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Ecotourism in Brazil by 2035: four scenarios to leverage sociocultural and environmental sustainability

Ecoturismo no Brasil até 2035: quatro cenários para alavancar a sustentabilidade sociocultural e ambiental

Nayara Rodrigues Marques, Elimar Nascimento, Mateus José Alves Pinto, Jaqueline Gil, Ian Yeoman, Pollyana Pugas

ABSTRACT: Brazil is among the most competitive countries in terms of nature and biodiversity resources. However, this potential is not reflected in its sustainable ecotourism services. Will ecotourism be a protagonist in the creation of a sustainable tourism future in Brazil or continue a passive agent? From this research question, four scenarios for ecotourism in Brazil by 2035 were elaborated through scenarios building approach. In the *Thriving Niches* scenario, ecotourism will be booming but concentrated in a few destinations. In *Many Oases*, low economic growth might keep entrepreneurs' supply chain mostly focused on high-end consumers. *Slowly, About to Stop* represents a scenario with low diversification and limited contribution to future sustainability. Finally, *Brazil: Land of Ecotourism* portrays a dynamic economic scenario with the consolidation of new services and destinations. In summary, the study seeks to encourage the latter scenario as it highlights ecotourism as a protagonist in the strengthening of sustainable tourism services and destinations, conservation or regeneration of biomes and creation of benefits to communities.

KEYWORDS: Ecotourism; Futures Studies; Scenario Analysis; Sustainability; Brazil.

RESUMO: O Brasil está entre os países mais competitivos em termos de recursos naturais e de biodiversidade. Todavia, esse potencial não se reflete em seus serviços de ecoturismo. O ecoturismo será protagonista na construção de um futuro sustentável para o turismo no Brasil ou continuará sendo um agente passivo? A partir dessa questão, foram elaborados quatro cenários para o ecoturismo no Brasil até 2035, por meio da abordagem de construção de cenários. No cenário *Nichos Pujantes*, o ecoturismo estará em expansão, porém concentrado em poucos destinos. Em *Muitos Oásis*, o baixo crescimento econômico pode manter a oferta dos empreendedores majoritariamente voltada para consumidores de alto padrão. *Devagar, quase parando,* representa um cenário de baixa diversificação e contribuição limitada para a sustentabilidade. Por fim, *Brasil: Terra do Ecoturismo* retrata um cenário econômico dinâmico, com a consolidação de novos serviços e destinos. Em síntese, o estudo busca incentivar este último cenário, pois ele destaca o ecoturismo como protagonista no fortalecimento de serviços e destinos de turismo sustentável, na conservação ou regeneração dos biomas e na geração de benefícios para as comunidades.

PALAVRAS-CHAVE: Ecoturismo; Estudos de Futuros; Análise de Cenários; Sustentabilidade; Brasil.

Introduction

Brazil has been first (2015) and is now the third most competitive country in natural resources by the World Economic Forum (WEF, 2022), and ranks first in Forbes's Ecotourism Index (Cyrus; Pratt, 2023). With unique hotspots such as the Amazon and Pantanal (Wetlands), Brazil is home to unparalleled biodiversity (Myers et al., 2000). However, this potential is not materialised in transformative business leadership of nature-based tourism nor in ecotourism towards more sustainability in tourism to the same extent (Pegas; Castley, 2014; Matheus; Raimundo, 2017).

Brazil is not isolated since the World Economic Forum (WEF, 2020) highlights that Latin America (Latam) in general benefits widely from rich natural resources and improving international openness, but many obstacles are yet to be overcome, such as safety and security, gaps in health and hygiene, underdeveloped infrastructure, and environmental issues. Despite oversized potential, Brazil is not image-wise recognised as a sustainable ecotourism powerhouse, nor is its economic returns enough to finance expanded conservation or regeneration of biomes, something Costa Rica and Peru perform better within the region (Bremner, 2021).

In this context, the study question was: will ecotourism be a protagonist in the creation of a sustainable tourism future for Brazil by 2035? Bearing this question in mind, four scenarios for ecotourism in Brazil by 2035 were developed to illustrate how the potential may eventually become a leverage for sustainability in its tourism industry development, evenly or unevenly nationwide. Through the scenarios, the study proposed analytical pathways capable of driving ecotourism stakeholders from public and private sectors towards a desired future, and direct policies, actions, and investments in a common direction. Focusing on Brazil's unparalleled ecotourism potential, this paper also explored the key variables and stakeholder roles necessary to unlock the country's capacity to drive transformative sociocultural and environmental sustainability.

