



Breaking The Brand of Rhino Horn in Viet Nam
Second Annual Report (March 2014-April 2015)

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Dr. Lynn Johnson

The document summarises the second 12 months of the Breaking The Brand project. This project was created to address the spiralling demand for rhino horn from Viet Nam, which is the primary driver of the current rhino killing spree in Africa and Asia. Our sole focus is on demand reduction by targeting the primary users of genuine rhino horn in Viet Nam. We do not attempt to target the groups that are most likely using fake rhino horn. Similarly, our approach is not to run awareness raising or an education campaigns. There are many other organisations doing awareness raising and education incredibly well. We are a team of volunteers based mainly in Melbourne, Australia and supported by the Perth based SAVE African Rhino Foundation.

To ensure that we maximise the effectiveness of our campaigns we constantly consider how the context for the rhino poaching crisis is changing over time. Similarly, we have endeavoured to educate ourselves on the changing nature of wildlife trafficking.

This work has been undertaken with the support of many individuals around the world who we will attempt to thank at the end of the document. However, before we go any further we must single out some individuals for a special mention.

With special thanks to:

Nicholas Duncan, Founder of The SAVE African Rhino Foundation

together with

An and Tuyen

and

Nigel Dawson and Randal Glennon, Co-Directors of Three Wise Men

Without the support of these 5 people, we could not have achieved so much so quickly.

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Executive Summary

This document summarises the second 12 months of the Breaking The Brand (BTB) project. Our sole focus is creating and delivering effective demand reduction campaigns targeting the primary users of genuine rhino horn in Viet Nam.

We have achieved the following milestones during the March 2014 – April 2015 period:

1. Raised \$58,000 to deliver two pilot demand reduction campaigns using health anxiety around rhino horn infusion as the main motivation to achieve reduced demand. The campaigns ran for 5 months in a number of key business, airline and women magazines in Viet Nam.
2. Continued to share and cross-checked our user analysis, demand reduction insights and broader findings with representatives of established conservation organisations – including representatives at TRAFFIC, FFI, WildAct Viet Nam and the Rhino Rescue Project together with independent conservationists and zoologists.
3. Travelled to South Africa, Viet Nam and Kenya to further our understanding of the current situation in relation to combating rhino poaching and rhino horn demand.
4. Presented to the UNODC Wildlife and Timber Crime workshop in Bangkok.
5. Refined our definition of demand reduction and shared our insights with other organisations seeking the same aims in Viet Nam and China.
6. Expanded our media profile through blog posts, interviews, social media and running the crowdfunding campaigns

We also continued to build our relationships with established players in the rhino conservation field and we have analysed the interplay between donors, established conservation strategies, wildlife trafficking and the user behaviour. This has led us to conclude that we are facing a difficult situation in relation to successful demand reduction because of the pro-trade stance of the South African government and the targeted campaigns for a legalised trade undertaken by the pro-trade lobby in South Africa. Our current conclusion is that potentially effective demand reduction efforts can and will be diminished and undermined for as long as there is a prospect of a legalised trade.

While the focus of this report is the last 12 months not everything can be covered to maintain readability and to keep the report reasonably short. The report is presented in four sections:

Section 1: BTB's Rhino Horn Demand Reduction (RhiNo) Campaign in Viet Nam

Section 2: Understanding the Impact on Demand Reduction of All Aspects of the Conservation – Supply – Demand Chain

Section 3: The Evolution of the Breaking The Brand Project

Section 4: Conclusion and Next Steps

Our focus for the next 12 months will be expanding the trial-and-evaluation of demand reduction messages. This means testing status anxiety messages in addition to health anxiety and using quantitative and qualitative evaluation techniques that are designed to work for illegal activities and consumption of illegal products. We aim to run one or two such test-and-measure campaigns in Viet Nam in late 2015. We will further work on a clearer definition of what constitutes demand reduction and an evaluation methodology for such campaigns. We will also monitor the evolving market for rhino horn and any changes to the customer base who are looking to buy genuine rhino horn. This will enable us to continue to target money on the strategies that provide the highest return on investment from a demand reduction perspective.

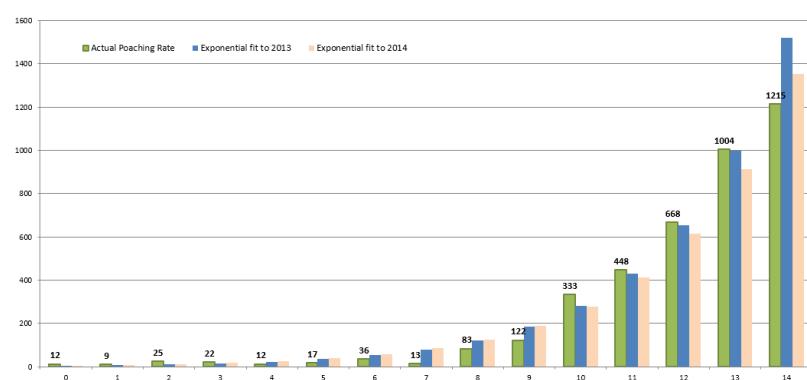
Section 1 – BTB’s Rhino Horn Demand Deduction (RhiNo) Campaign in Viet Nam

Problem Update

The Breaking The Brand (BTB) project was launched in February 2013 with the document: ‘Project Proposal - Breaking the Rhino Horn Brand in Viet Nam’ <http://breakingthebrand.org/wp-content/uploads/2014/05/Project-Proposal-Breaking-the-Rhino-Horn-Brand-in-Vietnam.pdf> and has so far focussed exclusively on running demand reduction campaigns in Viet Nam to break the escalating demand for rhino horn which is driving the poaching in Africa and Asia. A first year report was written to cover the first 12 months of operation of the project <http://breakingthebrand.org/wp-content/uploads/2014/05/Breaking-The-Brand-Project-The-First-12-Months.pdf>

Before going into detail about the project outcomes for the last 12 months, it is necessary to consider how the context for the rhino poaching crisis has changed in this time period. In particular:

1. Poaching rates have continued to grow and it won’t be until the end of 2015 that we will be able to state definitively if they are still growing exponentially or not. Unofficial figures coming out of South Africa for 2015 indicate growth is probably still exponential.



Evidence from other countries in Africa and Asia, for example a recent increase in poaching rates in Namibia, also points towards a continuing exponential increase in demand.

2. The South African government has adopted a thinly veiled pro-trade stance:
<http://www.news24.com/Green/News/SA-may-sell-its-massive-rhino-horn-stockpile-in-2016-20150210>
3. Horn infusion, which the Vietnamese consumers are most worried about, was actively targeted by the pro-trade lobby in South Africa (SA) with the aim to fully discredit the horn devaluation technique and stop infusions. The infusion project initially lost some ground in the second half of 2014, but as of early 2015 is beginning to rebuild.
4. Anecdotal evidence from both the South African and Vietnamese supporters of Breaking The Brand alleges SA pro-trade representatives have links in to Viet Nam and there is emerging testimony that they have actively countered the Lunar New Year BTB advertising campaign; our second campaign profiling the horn infusion process.
5. The SA pro-trade focus is neutralising any attempts by the Vietnamese government to target the users of genuine rhino horn who are some of the wealthiest and most influential people in Viet Nam.

These changes mean that the context for BTB and our campaigns has shifted from our initial findings in early/mid 2013. Certainly what has become clear is that there are a number of influential groups and individuals who, while happy to save rhinos, have no desire to see the demand for rhino horn diminish. As we wait for the outcomes of the CITES (CoP17) in 2016 regarding a legalised trade in rhino horn or one-off sale of the stockpiled rhino horn (similar to the ivory sale in 2008) in both government and private hands, effectively this is causing:

1. Policing/prosecution of the users of rhino horn to be neglected.
2. The opportunity to actively undermine potentially effective demand reduction messages and ensure that the demand and value of rhino horn is preserved.

3. The creation of new demand in the anticipation of large a windfall due to speculation on the trade or one-off sale of rhino horn.

This 'holding pattern' and debate is confusing the message in demand side countries and is likely to be contributing to the increased rhino poaching rates. We cannot see how demand reduction efforts can be successful if the speculation around trade legalisation is allowed to persist. It should be self-evident that both potential suppliers and traffickers will do anything to preserve their market and their income stream, it should be even more self-evident that those who stockpile horn today do so at considerable expense and therefore expect this investment to pay off handsomely in the near future. Any attempt to reduce demand or devalue the product will be fought.

More generally, with the increased profile of poaching and wildlife crime there is a growing level of extinction anxiety in the public domain. This is resulting in an increase in donations to the wildlife sector. Over time this increase in donations will with an increased level of scrutiny. Any strategies that could work to save animals, but the conservation sector isn't using because they are being too risk adverse and politically correct, could have future consequences if extinction anxiety tips in to public outrage. This is detailed more in: <http://breakingthebrand.org/conservation-vs-wildlife-traffickers-who-do-you-think-will-win-the-war-in-wildlife-crime/>

The above statements will be discussed in much more detail in the relevant sections of the report. But first we would like to outline the campaigns BTB ran in Viet Nam.

Viet Nam Advertising Campaign

Our primary achievement in the last year was to launch two advertising campaigns in Viet Nam:



Breaking The Brand's pilot RhiNo campaign – Is it worth the risk? went live on the 15th September 2014. \$30,000 was raised to place 19 adverts in three key business magazines and in the top selling women's magazine. It also included two consecutive months in Heritage, the in-flight magazine of Viet Nam Airlines. The publications we selected ensured the adverts reached the target audience. In addition, we opted to only use full-page and half-page ads to increase visibility and impact. We were on a steep learning curve for the pilot campaign, which involved establishing a relationship with the ad buying agency in Viet Nam and understanding how to navigate media censorship in Viet Nam. For more information on the pilot campaign: <http://breakingthebrand.org/look-what-you-have-achieved/>

For \$30K we can place two continuous months of full or half page adverts in ALL these publications.



