SUSTAINABILITY HERE AND NOW

Brazilian from 11 Capital Cities Talk About the Environment, Consumer Habits and Recycling
Summary

1. Introduction
Presentation – Izabella Mônica Vieira Texeira, Minister of the Environment
What Brazilians think about the environment – Samyra Brollo de Serpa Crespo, secretary of Institutional Articulation and Environmental Citizenship and Christianne Urioste Canavero, Sustainability Director of Walmart Brazil
Knowing to mobilize – Marcos Samaha, President and CEO of Walmart Brazil
The Route from Memory to Behavior – Eduardo Sincofsky, vice president of Synovate Brazil

2. Summary and methodology
Executive summary Methodology and sample
Profile of respondents

3. Highlights
The happiness issue
Information about the environment
Health and violence are priority
Public cleaning
Solutions for the environmental problems
Who works for the environment
Thoughts about the environment -1
Thoughts about the environment -2
The role of schools – the new generation
Routine behavior
Habits regarding the environment
Consumption and responsible disposal
Garbage selection
Selective collection – the importance of garbage pickers
Supermarkets – recycling and getting rid of plastic bags
The world without plastic bags
Prohibition of plastic bags
Behavior during shopping
Electronic garbage

Cover: Shutterstock image bank
Many are the challenges for our country, especially for the area of environmental sanitation with the creation of a national regulatory framework for solid waste management, after Law 12,305 of 2010 has come into force. I am particularly talking about the management of what we call “garbage” in urban centers. Today, over 75% of the Brazilian population lives in cities, and a great deal is concentrated in the so-called metropolitan areas, cities without set borders (endless cities) with large territories and enormous social and cultural diversity, but with one characteristic in common: they have increasingly become factories for the consumption of energy, goods, environmental services and raw materials.

The Brazilian Geographical and Statistics Institute (IBGE) reassures in a survey carried out in 2008, with a report published in 2010, that only 17% of the Brazilian cities, most of which in the Southeast – a bit over 900 cities – operates a selective garbage collection system; a bit over 40% has a sanitary landfill and, last but not least, only 11% of the Brazilian homes are used to separating domestic garbage.

To bring more details into this picture of concern, about 12 billion plastic bags are thrown away each year without proper management, causing visible damage to urban environment and nature, which led the Ministry of the Environment to conduct the campaign “Saco é um saco” [Bag is a pain] a bit over a year ago.

As a result, taking the initiative to carry out a survey in the 11 major Brazilian capital cities about the habits of consumption, disposal, recycling, choosing cities precisely because they have increasing trends in per capita consumption seems appropriate and useful.

To achieve ambitious goals such as the eradication of the dumps and the best use of the materials thrown out today, representing true waste savings, you need to know the habits of consumption, disposal and especially the population’s will to adhere to the public policies that will rise from the regulation of the National Solid Waste Act.

The National Policy on Solid Waste brings and will apply the concept of shared responsibility, in which society has defined responsibilities and should do its part. It also enlightens and inspires activities on environmental education and engagement of consumers that are provided in the National Sustainable Consumption and Production Plan (PPCS) which will be released later this year. The Plan was in public consultation for two months and anticipates a series of actions that will promote increasing recycling as top priority in Brazil.

Our challenge, therefore, with the presentation of data from this survey, carried out by SAIC - Secretaria de Articulação Institucional do MMA [Ministry of the Environment Department of Institutional Articulation] together with the Syngenta Institute and WALMART Brazil’s sustainability area, our partners, is to identify on the one hand, the potential of the population adhering to environmentally responsible behavior, and on the other, the contradictions, myths and factual errors, which take thousands of citizens to act in a yet predator and little engaged way.

The research provides interesting and encouraging data on the population’s will to abandon the excessive use of plastic bags; it shows our accomplishment in carrying out our successful campaign with the support of major supermarket chains, and invites us to serious reflection on how to take advantage of the potential will of the population to participate in campaigns to separate garbage, and stop water and energy waste: sensitive areas for public management, crucial issues for our society.

“To combat the waste economy, you need to know the population’s consumption and disposal habits”
Our motivation to carry out our research, the main results of which we make known through this publication, was brought about from the common desire of Walmart Brazil and the Brazilian Ministry of the Environment, to verify whether the campaign to reduce plastic bags had reached the largest group of consumers. After all, it is the consumers - ordinary citizens – who define a change in habits when there is no legislation establishing an obligation or prohibition.

For almost a year and a half of efforts to keep the flame burning, we received a lot of information about the adherence of consumers and other retailers; we also became aware of the controversies generated in many states and municipalities. It was rewarding to have news of excellent results in small municipalities, which managed to make agreements with the population and the local supermarket chains, significantly reducing the use of conventional plastic bag, with no law prohibiting such use. Many ecobags were sold throughout Brazil, the so-called returnable bags. Good for business, good for citizens, good for the environment.

But what we did not know, among the many positions available in favor of the reduction, of the charging for the plastic bags, of the ban, was the real level of adherence to the idea that the plastic bags used for packing purchases cause serious problems to biodiversity and to life quality, and that it is reasonable to imagine a world without them. And this was precisely the scenario that we proposed to the citizens of 11 Brazilian state capitals: what would you do if you woke up tomorrow and there were no more plastic bags?

We took the offer of partnership of Synovate, a specialized institute, and we offered, in a true collective creation, to put together the research scope. With teams from Walmart Brazil, from the Secretaria de Articulação Institucional e Cidadania Ambiental do MMA [Ministry of the Environment Department of Institutional Articulation and Environmental Citizenship], and from the Institute, we tried to build three sets of questions that seemed to help in understanding a range of issues related to the Brazilians’ consumption, disposal and recycling habits.