The scenarios result from a qualitative study involving experts from different fields and institutions across Brazil, Costa Rica, and New Zealand. Moreover, ecotourism in Brazil and Latin America have not seen nor benefited from the scenarios approach, nor pre neither post-pandemic, facing therefore a research gap in future-driven regional opportunities. The theoretical-methodological framework underpinning this research is presented below, followed by the four scenarios' debates.

Literature review

Scenario building in tourism research

The scenario building approach is a tool within the research field of Futures Studies, an area that emerged approximately five decades ago in the industry but expanded among academia - especially tourism - only recently (Yeoman; McMahon-Beattie, 2014, 2023). Futures Studies require certain levels of unpredictability when anticipating scenarios through which futures can occur, illustrating pathways that businesses, governments, and

phenomena may decide to take and therefore unleash possibilities (Pinto, 2021). The future is a social construction, a result of trillions of human decisions (social actors) within their respective societies (made up of variables), the object of foresight studies (Godet, 1991; Schwartz, 2005).

Rather than making predictions through forecasting, Futures Studies seek to understand and propose possible futures through foresight: different stories used as backdrop for making better decisions in the present, based on what needs to be shaped for the desired future (Enger et al., 2015). Future creation depends on the present policies and actions of continuity and discontinuity (Godet, 1991; Belfort; Porto, 2003; Porto et al., 2005; Schwartz, 2005). According to Moriarty (2012), the typical process to develop scenarios is by identifying future drivers that might influence an operating environment. These drivers should be the most impactful and uncertain (Postma, 2014), in order to explore spaces of yet unknown possibilities, and be defined with the participation of stakeholders from different backgrounds (Postma, 2015). Scenarios seek to guide strategic decisions to be made in the present, aiming to direct investments, capture unparalleled opportunities and restrict threats towards building the desired future.

Albeit “limited in scope” (Scott; Gössling, 2015), there are studies involving scenarios and tourism. From a pre-Covid era, Frost et al. (2014) examined how changes in the Asia-Pacific region will affect nature-based tourism by 2050, departing from seven future drivers: shifting demographics; increasing urbanisation; climate changes; media technologies/duplication technology; psychological drivers; health care trends; and development at any cost. Their findings reveal that a failure to protect nature in the region may have a negative sociocultural impact on communities, since many Asia-Pacific societies have a sacred attachment to nature.

Considering post-pandemic times in country-based perspectives, works like Komasi et al. (2022) for Iran´s nature-based tourism identified six key drivers of change while analysing ten future scenarios: safety; economic stability; private sector participation; human crises; national and international advertising; and travel costs. The authors concluded that the economic stability driver mostly influenced the confidence of foreign tourists when deciding for nature-based tourism. Yeoman et al. (2022) developed scenarios for New Zealand tourism highlighting trade-offs and conflicts that could emerge, in light of scenario-planning processes applied specially to building foresight skills and resilience within the industry’s stakeholders.

Regarding the correlation between sustainability and nature-based tourism, some examples reinforce the role of stakeholders to articulate desirable futures for the tourism industry. Gössling et al. (2012, p. 913) stated that “sustainability has been widely embraced at a conceptual level, but difficulties remain to implement it on an operational level from within the sector”. Therefore, the transition to a more sustainable future should occur in a way that is doable for stakeholders, rather than disruptive. In turn, Ernst and van Riemsdijk (2013) showed that engaging stakeholders in the decision-

making process towards climate actions can contribute to robust and disruptive decisions and may strengthen climate mitigation measures by considering local contexts within empowered communities. Finally, in one of Yeoman et al.'s (2022) scenarios, the authors reimagined New Zealand as an Eco Paradise, with stakeholders deciding to implement green practices widely.

Nature-based tourism and ecotourism conceptual distinctions

Conceptual differences between nature-based tourism and ecotourism illustrate the Latin American context. Nature-based tourism can be defined as activities in non-urban and natural environments, regardless of whether their practice is responsible/sustainable (Martins; Silva, 2019). The term is broader as it involves trips to appreciate nature and the role of natural landscapes, being based on the motivation and behaviour of tourists (Franco et al., 2021; Pires, 1998). Nature-based tourism encompasses segments and niches such as adventure, hunting or sports fishing, in addition to ecotourism itself (Wearing; Neil, 2014; Franco et al., 2021). It can have benefits measured by employment, income, and business opportunities indicators, though at the cost of acculturation, abandonment of traditional ways of life, inflation, potential local conflicts, and increased criminality (Thapa et al., 2022).

