

# **Project Proposal**

## **Breaking the Brand of Rhino Horn in Vietnam**

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This document outlines a potential approach to tackling the rapidly rising demand for rhino horn in Vietnam, the primary market driving a recent spike in rhino killings in South Africa. Last year 668 rhinos (2.7% of the total population) were killed in South Africa, compared with an average of 12 per year between 1990 and 2007. With strong anti-poaching measures already in place, it would appear that only addressing the demand side will provide the breakthrough needed to protect the future of the rhino.

The analysis of the key consumers that have been identified as driving Vietnamese demand implies that taking well established campaign and marketing strategies perfected by Western media to target aspirational consumers will likely work with appropriate cultural adjustments.

This work has been undertaken with the support of friends and colleagues for the Melbourne Vietnamese community. It remains a work in progress until a hosting organization with a large international footprint can be found.

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## Executive Summary

This document outlines a potential approach to tackling the rising demand for rhino horn in Vietnam, the primary market driving a recent spike in rhino killings in South Africa. Last year alone 668 rhinos (2.7% of the total population) were killed in South Africa, compared with an average of 12 per year between 1990 and 2007. It would appear that even going to extreme measures in protecting the animals from poachers is not going to stop the rising demand and increasingly sophisticated poaching and smuggling operations.

In order to address the demand side, a good understanding of the consumer of rhino horn in Vietnam is required, including their primary motivations for obtaining and consuming rhino horn. Fortunately, a July 2012 report by TRAFFIC for the first time presented an analysis of the 3 key consumer groups of rhino horn in Vietnam.

In this project proposal we demonstrate that the underlying motivation for each of the three key consumer groups can be understood and used in designing campaigns to tackle the demand for rhino horn. In fact, the demand is not driven by ancient culture or traditional medicine, but rather by the aspirational demands of a rapidly increasing class of young and affluent people. This means that these groups will be susceptible to the types of brand building and shaping campaigns perfected by Western advertising agencies over the last 50 years.

Consumer Group	Motivation for Consumption	Campaign Options
<b>Habitual Users on the Social Circuit</b>	Sense of belonging to exclusive circle Social Status, Recognition Self-medication for hangovers Peer group pressure	Celebrity based campaign making rhino horn 'uncool' Mirror Lynx anti-fur campaign Social media campaign Promoting a substitute
<b>Family of Terminally Ill Patients (e.g. cancer)</b>	Presumed miracle cure Guilt – do whatever it takes to keep the family member alive	Targeted awareness/education campaign for doctors/nurses Palliative care training Vilifying the 'touts' in hospitals Scientific study showing lack of efficacy
<b>Affluent Mothers</b>	Duty to protect their babies Presumed efficacy to tackle high fever in infants (link to traditional use) Peer group pressure	FUD (fear, uncertainty, doubt) Elicit empathy with rhino babies losing their mothers Social media campaign Scientific study showing lack of efficacy

In addition we present options for involving Overseas Vietnamese communities and Vietnamese students studying in the US, Canada and Australia in a general awareness campaign around how rhino horn is actually obtained (through killing the animal).

Finally, a high level project plan outlines the phases in creating a successful campaign to breaking the brand of rhino horn in Vietnam.

## Introduction

The history of the 'war on drugs' shows that supply side measures alone cannot prevent the consumption of illicit goods for which continuing demand exists. In 2013 we are faced with the real prospect of rhinos being poached to extinction due to exploding demand from Vietnam for rhino horn. Last year 668 rhinos were killed in South Africa, compared with an average of 12 per year between 1990 and 2007. With a total population estimated at 25,000 animals the loss last year amounts to 2.7% of the population.

Despite South Africa's ongoing attempts to curtail poaching, the number of poached rhinos continues to grow. From 2010 to 2011 the number of rhinos poached increased from 333 to 448.

This document outlines a possible approach to tackling the demand side. It is a work in progress, as new sources of information are continuously incorporated as they come to my attention. This work has been undertaken with the support of friends and colleagues for the Melbourne Vietnamese community. They have kindly used their networks, both locally and in Vietnam, to source information, beliefs and perceptions regarding rhino horn from these communities. The focus of this work is to understand:

1. The types of customers in Vietnam and expat Vietnamese communities
2. The range of reasons for consumption of rhino horn
3. The brand history, current brand and level of entrenchment with each type of consumer
4. Possible pressure points on consumers
5. The best way to 'break the brand' of rhino horn with each type of consumer

Furthermore, the report highlights where previous campaigns had successfully broken a brand (see Appendix A).

## Why Vietnam?

Since 2003 Vietnam has rapidly grown to become the world's largest recipient of illegal sources of rhino horn from South Africa. Rhino horn trade and usage in this market had largely remained an undocumented mystery until a TRAFFIC report in 2012 ["The South Africa – Viet Nam Rhino Horn Trade Nexus"] identified the 3 key consumer groups and their motivations. The report also made it clear that even though Vietnam is a signatory to CITES, curtailing the trade into and inside the country would be exceedingly difficult. Multiple wholesale and sales channels exist once rhino horn enters the country and policing the borders is ineffective at this stage, as the very small amount of seized rhino horn illustrates.