Title: Saigon Business Weekend
Target: Businessmen
Circ: 30,000
Issued: Weekly



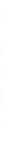
Title: Investment Bridge
Target: Businessmen
Circ: 65,000
Issued: Weekly



Title: Heritage
Target: Businessmen & Vietnam Airlines
Circ: 175,000
Issued: Monthly



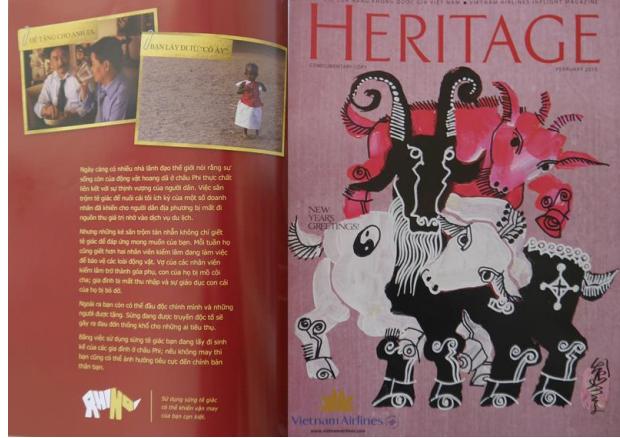
Title: Shopping & Family
Target: Best-selling women's mag
Circ: 100,000
Issued: Weekly



Title: Capital Security
Target: All, skewed to male
Circ: 75,000
Issued: Daily

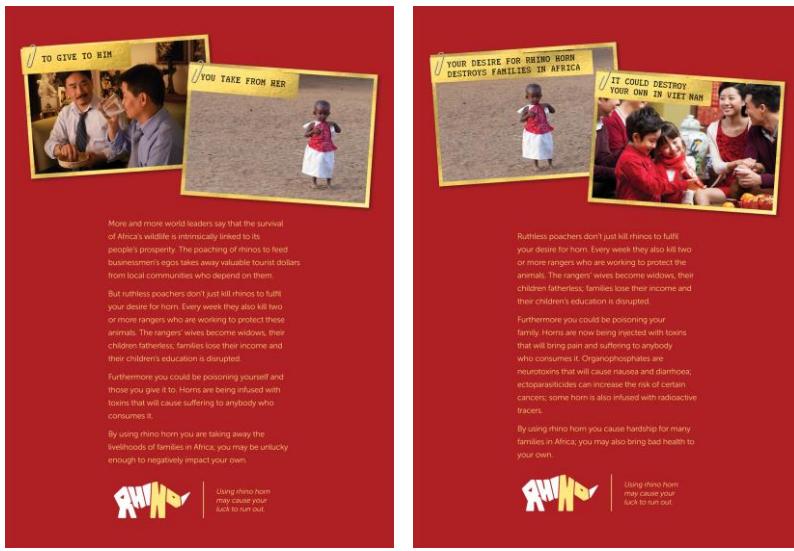
Vietnamese are travelling to see family for the Lunar New Year holiday.

We are particularly pleased that for 3 of the 4 months from beginning of November 2014 to the end February 2015 we had full page RhiNo adverts in Heritage Magazine.



Vietnam Airlines has about 300 daily flights to 21 destinations domestically and to 28 internationally. The airline increases capacity to cope with the demand for Vietnamese New Year, Viet Nam's most important celebration. Hundreds of extra flights are scheduled during this period; in 2013, the carrier added an extra 174,000 seats. We know that by placing an advert in the magazine we are targeting some of Viet Nam's wealthiest citizens and the demographic group that can afford to buy genuine rhino horn.

Again the Lunar New Year adverts focused on health anxiety in the text, discussing the horn infusion process. We also added some information on the human costs of wildlife poaching in 2 of the 4 adverts from the campaign:



In ongoing conversations with our target group we were hearing an increasing sense of 'shame' as we discussed the human toll of the poaching crisis. People were not empathetic to the death of rangers, the view being "They chose to do that job, they could work somewhere else" but emotion was triggered when BTB discussed the families. Talking about wives becoming widows and children fatherless generated reactions and questions so we decided to add this to the message.

The cost of this Lunar New Year campaign was higher given the time of year when there is much more competition for advertising space and publications charge premium rates. It was vital to advertise at this time of the year as rhino horn use spikes during this holiday; it is given as a gift to gain favours with managers and business contacts in the weeks leading up to the holiday and use in the so called 'millionaire's detox drink' increases markedly due to the nature of the celebrations. For more information on the campaign: <http://breakingthebrand.org/vietnamese-new-year-campaign-will-your-luck-run-out-goes-live/>

A total of \$58,000 was spent in producing (purchasing images, photography) and publishing the first two campaigns; with over \$55,000 spent on publishing ads in Vietnamese media. Commercial rates had to be paid in all publications as:

1. These are premium magazines for our target group which means that BTB is competing with local and international luxury brands for the advertising space.
2. We had to ensure BTB's adverts were published in the section/location of the magazine where they would be seen. In speaking to NGO's who had negotiated pro-bono or reduced rates, they informed BTB that it had been detrimental to their campaign as they had been placed in a much less visible part of the publication.



All the adverts were produced with the creative (and pro-bono) support of Nigel Dawson and Randal Glennon, Co-Directors of Three Wise Men (<http://www.three-wise-men.com.au/what-weve-done/print-collateral/>) Their offer of continued involvement on this project is very much appreciated.

As part of the Lunar New Year campaign BTB was delighted to be able to join forces with WildAct Viet Nam (<http://www.wildact-vn.org/>) and distribute 1,000 of the specially designed red envelopes in the Melbourne Vietnamese community.



WildAct's red envelopes raised awareness about the impact of purchasing wildlife products. BTB's network in to the Vietnamese community in Melbourne fed back that there was a lot of chatter at family gatherings where the envelopes were used.

As mentioned a total of \$58,000 was spent on our two advertising campaigns. In comparison we have heard discussions quoting costs of USD\$1-2Million per year to protect a herd of approximately 150 rhinos in a large conservancy, depending on location and terrain.

Fundraising

Breaking The Brand is a volunteer run project and we all pay our own expenses; 100% of the funds raised went to producing and publishing the campaigns.

The funds raised for both campaigns came via donations, crowdfunding and events. Our largest individual donations came from:



\$20,000



New Zealand

\$6,000



\$4,000



NSW's Branch

\$3,000

Crowdfunding was done both locally in Australia (Pozible and Givenow) and internationally (Indiegogo). In terms of return on investment it must be said that going down the crowdfunding path has been hard work and this is something BTB hasn't fully understood and mastered:

1. We haven't worked out how to convert the likes/shares our crowdfunding campaigns receive to donations.
2. We have tried helping people to put the donations in perspective by asking them to forego a glass of wine a week, cup of coffee a week and other similar initiatives.

The crowdfunding raised about 20% of the total funds we raised for both campaigns, but the main donations came from people we directly targeted via email, not from any of the social media followers.



Crowdfunding campaigns take a lot of effort to prepare and to sustain (via Facebook, email, Twitter etc.) during the 45 or so days of each campaign. We will continue to pursue similar fundraising strategies throughout the trial and evaluation phase in 2015, to raise the funds to test the status anxiety campaigns and the evaluation methodologies. Once we have completed the trial phase, we will focus large-scale donations from individual wealthy donors to finance the full-scale roll-out.



Other crowdfunding ideas BTB has developed includes an Everyday Hero pack, with our very first 'hero' supporting the project, just as this report is being finalised.

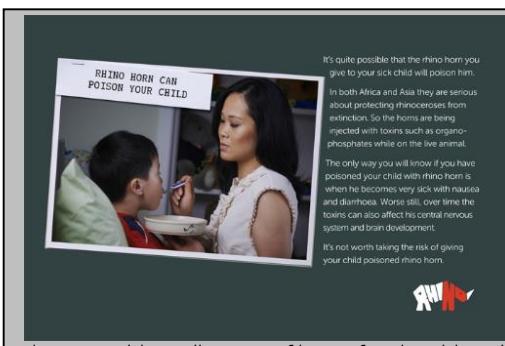
BTB's supporters are acknowledged: <http://breakingthebrand.org/supporters/>

Results and Feedback

BTB did not have the funding to conduct a formal evaluation for the campaigns. Instead, we have gathered informal feedback during our trip to Viet Nam in October/November 2014 and analysed social media and website activity. The response to the pilot campaign, launched 15th September, was positive and immediate:

1. By the middle of October 2014 Viet Nam was ranked number 3 in the countries downloading information from our web site (before campaign launch it was in top the 25). It has remained in the top 5 since then.
2. In the same time frame Ho Chi Minh and Hanoi jumped to the second and third cities following us on Facebook, this has been maintained and we get daily support from Vietnamese citizens.
3. While in Viet Nam Breaking The Brand was interviewed for TV and newspaper articles, the main focus of questions was about wanting more knowledge about horn poisoning.