Ecotourism is a more specific concept. Albeit mostly applied inappropriately as a "buzzword", it "remains a vague term used to market anything related to nature or environmental tourism" in Latin America (Mader, 2002, p. 272). When conceptually properly used, it requires trips connected to sustainable values and practices in nature, aiming to finance or protect conservation of the visited biomes, strengthen the well-being of local populations, and raise tourists' awareness via environmental education and interpretation (Wearing; Neil, 2014; Martins, 2018; Franco et al., 2021; Fennell, 2022; The International Ecotourism Society, n.d.; UN Tourism, n.d.).

The essence of the western characteristics of ecotourism are enthusiasm for natural destinations, learning and sustainability (Fennell, 2022). It encompasses leisure conducted safely, in a human-nature harmony and well-planned manner, which promotes nature conservation or regeneration, and local communities' empowerment. The principles guiding ecotourism include nature-centrism; minimising impacts and generating conservation measurable benefits; raising nature-importance awareness; environmental education or interpretation; quality of life for local communities; positive experiences (for tourists and hosts); economic benefits for entrepreneurs, workers, and the locals (Wearing; Neil, 2014; Fennell, 2022; UN Tourism, n.d.). Cobbinah (2015) highlights that environmental conservation remains a fundamental principle of ecotourism.

Sustainability in ecotourism: a fragmented perception

Ecotourism is an effective tool for biodiversity conservation, strengthening social cohesion and improving quality of life, as well as reducing poverty and favouring learning - both for consumers and suppliers (Fennel, 2022). Das and Chatterjee (2015), based on success stories across several destinations, concluded that ecotourism has proven to be an effective

environmental conservation tool. Those cases reflect “properly organised ecotourism, which enables local people to augment their livelihood security through employment in ecotourism related activities and small enterprise development” (Das; Chatterjee, 2015, p. 13).

Das and Chatterjee (2015) also noted the differences between praxis and theory within sociocultural impacts of ecotourism, like community participation (or not) and empowerment, gender parity, conflicts between conservation and sociocultural betterment, among others. They concluded that there is a “mutual interdependence among the economic and sociocultural aspects of ecotourism and conservation of natural resources” (Das; Chatterjee, 2015, p. 14). The improvement of local quality of life “fosters respect for their own culture and helps them to participate in the program leading to cultural and political empowerment respectively” (Das; Chatterjee, 2015, p. 14).

Moreover, ecotourism’s sociocultural sustainability dimension is related to the community-level relations, like the generation of benefits to the locals, governance capabilities (including the governance of the natural resources), economic contribution, cultural identity and social relations (Silva, 2013). For example, Silva (2013) described the risk of ecotourism destinations worldwide to create new forms of exploitative classes, interrelations, uneven distribution of profits, social competition, and conflicts between stakeholders and their social groups. Costa Rica’s history of ecotourism development also shows a similar paradox: the one of economic development and/or environmental conservation (Van Tassell; Daniel, 2006).

Finally, Cobbinah (2015) case study in Ghana evidenced that ecotourism also faces uncertainties since her “findings indicate that certain sustainable principles of ecotourism (e.g., cultural preservation, community engagement) are missing” (Cobbinah, 2015, p. 188). Furthermore, Maranhão and Azevedo’s (2019) study on ecotourism in Brazilian public policies showed that the educational and social participation interfaces are often neglected, prioritising marketing and environmental bias. Therefore, a remarkable notice goes to the fact that for ecotourism destinations and services to succeed, principles related to sociocultural sustainability should not be neglected or forgotten, since they are no less essential than the environmental dimension.

Retrospective of ecotourism development in Brazil

Ecotourism in Brazil emerged in the 1970s, with commencing inland movements towards places with nature potential and services yet to be entirely developed. The sector however gained momentum in the 1990s (Ministério do Turismo [MTur], 2010), following the upshots of the successful Brazilian civil society environmental movements of the 1980s and 1990s, strengthened by Rio-92 - the United Nation’s first Earth Summit (Neiman; Mendonça, 2005). Inaugural ecotourism development initiatives undertaken by the Brazilian government also date to the early 1990s, with the launch of the Ecotourism Operational Manual, the National Ecotourism Policy, and the Ecotourism Development Poles project (Barros; Penha, 1994).