Whilst no quantitative data exists that irrefutably links increased consumption in Vietnam to the rise in rhino killings in South Africa, all anecdotal evidence at this time seems to point in this direction. In addition recent evidence on the ground in South Africa shows a massive jump in hunting permit applications from Vietnamese hunters in recent years (see Appendix B). As a result, this report focuses on rhino horn demand in Vietnam.

## Quick Facts – Vietnam

Vietnam has a population of about 92 million people, with approximately 80% of the populace under the age of 40 and 72% of this majority under the age of 24. The median age is 27.8 years (2011 data). More detailed demographic information can be found in Appendix C.

Vietnam has had a decade of astonishing economic growth, growing at 7% annually over the period, based on an aggressive commitment to economic liberalization and international integration (CIA, 2011). As a result, GDP per capita has nearly doubled between 1999 and 2011 to \$3,400pp in 2011, even though the population grew by nearly 15 million over the same time frame.

Of further note is the large population of overseas Vietnamese, with around 1.8million in the US and 200,000 in Australia. These two countries are also the most preferred destinations for Vietnamese students who wish to study overseas.

It should also be noted that the number of Internet users in Vietnam has grown from basically zero to 24million between 2002 and 2009.

## Rhino Horn Users in Vietnam and Expat Vietnamese Communities

The TRAFFIC report “The South Africa – Viet Nam Rhino Horn Trade Nexus” identified 3 primary consumer groups who are likely to be driving the exploding demand for rhino horn in Vietnam:

- **Habitual Users on the Social Circuit**

This is assumed to be the largest consumer group. These consumers are usually affluent, middle-aged, urban-dwelling individuals, mostly – but not exclusively – men, who frequently drink rhino horn mixed with water as part of a detoxifying beverage, often after excessive drinking or binging. The notion of rhino horn mixed with water as a general health, body-rejuvenating hangover-curing tonic has further evolved to occasions where rhino horn is added directly to rice wine and drunk in elaborate social or business settings. Within this group, social status is attached to one’s ability to consume rhino horn casually and conspicuously without being overtly ill.

Young, affluent, habitual users of rhino horn are, generally speaking, the most superficial, one could argue mindless, consumers in Vietnam, but probably account for the greatest volume of rhino horns consumed in the country today. For this group, procurement of rhino horns is through more informal channels of trade, including internet distributors as well as personal connections through social networks which may include government officials. This usage is predicated upon self-medication that takes place in the complete absence of a doctor’s advice. Rather, like prohibited recreational drug usage in other cultures, one’s peer group becomes the vehicle for initiation and acceptance of rhino horn usage. Indeed, social status is enhanced or reaffirmed by joining this exclusive club of rhino horn users in Vietnam.

- **Terminally Ill or Seriously Ill Patients**

Recent popular belief in Vietnam seemingly promotes rhino horn usage as treatment, and possibly a cure, for life-threatening cancer. The consumers suffer from serious, generally fatal, diseases and have

turned to rhino horn to cure or improve their conditions. Those who fall into this group are often desperate individuals who are irrationally susceptible to notions of a panacea, especially if promoted by someone with authority like a traditional medicine doctor or encouraged by worried family members.

The discussion concerning the promotion of rhino horn as a curative medicine for cancer is instructive in trying to ascertain the motivation of most individuals in this important consumer group. Evidence of rhino horn dealers or their touts deliberately seeking out and targeting individuals suffering from cancer underscores a controversial, if not predatory and unethical, aspect to rhino horn marketing directed at this particular consumer group. Touts have been found infiltrating cancer wards and, in some cases are doctors, nurses and auxiliary staff. In the absence of credible clinical trials providing evidence of the efficacy of rhino horn in cancer treatment, most victims of debilitating oncological disorders and other serious illnesses potentially also become hapless victims of false hope and financial fraud, expending large sums of money on rhino horn remedies that will probably do little, if anything, to improve their medical conditions.

- **Affluent Mothers**

The third group of rhino horn users appears to represent a relatively recent trend amongst affluent, middle to upper income, mothers who feel it is important to keep small quantities of rhino horn at hand for home preparation of medicines to treat high fever, especially that which occurs in children. The volume of rhino horn used by these mothers appears to be significant, but probably is less than that required for the first two consumer groups. Consumers in the category are heavily influenced by social media. More than any other user group, rhino horn usage by this group of consumers links most strongly with traditional notions of rhino horn as medicine.

In addition my research within the Melbourne Vietnamese community has highlighted that even expat Vietnamese who have been living in Australia for 30+ years still use rhino horn. They bring rhino horn (and tiger paw) back to Australia from a holiday in Vietnam visiting family. This particular use seems centered around gift giving and using it for children to 'make them strong'.

This is in line with other research that has found rhino horn is also used in Vietnam as a 'status' gaining / affirming gift. This includes overseas business people operating in Vietnam who come from cultures where 'saving face' is an important cultural consideration (e.g. China, Japan, Korea). The TRAFFIC report also quoted instances where rhino horn could be used as a deposit in the purchase of luxury items such as cars.

