

## Illegal Wildlife Trade (IWT) Challenge Fund Annual Report

To be completed with reference to the “Writing a Darwin Report” guidance: (<http://www.darwininitiative.org.uk/resources-for-projects/reporting-forms>). It is expected that this report will be a **maximum** of 20 pages in length, excluding annexes)

**Submission Deadline: 30<sup>th</sup> April 2018**

### IWT Challenge Fund Project Information

Project reference	IWT045
Project title	Research and pilot campaign to reduce demand for pangolins
Country/ies	China
Contract holder Institution	Zoological Society of London
Partner institution(s)	Eco-bridge Continental, TRAFFIC
IWT grant value	£386,944
Start/end dates of project	01/06/2017 – 31/03/2021
Reporting period (e.g. April 2017- Mar 2018) and number (e.g. Annual Report 1,2,3)	June 2017 – Mar 2018 Annual Report 1
Project leader name	Carly Waterman
Project website/blog/social media	N/A
Report author(s) and date	Carly Waterman 30 April 2018

### 1. Project rationale

Pangolins are the world’s most trafficked mammals, with >1 million estimated to have been illegally traded over the past decade. All eight species are listed as threatened on the IUCN Red List (two CR and two EN in Asia; four VU in Africa) on the basis of population declines.

Demand from increasingly large and affluent Chinese urban populations for pangolin meat (eaten as a luxury dish), and scales (used in traditional Chinese medicine) is one of the primary drivers of trafficking. Illegal trade in pangolins is now taking place on a commercial scale from >16 ODA recipient countries (including 6 least-developed countries) in Africa and Asia. The large nature of recent seizures (e.g. 4,000kg of scales from Cameroon seized in Hong Kong), indicates the involvement of organised criminal trade syndicates.

Criminals undermine the rule of law, generating huge profits at relatively little risk, whilst exploiting the poorest and most vulnerable community members in pangolin range-states. Local poachers at the start of the trade chain risk arrest and injury/death but accrue minimal benefits. Communities adjacent to wild pangolin populations see their natural resources depleted, face compromised security and feel disempowered in the face of criminal elites.

Efforts to address the increasing market demand driving illegal wildlife trade are essential, yet have largely failed because they lack the in-depth and culturally sensitive understanding of both demand and the most appropriate interventions with which to change consumer behaviour.

Through piloting targeted and evidence-based behaviour change strategies, this project will measurably reduce demand for pangolins among key consumer groups in China. Focusing initially in Guangdong (population 107 million; one of China's main markets for pangolins), it will reduce the market opportunities to which criminal syndicates are responding, resulting in decreased pangolin poaching/trade and greater livelihood security for vulnerable communities in 6 low-income range-states.



Figure 1: Map of China with Guangdong Province highlighted in red.

## 2. Project partnerships

Project partners Ecobridge-Continental and TRAFFIC have been fully engaged in all aspects of project planning. A two-day project inception workshop was held in July 2017 and attended by key representatives from each organisation. Partners have provided input into the project since the workshop via email, Skype meetings and face-to-face meetings in Beijing in March 2018.

**Eco-bridge Continental:** formal four-year collaborative and annual project agreements outlining role and responsibilities of EBC and ZSL were signed following the project inception workshop. The EBC Director was instrumental in identifying key national government stakeholders to engage in the project and helped to secure a letter of support from the State Forestry Administration (SFA) after more than 12 months of liaising with them about the project. This letter of support is a fundamental requirement for successful registration of the project under China's new (2017) law governing the work of foreign NGOs. Under this law, international NGOs cannot undertake any project work, or transfer funds to a Chinese partner organisation, without being formally registered at the level of either the organisation or the individual project (see section 3.1 below for further details).

EBC has previously focused primarily on ecological research but is keen to increase staff capacity in the field of social science and, in particular, increase knowledge of Social and Behaviour Change Communication (SBCC) approaches. EBC staff have been fully involved in all aspects of project planning and decision-making. The key challenge over the past 12 months has been the delays with project registration meaning that ZSL cannot legally transfer funds to EBC. As a result, EBC has not been able to recruit a team to undertake the consumer

research as originally planned. Efforts in Y1 have therefore focused primarily on clarifying requirements for project registration, drafting and finalising required documents such as annual agreements, as well as obtaining necessary external supporting letters, including the letter of support from the SFA. We are pleased to report that the letter of support was secured in March 2018. We are now proceeding with registering the project and are optimistic this will be completed within a month (official guidelines state the registration process takes approximately two weeks).

**TRAFFIC:** has provided technical input into the project design and selection of a market research agency to lead on the research (necessary since EBC have been unable to recruit a team of researchers) and is providing technical input into the development of the methodology. TRAFFIC has strong relationships with the demand reduction 'Community of Practice' comprising experts in the field of behaviour change, many of whom will be engaged in campaign development and implementation following completion of the research phase of the project. TRAFFIC also has a strong relationship with the China CITES Management Authority, which has expressed support for initiatives to reduce demand for pangolins, and the Traditional Chinese Medicine (TCM) Association, another key stakeholder for the campaign. Input from TRAFFIC has been limited since the project inception workshop, due to delays in implementing the project. However, we are pleased to report that a TRAFFIC-led collaboration, involving ZSL and WWF China has successfully secured matched funding for the project from the European Union. Approximately EUR 100,000 was secured in January 2018 towards reducing demand for pangolins in China. This is part of a larger TRAFFIC-led proposal that also aims to increase the sustainability of rosewood trade. The new 2.5 year grant will enable us to secure additional data on the trade by undertaking physical and online market surveys of pangolin products, as well as bolster funding for campaign implementation.

**University of Oxford:** Diogo Verissimo, now based at Oxford Martin School at the University of Oxford, remains involved in the project as a technical specialist. His role has expanded from purely designing the monitoring and evaluation of the campaign to providing technical input into the development of the methodology. Specifically, Diogo is introducing sensitive questioning techniques, such as the Unmatched Count Technique, as a means of assessing the accuracy of data collected via direct questioning during the consumer research phase.

**China State Forestry Administration:** as noted above, the SFA has recently provided a letter of support for the project (**Annex 4**).

**China CITES Management Authority:** supportive of the project. Involved in ongoing discussions with TRAFFIC about reducing demand for illegal pangolin products and provided a letter of support for the EU grant application.