The early 2000s saw the creation of the Ecotourism Development Programme for the Amazon and the National System of Conservation Units (Neiman; Mendonça, 2005). In 2004, the creation of the Brazilian Association of Ecotourism and Adventure Tourism Companies (ABETA) brought together the private sector's stakeholders to advocate for investments facilitation, new products, and safety programmes. Subsequently, the year 2006 witnessed the birth of the Adventure Tourism Qualification and Certification Programme (Aventura Segura) and marked the set-up of the international norm ISO/TC228 - tourism and related services (ABETA, n.d.). In 2010, ABETA launched the first study on the profile of adventure and ecotourism tourists (ABETA, 2010), providing in-depth analytical information about demand preferences and supply opportunities.

In the late 2010s, a combination of actions expanded ecotourism in Brazil. First, public-private partnerships were signed for the management of national parks, with ecotourism as a central means for financing the services (ICMBio, 2018). Moreover, Sebrae launched its nationwide ecotourism hub, named *Polo Sebrae de Ecoturismo*. Also, the Brazilian Trails Network (*Rede Trilhas*), a national long-distance trails system, was founded (Omena; Bregolin, 2020; Menezes et al., 2022; Rede Trilhas, n.d.). In recent years, however, ecotourism has not been represented to the same extent as in the previous three decades, seeing consequences such as discontinuity in studies, programmes and investments (Maranhão; Azevedo, 2019).

Despite having one of the world's largest populations and territories, six diverse biomes, a solid domestic market and multiple diversification possibilities, Brazil faces a concentration of activities in just a few ecotourism destinations. Across the country, several emerging ecotourism hubs, such as conservation units, protected areas, Indigenous territories, and reforested lands, have the potential to become new ecotourism hotspots. However, limited capital for investment and insufficient national public policies have contributed to slowing down the process of ecotourism development as a means to finance conservation.

Brazil's records of civil society movements and government-led programmes pro-conservation, in addition to its considerable potential, does not reflect on a booming ecotourism destination. Ecotourism is still taking shape, and sustainability has yet to become a core element of its business models and services. Given nowadays crises (health, climate, and loss of biodiversity) and Brazil's leadership on international environment discussions at COP 30, the opportunity for another ecotourism push lies ahead.

Methodology

In a time of multiple uncertainties and rapid changes, a way to shape the future is by building scenarios, as the methodology adopted in this study. Foresight and scenario work from Godet (1991), Van Der Heijden (1996), Belfort and Porto (2003), Porto et al. (2005), Schwartz (2005), among others, guided the five steps implemented to develop the ecotourism scenarios for Brazil. The five steps for this qualitative study were: 1. Definition and characterization of the object and retrospective study; 2. Diagnosis; 3.

Identification of the main future drivers of change; 4. Combining critical uncertainties with impactful variables; and 5. Development of the scenarios.

To create the scenarios, the authors collected and analyzed secondary data, such as research on ecotourism and technical documents related to the segment (including plans, laws, and policies). They also gathered and analyzed primary data through workshops and interviews with experts. Then, the data were triangulated to form the scenarios using a scenario-building exercise. Table 1 presents a summary of the methods used in each step.

Table 1: Synthesis of methods.

Scenario-building steps		**Main strategy**	**Data collection and analysis**
1	Definition and characterization of the object	Office research	Bibliographic review
		Workshop 1 (13/10/2022 - 51 experts) - Global inspirations: concepts, trends, and cases	Secondary data such as technical reports
	Retrospective study	Workshop 2 (24/10/2022 - 35 experts) - Past and Present: retrospective and diagnosis	Interview with experts
2	Diagnosis		
3	Map out the main future drivers		Workshop with experts in areas of environment, culture, climate change, entrepreneurship, tourism, and scenarios building
4	Combining critical uncertainties with impactful variables	Workshop 3 (26/10/2022 - 37 experts) - Where is Ecotourism moving to in Brazil (critical conditions and uncertainties)	Primary data collection via questionnaire on Google forms and Mentimeter Triangulation and analysis of collected information
5	Development of the scenarios	Workshop 4 (14/11/2022–35 experts) - Presentation and comments on a draft version of the scenarios	Elaboration of the scenarios Workshop with experts to validate uncertainties and impactful variables Descriptive narrative of the scenarios and identification of its objectives, risks, and critical intervention points
		Office research - 18 to 25 November 2022: Experts individual contributions (online) to the scenarios	Individual consultation with experts (Google docs) Review of the four scenarios

Source: Elaborated by the authors (2022).