4. 80% + of the questions we receive from the Vietnamese media and community are about horn infusion and the impact for people.
5. Vietnamese NGO's confirmed our messaging works including: Feedback from Vu Thi Quyen, Executive director and Founder of Education for Nature in Viet Nam: "*I often use your work as good examples for our staff in the office. I love your messaging style as you keep things simple but very creative at the same time. I believe that your messaging works well for Vietnamese*".
6. NGOs in Viet Nam say there is a lot of chatter on social media about our campaign.
7. Example of emails we received regarding marketing concepts: "*Congratulations on the launch of your advertising campaign. As an academic interested in consumer studies, I have always been a strong supporter of marketing initiatives that directly target the end-user, and surprised that there are not more organisations such as yours that prioritise a consumer-oriented strategy in tackling the rhino horn problem. I think that your current campaign strikes a good balance between awareness, education, stigmatisation, shock and emotional response. Something that has been lacking, in my opinion, in many of the other campaigns that seem to broadly focus on general education and awareness*" Dr. Stephen Saunders Department of Marketing, Monash University.



Anecdotal evidence of people changing purchasing behaviour as a result of our campaign: A conversation with one Vietnamese businessman proved interesting. He said: "When I saw the adverts I told a friend whose child has cancer; I know they were using rhino horn. My friend was shocked and wondered why the people of Viet Nam weren't been told about rhino horn poisoning. The family said that they will finish the piece of horn that they have, but they won't buy any more as they don't want to risk giving their sick child poisoned rhino horn." Whilst this is just one story and we didn't hear it directly from the family, it

does provide a glimmer of hope for the rhino. Like anywhere in the world, in Viet Nam what you hear from your peer network has an impact on what you buy and do. If this family are talking to their peer group about their new concerns regarding using rhino horn, our hope is that over time this message will spread, including on social media. Similarly, we hope that people, such as this family, may talk more openly to local conservation groups and the media about their decisions to stop buying rhino horn.

Whilst visiting Viet Nam I stayed at a hotel on "Traditional Medicine" street, Lan Ong Street, Hoan Kiem District – featured in BBC Newsnight: <http://www.youtube.com/watch?v=DqclwkbqAQY> Most of the shops openly advertise they sell the dish to grind rhino horn in. Why sell the dish if they don't sell the horn (fake or real)? It is just another indication that people aren't worried about policing.

Probably more worrying was the realisation that what we are seeing now is just the tip of the iceberg given the rapid growth of local wealth. The cities reminded me of Berlin and Prague in the 1990's, the amount of restoration and construction is staggering and the number of luxury brands primed to enter the country is very telling about the increasing spending power. The capacity for growth is mindboggling. The next 12-24 months will be critical in undermining 'fashion trends' such as rhino horn use. The level of wealth is demonstrated by the images of the suburbs the wealthy live in Viet Nam.



These two images show the Ciputra area of Hanoi, highlighted in a TRAFFIC factsheet as a suburb where a typical rhino horn user would be likely to live:

<http://www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/Rhino-horn-consumers--Konsumentenforschung-Nashorn-WWF-TRAFFIC.pdf>

Greater Focus on the Users of Rhino Horn

One of the missing components in targeting the demand for rhino horn was that when the BTB project started in 2013 there were no existing adverts confronting the users of rhino horn with images of themselves. The images used by the conservation industry focused on images of the rhino (cute, majestic, butchered or whimsical). These are not images that the user would even notice and if by chance they did, the images were highly unlikely to create an instant or significant emotional response in the recipient.

In the main the conservation industry creates adverts that work for their own or their donors' values or beliefs. Similarly, most adverts aim to trigger empathy or appeal to rational argument or higher values. These aren't the type of adverts that trigger an emotional response in the user groups, as their motivations to consume are entirely selfish (status gain, miracle cure).

But the sector is learning and we are delighted to be a part of a growing number of organisations targeting specific user groups and creating campaigns that provide a link to the consumers identity. Two campaigns in particular stand out:

TRAFFIC's 'Chi' Campaign



Launched World Rhino Day 2014

Education for Nature Viet Nam



Launched March 2015

Both these campaigns show the users images of themselves, something they can relate to and will pick up on because of their self-centred view of the world. They have therefore a much higher chance of being noticed by the users of rhino horn.

Greater Profile of Rhino Horn Poisoning in Viet Nam

When we interviewed the users of genuine rhino horn in Viet Nam in 2013 we asked them their thoughts on the rhino horn poisoning/infusion strategy that was being used in South Africa to physically devalue horns on the living rhino. At the time none of the people we interviewed had heard about the technique and they all indicated that they were worried by it and would like more information. One interviewee even stated that knowing that rhino horns were being poisoned would be the only way she could discourage her aging father-in-law from wanting rhino horn, as he had been asking his wealthy children to buy it for him to 'cure' a health problem.

Given health anxiety was elicited as one of only two reasons the users would stop consuming rhino horn, one of BTB's key objectives was creating a demand reduction campaign that highlighted the risk of consuming horn that had been treated with a toxin. Since launching our campaign in September 2014, the over 30 adverts published have discussed rhino horn poisoning in some detail. Over 80% of the questions we get from the Vietnamese community and journalists are about the rhino horn infusion process, so we are delighted that it is getting a greater profile in Viet Nam.

Two further developments in Viet Nam about the communication of rhino horn poisoning are pleasing:



In December 2014 WildAct VietNam (www.wildact-vn.org) created and delivered workshops for doctors and nurses in 'Western' medicine hospitals. The workshops are proving very valuable and as Trang Nguyen, the founder of WildAct, observed "The doctors and nurses were particularly engaged when images and videos of horn infusion were presented to the group."

Given WildAct's understanding of the primary users of genuine rhino horn, they too believe that rhino infusion is a good method to trigger behaviour change in Vietnam. This is why they launched campaigns highlighting the infusion process.

During this period posters illustrating the horn infusion process were placed in patient waiting rooms throughout major cities. These two campaigns introduced the plight of the rhino and reiterated the fact that rhino horn has no medicinal benefits. They also focused on the rhino horn toxin infusion process and the potential health implications for people consuming tainted horn.

Given rhino horn infusion is a key concern for the users of rhino horn it is good news that the horn infusion process is getting more media attention in Viet Nam.



Since April 2015 rhino horn infusion and Rhino Rescue Project have been featured in over 50 newspapers and magazines articles in Viet Nam.

Users of rhino horn are getting more-and-more of the information about the rhino horn infusion process and the risks of ingesting poisoned rhino horn.

It is not a surprise that the pro-trade lobby is worried about rhino horn infusion, given it is the single biggest concern to the user, be it ingested for perceived health benefits or for status purposes in the 'millionaires' detox drink. As a result horn infusion is the best strategy to reduce demand and price. From BTB's perspective this technique should be considered as part of the mix of strategies being used to stop the rhino poaching crisis. It would be beneficial if organisations, such as Rhino Rescue Project (RRP), get the funds they need to perfect and rollout this technique. We will discuss this further in Section 2.

Section 2 - Understanding the Impact on Demand Reduction of all Aspects of the Conservation/Supply/Demand Chain

As we continued to evolve our understanding of the rhino poaching problem, we recognised that a lot is being done to save the rhino and a lot of money is being spent, whilst at the same time poaching numbers are still rising. We wanted to research why this was occurring. There is no point pursuing an idea, such as demand reduction, without investigating the main aspects of the issue and looking at the interplay between the behaviour of parties including:

1. Governments/stakeholders in range countries
2. Governments/stakeholders in consumer countries
3. Wildlife and conservation activists
4. Pro-trade lobbyists
5. Mainstream and social media

We excluded security measures and the trafficking activity itself which has been studied in detail by other agencies. Though it is too much to document all the findings and insights, a few key ones will be outlined in this section.

Summary - South Africa Trip

In February/March 2015 the Breaking The Brand leadership team visited South Africa. The objectives of the visit were:

- To observe the rhino horn infusion process first hand and meet the Rhino Rescue Project (RRP) team, their clients and supporters.
- By observing the infusion process first hand be able to answer in a greater depth the questions we were being asked about infusion by the Vietnamese community and press.
- To speak to people directly about any concerns about the infusion technique; we were alerted to the changing circumstances in mid-2014 with the start of a concerted attack on horn infusion and the increasing profile of the pro-trade debate in the lead-up to the CITES 2016.
- To understand how pro/anti-trade beliefs and campaigns may affect the Breaking The Brand Viet Nam campaign and how the current debate in SA will continue to escalate in the lead-up to the CITES 2016 conference. In essence, all the investments made by the pro-trade lobby will only pay off if CITES allows either legalised trade in horn or a one-off sale (as with ivory in 2008).

We were prompted to go to South Africa by a 2014 paper written about both horn infusion and the economic argument for a pro-trade approach. This single paper was the starting point for what amounted to a character assassination of the Rhino Rescue Project and the horn infusion technique conducted via the mainstream media in South Africa.

The paper was based on very poor science and on a deceptive economic argument: devaluing horn through infusion does not in itself reduce demand for untreated horn, so it will only drive poachers to seek out untreated horn from somewhere else. Obviously the same 'economic' argument applies equally to all protection measures such as armed rangers, de-horning, dog squads, drones etc. – you could argue that these simply drive poachers to seek out less protected parks and reserves.

Given this, we needed to understand why the authors had singled out horn infusion. The only difference is that all other methods do not affect the value of the horn in a future, legalised market place. But the horn infusion method of rhino protection does. It was therefore becoming clear how a pro-trade agenda was impacting valuable strategies such as horn infusion. To read more on this: <http://breakingthebrand.org/would-you-actively-devalue-something-you-had-16-tons-of-and-wanted-to-sell/>

With this high-stakes debate in mind we decided that we needed to speak to all parties in person and observe horn infusion first-hand. Whilst in South Africa we observed 3 rhinos undergoing the infusion process. All indications are that the chemical compound travelled through the horn; within seconds of the toxin (and dye) being infused into the horn it was bubbling out of the horn several centimetres from the entry point. More information on horn infusion can be found at: <http://rhinorescueproject.org/>, the FAQ page is particularly informative: <http://rhinorescueproject.org/faq/>



Beyond gaining much deeper insights into the infusion technique, our conversations with stakeholders from government agencies, private rhino owners, local conservation groups, activists and consultants to the government showed clearly that no one understood the nature of the demand or the users of genuine rhino horn. This is obviously very concerning since South Africa appears to be actively pursuing a trade legalisation agenda and they are creating risk-benefit models for pro/anti-trade decisions based on incomplete information.