**USAID:** supporting complementary research on demand for pangolin products through its Wildlife Asia programme. USAID has recently completed, via GlobeScan, qualitative research on demand for pangolins and other wildlife products (rhino horn, tiger products) and is commencing quantitative research. USAID's SBCC's Objective 1 lead has agreed to share key findings on pangolins with this project to help inform our more comprehensive research into demand for pangolin products.

**NGO Community:** the Project Leader is in regular contact with IFAW and WildAid, who are engaged in ongoing awareness-raising on the impact of pangolin consumption in China. IFAW is planning a SBCC campaign to reduce demand for pangolin products across China, informed by the results of the ongoing USAID-directed research and are keen to collaborate to increase the scope of the campaign.

**GlobeScan:** an international market research agency with offices in Hong Kong, GlobeScan (<https://globescan.com/>) has extensive experience in conducting sensitive consumer research, including on illegal wildlife trade. GlobeScan has recently completed an investigation into ivory consumption on mainland China in partnership with TRAFFIC and WWF China, and is currently working with USAID to undertake research into the consumption of various IWT products, including pangolins. We have appointed GlobeScan to undertake the research phase of this project to enable us to legally move forwards while awaiting registration under the new NGO law.

### **3. Project progress**

#### **3.1 Progress in carrying out project Activities**

##### **Project Registration**

This activity was not included in the funding proposal because it was not a requirement at the time of submission. However, the Government of China introduced a new foreign NGO law in January 2017 which requires that all foreign NGOs undertaking projects in China be registered with both the Beijing and relevant provincial Public Security Bureaus. Registration can be either at the level of the organisation (an extremely lengthy process) or at the project level.

A lack of clarity on the specific government requirements for the registration process from the provincial and central Chinese Government bodies overseeing this resulted in a significant delay in registering this project. This delay, while not unique to this project (or to ZSL), resulted in us being unable to begin undertaking activities on the ground in China as planned in the proposal (i.e. via recruiting, training and deploying our own research team) as funds cannot legally be transferred to our designated Chinese partner, EBC, until the project is registered.

ZSL staff in China and the UK spent considerable time and effort on gaining clarity on the project registration process and, by October 2017 (nine months after the introduction of the new law), we finally had sufficient information to be able to develop a flow chart to document the registration process (**Annex 5**) and create templates for the documents needed for project registration (project collaboration and annual agreements, funding confirmation letter, ZSL information for Form 11, and a translated, notarised and stamped copy of our Charity Commission letter). Although this sounds like a long time, it is worth noting that, as far as we are aware, ZSL is the first UK conservation NGO to successfully register a project in China (an online learning course in conservation was registered in February 2018) Several other UK conservation NGOs have since approached ZSL for advice and guidance on the project registration process.

Chinese partner institutions (i.e. EBC) are responsible for submitting the above documents, together with a project permission letter from the relevant Chinese overseeing authority (the SFA in the case of this project). EBC began liaising with the SFA about this project in October 2016 but due to the sensitive nature of the project, only managed to successfully obtain a formal letter of support at the end of March 2018 (**Annex 4**). We are pleased to report that we now have all of the documentation required for project registration which, according to the guidelines, should take approximately two weeks from submission.

##### **Activities for Output 1: Products and uses having the most detrimental impact on wild pangolin populations identified and broken down to their component behaviours and the various groups engaging in this use**

At a project inception workshop in July 2017, involving all project partners, it was agreed that should delays with project registration result in us being unable to implement the project as outlined in the proposal, then we would recruit a market research agency to undertake the research. ZSL can legally recruit an agency based outside of China to undertake the research whilst registering the project.

Having assessed various market research agencies based on previous experience, partner recommendations, quality of recent research outputs and value for money, we concluded that GlobeScan represents the best option for the demand reduction research phase of this project. Following approval of our Project Change Request (submitted to LTS in Feb 2018), we appointed GlobeScan to complete the research (following the IWTCF and ZSL procurement policies).

GlobeScan is currently undertaking desk research on previous relevant studies and drafting the moderator guides for ten in-depth interviews and four focus group discussions, with relevant stakeholders (e.g. consumers, TCM practitioners, restaurant staff). These will be undertaken in May 2018. Insights gained from this qualitative research will be used to inform the developed of an online questionnaire targeted at members of the public. 1,000 questionnaires will be administered in July-August, with an additional booster sample of 150 respondents that fit the profile of pangolin consumers. The research will enable us to identify key pangolin products in

prevalent use, behaviours encouraging their use, and uses being employed in different consumer groups.

The results of the qualitative and quantitative research will be presented at a stakeholder workshop in Guangzhou, which is planned for September 2018. Although this is approximately six months behind our original schedule, we are confident that we can make up the time during the campaign planning stage (the timeline for which was deemed generous at the project inception workshop) and commence implementation of the campaign on schedule.

**Activities for Output 2: The most important factors influencing the behaviour of the different audience groups for each behaviour prioritised in Output 1 are identified and understood**

The activities associated with Output 2 will be carried out simultaneously with the Output 1 activities. Following data collection over the next four months, GlobeScan and technical experts from ZSL, Oxford University and TRAFFIC will work together to analyse the data and document social norms, socio-demographic, attitudinal and other aspects of target audience profiles and gain insight into the specific triggers and drivers of pangolin consumption. The research will also test potential campaign messages and messengers to identify which will be most successful in bringing about the desired behaviour change. Results will be presented and discussed at the September 2018 stakeholder workshop, as above, and a full report will be made available to stakeholders. The results of the research will also be written up for publication in an international peer-reviewed journal.

**Activities for Output 3: Behaviour change models developed that can be practically applied to tackle specific triggers and drivers of pangolin consumption effectively, through highly targeted campaign messages**

The behaviour change models will be developed by experts drawn from the demand reduction Community of Practice and shared with key stakeholders planning or implementing on-going demand reduction activities to assist them with their work. Community of Practice collaborations have already led to joint and complementary demand reduction initiatives amongst a range of conservation NGOs active in China, including WildAid and IFAW, both of which currently have pangolins as a major focus. Corporate partners of the 'Community of Practice', including e-businesses, travel service providers and couriers companies have also been engaged on various demand reduction initiatives.

**Activities for Output 4: Social marketing framework developed that can be used to identify and set communication objectives for effective demand reduction campaign**

The activities under Output 4 are planned for Y2.