The first step was divided in two phases: a) definition and characterization of the object (ecotourism in Brazil 2023-2035); b) the trajectory of ecotourism in Brazil over the last 30 years, covering a period longer than the prospecting years. Subsequently, the diagnosis stage described the main characteristics of ecotourism in Brazil. To address these two steps, the authors carried out secondary data analysis (bibliographic review and technical reports), followed by interviews with 15 experts. These

experts were asked about the elements of continuity and discontinuity in the retrospective study. In addition to the literature review, two workshops were held to analyse concepts and ecotourism contexts. In these meetings, experts indicated the most striking features of ecotourism in the country, resulting in a comparison with previously analysed data.

Step number three identified the main future drivers and trends (critical uncertainties) for ecotourism in Brazil. Critical uncertainties are phenomena with a high degree of impact on the system evolution (e.g., the impact of technological innovations, solutions to reduce carbon emissions, etc.). The data were gathered through the aforementioned interviews and a third workshop. An exercise was applied with the expert group to evaluate and quantify the various uncertainties, according to their degree of uncertainty and intensity (potential impact).

The fourth step consisted of combining critical uncertainties (combinatorial analysis) to structural factors in the form of two orthogonal axes. Combining these macro-uncertainties generated the archetype for the scenarios. At each extremity of the axes, plausible macro-hypotheses and their combinations generated the philosophy of each scenario (Schwartz, 2005).

The fifth step developed the analytical description of each scenario, indicating how they can impact Brazil's ecotourism configuration, with critical points of intervention making it tangible for improvement or direction changes, meeting the stakeholders' expectations. Risks were also highlighted, particularly in relation to threatened nature conservation. The final workshop allowed the experts to review and validate the proposals. After the workshops and contribution through the exercises, the experts individually commented on the draft version of the scenarios.

It is important to note that the four workshops (four hours each) were held between October 13, 2022, and November 14, 2022. A total of 71 experts from different backgrounds and 49 organizations (Table 2) participated in the workshops. Areas of expertise included tourism, adventure, culture, entrepreneurship, environment, conservation, music, media, sociology, scenarios-building, academia, and research. There was gender and racial balance, including people of European-descent, African-descent, river-side and indigenous communities from all six Brazilian biomes.

Table 2: Experts who participated in the workshops.

Gender	Institution/Company	Workshops
Male	Adventure Travel Trade Association (ATTA)	3, 4
Female	Amplia Mundo	All
Male	Amplia Mundo	All
Female	Amplia Mundo	All
Male	Ank Brasil	3
Female	Appana	1, 2
Male	ABETA	1, 2
Female	Bahia Travel Operadora e Consolidação	3
Female	Banco Interamericano de Desenvolvimento (BID)	2, 4

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Gender	Institution/Company	Workshops
Female	Bionúcleo	All
Male	Bionúcleo	1, 2, 3
Female	Brazilian Luxury Travel Association (BLTA)	4
Female	Casa Firjan | Lab de Tendências	1, 3, 4
Female	EMBRATUR	1, 2, 3
Male	EMBRATUR	1, 3
Female	EXXAS Smart City Bureau	2
Male	EXXAS Smart City Bureau	2, 3
Female	Fundação Grupo Boticário	All
Male	Grupo Rio da Prata	All
Male	Indígena Macuxi	3
Male	Individual consultant	3
Female	Individual consultant	1
Male	Individual consultant	1
Female	Instituto Federal de Brasília (IFB)	1, 2, 3
Female	Instituto Mamede	2, 3
Male	Instituto Semeia	1, 2, 3
Female	Lab Turismo	1, 2, 4
Male	Lab Turismo	1, 4
Male	Lab Turismo	1, 4
Male	Lab Turismo	1
Female	Lab Turismo	4
Female	Ministério do Meio Ambiente (MMA)	All
Female	Ministério do Turismo	2, 3
Male	Natural Extremo	1, 2
Male	O2eco	3
Male	PNUMA/ONU	3
Female	Polo Iguassu	1, 2, 3
Male	Pure Brasil	1, 2
Female	Quadro Consultoria	All
Male	SEBRAE AM	3, 4
Male	SEBRAE AM	2
Female	SEBRAE ES	1
Female	SEBRAE MA	1
Female	SEBRAE MS	All
Male	SEBRAE MS	4
Female	SEBRAE MS	1, 3, 4
Male	SEBRAE MS	1, 3, 4
Male	SEBRAE MS	All
Male	SEBRAE MS	All
Male	SEBRAE MS	1, 4
Female	SEBRAE MT	4