Many of the issues that we apply we brought from the research “O que os Brasileiros pensam do Meio Ambiente e da Sustentabilidade” (MMA-ISR) [What Brazilians think about Sustainability and Environment], hoping to contribute towards the historical series that has been put together since 1991. Others were specially designed to highlight current issues from a rather “hot” agenda, presented to the whole current society with the recently enacted National Solid Waste Act, and the National Plan on Sustainable Production and Consumption. Both the Law and the Plan postulate shared responsibility between the government, the productive sector and the society, in the correct management of what we now call garbage, but which covers a variety of materials that can - if properly recycled - return to the productive chain of other assets.

Once the field and the first results were known, as a more complete assessment and more complex procedures of analysis will take time, we observed with satisfaction that the Brazilian society appears to be quite sympathetic to the idea of banning plastic bags from their lives and from the environment. Nothing more nothing less than 60% is in favor of a ban on the use of plastic bags. In a less formal language, we can say that the campaign “caught up” and that society is mature enough to carry out this important debate:

What is worth more: an apparent “comfort” and practicality, or our knowledge about the negative impacts of certain types of consumption?

We also collected a series of input on the behavior of the Brazilian population in the capital cities, which can greatly help in formulating public and private policies, as well as guiding many educational programs regarding the proper disposal of the products after consumption. It is the clear case of materials such as batteries, paints, solvents and expired medications. One of the most interesting is the claim that 17% of the people surveyed store electronic waste at home.

Another piece of information to be considered, but only superficially encouraging, is the fact that most people affirm that schools are the privileged place for actions that foster more environment-friendly attitudes. The old classical idea that “environmental education” is done at school. In other words, it is attributed to children and to the school the responsibility of being the place where the new society will be formed. Our hypothesis, without disregarding the role of schools, is that this view hides a possible omission, the fact that we actually do not consider ourselves capable of performing (or we do not want to perform) the necessary changes. But the title of the publication is very clear: we want to talk about sustainability today, here and now.

We also asked citizens for their opinion about the way they thought most appropriate for supermarkets, the places where they buy almost anything, to contribute towards responsible consumption. The answers are inspiring and somehow correspond to what retailers such as Walmart are already doing today: providing information about the products, facilitating the process of choosing, placing volunteer collection points of disposable materials at stores, and participating in campaigns to reduce the use of plastic bags.

Other results also encourage us and offer good food for thought: it is the case, for example, of the data on “what brings more happiness” for the population. Divided into four groups by the pattern of responses, we were pleasantly surprised to see that the most materialistic ones, who tie their expectation of happiness to “having more money” are not much greater group than those who still prefer self-fulfillment at work or who would like more time for leisure and the family. Each group, representing about one quarter of respondents each, show that nearly half the population of major urban centers in the country sees “intangible” goods as their biggest source of wellbeing.

This examination allows us to clearly state that there is a fertile ground for the adoption of responsible consumption and for affective consumption, the one that jointly connects us to the environment or to other human beings. One simply needs to see the huge potential of those who declare themselves willing to engage in joint efforts to solve or help solve any environmental problem.

Well: these and other data that readers will be able to verify in this publication, and in its entirety in the research that will soon be available on the websites of Walmart Brazil and of the Ministry of the Environment clearly show that the Brazilian population is increasingly sensitive to environmental issues and sustainability, and that research like this one can be used to inform actions from both the public and the private sectors, strengthening the necessary link between decision makers and the population’s opinion.
The construction of knowledge about a society requires an understanding of who the people who comprise it are, what their needs and aspirations are, and above all, how they wish to share their values to build a future which premises can be guided by the principles of sustainability and respect for individuality and rights to choose.

Walmart Brazil supports the research “Sustainability: Here and Now”, held jointly with the Ministry of the Environment (MMA) in Brazil, precisely because it believes that only by knowing the values of this society will it be possible to establish actions, initiatives and policies appropriate to these values.

This study shows that Brazilians are aligned with the needs of their time with regards to preserving the environment. They want products and services that have innovation as value and vision of a more sustainable world as a commitment. Walmart Brazil has supported the Ministry of the Environment in disseminating the campaign “Saco é um Saco” [Bag is a Pain] with the goal of reducing plastic bag use in retail. We were especially excited to see that the Brazilian society yearns for the creation of public policies that keep on encouraging the reduction in the use of this material.

Analyzing the results of this research it is clear that the Brazilian society is sensitive to the challenges it must face to keep the environment healthy and that every American is willing to contribute with their personal efforts - often enough they are shown the way. We at Walmart Brazil also want to be part of this history of mobilization and breakthrough. We are working to bring the society company products with sustainability attributes and, which are increasingly demanded by the Brazilians. Undoubtedly, this effort reflects the mission of the retail to be part of the solution to the challenges we face in this century.

For Walmart, the contribution to achieve economic, social and environmental balance is part of the process of building a better business by means of permanent dialogue with society and, consequently, by means of adopting practices and policies that allow achieving business continuity and continuity of the communities in which we operate in Brazil and worldwide.
Synovate’s research data on Sustainability and Purchasing Habits, in partnership with Walmart and the Ministry of the Environment, confirms a trend already observed: Brazil gives its steps in the “green” agenda, for now more focused on knowing and adhering to the subject rather than necessarily changing the behavior.

In this scenario, the formation of public opinion reveals a tangle of perceptions and concrete facts.

We can list three steps towards building the environmental cause: recollection of the matter, its “qualification”, when some idea or opinion on the subject appears, and finally, the moment of action, when memories and subjections lead to practice.

By the results analyzed, Brazilians now take the first two steps in the subject, showing some adherence based on the population’s concern about environmental issues. Although it is still far from being the main problem of the city or neighborhood, some uncontrollable data arise and delimit the issue: Nine out of ten Brazilians believe that “based on the way we use water, soon we will have no water to drink,” and only one out of five agrees that “concern for the environment in Brazil is exaggerated.”

At first, we could characterize these facts as “politically correct”. No doubt. However, this does not invalidate the qualification point that the Brazilian begins to make about the theme.