**Activities for Output 5: Demand reduction campaign package developed and implemented in >20 key locations across Guangdong province, having been piloted and shown to be effective in a representative city and/or rural area**

The activities under Output 5 are planned for Years 2-4.

### **3.2 Progress towards project Outputs**

**Output 1: Products and uses having the most detrimental impact on wild pangolin populations identified and broken down to their component behaviours and the various groups engaging in this use**

Desk research, together with a review of the outputs of previous pangolin consumer surveys undertaken by ZSL/TRAFFIC in May 2017, and findings from the ongoing USAID research, has generated some insights into the pangolin products in prevalent use (indicator 1.1), consumer groups using the different products (indicator 1.2) and behaviours encouraging the use of pangolin products (indicator 1.3). These will be further investigated by the research planned over the next four months and written up as a formal report (for sharing with stakeholders within China and the broader Community of Practice) and as a scientific paper in an international peer-reviewed journal. Although slightly behind schedule, we have every confidence that the project will achieve this output within the next six months, even in the unlikely event that are

further delays to project registration. This output is fundamental as it will underpin the development of the behaviour change campaign.

**Output 2: The most important factors influencing the behaviour of the different audience groups for each behaviour prioritised in Output 1 are identified and understood**

As above, some insights have been gained through desk research, and previous/ongoing research. However, further research is required in order to identify social norms, socio-demographic, attitudinal and other aspects of the target audience profile (indicator 2.1), as well as specific triggers and drivers of target behaviours (2.2). We anticipate fully achieving this output by September 2018.

**Output 3: Behaviour change models developed that can be practically applied to tackle specific triggers and drivers of pangolin consumption effectively, through highly targeted campaign messages**

No progress can be made on this project output until outputs 1 and 2 have been completed.

**Output 4: Social marketing framework developed that can be used to identify and set communication objectives for effective demand reduction campaign**

No progress can be made on this project output until Output 3 has been completed.

**Output 5: Demand reduction campaign package developed and implemented in >20 key locations across Guangdong province, having been piloted and shown to be effective in a representative city and/or rural area**

No progress can be made on this project output until Output 4 has been completed.

### **3.3 Progress towards the project Outcome**

**Outcome: Measurable reduction in demand for illegally traded pangolin products in Guangdong province, China, achieved through developing and piloting an evidence-based approach to change consumer behaviour, which can subsequently be used as a model to reduce demand for pangolin products in additional key markets within China.**

Progress towards the project outcome to date has been limited due to delays with project implementation. The only outcome indicator relevant to Y1 is indicator 0.1 (evidence-baseline developed for targeted behaviour change interventions in Guangdong Province by month 8). We now anticipate fully achieving this indicator by September 2018 (month 18).

We remain confident that the outcome indicators are adequate for measuring outcomes and that the project is likely to achieve the Outcome by the end of the funding period.

### **3.4 Monitoring of assumptions**

**Assumption 1: There remains high-level support from the Chinese government for addressing the illegal wildlife trade**

This assumption holds true. The Government of China remains committed to combating the illegal wildlife trade, as evidenced by the recent ban on the commercial processing and trade in elephant ivory. Although demand for pangolin products is considered a sensitive topic, China's CITES Management Authority (MA) under the SFA remains supportive of this project, and recently provided a letter of support for a funding application to the EU which includes reducing demand for pangolin products in China (matched funding for this project). The Head of International Co-operation at the SFA has also recently provided a letter of support for project registration (**Annex 4**).

**Assumption 2: The required stakeholders for implementation remain available and willing to engage**

Project partners, particularly TRAFFIC, have already established strong partnerships with numerous stakeholders (e.g. the demand reduction Community of Practice). Crucially, this includes China's TCM Association, which made commitments in 2010 to reject the use of illegal wildlife. Since then, the association has encouraged major TCM manufacturers and practitioners to sign similar pledges. The current project is building on and expanding the scope of TRAFFIC's existing relationships, as well as forming new ones.

### **Assumption 3: A 20% reduction in demand for pangolin products is a reasonable target based on previous campaigns**

We have no reason to change this assumption. Diogo Veríssimo, who has recently undertaken a comprehensive review of behaviour change initiatives relating to addressing the illegal wildlife trade advises that this is an ambitious but achievable target.

### **Assumption 4: Using sensitive questioning techniques and having a sufficiently large sample size ensures that data collected from the consumer research is representative and accurate**

Evidence suggests that using sensitive questioning techniques is more likely to elicit honest responses when asking about illegal or sensitive activities, such as some forms of pangolin consumption. We have incorporated the Unmatched Count Technique (a sensitive questioning technique) into our methodology to maximise the likelihood of obtaining representative and accurate data. Together with a comparatively large sample size (n=1,250 for the quantitative stage) we are doing everything possible within the budget and timeframe to ensure we obtain a true picture of consumptive behaviour.

### **Assumption 5: The behaviour change models, developed from the consumer research, reflect reality**

We have no reason to change this assumption at this stage. This assumption is likely to hold true providing assumption 4 holds true and we engage relevant experts in the development of the models.

## **4. Impact: achievement of positive impact on illegal wildlife trade and poverty alleviation**

**Impact: Reduced demand for pangolin products in China leads to a reduction in pangolin poaching and illegal trade, and removal of associated negative socio-economic impacts in least-developed pangolin range states.**

**What contribution is your project making to a higher level impact on illegal wildlife trade?**

There are well documented trafficking pathways linking the poaching of pangolins in at least 16 least-developed, low or lower middle-income countries in Asia and Africa to consumers in China. The large nature of many seizures, together with the presence of ivory/other high value IWT products in shipments of pangolin scales, indicates involvement of organised criminal trade syndicates.

Our theory of change hypothesises that reducing demand for pangolin products in key Chinese markets will lower their market value and thus reduce incentives for international criminal networks to engage in pangolin trafficking. This, in turn, will lead to less poaching and trafficking, allow overexploited wild pangolin populations to recover, and provide tangible benefits to people living in low-income pangolin range states.

As the project is still in the development phase, it is too early to assess any higher level impact it is having on the illegal wildlife trade. However, by drawing attention to the plight of pangolins to stakeholders in China, including the national government, British and EU Embassies, TCM Association and NGO community, the project has laid the groundwork for support for interventions and possibly even policy reform to reduce consumption of pangolins.