From an activist/conservation perspective we observed a lot of distrust in government, and the government isn't helping this given they are not releasing timely poaching figures. We were informed about concerns how poached animals are counted and regarding the definition of when a rhino is classified as poached or not – many people believe the poaching is understated. There is also a perceived mismatch in access to government for pro-trade and anti-trade people.

In addition we confirmed that there has clearly been a manufactured campaign against horn infusion – it seemed like everyone we spoke to had been fed the same sound bites. At the same time we observed that not many of the people who dismissed horn infusion based on the media reports last year had bothered to seek out more complete information, even if these people were actively working on rhino conservation.

When we showed people the images we had taken of the actual infusion process and discussed that the technique appeared to work from our observations and detailed discussions with RRP, many of the people we spoke to admitted that the arguments undermining infusion were weak and some realised that this has been an orchestrated campaign to discredit RRP and infusion.

A viable and effective infusion process is highly beneficial to reducing demand and we wish Rhino Rescue Project success in their future work and in providing the scientific evidence that infusion works.



KEY: The wealthy users of rhino horn don't see farmed/de-horned product as a substitute for wild rhino. There is a belief that horn from wild animals is 'better' as they eat wild food and have to fight to survive. This is a key reason why farming and de-horning rhino won't stop poaching, it will only create another market for people who will buy the cheaper product. Wealthy users want wild rhino and will pay a premium for it, so poaching will continue. It wasn't hard to find out this information, we simply asked the wealthy users, so why isn't this being highlighted as part of the debate?

Several people we spoke to alleged that pro-trade representatives were spending more-and-more time in Viet Nam; this has since been confirmed by some of our Viet Nam contacts. There is emerging evidence in Viet Nam that the Breaking The Brand campaign is being undermined with our Vietnamese supporters telling us what they are hearing:

- Breaking The Brand is lying, horn infusion doesn't work.
- The poisons don't spread through the horn.
- (A new one) The red poison forms into blobs and can easily be dug out of the horn.
- Horn infusion is illegal and it has been banned in South Africa.

Given how quickly Breaking The Brand was being attacked, we know that our RhiNo campaign is making some people nervous. So far it cost a total of just US\$58,000; we didn't expect that our small-scale campaign would already make the traffickers and pro-trade lobbyists nervous so early!

However, what we don't want to do is spend the next 12 months battling the undermining tactics of the pro-trade people rather than tackling the rhino horn demand. Even if we had the resources and the inclination to do this, there is no sizable percentage of the Vietnamese population that could be enlisted for support. There is simply no chance of creating public outrage; when wild rhinos became extinct in Viet Nam in 2011, there was barely a blip on the public radar. Until a decision about trade is made, either at CITES 2016 or beforehand, the pro-trade side will single out any approach that undermines demand, devalues the 'product' itself or threatens the potential profits to be made. For more information: <http://breakingthebrand.org/trade-legalisation-debate-the-new-root-cause-of-rhino-poaching/>

Other observations from South Africa:

- There appear to be understandable concerns that no systems have been created and implemented, either by government or the private rhino owners, to allow the complete and verifiable tracking of rhinos and their horn at any stage from birth to potential sale of stockpiled horn. The existing permit system is incomplete and can easily be abused or subverted.
- There are also concerns that no independent research has been done into the viability and sustainability of a farmed rhino industry, particularly the impact of keeping rhinos at unnaturally high population densities on sustainable birth rates e.g. stress levels, abnormal animal behaviour and abnormal reproductive behaviour.
- The argument put forward by the pro-trade lobby that sustainable use is not in conflict with preventing the animal from becoming extinct in the wild is dubious, as the government has not demonstrated how demand growth will be managed if the supply cannot keep up with demand. In media interviews the pro-trade lobby talk about "In the South African Constitution it details we have the right to the sustainable use of our wildlife." But the South African constitution, specifically point 24c in the Bill of Rights actually states 'ecologically sustainable' development and use. If you brought together a constitutional lawyer, an ecologist and an economist what would they agree on as the definition of 'sustainable development' vs. 'ecologically sustainable development'?

Constitution of the Republic of South Africa, 1996 - Chapter 2: Bill of Rights

24. Environment

Everyone has the right

1. to an environment that is not harmful to their health or well-being; and
2. to have the environment protected, for the benefit of present and future generations, through reasonable legislative and other measures that
 - a. prevent pollution and ecological degradation;
 - b. promote conservation; and
 - c. secure ~~ecologically sustainable~~ development and use of natural resources while promoting justifiable economic and social development.

Linking this pro-trade debate back to Viet Nam, BTB was told that South Africa's pro-trade/no-trade debate is the key thing slowing the Vietnamese Government's response to tackling consumption of rhino horn in Viet

Nam from a law-enforcement perspective. This makes perfect sense when you consider that no government would target its high net worth citizens, who are the primary users of genuine rhino horn, when:

1. These are the business people and entrepreneurs driving Viet Nam's rapid economic growth and
2. What they are doing could be made legal in 2016 if the South African government decides to take the pro-trade route.

As people stated, the pro-trade debate in South Africa effectively neutralises law enforcement based success in Viet Nam.

Summary - Invitation to Presentation at UNODC Workshop in Bangkok

BTB was invited to present our approach to demand reduction to the UNODC Wildlife and Timber Crime conference in Bangkok in January 2015. This was a great opportunity to gain an insight into the level of international collaboration in law enforcement and how likely it is that going after the traffickers will significantly disrupt the illegal trade in rhino horn in the near future.

Based on the presentations to the workshop it is clear that whilst international collaboration and asset seizure programs have started, this level of collaboration is quite recent for many of the participating countries. A key development in the last 12 months has been to encourage participating African and Asian countries to connect wildlife crime with the money laundering offences and legislation it can be linked to. This instantly means that penalties are a lot harsher and asset seizures become a real possibility.

From a rhino horn perspective it was great to see countries including Mozambique, Namibia, Kenya, Viet Nam and both mainland China and Hong Kong represented at the event. Sadly, South Africa didn't send a delegation to the event. At the time of completing this report two massive seizures of rhino horn (and ivory) occurred:

1. Viet Nam: <http://www.thanhniennews.com/society/vietnam-police-make-massive-seizure-of-rhino-horns-arrest-2-43122.html>
2. Mozambique (involving Chinese citizen): <http://www.thezimbabwean.co/news/africa-news/75873/police-seize-huge-haul-of.html>

It will be interesting to watch these cases evolve to see if the new focus on the financial crimes associated with the wildlife crime and any asset seizures eventuate. If they did, this would signal a shift - as mentioned in the article on the Mozambique arrest - which highlights previous prosecutions/penalties have been extraordinarily lenient being fines of slightly less than 6,000 US dollars.

From BTB perspective the developments in this international law enforcement area are very positive and will ultimately be crucial in defeating wildlife crime in the long run. Whether sufficient inroads can be made in the next few years to decisively impact rhino poaching and horn trafficking remains to be seen, this process is much broader than the rhino poaching crisis and cannot be fast-tracked easily for the sake of one particular species.



Delegates from a number of countries approached me about the BTB project and were extremely positive about the approach – the delegates saw that there may be other ways of addressing a crisis they would like to get under control, but are unable to within the law enforcement framework that currently exists. The presentation can be viewed here: <http://breakingthebrand.org/wp-content/uploads/2015/01/UNODC-Talk-Bangkok-General-Public.pdf>

Summary – Kenya Trip

As a result of the Breaking The Brand project and campaign our supporters in the Vietnamese community started to ask questions such as:

1. What do people in regional and remote communities in African countries feel about the rhino?
2. What do people feel about the rhino in the communities that poachers come from?
3. How do people in these communities benefit from rhinos?
4. How would they feel if their rhinos became extinct in the wild?

The interest we picked up on was not in the people currently involved in the tourism industry, but in the relationship between poorer regional and remote communities and the wildlife they had grown up with. Breaking The Brand team members had the opportunity to investigate this given our relationship with Brooke Squires, Manager Community Conservation, at Zoos Victoria and the community conservation work done in far Northern Kenya (Melako Community Conservation Area) by Zoos Victoria and her own company RAW Africa. Brooke generously offered that we could use her relationships and status in regional and remote communities to try get the answers to these questions. The region we visited was well known for wildlife tourism and it was also an area where the surrounding communities are economically poor.

Our trip to Northern Kenya had 4 objectives:

1. Understand the current perceptions around rhino conservation in remote communities that are bordering conservancies that house rhinos.
2. Analyse the opportunities for linking economic/social development and targeted donations to community efforts and education around wildlife conservation.
3. Understand the level of effort required to protect rhinos in local conservancies and the motivations for doing so.
4. And finally, based on our experience in Zimbabwe and Botswana in late 2013 where all the conservancies we visited were talking about China and rhino horn with no mention of Viet Nam, we took opportunity to road test the workbook: 'Who is Driving the Current Poaching Spree?' we had created for tour guides.