Now, in the analysis of what they are willing to do, a clear result is confirmed: Brazilians are not willing to pay “with money” for environmentally friendly products. What things would they be willing to do, then? Just as it was detected in other studies, there are some activities that do not “affect” one’s pocket, such as “eliminating waste of water,” “separating household waste” and “reducing energy consumption.”

Two well-known data are consolidated in this research:

- Curitiba shows up in most of the questions as a city where the population is clearly more favorable to actions that effectively take attitudes towards the environment.

- The upper classes are more engaged in the cause.

Research shows that there is still a long way to go to step three. When asked about what they actually do in favor of the environment, it is clear that there is a gap between thoughts and behavior. Looking at some of the everyday practices, we see an enormous collection of objects that are still deposited in ordinary bins. And probably the most revealing data of the survey: almost one fifth of the population has electronic junk at home because they do not know what to do with it.

Surely one of the biggest challenges is to articulate with the productive sector how the industry can absorb the investments in green products. If the consumer is not willing to pay for “environmentally correct” products, someone will have to bear with this. If we compare only one issue with other countries (Synovate survey in 22 countries in 2010), we see again how much Brazil has yet to evolve in this arena.

The route from memory to behavior

By Eduardo Sincofsky, vice-president of Synovate Brazil

Trash recycled at home

Source: Global Trends Synovate, July 2010, sample of 22 thousand interviewees
Brazil is concerned about the environment, but still does very little

- The survey was held between September 27 and October 13, 2010 in 11 Brazilian capitals, selected because they have increasing trends in relation to per capita consumption, the study was conducted by Synovate on request from the Ministry of the Environment and Walmart Brazil.
- The study is quantitative, applied 1100 structured questionnaires to a sample with a similar profile to the population of each capital; the results can be disaggregated by capital and segmented by income, age, sex and education.
- The interviewees were conducted at the homes of respondents randomly selected by the PPT method (proportional to the size of cities, then neighborhoods and then after the census) and were about the following topics: knowledge and opinion about general environmental issues; about consumer habits and recycling, and about willingness to participate and support activities that help protect the environment.
- The research focused on identifying the behavior, opinions and attitudes of Brazilians living in these capital cities who showed greater compliance and greater pro-activity in relation to environmental protection and the adoption of more responsible consumer habits.
- We defined as responsible or “aware” consumption that performed after careful selection in which the individual selects the healthiest and less harmful option to the environment. The ideal of responsible consumption is the minimization of the impact over natural resources, especially those of non-renewable sources, considering also neutralizing other negative social or cultural impacts. In a single sentence, consumer awareness is related to the values that the individual practices or advocates.

FINDINGS AND MAIN CONCLUSIONS

- Confirming the trend seen in most polls, the binomial criminality and violence, followed by concern about health and education are the three main problems identified by residents in their cities. Nearly there is no differentiation in this result when we break down into each capital city.
- In nine possibilities, environment gets the last option, but other problems associated with environmental problems such as sewage, garbage, and floods appear well positioned, showing that in the overall, environmental problems are well acknowledged by the population. It is pointed out the fact that environmental sanitation is not seen by the population as “environment”.
- Where environmental problems themselves are mentioned spontaneously, in relation to the neighborhood, for example, where people live, the main problem pointed out was the urban cleaning, followed by lack of green areas and pollution.
- Among the more positive data, 59% say that “the Environment should take priority over economic growth”;
- Over 85% say that “any change that humans cause to nature will probably make things worse” and an absolute majority of respondents believe that “only with major changes in habits and consumption” will it be possible to preserve natural resources.
-Confirming the perception that environmental problems must be solved by the government, the majority indicated the city hall and then the state government as the main responsible ones for solving the identified environmental problems; While showing great concern over environmental issues, there is great resistance in thinking about solutions that involve costs. In general, people are far more willing to donate time and volunteer community work, rather than buy more expensive products even if more eco-efficient, or contribute money to funds or environmental organizations;
- In fact one of the research findings was the low level of knowledge that people have about organizations and institutions that take care of the environment or work for some environmental cause. Over 80% of the population was unable to cite any organization spontaneously. Among those named, we can highlight the public organization IBAMA and the international Greenpeace.
- Regarding the consumer habits, the most interesting information is the society’s inclination for programs or activities to replace plastic bags; 60% speak out in favor of a law imposing its ban.
- Over 40% of the sample said that there is garbage collection in their District, 44% of cans and bottles, 42% paper and 36% of other material. It is confirmed that a large part of the collection is done by garbage pickers; the city halls are mentioned in second and NGOs in third. However, there is much to do about the proper disposal of waste. Some warnings:
  - 50% of respondents throw batteries in household waste;
  - 55% discard drugs in household waste;
  - 83% throw paints and solvents in household waste;
  - 77% discard used oil in the kitchen sink;
  - 17% have electronic waste stored at home.
- Regarding what the population is willing to do, the favorite actions are: separating garbage for recycling, eliminating water waste and engaging in campaigns to reduce energy, pointing at a high potential for adhesion in these public policy issues;
- The population seems to bet on the school and children and on the youth, as those who have more responsible attitudes towards the environment and consumption. The school was chosen as the place par excellence - the most appropriate - to teach environmental education;
- The positive role that supermarkets can play in consumer education was also a highlight. 3 main actions were listed under the scope of supermarkets: Information to facilitate consumer choice; collection points for disposable material, and the offer of healthier products.
- Finally, when asked about what could bring more happiness, whether money, time or profession, the sample was divided into two distinct groups, with similar percentages (those who prefer to bet on having more money and improving professional levels = 56%) and those who prefer more time with friends and family and uphold values such as hope and faith in humanity (44%).
- As a general conclusion, we can tell from the survey data that the Brazilians reveal a significant concern in relation to issues related to the environment, to health and to life quality, affirming they have various consumption and disposal patterns that characterize a society with considerable degree of responsible consumption.
- However, the unwillingness to make the changes that are difficult or that force people to “spend more money” demonstrates that there is still a reasonable gap between intention and action, and attitude itself.
- But the results, particularly based on the opinion about economic growth versus ecology, and others such as engaging in the problem of reducing plastic bags, show that there is fertile ground for environmental education programs and for campaigns that allow the environment to become a day-to-day issue.
- In general, educational and income together determined more engaging response patterns. In terms of age, individuals on both ends of the scale (the younger and the older) have the highest level of contradiction between thinking and doing.
- Comparing all capital cities, Curitiba stands out as the “capital” of “greener” habits and behavior, challenging the researchers to identify what educational strategies or strategies of other nature worked out to make this city show off this enviable winning position.
Methodology & Sample

Who

The general population, men and women aged between 16 and 70, from all social groups, in an amount equivalent to the gender ratio of the city where the interviews were conducted.