**What contribution is your project making to a higher level impact on human development and wellbeing (poverty alleviation)?**

Although it is too early to demonstrate any higher level impact on human development and wellbeing, we anticipate the project will have the following indirect impacts on communities in source countries:

**Reduced exploitation:** if the market value of pangolins decreases in the world's largest market, China, criminal syndicates will be less likely to exploit indigenous and rural



communities, incentivising or coercing them into poaching and trapping them in a cycle of poverty and crime.

**Livelihood and food security:** reduced poaching brought about by reduced demand will enable pangolin populations to recover, and maintain the role they play in maintaining healthy ecosystems through aerating the soil, improving nutrient quality and aiding the decomposition cycle. Healthy forest ecosystems provide food security for households between harvests, or in times of drought, flooding, crop failure and other types of emergency. Furthermore, healthy pangolin populations are a natural form of pest control which reduces the need for expensive and often destructive chemicals to treat and prevent termite infestations, saves money on repairing termite damage, and increases food security for crop-dependent communities in low income pangolin range states.

## **5. Project support to the IWT Challenge Fund Objectives and commitments under the London Declaration and Kasane Statement**

Demand reduction was highlighted as a priority in the London Declaration, Kasane Statement, Hanoi Statement and at CITES CoP17, where a Resolution was adopted encouraging Parties to take action to reduce demand for IWT products through the development of evidence-based behaviour change strategies.

China is a signatory to the London declaration and Kasane Statement and this project supports the following commitments:

- The London Declaration: Eradicating the market for illegal wildlife products (I, IV, VII)
- The Kasane Statement: Eradicating the market for illegal wildlife products (2)

The London Declaration emphasises the importance of actions being ‘scientific and clearly evidence-based, building on research into users’ values and behaviour, and form part of coherent demand and supply side reduction strategies’. This project is contributing to this objective through engaging experts in the field of behaviour change communications in the development of the research methodology that will underpin the behaviour change campaign.

The Kasane Statement highlights the importance of ‘conduct[ing] and/or support[ing] research to improve understanding of market drivers, including monitoring the effectiveness of demand reduction strategies and collating a portfolio of demand reduction good practice’. This project will provide a thorough understanding of market drivers for pangolin products in Guangdong province. The campaign M&E strategy will be designed and overseen by Diogo Veríssimo, a Post-Doctoral researcher with extensive experience in evaluating the impact of behaviour change campaigns. Lessons learned from this project will be shared with the demand reduction ‘Community of Practice’ in order to inform the development of other behaviour change campaigns in the region.

## **6. Impact on species in focus**

All eight pangolin species are threatened with extinction on the basis of population declines caused primarily by poaching. As stated in section 4 above, our theory of change hypothesises that reducing demand in China will lead to a reduction in poaching in pangolin source countries and eventual recovery of pangolin populations. While we are confident that the assumptions in the theory of change hold true, any impact this project has on pangolin populations in source countries would require a vastly expanded research program with multiple controls and years of study to be able to assess attribution with statistical rigor.

Within the timeframe of this project we can evaluate the effectiveness of the behaviour change campaign in reducing demand for pangolin products. Campaign effectiveness will be evaluated via attitudinal surveys conducted in campaign locations and control sites using a Before-After-Control-Impact (BACI) design. Attitudinal surveys are planned for Y3 and Y4. Market surveys conducted by TRAFFIC with matched funding (not part of this project) will also provide insights into availability and demand for pangolin products in Guangdong province.



## **7. Project support to poverty alleviation**

This project will have indirect benefits to indigenous and rural communities in pangolin source countries, as detailed in section 4. Though some individuals may be gaining financially from involvement in IWT networks, overall communities are suffering from reduced and unpredictable resources and an increase in social ills and insecurity. The reduction in demand for pangolin products from least developed, low and lower-middle income pangolin range States will lead to reduced poaching and trafficking of pangolins, which will help maintain more resilient natural ecosystems and faunas such that natural resources that local people depend upon for their survival and livelihoods will continue to be available.

## **8. Consideration of gender equality issues**

There are no notable achievements this year. However, data collected from questionnaires, in-depth interviews and focus groups will be disaggregated by socio-demographic factors such as gender, education level, relative income, ethnicity, age, religion, interests, values and social groups. A deep understanding of gender, along with these other social, economic and cultural variables is essential for developing targeted messages that will be effective in changing behaviour. Different consumer groups use pangolin products differently, experience different barriers and benefits, and will be affected differently by changes in availability or perceptions of use. The project will be sensitive to these differences and design behaviour change interventions that not only lead to the best conservation outcomes, but also, where possible, promote equality between different population groups.

## **9. Monitoring and evaluation**

The majority of monitoring and evaluation will be focused on the behaviour change campaign. However, M&E is fully integrated into every stage of the project. The questionnaires, marketing briefs, behaviour change approaches and campaign package will each be piloted, providing an opportunity for refinements to be made prior to broad-scale implementation.

The main monitoring and evaluation activities this year were relating to project registration. At the project inception workshop, project partners agreed to monitor progress of registration and to implement an alternative strategy (appointing a market research agency) should delays mean that it is unfeasible to complete the project plan as originally intended in Y1.

## **10. Lessons learnt**

It took an extremely long time to clarify the precise requirements of project registration, despite attending a briefing session in Guangzhou on the new NGO law and extensive consultation with the British Embassy in Beijing, the British Consulate in Guangzhou, the Chinese Embassy in London and conservation and development NGOs headquartered in the UK and US. This lack of clarity meant that it was very challenging to develop templates for the various documents listed as necessary in the official registration guidelines. As a result we worked through a process of trial and error, adjusting the document templates repeatedly, based on numerous instances of feedback. It is difficult to say what ZSL could have done differently, due to the general lack of clarity on the process even among government representatives in China. At this point however, due to successful registration of our first project in February 2018, we now have a proven process and template documents that can be used for future projects including this one.

Obtaining a letter of support from the SFA caused further delays, as we could not submit our application to register the project without it. As ZSL does not have a direct relationship with the SFA we were reliant on EBC to discuss the project with SFA representatives and secure their support. It is difficult to say whether having a direct relationship would have made a difference though, as demand for pangolin products is a highly sensitive topic at both the national and provincial government level. The Director of EBC is an advisor to the SFA and has a strong relationship with the Head of International Co-operation. This relationship was undoubtedly

instrumental in obtaining the letter of support. The process has provided an insight into the importance of developing personal relationships with stakeholders in China, which is something ZSL is prioritising at an institutional level and would recommend to others doing similar projects.