## **Consumer Awareness**

An important aspect in breaking habitual and medicinal use of a product is the level of awareness the consumer has of the origin, authenticity and efficacy of said product. In this regard the research both in the TRAFFIC report and in the Vietnamese community in Melbourne shows near complete ignorance on all 3 counts. It appears that:

- Most, if not all, consumers have next to no awareness of where rhino horn stems from and how it is obtained in reality that is by killing the animal. This is to be expected and is similarly true for any number of goods consumed in mature Western democracies.
- The TRAFFIC report estimated that up to 90% of what is sold as rhino horn in Vietnam is fake. Water buffalo horn and cow horns are imported from China and elsewhere as a substitute that without forensic testing would be hard to distinguish in the ground up form.
- The traditional efficacy ascribed to rhino horn is its ability to lower high fever, especially in children. All other claimed properties are recent and without any basis in published research. This opens an avenue for peer reviewed research that debunks the claimed efficacy as, for example, a cancer medication.

It appears that consumer awareness of the myth surrounding rhino horn is generated within social circles, through peer networks, social media and family connections. Mass media attention to rhino horn in Vietnam either as a 'product' or as a 'story' around rhino conservation appears to be very low (see Appendix D).

Any strategy to break the brand will have to be targeted to each of the consumer groups and will have to include 'viral marketing' elements that enter the social networks in which the consumers are engaged.

## Current Brand Properties

For the habitual consumers on the social circuit rhino horn is not really a brand, more an 'entry ticket' to belong to an exclusive circle. There are many precedents for this and quite often these products are fads with little longevity. However, this cannot be assumed to be the case given the urgency of protecting the rhino. What is clear is that if a product with no known psychological or physical effect on the consumer can be a prerequisite for belonging to an exclusive social set, it can also be turned around into its antithesis – a reason for being excluded. The reason this couldn't be done with, for example, cocaine is that cocaine has a powerful and immediate psychological effect on the consumer that cannot be denied or 'rebranded'.

In regard to the use of rhino horn as 'magic cure all' when medicine fails or is inaccessible to patients in dire need of a miracle, there are again many precedents of miracle cures without any proven efficacy, for example magnetic therapy and homeopathy. These miracle cures all rely on the (in itself very powerful) placebo effect. What is concerning in the context of rhino horn is that 2 key ingredients for maintaining a powerful placebo effect are in place:

- The reported practice of rhino horn being traded in hospitals and peddled by people with authority such as doctors, doctors of traditional medicine and nurses. The higher the perceived authority of the person prescribing the placebo, the higher is its efficacy.
- High priced placebos show higher efficacy in placebo research than lower priced placebos. Rhino horn is extraordinarily expensive by Vietnamese standards with the per-kilo price higher than gold.

For the young, affluent mothers having rhino horn in the house in case their children develop high fever, the brand is based on the efficacy ascribed to rhino horn in traditional Vietnamese medicine. In contrast to the other 2 main consumer groups, the need here is a protection/security need for something highly valuable (my child) without awareness that another creature has to suffer to alleviate this fear. This suggests the possibility of pursuing both a moral argument and suitable substitute with this group.

For the status gift giving variety of rhino horn use, the brand is all about monetary value, exclusivity and rareness. Again, there are parallels to other brands that serve similar purposes for example illegally traded antiquities.

## Cultural Considerations

Vietnam appears to be undergoing a high-speed cultural transformation. Formally still a 'communist' single party state (the official name is Socialist Republic of Vietnam) the actual economic system has little in common with the years of socialist government prior to the fall of the Communist Block. The current orientation is fully towards a liberal market economy, international economic integration, rapid growth and a cultural orientation towards the West. *The Economist* has characterized Vietnam's leadership as "ardently capitalist communists".

The result has been that tight government regulation and central planning have been replaced with a 'hands-off' government approach to the economy. While about 1/3 of the GDP is still generated by state-owned enterprises, their number has been declining rapidly, from 7,000 in 1990 to 1,000 today. Governance and compliance such, as auditing, are weak by Western standards, so it might be said that Vietnam is in an 'anything goes' period of development.

An additional consideration should be the large number of Vietnamese living overseas as a result of the Vietnam War. Estimated to total some 4 million, nearly half of them live in the US alone (see Appendix E for more detail). The second-generation overseas Vietnamese in the US, Canada and Australia have above average rates of tertiary education, which gives them high status within the community and also with relatives in Vietnam.

In general, children can only influence their parents in Vietnamese culture once they have attained a high-status level of education such as a university degree, including qualifications gained overseas. Many affluent Vietnamese parents send their children to study in the US and Australia. Tapping into these students as ambassadors for breaking the rhino brand will be a key aspect of any campaign. An example of a program targeting young adults/adults is Zoos Victoria's 'I, Animal' experience ([www.zoo.org.au/ianimal](http://www.zoo.org.au/ianimal)).

From research within the Melbourne Vietnamese expat community we know that even after 30+ years out of the country rhino horn is still widely used today, although more in line with its use in traditional medicine and as a status gift.

The demographics of the Vietnamese population will need to also be taken into account in designing any campaign(s). With such a large percentage of the population under 25, we should be able to tap into the celebrity culture that appears to have taken hold in Vietnam, especially with Gen Y. For a list of current Vietnamese celebrities, see Appendix F.

## Preliminary Campaign Ideas

Without preempting the research still to be done to design high-impact campaigns with the best possible return on investment, we have gathered a number of preliminary campaign ideas to illustrate that this project is a viable proposition for changing the brand perception and consumption patterns of rhino horn in Vietnam.