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Female	SEBRAE Nacional	1
Male	SEBRAE SC	2
Male	SEBRAE SP	4
Female	SPRINT Dados	1, 2, 4
Male	Três Arquitetura	All
Female	Turismo & Conservación Consultores - Costa Rica	1
Female	Turismo 360	1
Male	Turismo 360	1
Female	Turismo 360	1
Female	Turismo 360	1, 4
Female	Turismo 360	1
Male	Universidade de Brasília (UnB)	All
Female	Universidade de Brasília (UnB)	4
Male	Universidade de Brasília (UnB)	All
Female	Universidade de São Paulo (USP)	1
Male	Universidade Estadual de Mato Grosso do Sul (UEMS)	1, 3
Female	Universidade Estadual do Amazonas (UEAM)	2
Female	Viajar Verde	1, 3, 4
Male	Victoria University of Wellington	1, 4
Female	Vonát Consultoria & Treinamentos	All

Source: Elaborated by the authors (2022).

A moderator conducted the meetings. At the end of each workshop, the experts also provided input on trends, future drivers and scenarios through exercises applied via digital tools (Google forms and Mentimeter). The experts were considered “scenario builders” in this research, as their contributions enabled the identification of the critical uncertainties and impactful variables for the four scenarios presented.

Results and discussion

Based on the developed theoretical-methodological framework (Table 1), the results of the empirical model of the proposed futures for ecotourism in Brazil are summarised in Table 3.

Table 3: Synthesis of the results.

Scenario-building steps		**Results (sections)**
1	Definition and characterization of the object	Ecotourism in Brazil from 2023 to 2035 (*Introduction and Literature review*)
	Retrospective study	Retrospective of ecotourism development in Brazil (*Literature review*)
2	Diagnosis	Retrospective of ecotourism development in Brazil (*Literature review*)
3	Map out the main future drivers	18 future drivers (*Table 4*)
4	Combining critical uncertainties with impactful variables	The dynamism of the Brazilian economy and Ecotourism potential and attractiveness (*Figure 1*)

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Scenario-building steps		**Results (sections)**
5	Development of the scenarios: Philosophy; Descriptive narrative; Objectives; Critical points of intervention; Risks	Thriving Niches (*Results and discussion*)
		Brazil: Land of Ecotourism (*Results and discussion*)
		Many Oases (*Results and discussion*)
		Slowly, About to Stop (*Results and discussion*)

Source: Elaborated by the authors (2022).

The next topics present the configuration and main dimensions of the four scenarios, including their philosophy, key characteristics, objectives, risks, and critical points.

Future drivers of ecotourism in Brazil

Eighteen future drivers were identified and divided into four categories, from broader to specific perspectives: international, international-national, national-specific, and specific of ecotourism (Table 4).

Table 4: 18 future drivers of ecotourism in Brazil.

Categories	**Future drivers**	**Brief description**
International	1. Military, health, and financial security	The world is experiencing serious uncertainties in three areas: health (COVID-19 pandemic), military (wars between Russia and Ukraine or Palestine and Israel) and finance (since the 2008 crisis). These events affect global economic dynamics.
	2. Global ecological crisis	Three aspects of this crisis: climate change, loss of biodiversity and pollution, - considering the awareness of the harmful impacts on nature caused by the industrial economic model (18th/19th centuries) and the fossil fuels (20th century).
International-national	3. Dynamics of the Brazilian economy	A country's economic dynamism combines several variables in international and domestic contexts. This is a high uncertainty key future driver since the flow of tourists increases in circumstances of economic growth - and vice versa.
	4. Valorisation of health, well-being and nature	Increase in concerns and care about health and well-being, as well as a greater value for nature, is reflected in the necessity to spend more time outdoors. Travelling to enjoy more peaceful, relaxing and healthy activities/destinations is on the rise.
	5. Energy and transport costs	The financial, health and war crises have caused disruption in the global value chain, influencing the rise in energy and transport prices. These costs have a negative impact on tourism, particularly in transportation, accommodation and gastronomy.
	6. Demographic transition	In the future, Brazil's population will be older, slightly more urban and in decline. Changes should gradually impact ecotourism development: urban residents tend to seek more contact with nature, and the elderly generally have more time to travel.