Finally, with the benefit of hindsight, it is clear that we could have appointed a market research agency sooner so that the consumer research could be completed during Y1. However, we were optimistic that we could register the project before the end of 2017, and were sympathetic to EBC's strong desire to recruit and train a team of researchers in-house to undertake the consumer research. The Oxford Martin School is currently involved in a similar project (developing an evidence-base on bear bile consumption) following this approach, and it has proven highly cost effective, as well as allowing the PI direct oversight of data collection and, hence, quality control. Having said that, we are confident in GlobeScan's ability to collect robust and accurate data. They have an excellent track record of undertaking research into demand for wildlife products in China. Furthermore, our technical experts are involved at each stage of project development, and will approve moderator guides and questionnaires prior to them being used. We are also planning to discretely observe the focus groups sessions to gain additional insights into stakeholder opinions and ensure quality control of data collection.

#### **11. Actions taken in response to previous reviews (if applicable)**

N/A

#### **12. Other comments on progress not covered elsewhere**

#### **13. Sustainability and legacy**

We have increased the profile of the project considerably within China over the past nine months through engagement with government stakeholders (particularly the SFA and CITES MA), the TCM Association and face-to-face meetings with international and local NGOs in July 2017 and March 2018. Internationally, we have reached out to members of the demand reduction Community of Practice, and the IUCN SSC Pangolin Specialist Group to share the aims of the project and seek advice and information that might be relevant to project implementation.

We remain committed to building capacity for SBCC approaches in China through training project personnel and the wider Community of Practice in social science and social marketing, as well as through the participatory stakeholder workshops and working group activities. We will also share lessons learned and success factors on the Wildlife Consumer Behaviour Change Toolkit ([www.changewildlifeconsumers.org](http://www.changewildlifeconsumers.org)) and provide insights into the value of SBCC approaches in effecting change in China.

The EU-funded project involves policy work to phase out the legal domestic trade in pangolin scales (which exists in parallel to illegal trade) from diminishing government stockpiles. As noted above, the TCM Association made commitments in 2010 to reject the use of illegal wildlife and has, since then, encouraged major TCM manufacturers and practitioners to sign similar pledges. Previous research suggests that societal behaviour controls (e.g. legislation and law enforcement), or restricting consumer choice (e.g. by retailers removing products from sale), together with messaging issued by those influential with target audiences is most effective in creating an adequate environment for meaningful behaviour change.

#### **14. IWT Challenge Fund Identity**

We have acknowledged the support of the IWT Challenge Fund in all workshops, meetings and presentations relating to the project both in China and the UK. This includes the project inception workshop (agenda and minutes), proposal to the SFA and meetings with conservation NGOs. Going forwards, all project documentation (including briefings, reports, leaflets, etc.),

communication products (video, audios, posters), workshop banners and posters, presentations and other communications vehicles will prominently note the support of the IWT Challenge Fund. Similarly, the UK Government's support will be noted in any speeches or presentations that refer to the project, and in interviews with the media.

## 15. Project expenditure

**Table 1: Project expenditure during the reporting period (April 2017-March 2018)**

Project spend (indicative) since last annual report	2017/18 Grant (£)	2017/18 Total actual IWT Costs (£)	Variance %	Comments (please explain significant variances)
Staff costs (see below)	█	█	█	█ █ █ █ █
Consultancy costs	█	█	█	
Overhead Costs	█	█	█	█ █ █ █ █
Travel and subsistence	█	█	█	
Operating Costs	0	0	0	
Capital items (see below)	0	0	0	
Others (see below)	█	█	█	█ █ █ period.
<b>TOTAL</b>	<b>60,781</b>	<b>51,015</b>		

## 16. OPTIONAL: Outstanding achievements of your project during the reporting period (300-400 words maximum). This section may be used for publicity purposes

I agree for the IWT Secretariat to publish the content of this section (please leave this line in to indicate your agreement to use any material you provide here)

## Annex 1: Report of progress and achievements against Logical Framework for Financial Year 2017-2018

Project summary	Measurable Indicators	Progress and Achievements April 2017 - March 2018	Actions required/planned for next period
<p><b>Impact</b></p> <p>Reduced demand for pangolin products in China leads to a reduction in pangolin poaching and illegal trade, and removal of associated negative socio-economic impacts in least-developed pangolin range states.</p>		<p>By drawing attention to the plight of pangolins to stakeholders in China, including the national government, British and EU Embassies, TCM Association and NGO community, the project has laid the groundwork for support for interventions and possibly even policy reform to reduce consumption of pangolin products in China and associated poaching/illegal trade.</p>	
<p><b>Outcome</b></p> <p>Measurable reduction in demand for illegally traded pangolin products in Guangdong province, China, achieved through developing and piloting an evidence-based approach to change consumer behaviour, which can subsequently be used as a model to reduce demand for pangolin products in additional key markets within China.</p>	<p>0.1 Evidence-baseline developed for targeted behaviour change interventions in Guangdong Province by month 8</p> <p>0.2 Behaviour change action plan developed by month 18</p> <p>0.3 Demand reduction campaign being implemented in &gt;20 locations within Guangdong province by month 32</p> <p>0.4 20% reduction in demand for pangolin products in Guangdong province by end Y4 compared to pre-campaign baselines</p>	<p>0.1 Anticipate achieving by month 18</p> <p>0.2 Y2 indicator</p> <p>0.3 Y3 indicator</p> <p>0.4 Y4 indicator</p>	<p>Qualitative and quantitative research into consumption of pangolin products, identification of key audience(s) for behaviour change campaign and messages/messengers that are most likely to be effective. Development of behaviour change action plan and draft campaign strategy.</p>
<p><b>Output 1.</b></p> <p>Products and uses having the most detrimental impact on wild pangolin populations identified and broken down to their component behaviours and the various groups engaging in this use</p>	<p>1.1 Pangolin products in prevalent use identified by month 6</p> <p>1.2 Consumer groups using different pangolin products identified by month 6</p>	<p>1.1 Some insights generated through desk research and review of survey data. These will be further investigated over the next 4 months.</p> <p>1.2 Some insights generated through desk research and review of survey data. These will be further investigated over the next 4 months.</p> <p>1.3 Some insights generated through desk research and review of survey data. These will be further investigated over the next 4 months.</p>	