### I. Affluent Mothers

We would suggest a combination of FUD (fear, uncertainty, doubt) and empathy in targeting affluent mothers who obtain rhino horn for their children. FUD can be effectively disseminated through the social media and networks that these mothers frequent. Examples of FUD type strategies are:

- Stories about rhino horn poisoning in South Africa and the risk to consumers (See TRAFFIC report)
- Stories about the level of fake product on the market and the risk associated with fake product
- Stories about the lack of efficacy of rhino horn in reducing fever and alternative remedies that work
- Stories about adverse reactions of children to rhino horn consumption

If these stories are written by 'people they trust' or aspire to be like, for example other affluent mothers, celebrity mothers or health professionals, then this will quickly undermine the brand.

In addition, the driver for obtaining rhino horn for these mothers is their protective instinct – I'll do anything to keep my child safe. This is driven by love and empathy as the underlying emotions. We can use this driver to elicit empathy for the baby rhinos losing their mothers through poaching. See below for an image from a campaign in South Africa.





Similarly, campaigns enabling Vietnamese children to name baby rhinos born in African sanctuaries and zoos around the world would elicit empathy. For example, Australia Zoo conducted a successful public campaign to name their first baby rhino in 2011.



<http://www.youtube.com/watch?v=dHoj4KAJwWk>

With the birth of another new calf this month, the public now have a chance to name the baby rhino in a Facebook competition.

## 2. Terminally Ill Patients

With this group, campaigns need to target hospital staff (doctors, nurses) and family members. In conversations with palliative care specialists it appears it is the family that primarily push for alternative therapies when mainstream medicine can no longer help. The motivation for using rhino horn (or any other miracle cure for incurable disease) is for families to reduce feelings of helplessness and to also feel that they have done everything they possibly could in keeping a loved one alive for as long as possible. The patient is often seen to be much more realistic about their prognosis but will even continue chemotherapy they don't want rather than say no to the family. So together with grief and loss of hope, the emotion of guilt is triggered for family members.

Guilt can also be the driver for doctors and nurses if they lack access to the means, such as funds, medication, surgery or radiotherapy, for keeping the patient alive for longer. Given the price of rhino horn, this may not be of concern to families of patients who obtain it, as they would presumably be able to pay for any available level of treatment.

The main avenue for attacking rhino horn as a miracle drug is to demonstrate its complete lack of efficacy through scientific studies. This is a slow process as studies are expensive, need to be carefully designed and must comply with a whole raft of rules and regulations.

Another avenue is to improve the options available to patients in regards to palliative care. One of the key aspects of palliative care is for the nurses or other health care professionals to conduct family meetings to discuss care options. One main focus of these facilitated sessions is to empower the patient to say what they want. Similarly, they support the family to deal openly with the feelings of helplessness and guilt and to make it OK that there is nothing that they can do. Maybe funds could be allocated for a pilot in one or two hospitals in Vietnam to further train local health care case workers to be able to instigate and facilitate these family meetings when necessary.

The third avenue is to target the motives of the people pushing rhino horn in hospitals. Our moral compass generally makes us despise people who are trying to profit at the expense of the weak and dying, so instead of discrediting the product itself, there is the option of discrediting the 'dealers' who bring in the high level of fake rhino horn being sold by people unscrupulously exploiting their 'victims'.

### 3. Social Circuit Consumers

A fad stops being cool when the 'in-crowd' decides it's no longer cool. This would mean the aim of any campaign targeting this biggest consumer group is to make rhino horn and its consumption completely uncool. Working with celebrities and opinion leaders who matter to the social circuit consumers is the proven avenue of shifting their behavior. This creates an opening for a substitute, which could elicit the strong cooperation of luxury brands aiming to get a foothold in the Vietnamese market. An example could be a campaign sponsored by the likes of Red Bull targeting the Habitual Users on the Social Circuit and linked to Red Bull Events (<http://www.redbull.com/en/events>). Another example would be dealers in luxury cars given the TRAFFIC report also quoted instances where rhino horn could be used as a deposit in the purchase of luxury items such as vehicles.

Advertising, YouTube campaigns, celebrity interviews on high-rating TV/radio shows, social media campaigns and magazine advertorials can all be used as part of undermining the rhino horn brand. We will draw on the experience of the Lynx campaign against wearing fur (see Appendix A) by updating their campaign strategies to the 21<sup>st</sup> century and adapt them to the Vietnamese culture.

### 4. General Awareness

There is also the need for a general awareness campaign of how rhino horn is obtained in reality and pushing the inconvenient truth that it is a bloody and deadly business for the animals and their keepers – as demonstrated by the image of an anti-poaching team that guards a northern white rhino, part of a 24-hour watch, at Ol Pejeta Conservancy in Kenya.



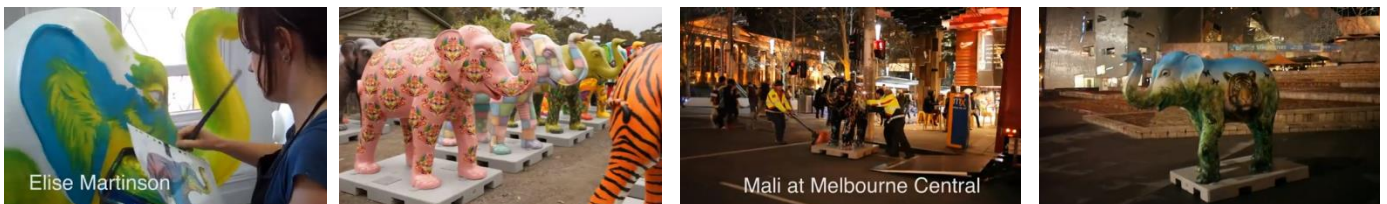
This will assist in shifting perceptions about the product/brand overall and help generate the conversations to influence behavior. We would see overseas Vietnamese communities and students as a key target group for the initial awareness campaigns, generating a support network for broader campaigns in the process. Another target group would be the expat Vietnamese in the USA, Canada and Australia.