Where

11 capital cities belonging to the 5 Brazilian regions: Midwest, Southeast, South, Northeast and North.

How

Quantitative study conducted by means of interviews in the census areas of cities, using a structured questionnaire, which lasted about 40 minutes.

When

Study carried out between September 27 and October 13, 2010.

SAMPLE

* The total data were weighted in proportion based on population size of each of the areas.
* Sampling error: 3.0% for the Total sample and 9.8% for the sample of each of the cities
* Reliability degree: 95% reliable

<table>
<thead>
<tr>
<th>Rank</th>
<th>Capital city</th>
<th>State</th>
<th>Region</th>
<th>GDP per capita</th>
<th>Population (Estimate IBGE July/2009)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1°</td>
<td>SÃO PAULO</td>
<td>SÃO PAULO</td>
<td>SOUTHEAST</td>
<td>R$ 25.675</td>
<td>11.037.593</td>
</tr>
<tr>
<td>2°</td>
<td>RIO DE JANEIRO</td>
<td>RIO DE JANEIRO</td>
<td>SOUTHEAST</td>
<td>R$ 20.851</td>
<td>6.186.710</td>
</tr>
<tr>
<td>3°</td>
<td>BRASÍLIA</td>
<td>DISTRITO FEDERAL</td>
<td>MIDWEST</td>
<td>R$ 37.600</td>
<td>2.606.885</td>
</tr>
<tr>
<td>4°</td>
<td>BELO HORIZONTE</td>
<td>MINAS GERAIS</td>
<td>SOUTHEAST</td>
<td>R$ 13.636</td>
<td>2.452.617</td>
</tr>
<tr>
<td>5°</td>
<td>CURITIBA</td>
<td>PARANÁ</td>
<td>SOUTH</td>
<td>R$ 17.977</td>
<td>1.851.215</td>
</tr>
<tr>
<td>6°</td>
<td>MANAUS*</td>
<td>AMAZONAS</td>
<td>NORTH</td>
<td>R$ 18.902</td>
<td>1.738.641</td>
</tr>
<tr>
<td>7°</td>
<td>PORTO ALEGRE</td>
<td>RIO GRANDE DO SUL</td>
<td>SOUTH</td>
<td>R$ 20.900</td>
<td>1.436.123</td>
</tr>
<tr>
<td>8°</td>
<td>SALVADOR</td>
<td>BAHIA</td>
<td>NORTHEAST</td>
<td>R$ 8.870</td>
<td>2.998.056</td>
</tr>
<tr>
<td>9°</td>
<td>FORTALEZA</td>
<td>CEARÁ</td>
<td>NORTHEAST</td>
<td>R$ 9.325</td>
<td>2.505.552</td>
</tr>
<tr>
<td>10°</td>
<td>RECIFE</td>
<td>PERNAMBUCO</td>
<td>NORTHEAST</td>
<td>R$ 12.091</td>
<td>1.561.659</td>
</tr>
<tr>
<td>11°</td>
<td>GOIÂNIA</td>
<td>GOIÁS</td>
<td>MIDWEST</td>
<td>R$ 13.006</td>
<td>1.281.975</td>
</tr>
<tr>
<td>12°</td>
<td>BELÉM</td>
<td>PARÁ</td>
<td>NORTH</td>
<td>R$ 8.765</td>
<td>1.437.600</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sample City</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belém/PA</td>
<td>100</td>
</tr>
<tr>
<td>Belo Horizonte/MG</td>
<td>100</td>
</tr>
<tr>
<td>Brasília/DF</td>
<td>100</td>
</tr>
<tr>
<td>Curitiba/PR</td>
<td>100</td>
</tr>
<tr>
<td>Fortaleza/CE</td>
<td>100</td>
</tr>
<tr>
<td>Goiânia/GO</td>
<td>100</td>
</tr>
<tr>
<td>Porto Alegre/RS</td>
<td>100</td>
</tr>
<tr>
<td>Recife/PE</td>
<td>100</td>
</tr>
<tr>
<td>Rio de Janeiro/RJ</td>
<td>100</td>
</tr>
<tr>
<td>Salvador/BH</td>
<td>100</td>
</tr>
<tr>
<td>São Paulo/SP</td>
<td>100</td>
</tr>
</tbody>
</table>

Total: 1100
Interviewees’ Profile – Total

**Sex**
- 53% Masculine
- 47% Feminine

**Age**
- 27% 16 to 24
- 23% 25 to 34
- 16% 35 to 39
- 11% 40 to 49
- 1% 50 or more

Average: 37 years old

**Social class***
- 5% Class A
- 25% Class B
- 43% Class C
- 26% Class D
- 1% Class E

* Brazilian criterion for socioeconomic rating ABEP

**Education**
- 37% Pre School
- 25% Primary School
- 26% High School
- 1% High Education

Base: 1100 Cases
A society with values and hope in humanity

The time to spend with family and friends, and faith in the human capacity to overcome the difficulties are among the key values of Brazilians, with 44% of responses. A quarter of people would like to have more favorable conditions to further their studies and improve their professional performance.

31% of respondents showed a willingness to increase the level of consumption, claiming to want more money to buy more things than they need.

What is important for your happiness today?