	<p>1.3 Behaviours encouraging the use of pangolin products identified by month 6</p> <p>1.4 Expert working group convened to advise on campaign implementation by month 7</p>	<p>1.4 Key members of expert working group have been identified. Membership will be finalised at the September workshop.</p>
<p>Activity 1.1</p> <p>Pilot and conduct questionnaires in urban and rural areas in Guangdong, documenting key pangolin products in prevalent use, behaviours encouraging their use, and uses being employed in different consumer groups. Combine with desk-based research and data on pangolin markets and consumption collected by TRAFFIC, Wild Aid and others.</p>		<p>The questionnaire was piloted in May (prior to the project start date). This has been shared with GlobeScan who will refine it based on the qualitative research findings and pilot it in June/July 2018.</p>
<p>Activity 1.2 Data analysis and synthesis of key findings, including identification of key behaviours on which to focus during campaign.</p>		<p>Analysis of qualitative data will take place in May/June and analysis of quantitative data is planned for August 2018.</p>
<p>Activity 1.3 Inception workshop to introduce the demand reduction initiative and present research findings to project partners, government and other key stakeholders. These are likely to represent diverse interests (e.g. behavioural science, social research, behavioural economics, advertising, marketing, communications, public relations, governmental policy and wildlife conservation). The workshop will facilitate an 'enabling environment' for initiative delivery and empower government officials to take a leadership role in the project. Workshop discussion will confirm the most appropriate approach and initiative implementation process.</p>		<p>The workshop is planned for September 2018.</p>
<p>Activity 1.4 Convene a working group of relevant experts drawn from stakeholders engaged through the inception workshop to advise on the implementation of the programme. Discussion will be convened and coordinated by the Project Co-ordinator.</p>		<p>Working group membership and ToR to be finalised following September workshop.</p>
<p>Activity 1.5 Prepare and publish report for distribution to stakeholders and other interested parties.</p>		<p>The report will be made available ahead of the September workshop.</p>
<p><b>Output 2.</b> The most important factors influencing the behaviour of the different audience groups for each behaviour prioritised in Output 1 are identified and understood</p>	<p>2.1 Social norms, socio-demographic, attitudinal and other aspects of target audience profile analysed by month 6</p> <p>2.2 Specific triggers and drivers of target behaviours identified by month 6</p>	<p>2.1 Some insights generated through desk research and review of survey data. These will be further investigated over the next 4 months.</p> <p>2.2 Some insights generated through desk research and review of survey data. These will be further investigated over the next 4 months.</p> <p>2.3 The most appropriate audience segmentation approach will be defined at the September workshop.</p>

	2.3 Most appropriate audience segmentation approach defined by month 9	
Activity 2.1 Undertake in-depth interviews and focus groups in urban and rural areas in Guangdong province to document social norms, socio-demographic, attitudinal and other aspects of target audience profiles and gain insight into the specific triggers and drivers of pangolin consumption.		The moderator guide for in-depth interviews and focus groups is in development, and will be used for qualitative research scheduled for May/June 2018.
Activity 2.2 Data analysis and synthesis of key findings.		Analysis of qualitative data will take place in May/June 2018.
Activity 2.3 Workshop to present research findings to government, expert group and other stakeholders. Workshop discussion will confirm the most appropriate audience segmentation approach for the selected behaviour(s). Note this workshop will now be combined with the inception/behaviour identification workshop(1.3)		The workshop is planned for September 2018.
Activity 2.4 Report preparation and publication. Report will also be distributed to key stakeholders and other interested parties.		The report will be made available for the September workshop.
<b>Output 3.</b> Behaviour change models developed that can be practically applied to tackle specific triggers and drivers of pangolin consumption effectively, through highly targeted campaign messages	<p>3.1 Behaviours, influencing factors, target audiences and key influencers on which to focus the campaign prioritised by month 9</p> <p>3.2 Behaviour models to show how behaviours, influencing factors, target audiences and key influencers interact and the outcome of these interactions developed by month 10</p> <p>3.3 Outcomes most likely to deliver key behaviour changes sought identified by month 10</p>	<p>3.1 These factors will be prioritised in August and September.</p> <p>3.2 Behaviour models will be developed by the working group in September.</p> <p>3.3 Outcomes will be identified in September.</p>
Activity 3.1 Working in collaboration with selected experts, analyse the behaviour identification and audience segmentation research in order to identify behaviour change models which can be practically applied to tackle specific triggers and drivers effectively through highly targeted campaign messages.		The working group will analyse the results of Outputs 1 and 2 to identify the most appropriate behaviour change models for the campaign.
Activity 3.2 Preparation of proposed behavioural change models. Models will be shared with key stakeholders planning or implementing on-going demand reduction activities to assist them with their work.		The behaviour change models will be developed in September.

<p><b>Output 4.</b> Social marketing framework developed that can be used to identify and set communication objectives for effective demand reduction campaign</p>	<p>4.1 Strategy for engaging key influencers and ‘champions’ in campaign developed by month 12</p> <p>4.2 Behaviour change action plan or marketing brief developed for each of the agreed behaviour models by month 18</p> <p>4.3 Key Performance Indicators (KPIs) developed to monitor progress of campaign by month 18</p>	<p>4.1 The strategy will be written up following the September workshop.</p> <p>4.2 Y2 indicator</p> <p>4.3 Y2 indicator</p>
<p>Activity 4.1 Identify and recruit relevant marketing experts to develop marketing brief and, where appropriate, behaviour change action plans for “Influencing the Influencers”.</p>		<p>Marketing experts will be recruited following the September workshop.</p>
<p>Activity 4.2 Where appropriate, identify key influencers and ‘champions’ to advise and assist in developing and implementing the marketing briefs and behaviour change action plans.</p>		<p>Key influencers and champions will be identified during and after the September workshop.</p>
<p>Activity 4.3 Develop marketing brief or behaviour change action plan for each of the agreed behaviour models.</p>		<p>Y2 activity</p>
<p>Activity 4.4 Review of proposed marketing briefs or behaviour change action plans by expert groups..</p>		<p>Y2 activity</p>
<p>Activity 4.5 Theoretical and practical mapping with focus groups.</p>		<p>Y2 activity</p>
<p>Activity 4.6 Preparation and publication of proposed marketing briefs or behaviour change action plan</p>		<p>Y2 activity</p>
<p><b>Output 5.</b> Demand reduction campaign package developed and implemented in &gt;20 key locations across Guangdong province, having been piloted and shown to be effective in a representative city and/or rural area.</p>	<p>5.1 Communication and campaigning experts identified and recruited by month 20</p> <p>5.2 Campaign package developed based on marketing briefs by month 24</p> <p>5.3 Campaign team identified and convened by month 30</p>	<p>5.1 Y2 indicator</p> <p>5.2 Y2 indicator</p> <p>5.3 Y3 indicator</p> <p>5.4 Y3 indicator</p> <p>5.5 Y4 indicator</p> <p>5.6 Y4 indicator</p>