Given social media will need to be a key part of the media mix, people who have a social media profile should be targeted for support. An example is John Luc, also known as Mychonny by his fans. He is a 22 year old Vietnamese-Chinese Australian who lives in Melbourne. He joined YouTube in March of 2008 and makes spoof 'Asianese' videos of himself, friends, and family. Mychonny has 524,217 subscribers and his youtube videos have had up to 5 million views. (<http://mychonny.com/>)

Another possible awareness tool is to mirror the successful Wild in Art campaigns (<http://www.wildinart.co.uk/>) where artists and children get the opportunity to paint and display baby rhinos. This could be combined with images and information on rhinos and rhino poaching in South Africa.



By doing this with artists and schools in a given Vietnamese city, both the city and the project could be highlighted. An example of this was the highly successful 'Mali in the City' project undertaken to celebrate the 150<sup>th</sup> birthday of Melbourne Zoo (<http://www.youtube.com/watch?v=UEgG6XNHlp0>).



## Project Outline

Based on the information presented above, we believe there is a viable prospect of designing campaigns to profoundly alter the brand and consumption of rhino horn in Vietnam. Tackling the demand side in parallel with conservation and anti-poaching measures in South Africa would certainly increase the chances of securing the survival of rhinos in the wild.

We believe that the best opportunity for success would be to create an international project hosted by a high-profile conservation organization such as FFI, WWF or TRAFFIC which involves local staff/volunteers in Vietnam and in the expat communities in the US, Canada and Australia.

### Phase I

In the first phase we would need to expand on the work the TRAFFIC team did in Vietnam:

- Verify the findings in regards to brand and consumers of rhino horn detailed in the TRAFFIC report cited in this document
- Identify potential targets for influencing the social networks the 3 key consumer groups are currently using/rely on
- Get a stronger understanding of the 'stickiness' of the current rhino horn brand with each consumer group. How strong is the belief in the claimed properties? How susceptible is the product to substitution? How much of an influence does the very high percentage of fake product have on the brand?
- Identify the celebrities and high status individuals most relevant to each of the 3 key consumer groups. Would they be open to engagement in our campaign?
- More detailed analysis of social media in Vietnam and their ability to support / dent demand for rhino horn in the key current / prospective consumer groups
- Analysis of who stands to lose the most, and what, if a campaign attacking rhino horn use is launched in Vietnam and how they are likely to fight back. This may include pivotal market participants, political players, business owners/executives and criminal syndicates

We believe that much of this research will have to be conducted informally, but some level of seed funding from the hosting organization will be required for Phase I/II.

In addition we would conduct two related projects in Phase I:

1. Detailed analysis of previous successful campaigns in breaking or shifting brands. This will include the fur trade example, but also non-conservation related examples. The idea is to extract the common elements and look at the peculiarities related to illicitly traded goods and 'miracle cures'.
2. Scope a scientific study that would establish the (lack of) efficacy of rhino horn as a treatment for terminal illness like cancer. Find potential university partners that would have credibility in Vietnam.

### Phase II

In the second phase we would design the individual campaigns to influence each of the key consumer groups. Beyond the project team and volunteers this would involve working with marketing and advertising agencies

with experience in Vietnam who would be prepared to invest time and resources pro-bono given the high-profile nature of the project and the potential image gain for being involved.

Based on the findings from Phase I and the campaign design from Phase II, a detailed project scope, timeline and budget can be created after Phase II is complete.

### **Phase III**

Fundraising, awareness and coalition building will ride on the campaign created from Phase II. During Phase III we will:

- Build and ramp up the fundraising team and campaign
- Build up the project team in Vietnam and in the US/Australia/South Africa
- Build awareness in the Vietnamese expat communities and in Vietnam to recruit volunteers
- Create a coalition of supporting organisations already active in the conservation space
- Establish partnerships with organisations in Vietnam that can/want to support the project

Phase III would also progress the scientific research to the point where the study design and approvals are completed and the study partner(s) have been selected.

### **Phase IV**

Project Implementation. Given the nature of the project all campaigns will be analysed concurrently with being implemented and refined / altered as required.

## Appendix A – Historical President of ‘Breaking a Brand’ in Conservation Effort

The idea for breaking the brand is not new. One of the best campaigns was by Lynx, launched in the 1980's to tackle fur trade.