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National-specific	7. Technological innovations	Technology and innovation impact the mode of production and lifestyle of all humans. The uncertainty lies in what new technologies will have an impact on ecotourism, and what is the capacity of Brazilian entrepreneurs to absorb them.
	8. Governance of ecotourism	There is a lack of efficient, continuous, articulated and mobilising public policies focused on ecotourism in Brazil. Good governance could improve the quality and quantity of ecotourism services in the country, attracting more visitors.
	9. Credit and investments in ecotourism	Considering that most ecotourism companies in Brazil are micro or small, credit and investment could have an extraordinary impact on the evolution of ecotourism. However, Brazil's microcredit system is deficient, expensive, and bureaucratic.
	10. Access infrastructure and services in ecotourism destinations	Investments in infrastructure (e.g., access, communication, clean energy, sanitation and workforce) are essential to allow ecotourism destinations to flourish and consolidate. The uncertainty lies in maintaining or expanding this investment.
	11. Public safety of tourist destinations	Safety is an important factor in the travel decision-making process. However, Brazil has high levels of crime and violence. This is a serious obstacle to increasing ecotourism flows, as well as the frequency of accidents in nature destinations.
	12. Qualification of the labour force	The low qualification level of the Brazilian workforce in the tourism sector is an obstacle to ecotourism development. Overcoming this obstacle is a major challenge, as it contributes to a negative image of the sector, and it limits the opportunities.
Specific of ecotourism	13. Engagement of local authorities and populations	The local inhabitants' engagement in tourism provides added value to destinations, since they share their local knowledge and lend authenticity to tourism activities. This future driver is directly related to the sociocultural sustainability dimension.
	14. Adoption of sustainable and regenerative practices in destinations	As the ecological crisis intensifies, the pressure on businesses and governments to adopt sustainable practices increases. Although still incipient, currently more verbal than practical, Brazilian ecotourism destinations tend to adopt some practices.
	15. Demand for quality at Brazilian ecotourism destinations	The diversity of tourist profiles influences the way they appreciate and enjoy nature. Some of these visitors are highly demanding, pressuring destinations to improve and diversify the services offered, which has a positive impact on attracting tourists.
	16. Tension between concentration and decentralisation	The tendency towards massification of some destinations, a result of concentrated demand, might degrade nature and thus the ecotourism attractions themselves. If diversification is consistent, concentration may decrease, otherwise it persists.
	17. Attractiveness and diversification of ecotourism destinations	The flow of ecotourists is growing steadily. This growth will be smaller or larger depending on the economic dynamism of the destinations and the ability to respond to demand through distinctive and quality offers.
	18. Conflict over land use	Brazil is characterised by the disorderly occupation of its territory, compromising the reproduction of the country's natural capital. If this event continues to expand, it is likely to conflict with the expansion of ecotourism.

Source: Elaborated by the authors (2022).

Among these future drivers, the global safety or crises, the country's economic stability, private investments, shifting demographics, urbanisation, climate change, technologies, and health valorisation dialogue with the key drivers of other regions' nature-based tourism (Frost et al., 2014; Komasi et al., 2022).

Four scenarios for ecotourism in Brazil by 2035

Among the 18 future drivers identified, two were selected as the most relevant due to their impact capacity and level of uncertainty for 2035: *dynamics of the Brazilian economy and attractiveness and diversification of ecotourism destinations* (Table 4, above). The conjunction of these two future vectors produced the four scenarios summarised in Figure 1 and described in this section.