	<p>5.4 Communication tools and products developed and piloted by month 30</p> <p>5.5 Campaign package implemented in &gt;20 key locations in Guangdong province by month 48</p> <p>5.6 Positive change in KPIs determined in Output 4 (e.g. attitudinal surveys of target consumer groups show 20% decrease in desire to consume pangolin products compared to pre-campaign baselines) by month 48</p>	
Activity 5.1 Identify and recruit relevant communication and campaigning experts to develop campaign package.		Y2 activity
Activity 5.2 Design and develop campaign package based on the marketing briefs.		Y2 activity
Activity 5.3 Workshop to present campaign proposal to government and other stakeholders and decide on agreed campaign package.		Y2 activity
Activity 5.4 Identify and convene campaign team.		Y3 activity
Activity 5.5 Develop and pilot communications tools and products to support implementation of the campaign package.		Y3 activity
Activity 5.6 Implement campaign package in at least 20 locations in Guangdong.		Y3 activity
Activity 5.7 Pre-intervention attitudinal surveys for impact evaluation.		Y2 activity
Activity 5.8 Ongoing campaign implementation, monitoring and evaluation.		Y3 & 4 activity
Activity 5.9 Post-intervention attitudinal surveys and report production.		Y4 activity

**Annex 2: Project's full current logframe as presented in the application form (unless changes have been agreed)**

*N.B. if your application's logframe is presented in a different format in your application, please transpose into the below template. Please feel free to contact [IWT-Fund@ltsi.co.uk](mailto:IWT-Fund@ltsi.co.uk) if you have any questions regarding this.*

Project summary	Measurable Indicators	Means of verification	Important Assumptions
<b>Impact:</b> Reduced demand for pangolin products in China leads to a reduction in pangolin poaching and illegal trade, and removal of associated negative socio-economic impacts in least-developed pangolin range states.			
<b>Outcome:</b> Measurable reduction in demand for illegally traded pangolin products in Guangdong province, China, achieved through developing and piloting an evidence-based approach to change consumer behaviour, which can subsequently be used as a model to reduce demand for pangolin products in additional key markets within China.	0.1 Evidence-baseline developed for targeted behaviour change interventions in Guangdong Province by month 8 0.2 Behaviour change action plan developed by month 18 0.3 Demand reduction campaign being implemented in >20 locations within Guangdong province by month 32 0.4 20% reduction in demand for pangolin products in Guangdong province by end Y4 compared to pre-campaign baselines	0.1 Completed questionnaires, interview records, focus group reports; workshop reports and open source peer-reviewed publication 0.2 Behaviour change action plan publication 0.3 Campaign products and tools (e.g. media articles, PSAs) and records from events (e.g. conference proceedings) 0.4 Analysis of data collected using Before-After-Control-Impact framework plus raw data	There remains high-level support from the Chinese government for addressing the illegal wildlife trade  The required stakeholders for implementation remain available and willing to engage  A 20% reduction in demand for pangolin products is a reasonable target based on previous campaigns
<b>Output 1</b> Products and uses having the most detrimental impact on wild pangolin populations identified and broken down to their component behaviours and the various groups engaging in this use	1.1 Pangolin products in prevalent use identified by month 6 1.2 Consumer groups using different pangolin products identified by month 6 1.3 Behaviours encouraging the use of pangolin products identified by month 6 1.4 Expert working group convened to advise on campaign implementation by month 7	1.1 Raw data (completed questionnaires), data analysis and report 1.2 Raw data (completed questionnaires), data analysis and report 1.3 Raw data (completed questionnaires), data analysis and report 1.4 Contact details of working group members	Using sensitive questioning techniques and having a sufficiently large sample size ensures that data collected from the consumer research is representative and accurate
<b>Output 2</b> The most important factors influencing the behaviour of the different audience groups for each behaviour prioritised in Output 1 are identified and understood	2.1 Social norms, socio-demographic, attitudinal and other aspects of target audience profile analysed by month 6 2.2 Specific triggers and drivers of target	2.1 Raw data (completed questionnaires, interview records, focus group reports), data analysis and report 2.2 Raw data (completed	Using sensitive questioning techniques and having a sufficiently large sample size ensures that data collected from the consumer research is representative and accurate

	<p>behaviours identified by month 6</p> <p>2.3 Most appropriate audience segmentation approach defined by month 9</p>	<p>questionnaires, interview records, focus group reports), data analysis and report</p> <p>2.3 Workshop report</p>	
<p><b>Output 3</b></p> <p>Behaviour change models developed that can be practically applied to tackle specific triggers and drivers of pangolin consumption effectively, through highly targeted campaign messages</p>	<p>3.1 Behaviours, influencing factors, target audiences and key influencers on which to focus the campaign prioritised by month 9</p> <p>3.2 Behaviour models to show how behaviours, influencing factors, target audiences and key influencers interact and the outcome of these interactions developed by month 10</p> <p>3.3 Outcomes most likely to deliver key behaviour changes sought identified by month 10</p>	<p>3.1 Workshop report</p> <p>3.2 Reports containing behaviour models</p> <p>3.3 Workshop reports and publications</p>	<p>The behaviour change models, developed from the consumer research, reflect reality</p>
<p><b>Output 4</b></p> <p>Social marketing framework developed that can be used to identify and set communication objectives for effective demand reduction campaign</p>	<p>4.1 Strategy for engaging key influencers and 'champions' in campaign developed by month 12</p> <p>4.2 Behaviour change action plan or marketing brief developed for each of the agreed behaviour models by month 18</p> <p>4.3 Key Performance Indicators (KPIs) developed to monitor progress of campaign by month 18</p>	<p>4.1 Stakeholder engagement strategy</p> <p>4.2 Behaviour change action plan publication, marketing briefs</p> <p>4.3 Monitoring and evaluation plan</p>	<p>Key influencers and 'champions' can be incentivised to join the campaign through non-monetary means</p>
<p><b>Output 5</b></p> <p>Demand reduction campaign package developed and implemented in &gt;20 key locations across Guangdong province, having been piloted and shown to be effective in a representative city and/or</p>	<p>5.1 Communication and campaigning experts identified and recruited by month 20</p> <p>5.2 Campaign package developed based on marketing briefs by month</p>	<p>5.1 Contact details of experts</p> <p>5.2 Campaign package document</p> <p>5.3 Contact details of campaign team</p>	<p>Consumers respond to campaign as predicted in models and sufficient time has been allocated for tweaking communication tools and products as necessary prior to roll out to additional locations</p>