<table>
<thead>
<tr>
<th></th>
<th>25 to 34 y.o.</th>
<th>35 to 39 y.o.</th>
<th>40 to 49 y.o.</th>
<th>50 y.o. or more</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fortaleza</strong></td>
<td>32%</td>
<td>25%</td>
<td>11%</td>
<td>17%</td>
</tr>
<tr>
<td><strong>Goiânia</strong></td>
<td>48%</td>
<td>31%</td>
<td>27%</td>
<td>18%</td>
</tr>
<tr>
<td><strong>Salvador</strong></td>
<td>41%</td>
<td>31%</td>
<td>26%</td>
<td>18%</td>
</tr>
<tr>
<td><strong>Porto Alegre</strong></td>
<td>39%</td>
<td>25%</td>
<td>21%</td>
<td>17%</td>
</tr>
<tr>
<td><strong>Recife</strong></td>
<td>42%</td>
<td>31%</td>
<td>22%</td>
<td>15%</td>
</tr>
</tbody>
</table>

**More money to buy things I need**

<table>
<thead>
<tr>
<th></th>
<th>25 to 34 y.o.</th>
<th>35 to 39 y.o.</th>
<th>40 to 49 y.o.</th>
<th>50 y.o. or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bases</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td><strong>More money to buy things I need</strong></td>
<td>36%</td>
<td>30%</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td><strong>More faith in human capacity to overcome difficulties</strong></td>
<td>13%</td>
<td>22%</td>
<td>26%</td>
<td>34%</td>
</tr>
<tr>
<td><strong>More conditions to improve education or profession</strong></td>
<td>29%</td>
<td>31%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td><strong>More time to socialize with family and friends</strong></td>
<td>21%</td>
<td>16%</td>
<td>22%</td>
<td>24%</td>
</tr>
</tbody>
</table>
Brazilians do not feel comfortable to talking about the environment

Almost one quarter (22%) of people believed to be misinformed about the environment, while 26% believe they are well informed about environmental issues and ecology. However, about half the people who participated in the survey said they are “somewhat” informed about the environment. Information seems to be one of the key factors driving change in the habits of Brazilian society in favor of the environment.

Do you consider yourself informed about the environment or ecology?

Question: Do you feel informed about the environment and ecology? (ONLY OPTION TO ANSWER - STIMULATED RESPONSE)

Base: 1100 Cases
Brazilians indicate health and violence as major urban problems

Health and violence are perceived as the major urban problems. Environment is placed at “the end of line”, with only 2% of responses. However, many issues that are clearly “environmental” have a prominent place without people identifying them as issues related to the environment or to the quality of natural resources. Examples of these are sanitation, collection and disposal of garbage and even traffic jams that, besides being one of the main responsible for the emission of greenhouse gases in major cities, transforming the urban environment in an area of great discomfort.

Another issue to having a strong impact on quality of life related to the environment, and that which almost out of answers, with little perception among the interviewees, is the housing in a country where a significant portion of the population lives in poor housing conditions, especially in large urban centers. In 2000, according to the Institute of Advanced Economic Research (IPEA), 1.4 million housing units were considered substandard. Public transportation also had low ratings among urban environmental problems.

The perception of what environment means is low in cities

Question: Thinking about the city where you live, what is the problem in this list that you consider most important? And secondly? And third?
(MULTIPLE RESPONSE OPTIONS - STIMULATED RESPONSE)

<table>
<thead>
<tr>
<th>1st in rank</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health/Hospitals</td>
<td>30%</td>
</tr>
<tr>
<td>Violence/Criminality</td>
<td>24%</td>
</tr>
<tr>
<td>Education</td>
<td>8%</td>
</tr>
<tr>
<td>Sanitation/Sewage</td>
<td>7%</td>
</tr>
<tr>
<td>Unemployment</td>
<td>7%</td>
</tr>
<tr>
<td>Homeless children</td>
<td>5%</td>
</tr>
<tr>
<td>Public transport</td>
<td>5%</td>
</tr>
<tr>
<td>Landfill/Open-air landfill</td>
<td>4%</td>
</tr>
<tr>
<td>Traffic Jams</td>
<td>3%</td>
</tr>
<tr>
<td>Cost of living</td>
<td>2%</td>
</tr>
<tr>
<td>Environment</td>
<td>2%</td>
</tr>
<tr>
<td>Housing</td>
<td>1%</td>
</tr>
</tbody>
</table>

Highlight - 1st in rank

Health/Hospitals: Brasil, 50%
Violence/Criminality: Curitiba, 40%
Education: São Paulo, 12%
Sanitation/Sewage: Rio de Janeiro, 17%
Public cleaning is the big issue in the neighborhoods

The perception of society about daily environmental issues is in focused on some very objective aspects. Public cleaning services, for instance, is seen as the biggest environmental problems to be found near people’s houses. With much smaller percentages, the lack of green areas and environmental pollution come next. And these are issues that, for most people, should be resolved by the public authorities, whether local governments or state governments.

However, there is willingness to participate in the solution. While 80% of respondents are willing to sign a manifesto in favor of solutions, nearly 60% express willingness to roll up their sleeves and participate in task forces or working groups in neighborhoods to improve environmental quality, revealing the significant potential for participation to be enjoyed.