Over 9 days we had meetings in Nairobi, Nanyuki area (including Ol Pejeta), Il Ngwesi, Dol Dol, Isiolo and Sera Conservancy. These individual and group meetings were mainly with elders, young male leaders, young warriors, women and teachers of the Maasai community, but we also interviewed several people who were of Kikuyu, Samburu and Luo decent. In many of the interviews a local interpreter was needed.

What was unexpected was the lack of knowledge about the rhino in these communities. Other than from elders and teachers, in the main the responses were (1) Nothing (2) They are aggressive. Some people knew there were two types, in their words "Some that grazed and some that browsed". Of the people who mentioned



this, most did not know which-was-which. This lack of understanding is not helping the anti-poaching efforts. There was a real sense that for the people of these regions the rhino was effectively extinct. So we wanted to test how quickly the rhino could be 'brought back to life' for these people in Northern Kenya.

Once this was baseline knowledge was tested, the groups were shown videos and photographs of rhinos, including:



What was fantastic about the interviews was the response from people. Within a few minutes of showing the videos and images people's responses went from knowing nothing to:

Emotional

1. The babies look cute and they are relaxed with their mother.
2. The mothers look caring.
3. They look like people can be safe around them and we could share space.
4. Shock that people around the world were so interested in rhinos, we didn't realise how lucky we were to have real rhinos.
5. We don't want to just have statues in Kenya, we want the real thing.
6. We need to save them because they are unique.

Economic

Although we deliberately steered away from linking the value of a rhino to money, patterns did come up unprompted. These patterns included:

1. I didn't know they lived for so long, they can help provide jobs to the community for over 40 years if we protect them, whereas the benefit from poaching is just once.
2. If more people want to come to see rhinos as well as elephants and lions it can help with jobs and salaries.
3. Poachers get a lot of money.

So people with no or little knowledge of the rhino reacted favourably to images portraying the animals in a positive light – cute calves, caring mothers, majestic portraits etc.

It was further apparent that there are a large number of opportunities where small-scale community infrastructure projects and social enterprise can be linked to 'bringing the rhino back to life'. Local teachers and community leaders were interested in receiving education materials about the rhinos. The projects run by Zoos Victoria in the Melako region of Kenya have provided evidence and insights into how to create a range of age-appropriate conservation learning materials. A prototype education pack has been designed to 'bringing the rhino back to life' for children, families and communities in these types of regional and remote communities.



The Nairobi National Museum

Rhino: The Forgotten Mammal

On a recent visit we noticed that there is no rhino displayed in the Hall of Mammals in the Nairobi National Museum in Kenya. We paid for a guide to show us through the museum and he told us some amazing stories about the animals on display. We waited to ask about the missing rhino until we were about to leave this section of the museum. We wanted to see if there was some mention of this iconic animal unprompted. There wasn't. We asked our guide if the rhino had been taken off display given the poaching problem that has resulted in rhino horns been stolen from museums around the world. His answer came as a surprise, "As far as I can remember, there has never been a rhino in the Hall of Mammals". Given he had told us some detailed information and several great stories about other animals we asked what he knew about rhinos. "They are aggressive". That was it.

This is a great opportunity lost to acquaint Kenyan school children (and adults) to a native animal that is currently under massive threat from poaching. Thousands of school children visit the museum every week and hear stories about elephants and lions—but don't see or learn about the rhino. The passion and energy of these children is needed to ensure the long-term survival of the rhino in Kenya.

This lack of knowledge about the rhino was backed up by interviews we conducted with community members from regional and remote area including community elders and younger male leaders, local women's groups, guides and lodge personnel, teachers and young warriors. The people we interviewed came from Maasai, Samburu, Kikuyu and Luo ethnic groups.

Prior to showing people pictures and videos of rhinos we asked what they know about the rhino. Other than Elders and Teachers, in the main the responses were:

1. Nothing
2. They are aggressive

This lack of understanding is not helping the anti-poaching efforts. Once this was tested the groups where shown videos and photographs of rhinos (some of the comments recorded are shown on page 2.)

The rhino is effectively extinct for many people in Kenya. One teacher we spoke to even made the link that it is no different to the dinosaur at the front entrance of the museum. But how can children or adults fight to save an animal they barely know exists. Let's bring the rhino back to life for the people of Kenya.

The Nairobi National Museum is crucial solving this critically important challenge.



The Nairobi National Museum

Bringing the Rhino Back to Life for all the people of Kenya

Stage 1: Extensive exhibition about the rhino in the large temporary exhibition space on the first floor of the museum.

This stage would utilise all angles about the rhino that people find endearing, fascinating and awe inspiring. Examples of this would include video and images about rhino calves, the relationship between mother and calf, the big male icon, the history, rhinos around the world, poaching, anti-poaching strategies and the demand for rhino horn. This section would also included a section on the cultural & economic impact of Kenya losing its wild rhinos. Evoking both empathy and anger is the best fuel for action. As part of the exhibition there must be opportunities for people to take action before they leave the museum. If this doesn't happen people will disengage because they feel hopeless because they can't help. This call to action could take many forms.

Stage 2: (Re-)introduce the rhino to its permanent position in the Hall of Mammals.

On permanent display is a native, black rhino and a non-native, white rhino. The tour guides have lots of information and stories about the rhino and some form of call to action is maintained.

Figurehead(s)

A 'figurehead' or celebrity who becomes the face of the project and assists with fundraising and sponsor involvement. Given his commitment to the Natural History Museum in London, David Attenborough may be a natural choice. His celebrity status would help with sponsorship and profile for the project.

Partners and Sponsors

We would suggest a partnership with for example, the Kenyan President, Dr. Paul Kahumbu and the Obama family. To engage younger people it may also include, say Prince William and a local Kenyan celebrity.

This presents a huge missed opportunity to create a relationship with the animal for visiting school children. A suitably arranged display of a rhino in National Museum of Kenya can create a positive image and story for Kenyan school children and thereby assist conservation and anti-poaching measures.

Breaking The Brand To Stop The Demand
Who is driving the current demand for rhino horn?



www.breakingthebrand.org

The Breaking The Brand Project is supported by 

Finally, after being able to test the work book for tour guides during our Kenya trip it has been rolled out to a number of countries including South Africa (with the support of The SATIB Conservation Trust), Kenya, Zimbabwe, Botswana and Namibia.

During our recent visit to South Africa we were very excited to hear how knowledgeable our Kruger National Park tour guide was about the Vietnamese users of rhino horn and to hear him quote directly from the workbook, including "How rhino horn is used as a status symbol by businessmen to negotiate business deals."

The workbook can be downloaded via: <http://breakingthebrand.org/wp-content/uploads/2013/12/Workbook-Who-is-driving-the-current-demand-for-rhino-horn1.pdf>

One of the most disconcerting discoveries from our trip was that there is no rhino on display in Nairobi National Museum, which is visited by thousands of school children each week. There is a specific 'Hall of Mammals' room which has a central display with elephants, giraffe, buffalo and zebra and all the large cats on display, but no rhino.

We asked our museum guide if the rhino had been taken off display given the poaching problem that has resulted in rhino horns been stolen from museums around the world. His answer came as a surprise, "As far as I can remember, there has never been a rhino in the Hall of Mammals". Given he had told us some detailed information and several great stories about some of the other animals, we asked what he knew about rhinos. "They are aggressive". That was it.

Observations of Mainstream and Social Media

In the first instance it must be said that 2014/15 has seen an increase in the outpouring of concern about poaching and wildlife losses. Similarly, the increased profile of these issues as a result of the partnership between Prince William and David Beckham etc. is positive.

That said, coverage of wildlife/environment news is still very low (see George Monbiot column) and another key concern is about the narrow focus of mainstream media stories. In the main the focus is on 'the problem' as conventionally defined - poaching numbers, increased cost of security, orphaned rhinos, probability of extinction in the wild etc. This may help raise profile for the conservation aspect of the issue and maybe support agencies in raising funds, but it does not help getting focus on the underlying drivers – continued/increasing demand and ruthless traffickers both driving consumption.

Over time, as we speak to people concerned about this issue, the result is that a growing percentage appear to be left feeling hopeless and fatigued; and some are even withdrawing from being engaged in the issue. So instead of driving increasing attention to the urgency of the rhino poaching situation and the underlying causes, the media are simply rehashing emotional 'click-bait' and absolving people from having to think or seeing that there are a number of solutions that are still not tested or fully tested.

A great example of a different approach is The Guardian 'Keep it in the ground' campaign, which has a clear goal and message together with concrete action that can be taken. As opposed to the more general, superficial information given about the wildlife trade issue, this campaign is much more substantial and well rounded; there is certainly more depth and breadth to the articles, many of which focus on the causes of the climate challenges we now face. Breaking The Brand would love The Guardian to add a second wildlife campaign – 'Keep them in the wild' to their 'Keep it in the ground' environmental campaign!

In looking at the part that social media can play in solving specifically the rhino demand/poaching problem (but it can be also said for other animals and issues) the key problem is 'Social Media Noise'. The experience of using social media has been mixed and BTB has started to research how useful social media has been in driving change in the past and what it would need to do to drive change in the future; particularly when the problems only have a limited time available for a solution. We have considered this from both a micro and macro level.

Social Media Micro Level: Breaking The Brand's Facebook page, Nia's Friends was launched in August 2013 and has over 1,300 Likes. This page was designed primarily as a means to engage a set of dedicated followers and to disseminate information about our activities, to promote our blog posts and to point out significant developments in the rhino conservations - supply – demand chain.

