

Title: Understanding the market drivers behind the reduced demand for ivory products in Japan

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S1. Interview guide

AT THE START OF THE INTERVIEW

Start recording audio

Thank the interviewee for participating in the study

Talk briefly about the purpose of the study, using information from the 'Information Sheet'

State that this interview is being recorded for analysis purposes.

Ask whether they have any questions?

Confirm that the interviewee has read, understood and signed the Consent Form and received the countersigned document.

Notify interviewee that there will be few prompts will be given during interview to avoid bias but encourage interviewee to speak freely, as in an informal discussion.

QUESTIONS

PART 1

SAY:

What year were you born?

Please describe your current profession?

What is your connection to Japan?

Please describe in what capacity you are involved in the trade of elephant ivory, presently and in the past?

PART 2

SAY:

Demand is an economic principle that describes a consumer's desire and willingness to pay a price for a specific good or service.

Was there a demand among consumers for ivory in Japan in 1983?

Prompt: Please describe the situation of the ivory market then and the consumers' demand for ivory.

Is there a demand among consumers for ivory in Japan presently?

Prompt: Please describe the situation of the ivory market presently and the consumers' demand for ivory.

Has there been a change in consumers' demand for ivory in Japan from 1983 to present day? In as much detail as possible, please describe the change in consumers' demand for ivory in Japan from 1983 to present day?

Prompt: What were the trends within the ivory market indicative of this change in the Japanese consumers' demand for ivory? Specific to certain products or in general.

PART 3

SAY: A market driver is a process, condition or resource that has an impact on the market. The domestic ivory market in Japan has been impacted by numerous market drivers from its peak in 1983 to present day.

Here given to you is a document with instructions. Please take your time to go through the document and complete the instructions.

Emphasize that you are interested in what the interviewee think was the influence that each of the market drivers had on the general Japanese consumer's demand for ivory.

S2. Codebook

Name	Description	Number of Coding References	Number of Files Coded
Level of demand	(RQ1) Captures information relating to the level, strength, and extent of demand for ivory in Japan at any point since 1983	110	27
Current	(RQ1) Captures information relating to the current level, strength, and extent of demand for ivory in Japan	33	18
Increase	(RQ1) Captures information relating to an increase in the level, strength, and extent of demand for ivory in Japan since 1983	4	3
Reduction	(RQ1) Captures information relating to a reduction in the level, strength, and extent of demand for ivory in Japan since 1983	56	24
Market drivers	(RQ2) Captures information relating to the impact of market drivers on consumers demand for ivory in Japan since 1983	917	30
Alternatives	(RQ2) Captures information relating to possible alternatives to ivory (e.g., titanium, boxwood) and their impact on consumer demand for ivory in Japan since 1983	46	23
Attitudes to animals	(RQ2) Captures information relating to consumer attitudes towards animal welfare and conservation issues, notably elephants in the ivory trade, and their impact on consumer demand for ivory in Japan since 1983	55	18
Awareness	(RQ2) Captures information relating to consumer awareness of the ivory trade, nationally and internationally, and its impact on consumer demand for ivory in Japan since 1983	114	26
CITES one-off sales	(RQ2) Captures information relating to the 1999 & 2008 CITES approved one-off sales of ivory, and their impact on consumer demand for ivory in Japan since 1983	39	22
Culture	(RQ2) Captures information relating to cultural characteristics, and their impact on consumer demand for ivory in Japan since 1983	51	21

Demographic changes	(RQ2) Captures information relating to the change in the population growth rate, and its impact on consumer demand for ivory in Japan since 1983	57	23
Fashion trends	(RQ2) Captures information relating to changes in fashion trends, and their impact on consumer demand for ivory in Japan since 1983	5	3
General change	(RQ2) Captures information relating to wider cultural changes, and their impact on consumer demand for ivory in Japan since 1983	19	10
Ivory as gift	(RQ2) Captures information relating to the tradition of gifting ivory, and its impact on consumer demand for ivory in Japan since 1983	22	14
Ivory as lucky	(RQ2) Captures information relating to the traditional perception that ivory embodies good luck, and its impact on consumer demand for ivory in Japan since 1983	18	13
Ivory as luxury	(RQ2) Captures information relating to the perception of ivory as an item of luxury, and its impact on consumer demand for ivory in Japan since 1983	41	21
Ivory as necessity	(RQ2) Captures information relating to the perception of ivory as an item of necessity (e.g., for shamisens), and its impact on consumer demand for ivory in Japan since 1983	2	2
Ivory as status	(RQ2) Captures information relating to the perception of ivory as an item of status, and its impact on consumer demand for ivory in Japan since 1983	27	15
Tradition	(RQ2) Captures information relating to the legacy of historical traditional of use of ivory, and its impact on consumer demand for ivory in Japan since 1983	43	20
Economy	(RQ2) Captures information relating to economic concerns in Japan, and their impact on consumer demand for ivory in Japan since 1983	86	28
Investment	(RQ2) Captures information relating to ivory's potential to be an investment commodity, and its impact on consumer demand for ivory in Japan since 1983	16	13