Extract from EADT 24 - full article [http://www.eadt.co.uk/news/features/how\\_lynx\\_set\\_the\\_fur\\_flying\\_1\\_1184497](http://www.eadt.co.uk/news/features/how_lynx_set_the_fur_flying_1_1184497)

*But the 1980s also marked the birth of an organisation that not only changed the face of British fashion but introduced a new campaigning style, using celebrities and hard-hitting advertising material.*

*These days, few people, other than those who grew up in the 1980s, will remember the name of anti-fur organisation Lynx. But its legacy is huge. Fur farming in Britain never recovered from the body-blow Lynx dealt it and was outlawed in 2003. Consumer attitudes to the wearing of fur were also changed irrevocably. It is no longer seen as acceptable on any meaningful scale.*

*Co-Founder - Lynne Kentish said "You can bang on about fur being cruel as long as you like but you have to attack them in some other way. The absolute thing was that if people didn't want to wear it that would finish the trade off."*

*Its 'dumb animals' campaign was shot by leading photographer David Bailey (who worked for free) and featured posters and a cinema advertisement showing a catwalk model dragging a blood-soaked fur coat with the slogan: it takes up to 40 dumb animals to make a fur coat but only one to wear it*

*Bailey also worked with Lynx on another campaign, which had the slogan: How would you like your fur madam? Gassed, strangled, trapped or electrocuted? And photographer Linda McCartney, herself a committed vegetarian, shot its 'rich bitch; poor bitch' poster, which showed a fur-clad model alongside a dead fox.*

*As well as Bailey and McCartney, celebrity supporters included Twiggy, Yasmin Le Bon, Elton John, rock stars Chrissie Hynde and Siouxsie Sioux.*

*Before long Harrods and many high street stores had closed their fur departments because of falling sales and Britain's fur farms started to shut down too*



Billboard created with support of David Bailey



Billboard created with support of Lynda McCartney

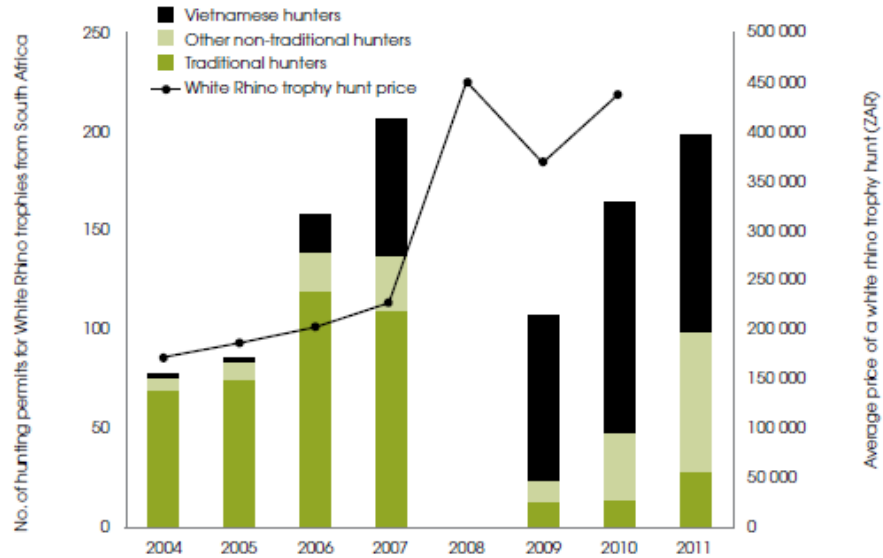


Advert created with support of David Bailey

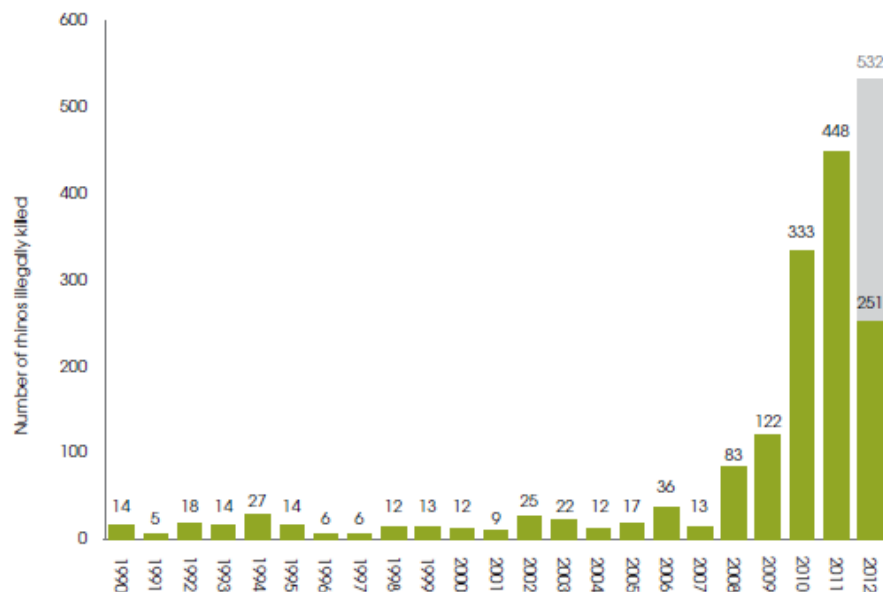
[http://www.youtube.com/watch?v=lohEqT1\\_C\\_o](http://www.youtube.com/watch?v=lohEqT1_C_o)

## Appendix B – Trend in Rhino Horn Poaching and Vietnamese Hunters\*

\*TRAFFIC Report – The South Africa – Viet Nam Rhino Horn Trade Nexus: A deadly combination of institutional lapses, corrupt wildlife industry professionals and Asian crime syndicate



**Figure 2** Origin of hunters applying for hunting permits for white rhino trophies from South Africa between 2004 and 31 March 2012 (data compiled from DEA by M. Knight; no hunting permit information was available for 2008).