Posting a cute/tragic rhino picture, cartoon or extinction story can get a few hundred shares, reach 10,000+ people in a couple of days and get lots of comments, but is of no value to rhino conservation or demand reduction. Putting up anything of real substance is lucky to reach 200 people. One of the ways we have used Facebook and Twitter to test if people can be 'moved into action' beyond that which can be done sitting at their computer. As an example: for most, though not all of our followers, it would be relatively easy to print a Speak Out For Rhinos letter: <http://breakingthebrand.org/take-action/speak-out/> sign it and post it. This is



06  **GEORGE MONBIOT**
Environmental commentator and author

George says simply that he writes about things that make him angry, but his ability to pick the subjects that matter, nail an argument and confront vested interests makes him Britain's leading independent commentator on the environment. The lasting impact of his book *Feral* (2013), which examines the case for rewilding, continues to win over sceptics. His *Guardian* column is hugely influential and his talks electrify lecture halls – one of his most inspiring messages is that by acting on what we believe we can all make a difference.

George will contribute the first in a new series of BBC Wildlife Essays, coming soon.

George Monbiot was just ranked a number 6 in the BBC Wildlife Powerlist of Briton's top 50 conservation heroes. In an article written for The Guardian in January 2015 he commented "Another study reveals a near total collapse of environmental coverage on ITV and BBC news: it declined from 2.5% (ITV) and 1.6% (BBC) of total airtime in 2007 to, respectively, 0.2% and 0.3% in 2014. There were as many news stories on these outlets about Madeleine McCann in 2014 – seven years after her disappearance – as there were about all environmental issues put together."

the first step to move into action beyond staring at a screen. The result has been limited and can be seen via:
<https://www.pinterest.com/niasfriends/speak-out-for-rhinos-selfies/>

This has to lead to the consideration of the value of social media:



This liking, sharing and commenting on Facebook and Twitter appears more designed to get a quick emotional fix or release for the follower. While BTB continues to use the Facebook we have reduced the frequency of posts and instead focus on increasing our email list. It would appear that activists who want to get real, genuine results may be better off building structures outside social media. This is something the BTB will research further in the coming year to see if social media can be more useful in driving a result.

Social Media Macro Level. From a macro level more concerning is that social media promotes a massive fragmentation in the conservation space. For example, the image on the right illustrates just a small subset of organisations 'working' on/in rhino conservation. BTB collected 3 pages full before we stopped (if we had done the exercise with elephants this would have been a significantly larger number).

So as conservationist, activists etc. we have to ask ourselves 'How is this helping?' Who really benefits from this level of fragmentation, from the cacophony of voices and the endless focus on the same, emotional messages, the same verbal noise? As long as people can be happily kept entertained by rehashing the supposed problem, the users and traffickers will continue to operate without fear. This may be ok when extinction in the wild is not on the agenda, but once we have really tight timeframes like with the rhino, then this noise becomes a distraction to solving the issue.

Too Many Voices Saying The Same Thing and No Message is Addressing the User of Rhino horn In Their Currency



This challenge is summarized in the article: <http://theearchdruidreport.blogspot.com.au/2012/12/last-weeks-post-here-on-archdruidreport.html>. The key messages from the article: "An extraordinary amount of what passes for argument in today's activist scene, after all, is exactly the sort of linking of verbal noises with simple emotional reactions, warm and fuzzy or cold and prickly as needed... Consider the way that the climate change movement went from an apparently unstoppable juggernaut a decade ago to nearly total failure today. The strategy chosen by the great majority of climate change activists could be adequately described as the mass production of cold pricklies; when the other side in the debate figured out how to counteract that, the activists' sole response was to shout "Cold prickly! Cold prickly! COLD PRICKLY!!!" as loud as they could, and then wonder why people weren't listening... You can't craft an effective strategy if your mental processes are limited to linking up verbal noises, simple emotional reactions, and vague abstractions. It really is as simple as that. Until those who hope to have an influence on any level recognize this, they're not going to have the influence they seek... The difficulty is that the activists, or for that matter the people, aren't actually giving the politicians any reason to pay attention; they're simply making noise, and the politicians have gotten increasingly confident that the noise can be ignored with impunity."

Whilst this article is talking about climate change activism, the arguments can be equally applied to the rhino conservation. The fragmentation is not helping and pressing the same emotional buttons over and over simply makes people immune to the pain.

Breaking The Brand's Profile

This section summarises what we have been able to achieve in terms of publicity over the last 12 months.

Website/Blog

Our website at www.breakingthebrand.org details the problem and the campaign. It also showcases all the media coverage we have received and links to all our social media platforms. We launched a blog on the site in January 2014 and have posted 28 lengthy blog entries to date. The website has about 2,000 unique visitors each month. BTB's blog posts are getting a regular following of between 1,000 – 2,000 views each month. The top 3 blog posts, each of which have had well over 10,000 views are:

1. <http://breakingthebrand.org/killed-for-useless-detox-drinks-and-needless-business-gifts/>
2. <http://breakingthebrand.org/values-development-behaviour-change-and-conservation/>
3. <http://breakingthebrand.org/to-save-rhinos-three-strategies-need-to-work-in-unison/>

We have also just launched a guest blog and will invite contributions from people working on all aspects of conservation and wildlife trade to discuss their observations and insights. Since launching a blog subscription process in January 2015, 124 have registered to receive BTB's blogs.

BTB has had a growing number of media and promotional opportunities, one of the most recent being an opportunity to write a 2,000 word article for the American Association of Zoo Keepers: <http://breakingthebrand.org/wp-content/uploads/2015/04/April-Journal-of-the-American-Association-of-Zoo-Keepers-Inc.pdf> and as this report was being finalized BTB had an article published in the May 2015 Edition of the World Association of Zoos and Aquariums Magazine: http://breakingthebrand.org/wp-content/uploads/2015/05/WAZA-N_2015-02_150504_BTB.pdf

For the full list of the media opportunities BTB has had: <http://breakingthebrand.org/media/>

Section 3 – The Evolution of Breaking The Brand

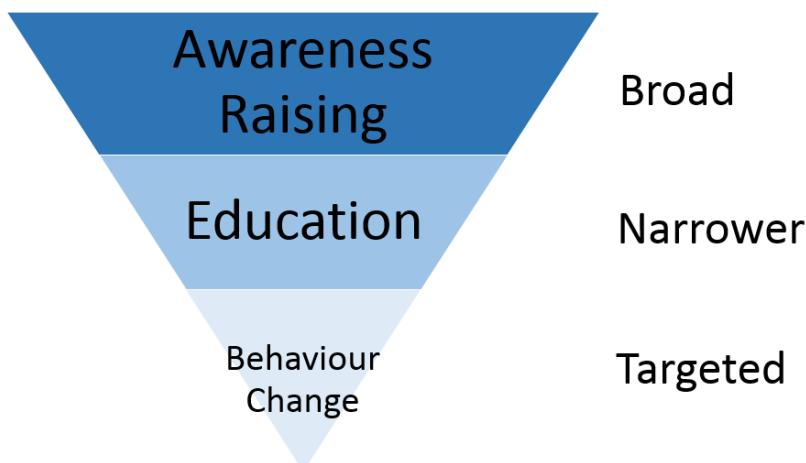
Demand Reduction Definition

If we have learnt one thing in Breaking The Brand this year it's how critical it is to have an agreed definition of what constitutes demand reduction and what doesn't. In the coming years demand reduction will play a bigger role in conservation (<http://breakingthebrand.org/conservation-vs-wildlife-traffickers-who-do-you-think-will-win-the-war-in-wildlife-crime/>) and it is vital that demand reduction is differentiated from general awareness raising and education (<http://breakingthebrand.org/poor-quality-demand-reduction-campaigns-and-strategies-will-provide-ammunition-for-pro-trade-lobby-groups/>).

In the first instance we put forward a couple of basic models:

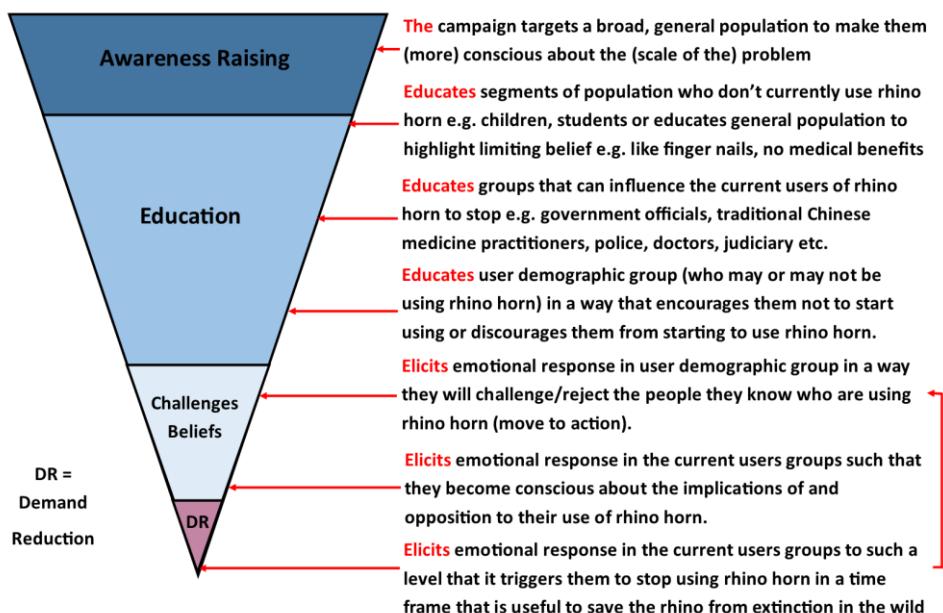
Iteration 1:

Behaviour Change



Iteration 2:

Basic Test to Differentiate Demand Reduction from Awareness Raising and Education



From Breaking The Brand's perspective a demand reduction campaign means **directly targeting users driving the current demand**. In recent months we have seen projects targeting primary and secondary school children in Asia being called demand reduction campaigns. They may, through education, ensure that these children don't become the next generation of users in 20 years' time, but these are not demand reduction campaigns. Awareness-raising and education can ensure that a change in demand is a sustainable change in the long-term.