In neighborhoods the environmental issue is not perceived

1st Question: What is the main problem in your neighborhood or community? (MULTIPLE RESPONSE OPTIONS – SPONTANEOUS RESPONSE)
2nd Question: What is the main ENVIRONMENTAL problem in your neighborhood? (MULTIPLE RESPONSE OPTIONS – SPONTANEOUS RESPONSE)
3rd Question: Which of these groups should resolve this problem? (ONE-OPTION RESPONSE – STIMULATED RESPONSE)

---

### General

- Safety: 28%
- Health: 11%
- Infrastructure: 10%
- Education: 2%
- Housing: 1%
- Environment: 1%
- Others: 1%
- Unemployment: 0%
- None/No problem: 12%

### Environmental

- Public cleaning: 39%
- Green Areas: 10%
- Pollution: 7%
- Non-environmental Issues: 4%
- Others: 3%
- None: 28%

### In Charge?

- City Hall: 40%
- State Government: 21%
- The neighborhood association: 13%
- Each of us: 9%
- Federal government: 5%
- Political parties: 5%
- Ecology organizations: 3%
- Local entrepreneurs: 2%

---

HIGHLIGHTS

- Safety: Fortaleza and Belém: 50%
- Health: Belo Horizonte: 22%
- Infrastructure: São Paulo and Brasilia: 15%
- Belo Horizonte: 14%
Complain to the government or join the neighbors

When faced with environmental problems in their neighborhood, people tend to take a number of different measures, ranging from seeking the government (municipal or state) to get politicians and parties. However, a large portion of the society still believes that mobilization is a good way. More than half of respondents are willing to complaining to the government and gathering the neighbors to protest. Then comes the search for support from environmental organizations and complaint to the press.

There are also those who prefer the path of Justice, suing the one causing environmental problems and only 1% of people do not seem to know what to do in case of environmental problems in their neighborhood.

Solution to environmental challenges

Question: Which of these alternative allows to achieve better environmental solution to a problem that affects you?

(ONE-OPTION RESPONSE – STIMULATED RESPONSE)

Base: 1100 Cases
Population do not know organizations that protect the environment

Over 70% of people say they do not know anyone who works for the protection of the environment, whether public or civil society organizations (NGOs) - which is undoubtedly a very important information. The best known organization, with only 4% of respondents, is the non-governmental organization Greenpeace, while IBAMA - Brazilian Institute of Environment and Renewable Natural Resources, the main government agency responsible for protecting the environment, is just behind with 3% of responses. Others reminded are the Tamar Project, which protects turtles, the Green Party and the non-governmental organization SOS Mata Atlantica, which together represent only 4% of responses. 14% of people did not even answered the question. Even with the great movement around environmental issues, the society does not clearly identify who are the actors in the defense of the environment. And, also, in general, they take little part in environment protection organizations.

Greenpeace and IBAMA are the most remembered names

Question: Do you know any group, entity or organization that works to protect the environment?
MULTIPLE RESPONSE OPTIONS – SPONTANEOUS RESPONSE)

![Chart showing responses to the question on groups known for environmental protection]

HIGHLIGHTS

Greenpeace: Belém, 14%; Belo Horizonte, 11%
IBAMA: Fortaleza, 9%
Projeto Tamar: Salvador, 6%; São Paulo, 4%
None: Porto Alegre, 89%
Does not know/has no opinion: Recife, 31%; Goiânia, 26%; Salvador, 24%
Concern about environment in Brazil is necessary

The research shows that most people believe that human intervention in nature tends to make things worse. Moreover, the belief that science can solve all the problems caused to the environment is decaying, and only 10% of people believe it. And almost 60% believe that existing concerns about environmental problems in the country are relevant.

Most people also show that there should be birth-control programs. Moreover, the belief is that the negligence towards water resources can lead to lack of drinking water within a short time. Forest resources are also perceived by 70% of society as finite and that their use should be controlled.

Thoughts about the environment

Question: Do you agree or disagree with each of these sentences?

ONE-OPTION RESPONSE – STIMULATED RESPONSE

Base: 1100 Cases
Ecology x Economics, a false dilemma

The contrast between economic growth and the environment shows that 59% of people believe that the preservation of natural resources must be above the issues related to economy. Also, 59% of people do not believe that environmental problems can be solved with small changes in habits: for most of the society, only major changes in consumer habits, transportation and meals can actually help maintain a healthy environment in the future. This question shows that society has the perception that the opposition between economic growth and sustainable development is a false dilemma.

Thoughts about the environment

Question: What is your level of agreement with these phrases? (ONE-OPTION RESPONSE – STIMULATED RESPONSE)

Base: 1100 Cases
A bet on the next generation

Schools are identified as the most appropriate place to build environmental awareness in society, being followed by the churches, communities and NGOs, governments and parties afterwards with much fewer answers. This wager in future generations and hope in the typical generosity of the churches shows little confidence in formal public programs.

Supermarkets are appointed as a partner for the construction of environmental policies for a significant portion of respondents, and a significant portion of people believe that companies can be the path to the solution of the environmental issues that affect society.

**Brazilians elect the schools as the most important organization in environmental education**

Question: Which of these institutions are able to influence over their actions in relation to the environment?

(MULTIPLE RESPONSE OPTIONS - STIMULATED RESPONSE)

<table>
<thead>
<tr>
<th>1st in rank</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>24%</td>
</tr>
<tr>
<td>Churches</td>
<td>19%</td>
</tr>
<tr>
<td>Communities</td>
<td>15%</td>
</tr>
<tr>
<td>NGOs</td>
<td>13%</td>
</tr>
<tr>
<td>Government/Governors/Politicians</td>
<td>12%</td>
</tr>
<tr>
<td>Supermarkets</td>
<td>11%</td>
</tr>
<tr>
<td>Companies in general</td>
<td>5%</td>
</tr>
</tbody>
</table>

*Base: 1100 Cases*
Willing to recycle and reducing of water consumption are priorities for the society

Among the three main items on which people have shown more willingness to cooperate, both can also help save money. Firstly comes, among day-to-day attitudes was water savings, secondly, comes the separation of household waste, and thirdly, the reduction of electricity consumption at home. Surprisingly close behind comes the willingness to not use plastic bags. This is an indication that there is an acceptance by society to public policy initiatives or even to eliminate bags.

However, in last places come attitudes that could mean some additional cost on the part of respondents, such as purchasing energy efficient appliances or to contribute with money to organizations that protect the environment. Among the cities that most cultivate friendly habits in relation to the environment are São Paulo and Curitiba.