**Figure 3** Number of rhinos killed in poaching incidents in South Africa 1990–2012, showing predicted total of 532 rhinos for 2012, based on rates to 20 June 2012 (data from M. Knight).

### Appendix C - Demographics of Vietnam Today\* #

\*Data compiled from Index Mundi (<http://www.indexmundi.com>)

<b>Population:</b>	91,519,289 (July 2011 est.)
<b>Age structure:</b>	0-14 years: 25.2% (male 11,945,354/female 10,868,610) 15-64 years: 69.3% (male 31,301,879/female 31,419,306) 65 years and over: 5.5% (male 1,921,652/female 3,092,589) (2011 est.)
<b>Median age:</b>	total: 27.8 years male: 26.8 years female: 28.9 years (2011 est.)
<b>Urbanization:</b>	urban population: 30% of total population (2010) rate of urbanization: 3% annual rate of change (2010-15 est.)
<b>Major cities – population:</b>	Ho Chi Minh City 5.976 million; HANOI (capital) 2.668 million; Haiphong 1.941 million; Da Nang 807,000 (2009)
<b>Literacy:</b>	definition: age 15 and over can read and write total population: 94% male: 96.1% female: 92% (2002 est.)

Availability of Mainstream health care Vietnam\*

	Vietnam #	Australian (comparison)
<b>Health expenditures</b>	7.2% of GDP (2009)	8.5% of GDP (2009)
<b>Physician density</b>	1.224 physicians/1,000 population (2008)	2.991 physicians/1,000 population (2009)
<b>Hospital bed density</b>	2.87 beds/1,000 population (2008)	3.82 beds/1,000 population (2009)

# A caveat to this comparison is the fact that hospitals and doctors in Vietnam are licenced for both mainstream and traditional medicine - see TRAFFIC Report The South Africa – Viet Nam Rhino Horn Trade Nexus: A deadly combination of institutional lapses, corrupt wildlife industry professionals and Asian crime syndicates.

*Now, both Western and traditional medicine are promoted by the government, but the scale of traditional medicine remains significant with at least 48 hospitals and institutes, over 240 departments in central and provincial hospitals, and more than 9000 health centres reportedly licenced to practise traditional medicine.*



Vietnam's strong fundamentals as an attractive investment destination include##:

##Data compiled from Indochina Capita ([http://www.indochinacapital.com/investing\\_in\\_vietnam.php](http://www.indochinacapital.com/investing_in_vietnam.php))

Solid Economic Growth:	Average annual GDP growth of 6.6% (2007 - 2011)
Sovereign Safety:	Little political turmoil or threat of terrorism
Socio-Political Stability:	One-party system with high degree of ethnic, linguistic and religious homogeneity
Rich Natural Resources:	Net exporter of crude oil; abundant mineral and other natural resources
Diversified Economy:	A global leader in agro-business and light manufacturing
Compelling Demographics:	Nearly 90 million people of which 70% are under the age of 35
Rapid Urbanization:	30% urbanization rate as of 2010 expected to increase to 45% by 2020
Rising Levels of Income:	Middle-class consumers emerging as household incomes rise dramatically
High Literacy Rate:	Over 90% in total; 95% for those 15 years old and up
Strong Foreign Direct Investment:	Committed FDI totaled more than US\$108 billion over the past three years

## Appendix D – Rhino Horn Sales on [www.youtube.com](http://www.youtube.com)

Examples found from research undertaken by Vietnamese supporters in Melbourne. The Vietnamese word for rhino horn (**sừng tê giác**) was typed into youtube search to find videos.

It is unclear if the videos are advertising rhino horns for sale or just showing them off. What is interesting is the dates the video was uploaded and the number of views\*:

<a href="http://www.youtube.com/watch?v=y9TgATY1fS8">http://www.youtube.com/watch?v=y9TgATY1fS8</a> (not sure if the numbers represent a contact phone number)	(Uploaded: Feb 2011, Views: 1,582)
<a href="http://www.youtube.com/watch?v=JiFFbX5fjTQ">http://www.youtube.com/watch?v=JiFFbX5fjTQ</a>	(Uploaded: Apr 2012, Views: 741)
<a href="http://www.youtube.com/watch?v=mjXgGvNEM0U">http://www.youtube.com/watch?v=mjXgGvNEM0U</a>	(Uploaded: May 2012, Views: 461)
<a href="http://www.youtube.com/watch?v=egV_5peW1MI">http://www.youtube.com/watch?v=egV_5peW1MI</a>	(Uploaded: Sept 2011, Views: 1,198)
<a href="http://www.youtube.com/watch?v=-s6ifQC-uEs&amp;feature=plcp">http://www.youtube.com/watch?v=-s6ifQC-uEs&amp;feature=plcp</a> (showing how to grind the horn to form a powder)	(Uploaded: Apr 2012, Views: 95)
<a href="http://www.youtube.com/watch?v=rSXx3radP9E">http://www.youtube.com/watch?v=rSXx3radP9E</a> (instead of grinding the horn manually, you can buy this machine to grind it for you)	(Uploaded: Mar 2011, Views: 409)

On a brighter side the following videos... The news segments highlight that rhino horns have been misconceived as these miracle antidotes to cure cancer, diabetes and other illnesses as well as minimising the effects of alcohol, allowing you to drink more without getting drunk.