Similarly, when a demand reduction campaign is created the conservation body needs to ask itself:

1. Have we researched the user groups and have we elicited from the current users their motivations to stop buying/consuming the product?
2. Have we inadvertently created a campaign that plays to our own values, but won't work for the users of the wildlife 'product' and so is unlikely to reduce the demand?
3. Have we created a campaign that will appeal to our donors' values and gives us a better chance of future donations rather than something that will work with the users of the wildlife 'product' and so is unlikely to reduce the demand?

In the case of the rhino, targeted demand reduction campaign singles out a small, wealthy elite in one or two countries and some conservationists and donors appear to still have a great deal of trouble of seeing such campaigns as 'conservation measures'. They are also reluctant to single out and 'accuse' identifiable groups, mainly because of the perceived impact on their own brand and reputation. Since the launch of our campaign some of the feedback from individuals in the conservation space has been:

1. The BTB campaign could work but is it too hard hitting so we can't be openly associated with it.
2. The BTB campaign is racist.
3. We couldn't get our politically correct donors to support a campaign like this.

As BTB scopes out the project to do an in-depth analysis of how to define what a genuine demand reduction campaign is, we would be very interested in working with representatives of large conservation organisations who may be considering the same question.

Our initial thoughts are that there are two possible approaches to defining demand reduction:

1. Based on actual measured reduction in purchase/consumption of illegal wildlife product.
2. Based on campaign design, targeting and evaluation measures.

As this is explored we need to find ways to measure a cause-effect relationship between the campaign and the measured reduction in consumption. Because the campaign takes place in the real world where it is not possible to eliminate all other possible causes to isolate one particular factor, this is not a trivial task. At the same time if a change in trend (e.g. from rising to falling demand) can be observed in the absence of any other significant changes in e.g. supply or law enforcement, then it would be possible to conclude that the demand reduction campaign played a key role in achieving the reduced demand.

To complicate matters, usually consumption of illegal wildlife products cannot be measured directly and a proxy measure – such as poaching level – has to be used. In some cases these proxy measures can be very reliable because of the ways the product is consumed and the knowledge about the distribution, population and poaching levels for the wildlife in question. Rhinos and rhino horn are a good example here, the distribution and poaching levels are known with a relatively high level of accuracy and consumption is confined to basically just one or two key countries.

In contrast using a proxy measure for the consumption levels of pangolin would be next to impossible, there are too many species distributed over numerous countries with both unknown population levels and poaching levels. In the case of pangolin it would be necessary to gather data on the actual numbers of pangolin served over a defined period in a representative subset of restaurants across the geographic spread of the campaign, first before the campaign and then again after the campaign to see if any change can be established. This would require obtaining the cooperation of restaurant owners, which may be difficult.

Additional difficulties include, first and foremost, the fact that purchase, possession and consumption may all be illegal and hence self-reporting would mean incriminating yourself. This means people are unlikely to self-identify as users and we have to use de-jeopardising techniques for quantitative surveys and highly trained interviewers and special interview techniques for qualitative research to get more reliable data. This is outlined in the next section of the report.

Measurement and Evaluation

Given that demand reduction will play a greater and critical role in the future conservation efforts for many species new methods to measure the impact and behaviour change in the users of these products needs to be developed. Many of the current data gathering techniques have limited use when there is a need to get people to truthfully talk about behaviours that may be illegal.

Breaking The Brand is a volunteer organisation that doesn't currently have the funds to do substantial evaluations. But that doesn't mean that we haven't tried to evaluate the response to our pilot campaign in Viet Nam. In early 2014, long before our pilot campaign was launched, we approached an international company with offices in Viet Nam to ask if we could interview senior managers in Hanoi and Ho Chi Minh City. To clarify:

- The managers were Vietnamese citizens.
- The interviews would be voluntary and no personal information would be collected.
- In volunteering for the interviews, this in no way indicated that the interviewee was a rhino horn user, simply that they were part of the demographic group that could afford genuine rhino horn.
- Even though the company supported the interviews, the evaluation would not formally be linked to the company.
- We wanted to interview at least 30 people.

In a recent article WildAid Managing Director John Baker said "Of 400 people interviewed in a survey commissioned by WildAid in late 2014, no one admitted having purchased rhino horn before. Either they will not admit it or the number of people surveyed did not get the right individuals." In another survey carried out by one of the large conservation organisations I was told by an employee that in reality of the several hundred people who were part of the survey it was estimated that between 3 and 8 were users of rhino horn.

From blog:

<http://breakingthebrand.org/how-to-elicit-and-measure-behaviour-that-people-dont-easily-admit-to/>

In the end the international company didn't want to go ahead; Breaking The Brand's request was taken to the lawyers who manage the company's risk and they said no. But we are not giving up and will try this company again and others that have a base in Viet Nam. We would recommend that the large conservation organisations who have strong corporate links ask these supporters for access to employees, who fit the right demographic group, as part of an evaluation strategy for campaigns.

De-Jeopardising Techniques

In the case of illicit or other behaviours which people don't like to disclose honestly, social scientists have developed a number of so-called de-jeopardising techniques that give better, more honest results than direct questioning or normal questionnaires. Breaking The Brand is using these de-jeopardising techniques to develop evaluations that will be used once we are able to roll out our campaigns on a larger scale.

Two such techniques we are reviewing are:

- I. The Randomised Response Technique (RRT) has been used extensively in the social sciences since the 1970s. In this technique a randomisation method (like throwing a pair of dice) is used to determine if the person should answer honestly or give a fixed answer (irrespective of whether they engage in the behaviour or not). Because the interviewer cannot see the result of the dice throw,

they don't know if the answer is pre-determined or an honest answer, this information can only be extracted statistically.

The RRT has been applied in the conservation industry, mainly in face-to-face interviews. For example, Solomon et al. (2007) reported that 39% of respondents admitted to hunting illegally inside Kibale National Park, Uganda, when asked via RRT, whilst only 1.7% of respondents admitted to this behaviour when asked directly. So this technique is immensely valuable in getting people to disclose illegal behaviour.

2. The Crosswise Model was proposed by Chinese researchers in 2008 and has been studied empirically since 2012. This technique enables online surveys where participants are presented with two questions, one 'inoffensive' question with a known distribution of answers ('What is the starting digit of your parents' house number?') and one 'offensive' question with an unknown distribution. The unknown distribution can be extracted from the complete data sample using statistical techniques. This method has been shown to be superior to RRT in online surveys, especially if the answers to the inoffensive question follow a so-called Benford Law (like the starting digit of house numbers).

In conclusion to this section on measurement and evaluation Breaking The Brand must clarify that whilst both sophisticated interview and quantitative survey techniques are available for collecting information on the behaviour of consumers of illegal wildlife products, we stress it is not always about the measurement. Often too much importance is placed on measuring and too little importance on understanding. The reason the two don't yield the same insights is that we will always prefer to measure what can easily be measured, and not necessarily what is relevant. This is in no way unique to the conservation industry, the same applies in the business sector, education, government and in academia.

For more information, please go to: <http://breakingthebrand.org/how-to-elicit-and-measure-behaviour-that-people-dont-easily-admit-to/>

Rhino Horn Demand Reduction – A Missed Opportunity To Undermine Vietnamese Users Status



In 2014 a survey suggested that demand for rhino horn had dropped in Viet Nam. In the media there were disputes between conservation bodies as to whether this has genuinely occurred or not.

Though valid questions were asked about the survey and its conclusion the media response was a lost opportunity to target the users, without agreeing or aligning with the survey.

When asked for comment, slipping in statements such as:

"Let's hope that rhino horn is going out of fashion with Viet Nam's elite" could translate to media headline

'Rhino Horn Going Out Of Fashion' or 'Viet Nam's Elite No Longer Interested in Rhino Horn'

Given the user groups are 'aspirationals' they are worried about how they are perceived and want to be seen as leading a trend; they don't like to be seen to be using anything that is going out of fashion.

The Breaking The Brand Big 5

Breaking The Brand is expanding its focus to tackling the demand for a number of key species. Over the last 18 months we have been approached by a number of organisations to look at the demand for ivory and lion bones; however the rhino is still our primary focus. As evidence



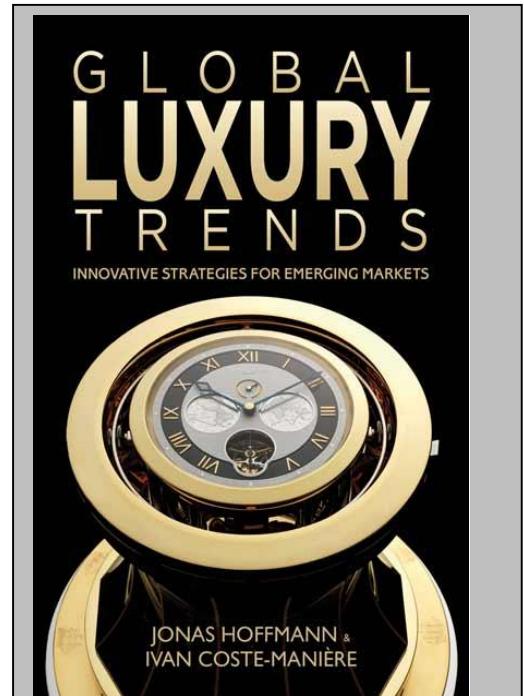
increases on a re-emergence of demand for rhino horn from China, we have decided to do research on the Chinese market for rhino horn in the same way have for Viet Nam; eliciting motivations to use and stop using in this country. Given many users of wildlife 'products' are multi-species users, while we research Chinese user of rhino horn it makes sense to incorporate other species into our ongoing research – elephant, lion and pangolin.

