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**

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

6% of respondents reported ever having bought or used tiger products

**HANOI**

**HO CHI MINH CITY**

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
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 ADS

ONLINE ADVERTISEMENTS

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
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:

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 TIGER BONE GLUE
(n=24)

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

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

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

6% consumed their last-used tiger product for medicinal purposes (n=46)
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.

**MEDICINAL**

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

**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.

**INTENTION TO USE:** HIGH

**FUNCTIONAL BELIEF:** HIGH

**PRODUCT ACCESS:** RELIABLE

**45–60 years old**

**VND20M** 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
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.

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.

INTENTION TO USE: HIGH
FUNCTIONAL BELIEF: HIGH
PRODUCT ACCESS: RELIES ON FAMILY
SUGGESTED MESSAGING AND IMAGE FRAMING

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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