers. He cares about his health, exercises once a week, and also consumes herbal alcohol, shark fin, and caterpillar fungus.

FUNCTIONAL

#### MEDICINAL

He buys tiger bone glue to treat symptoms associated with arthritis and sometimes for use as an aphrodisiac.

EMOTIONAL

#### SOCIAL

He is motivated to gift the product to confirm and gain respect from older family members. He also wants to display the tiger bone glue wine in his house for attention.

**45-60**  
years old

**VND20 M**  
approx. monthly income

**HIGH SCHOOL**  
education

**ASPIRES TO BE**  
successful in his job and  
values his image

**PURCHASES TO**  
give to family,  
cure arthritis,  
enhance sexual performance,  
display soaked in wine

**BARRIERS**  
fake products, legal regulations

**CONSUMED**  
at home, with peers or  
friends at social gatherings

**INTENTION TO USE: HIGH**    **FUNCTIONAL BELIEF: HIGH**    **PRODUCT ACCESS: RELIABLE**





## GROUP 02

# URBAN FEMALE CONSUMER

### GENERAL DESCRIPTION

She is in her late forties, married, makes around VND20 million (USD860 per month), has a high school education, and lives in the city. She is caring, thoughtful, and has in-depth knowledge about health treatments and remedies. She cares about her family's health, especially her parents. She buys nutritious food for her family. She exercises once a week and sees the doctor for a regular health check.

EMOTIONAL

#### SOCIAL

She is motivated to gift the product to confirm and gain respect from older family members.

FUNCTIONAL

#### MEDICINAL

She buys tiger bone glue to treat symptoms associated with arthritis.

**45-55**  
years old

**VND20 M**  
approx. monthly income

**HIGH SCHOOL**  
education

**ASPIRES TO**  
have a happy and healthy family

**VALUES**  
respects her parents, wants to be seen as a good daughter

**PURCHASES TO**  
give to family members, cure arthritis

**BARRIERS**  
fake products, legal regulations

**CONSUMED**  
at home

**INTENTION TO USE: HIGH**    **FUNCTIONAL BELIEF: HIGH**    **PRODUCT ACCESS: RELIES ON FAMILY**

# SUGGESTED MESSAGING AND IMAGE FRAMING

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TRAFFIC tested and retested sample images and messaging on focus groups made up of the target audiences, revealing the following insights.



## MESSAGES SHOULD:

- **BE SHORT, DIRECT AND EASY TO UNDERSTAND/MEMORISE**
- **SPEAK TO THE TARGET AUDIENCE WITH DIGNITY AND RESPECT**
- **MENTION TIGER BONE GLUE DIRECTLY**



## IMAGES SHOULD:

**CLEARLY ILLUSTRATE THE ACCOMPANYING MESSAGE**

**THEY SHOULD NOT DEPEND ON THE IMAGE OF A TIGER TO ELICIT SYMPATHY. FOCUS GROUPS REPORTED THAT IMAGES OF TIGERS WERE UNLIKELY TO SWAY CONSUMER BEHAVIOUR**

## OTHER RESONANT MESSAGING:

- **ACKNOWLEDGE TARGET AUDIENCE'S DESIRE TO TAKE CARE OF THEIR FAMILIES**
- **HIGHLIGHT SOCIAL RESPONSIBILITY FOR BUSINESS PEOPLE**
- **EMPHASISE THAT TIGER BONE GLUE IS NOT GOOD VALUE FOR MONEY**



## REACHING MALE CONSUMERS



Men responded to messages/images that:

- CAPITALISED ON THEIR DESIRE TO STAY STRONG
- ENCOURAGED THEM TO DEMONSTRATE LEADERSHIP BY NOT USING TIGER BONE GLUE
- FOCUSED ON SPORTS OR GAMES OF STRENGTH AND POWER
- USED THE COLOURS ORANGE, BLACK, OR RED

## REACHING FEMALE CONSUMERS



Women responded to messages/images that:

- PROMOTED HEALTH AND FITNESS
- WERE POSITIVE
- FEATURED RELAXING ACTIVITIES, SUCH AS YOGA
- USED THE COLOURS BLUE, WHITE, OR GREEN



TRAFFIC, the wildlife trade monitoring network, is a leading non-governmental organisation working globally on trade in wild animals and plants in the context of both biodiversity conservation and sustainable development.

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