We already know that China is the key market for ivory, lion bones and pangolin, although it is not the only market. By targeting four species in relation to Chinese demand we hope to build a more comprehensive picture of the end consumers. With use of these products ranging from meat consumption to medicine, jewellery and speculative investment, we are able to tackle a broad range of motivations to poach and trade illegal wildlife products. Our aim is to develop a more thorough framework of understanding demand and factors that can be used to impact and reduce demand depending on the specific motivations to use and the nature of the end consumer groups.

The odd one out of the BTB Big 5 is the giraffe. The myth of giraffe marrow bone as a cure for HIV/AIDS is being manufactured in Tanzania. Here we are dealing with a very different market, one that has actually been created in one of the 'range' countries. As this is a relatively new market, we believe we can learn a lot about how wildlife traffickers create markets and demand from including the giraffe in our research.

As with all our projects, we will do first-hand investigations on the ground, in the relevant communities and with the key demographic groups to learn what is happening and how these markets currently operate. We will also continue to liaise with conservation organisations who already have a wealth of knowledge about these markets. What we bring is our expertise in asking the right questions to elicit motivations to consume and stop consumption together with our knowledge and experience in designing behaviour change campaigns.

We will expand our knowledge of the demand for these 5 species over the course of the next 12 months, but the rhino will remain our primary focus.



Chapter 6 of this book talks about 'Engaging with the Luxury Consumer in China' and states that over 89% of Chinese luxury consumers today are under 45, with many no older than 35 years. (The so called Little Emperors).

Similarly a recent article in Virgin Australia's Voyeur magazine states: Nouveau riche around the world are realising that opulent displays of wealth doesn't necessarily bestow class or taste. The solution? Etiquette classes with royal protocol expert William Hanson who is teaching wealthy Chinese women everything from 'pastry skills' to 'how to be the perfect host'

This statement indicates a level of 'status anxiety' and a fear of being rejected by the people you aspire to and, as a result, could be used in creating a demand reduction campaign.

Section 4 - Conclusion and Next Steps

Conclusion

Over the second year of Breaking The Brand's operation, covering the period March 2014 – April 2015 period, we have continued to research the factors impacting the conservation – supply – demand chain, with a primary focus on the users of genuine rhino horn in Viet Nam.

From a rhino horn demand reduction perspective:

1. We still observe that health anxiety and status anxiety are the only two reasons the primary user groups would give up rhino horn in the short term. There is little evidence that users are impacted by the deaths of the rangers protecting rhinos from poachers. Yet there appears to be an emerging sense of shame about the impact on the lives of the wives and children of the rangers killed. The plight of the animal itself cannot be used to trigger a behaviour change in the time frame required to save the rhino from extinction in the wild.
2. As a result of point 1, BTB still believes that exploiting the health anxiety associated with rhino horn infusion is the most effective and fastest strategy of achieving demand reduction. We have proven that this can be brought to the users in the form of ad campaigns, whilst other groups have used workshops and press coverage to achieve the same aim. As predicted, there is an immediate, observable emotional response to these ads and stories, implying that the users are worried about their health.
3. At the same time it has to be said that we cannot compete with the resources marshalled by the pro-trade lobby in South Africa to fight horn infusion and to undermine its credibility both in South Africa and in Viet Nam. Given that a legal trade will make some already wealthy people in South Africa and Vietnam significantly richer, they are prepared to gamble everything on getting their way.
4. The pro-trade agenda in South Africa is not only a direct threat to horn infusion and running campaigns in Viet Nam informing the users about this, it is also a huge distraction for those who are trying to save rhinos from extinction in the wild. They are constantly drawn into arguments having to defend their current strategies and defending their anti-trade stance. Significantly, not enough people are asking the questions: *"Whilst we know that horns can be harvested for sale, are these the rhino horns that the wealthy users, driving the poaching of wild rhinos, will want to buy? Are farmed horns a substitute product for horns from wild rhinos to the primary user groups?"* BTB's research would indicate a farmed product is not seen as a substitute product and while the demand is there the poaching of wild rhinos will continue.
5. Equally, targeted demand reduction singles out a small, wealthy elite in one or two countries and some conservationists and donors appear to still have a great deal of trouble of seeing such campaigns as 'conservation measures'. They are also reluctant to single out and 'accuse' identifiable groups, mainly because of the perceived impact on their own brand and reputation. Since the launch of our campaign what we do has been called 'too hard hitting', 'racist' and 'would offend our donors' by various players in the rhino conservation space. These attitudes will have to shift and donor education will have to become a priority to make demand reduction viable from a fundraising and 'accountability' perspective.
6. On the positive side the last year has brought about a shift in thinking about demand reduction in some conservation groups and a number of new adverts presenting with users of rhino horn with campaigns that challenge their self-image.
7. At the same time the funds going into demand reduction remain tiny due to the arguments outlined above.

From a conservation/wildlife trafficking perspective:

1. There is a significant imbalance between the resources going into conservation measures versus demand reduction. To illustrate the under investment – in a recent discussion with a key rhino conservation body from then US they disclosed that only 2% of their funds are allocated to demand reduction. And much of what they term as demand reduction could be more correctly defined as awareness-raising or education.
2. Too much of what is sold to donors as demand reduction is in reality awareness-raising or education. Clearer definitions of what constitutes demand reduction are required. This is vital for several reasons, including:
 - a. The traffickers have realised how comparably safe it is to get rich from dealing in wildlife. As a result they are now moving beyond simply exploiting the existing demand for animal products such as rhino horn and ivory. Given how easy and lucrative it is to fill the demand for animal products compared to their other business, such as human, arms and drug trafficking, they are likely to be designing and manufacturing new markets.
 - b. To be prepared for the emerging demand countries – given the levels of economic growth these are likely to include Myanmar, Laos and Cambodia.
 - c. As to not to provide pro-trade lobby groups with ammunition to claim that demand reduction strategies haven't worked to save the species such as the rhino. It is imperative that the conservation industry in its naivety of what a demand reduction campaign really is doesn't play into this.
3. We have further observed that the increasing extinction anxiety is leading to increased fragmentation in the conservation and activist sector, exactly the opposite of what is needed. This phenomenon was also observable in the climate change movement once fossil fuel interests started to fight back and fight dirty.
4. The absence of good news and the lack of demonstrable results for the vast amounts of money being spent on protecting rhinos is leaving the conservation sector feeling exposed. The current result is more screaming and outrage, but no meaningful analysis of what has happened and why.
5. Demand reduction is a feasible strategy to get results, but requires agreement what is and isn't demand reduction.

Next Steps

While the research and analysis of the horn infusion process continues over the coming year, BTB will shift its campaign focus to trial a number of different ways of targeting status anxiety to achieve demand reduction outcomes. We have done the necessary research and are currently finalising our first 'status anxiety' campaign. It should be acknowledged that a status anxiety approach is more complex and may not be a fast in getting behaviour change as a health anxiety based strategy.

In the coming weeks we will start fundraising for this new campaign. We are looking to raise in the region of \$30,000 so we can run something small scale and test the response our status anxiety designs.

In addition to the campaigns we will trial a range of de-jeopardising techniques in the campaign evaluation process.

We will also continue to work towards a stricter definition of what constitutes a demand reduction campaign. As BTB scopes out the project to do an in-depth analysis of how to define what a genuine demand reduction campaign is, we would be very interested in working with representatives of large conservation organisations who may be considering the same question. The aim is that prior to the CITES 2016 meeting some (or even all) of the key players in rhino horn demand reduction have settled on a common definition and evaluation methodology for their campaigns, which then will allow us to combine our data and focus money in the strategies and campaigns with the highest return on investment from a demand reduction perspective.

BTB will further launch its own investigation into the Chinese demand for rhino horn, beginning with studying all the information and research already done by other agencies and individuals together with the small number of insights we have already gathered. This will allow us to hopefully quantify the relative demand and then we can use this information to adjust our campaigns as necessary to also address Chinese demand should it turn out to be significant as now suspected by quite a number of parties.

We will further use our investigations into the Chinese market to better understand current demand for ivory and what factors may be utilised to reduce that demand. We are not going to shift focus away from rhino horn, instead our aim for the next 12 months is to expand the scope of demand reduction campaigns we are creating.

Acknowledgments

What the Breaking The Brand project has achieved since its launch in February 2013 could not have been accomplished without the generous support of many individuals. They have offered their time to educate Breaking The Brand team members together with reviewing and giving feedback on our campaign ideas as they have evolved. Similarly, they have donated their services and intellectual property to the campaign. They have shared their research and they have bridged us in to their substantial networks. It is impossible to thank them enough for their interest, encouragement and support.

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<http://www.savefoundation.org.au/hewsite/>

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More of our supporters are acknowledged on our web site at: <http://breakingthebrand.org/supporters/>

We hope that 2015/16 will bring more positive news for wild rhinos in both Africa and Asia.





These are the views of the writer:

Dr. Lynn Johnson,
Founder, Breaking The Brand Project
Melbourne, Australia

Finally a personal thank you my husband and business partner, Peter Lanius, who over the last year has been pulled more-and-more in to the Breaking The Brand project.