Recession	(RQ2) Captures information relating to the economic recession, and its impact on consumer demand for ivory in Japan since 1983	43	26
International demand or changes	(RQ2) Captures information relating to international market and socio-economic climate, and their impact on consumer demand for ivory in Japan since 1983	39	17
Legislation	(RQ2) Captures information relating to legislation controlling the ivory trade, and their impact on consumer demand for ivory in Japan since 1983	122	29
Enforcement & regulation	(RQ2) Captures information relating to the enforced regulation of the ivory trade, and its impact on consumer demand for ivory in Japan since 1983	35	19
International	(RQ2) Captures information relating to international legislation controlling the ivory trade, and their impact on consumer demand for ivory in Japan since 1983	44	23
National	(RQ2) Captures information relating to national legislation controlling the ivory trade, and their impact on consumer demand for ivory in Japan since 1983	31	16
Paperwork	(RQ2) Captures information relating to a shift in administrative processes from using physical paper to digital formats, and its impact on consumer demand for ivory in Japan since 1983	25	15
Pressure	(RQ2) Captures information relating to efforts by various actors to affect demand for ivory, and their impact on consumer demand for ivory in Japan since 1983	231	28
Celebrities	(RQ2) Captures information relating to efforts by celebrities to affect demand for ivory, and their impact on consumer demand for ivory in Japan since 1983	15	12
Demand reduction campaigns	(RQ2) Captures information relating to campaigns which tried to reduce demand for ivory, and their impact on consumer demand for ivory in Japan since 1983	29	20
Industry campaigns	(RQ2) Captures information relating to pro-ivory industry campaigns, and their impact on consumer demand for ivory in Japan since 1983	43	21

International	(RQ2) Captures information relating to efforts by the international community to affect demand for ivory, and their impact on consumer demand for ivory in Japan since 1983	19	10
Media	(RQ2) Captures information relating to efforts by the media to affect demand for ivory, and their impact on consumer demand for ivory in Japan since 1983	81	26
NGOs	(RQ2) Captures information relating to efforts by NGOs to affect demand for ivory, and their impact on consumer demand for ivory in Japan since 1983	39	18
Trade	(RQ2) Captures information relating to the trade opportunities of ivory, and their impact on consumer demand for ivory in Japan since 1983	107	26
Availability	(RQ2) Captures information relating to the availability of ivory products for sale in Japan, and its impact on consumer demand for ivory in Japan since 1983	54	23
Change in retail outlets	(RQ2) Captures information relating to changes in retail outlets for ivory (eg., decisions to stop selling products), and their impact on consumer demand for ivory in Japan since 1983	25	15
Online shops	(RQ2) Captures information relating to the market shift for ivory to online retail outlets, and its impact on consumer demand for ivory in Japan since 1983	28	17
Properties of ivory	(RQ1&2) Captures information relating to perceived physical & immaterial properties of ivory	49	20
Uses	(RQ1&2) Captures information relating to specific products ivory is used for	90	25

S3. Summary table of participants

Trade Stance	Sector	Nationality
Pro: 11	Industry: 5	Japanese: 18
Neutral: 3	Academia: 11	Other: 14
Anti: 18	Government: 3	
	NGO: 13	

S4. Positive drivers of demand

Although our focus was on understanding what factors had led to the reduction of consumer demand for ivory, we also considered drivers of demand (Fig 1). Major themes that emerged were the positive qualities associated with ivory, the endorsement of the ivory market by the government, and marketing from the ivory industry. Some of these have already been discussed in detail above, such as the role of the government in consumer attitudes.

R26 *First of all, as a country, the national policy is that ivory should be traded domestically. National policy is and has been for years that ivory should be traded internationally, and in support that policy government has actively supported the ivory trade domestically and internationally. Of course that impacts on the mindset and the demand of citizens.*

marketing it as a high-end product. These perceptions however seem to be declining, particularly amongst the younger generations.

R24 *And then, you know, even on the major newspaper they had a huge propaganda, um, you know, particularly ivory stamp hanko, basically, saying that if you have an ivory hanko your life becomes a happy and then this is a very precious value.*