### Daily attitudes for the environment

**Question:** Which of these things you would personally be willing to do? (MULTIPLE RESPONSE OPTIONS - STIMULATED RESPONSE)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Separate domestic waste to make recycling easier</td>
<td>66%</td>
</tr>
<tr>
<td>Eliminate water waste</td>
<td>63%</td>
</tr>
<tr>
<td>Reduce electric power consumption at your home</td>
<td>46%</td>
</tr>
<tr>
<td>Not to use plastic bags</td>
<td>40%</td>
</tr>
<tr>
<td>Take part in campaigns to boycott products from companies that pollute the environment</td>
<td>18%</td>
</tr>
<tr>
<td>Reduce gas consumption at home</td>
<td>15%</td>
</tr>
<tr>
<td>Take part once a month, on a Sunday, in community work for reforestation of cleaning of rivers and streams</td>
<td>15%</td>
</tr>
<tr>
<td>Paying tax to clean up rivers</td>
<td>12%</td>
</tr>
<tr>
<td>Pay more for products cropped with no chemicals</td>
<td>9%</td>
</tr>
<tr>
<td>Contribute with money towards organizations that look after the environment</td>
<td>8%</td>
</tr>
<tr>
<td>Buy more expensive household appliances as long as they do not waste energy</td>
<td>7%</td>
</tr>
</tbody>
</table>

*Base: 1100 Cases*
Between gestures and intentions

Disposal of waste glass in the regular trash is the practice nearly half of all people, similar is the proportion among those who look for similar products with lower impact on the environment. However, almost 40% of people try to drink bottled water instead of water supplied by public service. Less than a quarter of people surveyed buy incandescent bulbs, which consume more energy.

Half of the respondents still plays batteries in the common trash, while even with high willingness to abandon the use of plastic bags, 90% of respondents still use this product everyday. The search for hormones–free steak, chicken and eggs also did not get many supporters: 64% of people do not pay attention to it.

Over 80% of people dismiss paints and solvents in regular trash, and more than 75% of respondents throw their waste cooking oil down the drain in the sink. As per consumption habits, environmental issues will require more commitment to stop being a problem.

Habits in relation to the environment

Question: Tell me if you practice these habits always, very often, rarely or have never practiced in them in your daily routine.

(ONE-OPTION RESPONSE)

Base: 1100 Cases

- 62% do not do that
- 30% do that

- 23% do not do that
- 77% do that

- 64% do not do that
- 36% do that

- 44% do not do that
- 56% do that

- 50% do not do that
- 50% do that

- 55% do not do that
- 45% do that

- 83% do not do that
- 17% do that

- 77% do not do that
- 23% do that

- 48% do not do that
- 52% do that

- 47% do not do that
- 53% do that

- 41% do not do that
- 59% do that

- 39% do not do that
- 61% do that

- 33% do not do that
- 67% do that

- 27% do not do that
- 73% do that

- 22% do not do that
- 78% do that

- 19% do not do that
- 81% do that

- 10% do not do that
- 90% do that

- 6% do not do that
- 94% do that

- 2% do not do that
- 98% do that

- 1% do not do that
- 99% do that

- 0% do not do that
- 100% do that
Changing consumer habits

The society is willing to avoid contamination of the environment being careful about disposal of products containing hazardous materials, such as batteries, paints and solvents. 45% of people report to be careful about it, while only 13% of people have sought to reduce car use. The habit of fixing things to prolong the life also has many supporters.

However, only 17% of people have stopped buying any product because they believe it is harmful to the environment. Even fewer, 14% of respondents, have made any complaint with the consumer protection agencies. A number that is striking is that 22% of people have reduced the consumption of meat for health reasons and 27% bought some kind of organic product. Curitiba is more attentive city to waste disposal; however, Brasilia is the city where consumer habits are changing faster.

In the last 12 months you...

In the past 12 months, have you done any of these actions? (ONE-OPTION RESPONSE)

Base: 1100 Cases
Curitiba is highlighted in garbage separation

The issue of separation of domestic waste into dry waste and wet garbage divides people. 47% say they do this separation, while 53% mix their waste in one same collection container. This is an issue that involves the provision of collection services with a separate allocation for each class of waste.

However, the survey itself shows that there may be other ways to addresses recyclables besides public collection. The supermarkets are singled out as a location they could send the recyclables accumulated at home.

Do you separate wet garbage from dry garbage?

(ONE-OPTION RESPONSE)

<table>
<thead>
<tr>
<th></th>
<th>Porto Alegre</th>
<th>Curitiba</th>
<th>São Paulo</th>
<th>Rio de Janeiro</th>
<th>Belo Horizonte</th>
<th>Brasília</th>
<th>Recife</th>
<th>Salvador</th>
<th>Fortaleza</th>
<th>Goiânia</th>
<th>Belém</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bases</td>
<td>1100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Yes</td>
<td>47,0</td>
<td>58,0</td>
<td>82,0</td>
<td>55,0</td>
<td>38,0</td>
<td>39,0</td>
<td>31,0</td>
<td>39,0</td>
<td>36,0</td>
<td>56,0</td>
<td>61,0</td>
</tr>
<tr>
<td>No</td>
<td>53,0</td>
<td>42,0</td>
<td>18,0</td>
<td>45,0</td>
<td>62,0</td>
<td>61,0</td>
<td>69,0</td>
<td>61,0</td>
<td>64,0</td>
<td>44,0</td>
<td>39,0</td>
</tr>
</tbody>
</table>

Base: 1100 Cases
Population confirms waste collector as the main agents of selective

Around 40% of the districts inhabited by the interviewees in this research have some sort of selective collection. So, about the same percentage of cans, bottles, paper and packaging end up having a more environmentally-friendly destination. However, about 7% to 9% of people do not have information on this type of service close to their homes.

The waste collectors are the main selective collection agents in the neighborhoods. Between 65% and 69% of all cans, bottles and paper sent for recycling in these communities have the collectors’ work as a support - products which have more stable market. The municipalities are left with almost a third of the responsibility for delivery of products to be recycled. The champion city in the collection is Curitiba, with an average of 90% for all materials.