<a href="http://www.youtube.com/watch?feature=player_detailpage&amp;v=ciDIQd9OpH0">http://www.youtube.com/watch?feature=player_detailpage&amp;v=ciDIQd9OpH0</a> (uploaded by <a href="http://www.rfatiengviet.net">http://www.rfatiengviet.net</a> the Vietnamese online news broadcast in America)	(Uploaded: July 2012, Views: 4,709)
<a href="http://www.youtube.com/watch?v=wb42YMON_h0">http://www.youtube.com/watch?v=wb42YMON_h0</a> (uploaded by <a href="http://www.vietnewstv.com">www.vietnewstv.com</a> Vietnamese news broadcast in America. The interviewee is Dr. Nguyen Dang Khoa)	(Uploaded: Jan 2011, Views: 16,196)

These viewing numbers are very low when you consider that the number of Internet users in Vietnam has grown from basically zero to 24million between 2002 and 2009.

## Appendix E – Expat Vietnamese Communities and Primarily Locations of Overseas Study

Country	Approximate Population Size	Main Locations
USA	~ 1.6 million	California (~38%): Orange County, Westminster, Garden Grove, San Jose Texas (~14%): Dallas-Fort Worth, Houston Washington: Seattle Other: Florida, Washington DC, Cleveland
Canada	~200,000	Mainly urban areas: Toronto, Montreal, Vancouver, Calgary
Australia	~200,000	NSW (~40%): Bankstown, Cabramatta, Canley Vale, Fairfield VIC (~40%): Abbotsford, Footscray, Sunshine, St.Albans

### Overseas Universities preferred by Vietnamese Students

There has been a sharp rise in number of Vietnamese students in the US in 2011. The country became the second most popular overseas study destinations after Australia.

### Appendix F - Vietnamese Celebrity List

Age Group	Celebrities In Vietnam	International Celebrities
Gen Y (15-30)	Dong Nhi (Đông Nhi) Khắc Việt (Khắc Việt) Minh Hằng (Minh Hằng) Cao Thái Sơn (Cao Thái Sơn) Ung Hoàng Phúc (Ung Hoàng Phúc) Mỹ Tâm (Mỹ Tâm) Chí Thiện (Chí Thiện) Bảo Thy (Bảo Thy) Thủy Tiên (Thủy Tiên) Hồ Ngọc Hà (Hồ Ngọc Hà) Hồ Quỳnh Hương (Hồ Quỳnh Hương) Khánh Phương (Khánh Phương) Noo Phước Thịnh (Noo Phước Thịnh) Khổng Tú Quỳnh (Khổng Tú Quỳnh) Khởi My (Khởi My) Lương Bích Hữu (Lương Bích Hữu) Miu Lê (Miu Lê) Ngô Kiến Huy (Ngô Kiến Huy) Quang Hà (Quang Hà) Tuấn Hưng (Tuấn Hưng) Văn Mai Hương (Văn Mai Hương) Vĩnh Thuyên Kim (Vĩnh Thuyên Kim) Vy Oanh (Vy Oanh) Thanh Ngọc (Thanh Ngọc) Thanh Thảo (Thanh Thảo) Trà My Idol (Trà My Idol) Bùi Anh Tuấn (Bùi Anh Tuấn) Hoàng Thùy Linh (Hoàng Thùy Linh) Minh Vương M4U (Minh Vương M4U) V-Music band 365 Band The Men	Trish Shayla Minh Tuyết (Minh Tuyết) Bằng Kiều (Bằng Kiều) Dương Triệu Vũ (Dương Triệu Vũ) Ngọc Sơn (Ngọc Sơn) Lâm Nhật Tiến (Lâm Nhật Tiến)

<p><b>Gen X (30 – 50)</b></p>	<p>Quang Dung (Quang Dũng) Thanh Lam (Diva Viet Nam) Hong Ngoc (Hồng Ngọc) Hong Nhung (Hồng Nhung (Diva Viet Nam)) Cam Ly (Cẩm Ly) Dam Vinh Hung (Đàm Vĩnh Hưng) Thu Minh My Linh (Mỹ Linh (Diva Viet Nam)) Tran Thu Ha (Trần Thu Hà (Diva Viet Nam))</p>	<p>Cam ly (also known by GenY) Dan nguyen (also known by GenY and BabyBoomers) Bang tam Anh minh (also known by GenY) Doan phi (also known by GenY) Dang the luan Quang minh Hong dao Trinh hoi Nhu Quynh (Nhu Quỳnh) Phi Nhung Manh Quynh (Mạnh Quỳnh) Che Linh (Chế Linh) Tuan Vu (Tuấn Vũ) Truong Vu (Trường Vũ) Manh Dinh (Mạnh Đình) Huong Lan (Hương Lan) Y Phung (Y Phụng) Tam Doan (Tâm Đoan) Son Tuyen (Sơn Tuyền) Ngoc Son (Ngọc Sơn) Duy Khanh (Duy Khánh) Ha Phuong (Hà Phương) Thanh Huyen (Thanh Huyền) Quang Le (Quang Lê) Nguyen Hung (Nguyễn Hưng)</p>
<p><b>Baby Boomers (50+)</b></p>		<p>Dalena (also known by GenX), phi nhung (also known by GenX), Minh tuyet (also known by GenX) Nam loc Van Son (also known by GenX) Thanh Tuyen Ky duyen (also known by GenX)</p>