rural area.	<p>24</p> <p>5.3 Campaign team identified and convened by month 30</p> <p>5.4 Communication tools and products developed and piloted by month 30</p> <p>5.5 Campaign package implemented in &gt;20 key locations in Guangdong province by month 48</p> <p>5.6 Positive change in KPIs determined in Output 4 (e.g. attitudinal surveys of target consumer groups show 20% decrease in desire to consume pangolin products compared to pre-campaign baselines) by month 48</p>	<p>5.4 Communication tools and products (e.g. PSAs, media articles); reports from pilot focus groups</p> <p>5.5 Campaign products and tools (e.g. media articles, PSAs) and records from events (e.g. conference proceedings)</p> <p>5.6 Analysis of data collected using Before-After-Control-Impact framework plus raw data</p>	
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**Activities** (each activity is numbered according to the output that it will contribute towards, for example 1.1, 1.2 and 1.3 are contributing to Output 1)

**Behaviour identification**

1.1 Pilot and conduct questionnaires in urban and rural areas in Guangdong, documenting key pangolin products in prevalent use, behaviours encouraging their use, and uses being employed in different consumer groups. Combine with desk-based research and data on pangolin markets and consumption collected by TRAFFIC, Wild Aid and others.

1.2 Data analysis and synthesis of key findings, including identification of key behaviours on which to focus during campaign.

1.3 Inception workshop to introduce the demand reduction initiative and present research findings to project partners, government and other key stakeholders. These are likely to represent diverse interests (e.g. behavioural science, social research, behavioural economics, advertising, marketing, communications, public relations, governmental policy and wildlife conservation). The workshop will facilitate an 'enabling environment' for initiative delivery and empower government officials to take a leadership role in the project. Workshop discussion will confirm the most appropriate approach and initiative implementation process.

1.4 Convene a working group of relevant experts drawn from stakeholders engaged through the inception workshop to advise on the implementation of the programme. Discussion will be convened and coordinated by the Project Co-ordinator.

1.5 Prepare and publish report for distribution to stakeholders and other interested parties.

**Audience segmentation**

2.1 Undertake in-depth interviews and focus groups in urban and rural areas in Guangdong province to document social norms, socio-demographic, attitudinal and other aspects of target audience profiles and gain insight into the specific triggers and drivers of pangolin consumption.

2.2 Data analysis and synthesis of key findings.

2.3 Workshop to present research findings to government, expert group and other stakeholders. Workshop discussion will confirm the most appropriate audience segmentation approach for the selected behaviour(s). Note this workshop will now be combined with the inception/behaviour identification workshop(1.3)

2.4 Report preparation and publication. Report will also be distributed to key stakeholders and other interested parties.

**Behaviour modelling**

- 3.1 Working in collaboration with selected experts, analyse the behaviour identification and audience segmentation research in order to identify behaviour change models which can be practically applied to tackle specific triggers and drivers effectively through highly targeted campaign messages.
- 3.2 Preparation of proposed behavioural change models. Models will be shared with key stakeholders planning or implementing on-going demand reduction activities to assist them with their work.

**Social marketing framework development**

- 4.1 Identify and recruit relevant marketing experts to develop marketing brief and, where appropriate, behaviour change action plans for “Influencing the Influencers”.
- 4.2 Where appropriate, identify key influencers and ‘champions’ to advise and assist in developing and implementing the marketing briefs and behaviour change action plans.
- 4.3 Develop marketing brief or behaviour change action plan for each of the agreed behaviour models.
- 4.4 Review of proposed marketing briefs or behaviour change action plans by expert groups.
- 4.5 Theoretical and practical mapping with focus groups.
- 4.6 Preparation and publication of proposed marketing briefs or behaviour change action plans.

**Campaign development, pilot and broad-scale implementation**

- 5.1 Identify and recruit relevant communication and campaigning experts to develop campaign package.
- 5.2 Design and develop campaign package based on the marketing briefs.
- 5.3 Workshop to present campaign proposal to government and other stakeholders and decide on agreed campaign package.
- 5.4 Identify and convene campaign team.
- 5.5 Develop and pilot communications tools and products to support implementation of the campaign package.
- 5.6 Implement campaign package in at least 20 locations in Guangdong.
- 5.7 Pre-intervention attitudinal surveys for impact evaluation.
- 5.8 Ongoing campaign implementation, monitoring and evaluation.
- 5.9 Post-intervention attitudinal surveys and report production.

**Annex 3 Standard Measures**

## Checklist for submission

	Check
<b>Is the report less than 10MB?</b> If so, please email to <a href="mailto:IWT-Fund@ltsi.co.uk">IWT-Fund@ltsi.co.uk</a> putting the project number in the subject line.	x
<b>Is your report more than 10MB?</b> If so, please discuss with <a href="mailto:IWT-Fund@ltsi.co.uk">IWT-Fund@ltsi.co.uk</a> about the best way to deliver the report, putting the project number in the subject line.	
<b>Have you included means of verification?</b> You need not submit every project document, but the main outputs and a selection of the others would strengthen the report.	x
<b>Do you have hard copies of material you want to submit with the report?</b> If so, please make this clear in the covering email and ensure all material is marked with the project number.	x
Have you involved your partners in preparation of the report and named the main contributors	x
Have you completed the Project Expenditure table fully?	x
Do not include claim forms or other communications with this report.	