The company recognizes the importance of the work of waste collectors in the structuring of recycling processes.
The society supports recycling and reduction of plastic bags

Supermarkets are perceived by society as an important interface with environmental issues. The main point in relation to supermarkets is to eliminate the use of plastic bags. However, other data show the importance of offering products with recyclable packaging, and also keeping products on the shelves that are pesticide free or organic.

The supermarkets are also indicated as points of collection of waste to be sent for recycling and, also, as a source of information on the environmental impacts caused by each product. The need for more information to consumers is identified as an essential factor for the preservation of the environment.

Supermarkets are seen by the society as partners to reduce plastic bags and as points of collection for recycling

Question: What are the three most important actions that supermarkets can or should do for the environment? (ONE-OPTION RESPONSE – STIMULATED RESPONSE)

1st Place

Base: 1100 Cases
The world without plastic bags

In a world without the bag, almost 70% of people would carry their groceries shopping bags made of other materials, while 22% would opt for the boxes.

At the home, however, is the need a solution to the disposal of daily waste. 47% of people would deposit their waste in trash cans or dumpsters, while 21% do not know or have not delivered any opinion on how to dispose of garbage.

If plastic bags disappear from the world ... (MULTIPLE RESPONSE OPTIONS – SPONTANEOUS RESPONSE)

... how to carry purchases from supermarkets?
- Bags/Bags made of other materials: 69%
- Boxes: 22%
- Shopping carts: 14%
- Others: 2%
- Handbags: 1%
- Does not know/Did not give an opinion: 6%

.. where would garbage and home waste be deposited?
- Garbage cans: 47%
- Boxes: 21%
- Bags/Bags made of other materials: 6%
- Other methods: 6%
- Other containers: 2%
- Does not know/Did not give an opinion: 21%

Base: 1100 Cases

HIGHLIGHTS
1) In the question “... how would you carry your supermarket shopping?”
   a. Bags/Bags made of other materials: Belo Horizonte and Recife, 82%
   b. Boxes: Recife, 93%; São Paulo, 30%
2) In the question “... where would you deposit the garbage and home residues?”
   a. Garbage cans: Recife, 77%
Many people favor the ban on plastic bags

The elimination of plastic bags may receive the support of 60% of society, while 23% is against the ban on the use of this item and 17% have no defined position. The way is open for public policies that inhibit the use of plastic bags in Brazil.

While 39% of people not heard of any campaign against the use of plastic bags, 60% already had access to that kind of campaign. This result shows that there is a very clear memory of society in relation to the campaigns against the use of plastic bags by the general trade.

Law against plastic bags has the support of society

If there was a law prohibiting the distribution of plastic bags you would ...

<table>
<thead>
<tr>
<th>In favor</th>
<th>Against</th>
<th>Indifferent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rio de Janeiro 68%</td>
<td>Salvador 68%</td>
<td>Curtitba 31%</td>
</tr>
</tbody>
</table>

Base: 1100 Cases

Have you heard about any campaign related to reducing the consumption of plastic bags?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Porto Alegre 51%</td>
<td>Fortaleza 51%</td>
<td>Salvador 50%</td>
</tr>
<tr>
<td>Rio de Janeiro 74%</td>
<td>Recife 70%</td>
<td></td>
</tr>
</tbody>
</table>
Most people prefer products with lower impact on the environment

Overall, the company wants to consume products that are friendlier to the environment. 74% of people say they are more motivated to buy products that have been produced using techniques with less environmental impact. However, according to this research, the cost is a limiting factor when it comes to deciding on environmentally friendly products that are more expensive.

Shopping behavior

If you find a product that was manufactured in an environmentally friendly way… (ONE-OPTION RESPONSE - STIMULATED RESPONSE)

- I get more motivated (Recife 93%, Fortaleza 42%)
- I get less motivated (3%)
- It doesn’t matter (23%)

Base: 1100 Cases
17% keeps electronic junk at home

TVs, stereos, computers, cell phones, and batteries comprise the major electronic junk items accumulated in people’s homes. 17% did not know what to do with it and keep at home just waiting to be able to give a suitable destination, which recycles its components.

However, 83% of people no longer have old or out-of-use equipment at home. The disposal of electronic waste is a major problem for environmental and waste policies, since they contain heavy metals of all kinds, and materials that can be reused in other productive cycles. The town where most people keep electronic equipment at home is São Paulo.

People do not know where to drop off electronic junk

(MULTIPLE RESPONSE OPTIONS – SPONTANEOUS RESPONSE)

<table>
<thead>
<tr>
<th>Electronic waste</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td>17%</td>
<td>83%</td>
</tr>
</tbody>
</table>

Base: 1100 Cases

Base: 1100 Cases
Masthead

This survey was conducted in 2010 by Walmart Brazil and the Ministry of Environment, with support from Research Institute Synovate Brazil and Envolverde.

Institutional Coordination
Samyra Crespo, secretary of the Institutional Articulation for the Ministry of Environment
Christianne Canavero Uróste, Director of Sustainability for Walmart Brazil

Coordination
Mark Chapman, Director of Marketing for Walmart Brazil
Eduardo Sincofsky, Vice President of Synovate in Brazil

Technical Coordination
Lily Amaral, Research coordinator for Walmart Brazil
Julia Noble, Sustainability Assistant Manager for Walmart Brazil
Ricardo Barbosa, Research Manager at Synovate Brazil

Publication
Agência Envolverde and Ruschel & Associados Coordination and Editing; Adalberto (Dal) Marcondes Publishing; Roger Ruschel Layout; Rafael Boni Ruschel Review; Nanci Vieira

www.walmartbrasil.com/sustentabilidade
www.mma.gov.br
SUSTAINABILITY
HERE AND NOW

Brazilian from 11 Capital Cities Talk About the Environment, Consumer Habits and Recycling