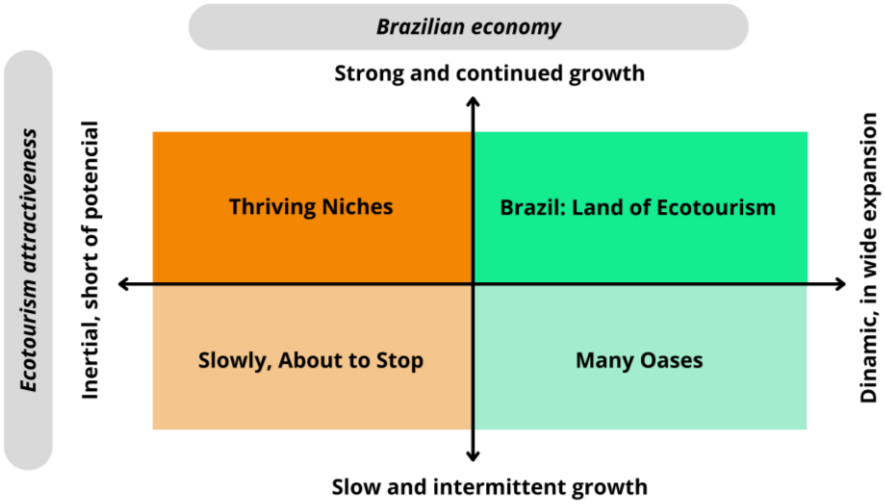


Figure 1: Scenarios for ecotourism in Brazil by 2035.
Source: Elaborated by the authors (2022).

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he *dynamism of the Brazilian economy* refers to the rise in wealth and people's income. This is essential in a country among the world's top ten economies, but with a population disposable income per capita below OECD average, representing limited resources for leisure and travel. Moreover, this driver impacts the level of investment in infrastructure, encouraging or holding back new businesses and tourist flows. Dynamic economies allow wider access to quality education and cultural goods. Also, better living conditions lead people to more self-care, well-being, and healthcare, impacting on higher valued nature and ecotourism.

The *attractiveness and diversification of ecotourism* refers to the initiative of ecotourism entrepreneurs and policy makers to consolidate new destinations, start new businesses and activities, which positively impacts the demand for quality, local engagement, technological innovation, sustainability practices, and environmental conservation. The stakeholders' involvement in the ecotourism value chain will be key to turning its potential into reality.

It is relevant to highlight that ecotourism grows across all scenarios. However, its form, pace or impact vary: more or less services innovation and diversification, territorial concentration, influence to nature conservation and sustainability. Ecotourism could deliver strong and quality growth, increase its market share, attract experienced and high-value travellers, including foreigners, and finance conservation and regeneration, or alternatively it could slowly be altered, without major impacts.

Scenario 1: Thriving Niches

Scenario 1 Philosophy

Thriving Niches flourish from economic dynamism, boosting ecotourism initiatives. However, bubble-centred stakeholders and entrepreneurs keep opportunities reduced. Travellers have limited destination options and, as a result, cases of massification and socio-cultural environmental damage emerge more often. Nature conservation financing, sociocultural and environmental sustainability practices through ecotourism is therefore limited.

Scenario 1 description and objectives

The Brazilian economy finally reaches positive stability, plateauing at an average GDP growth of 3% per year. However, favourable conditions for entrepreneurship are not reflected in ecotourism: the sector does not take ownership and full advantage of economic gains such as enlarged middle class, improved infrastructure, communication and public safety, capital markets availability, expansion of quality services, professional qualifications, and growth of the elderly as a consumption segment.

Implications of this weakened entrepreneurial capacity include flex governance based on poor coordination between public and private sectors. This fragility is both a cause and a consequence of irrelevant public policies, which fail to promote ecotourism or establish favourable investment conditions and impactful programmes. Brazil pays the price for limited investment in entrepreneurial and professional training and qualification, missing given opportunities when compared to international competitors' much undersized ecotourism potential.

Notwithstanding emerging environmental problems in most destinations, stakeholders are competent in certain locations and consolidate new sustainability-driven ecotourism centres. They revamp some traditional destinations by incorporating innovative business models in line with international requirements and trends, absorbing new technologies (including those related to regenerative practices) and engaging with the locals and authorities. Small private reserves funded by hospitality and ecotourism populate these centres, for example RPPN *Catedral do Jalapão* (TO) (Fonseca et al., 2018).

Brazilian safety standards for ecotourism and adventure activities (ABETA, n.d.) are valued internationally, contributing to a steady flow of tourists who are confident in having quality experiences. Energy and transport costs are falling, due to increased services offered, although gradually.

Diversification of ecotourism services is modest, concentrated but reasonably solid, mainly due to new technologies, ease of access and new sustainability practices.

The persistent valorisation of health, well-being, self-care, and nature, although more on a cognitive and emotional level, contributes to an increase (below expectations) in ecotourists. Concessions in public conservation units grow but remain limited to a few protected areas. Sustainability practices emerge due to the increased awareness of critical global ecological crises and contribute to some activity's diversification.

Mature destinations will increasingly focus on mass tourism to accommodate new tourist flows, with negative repercussions for nature. Diversification will not be enough to the emerging numbers of tourists (especially middle-income families). Many currently underdeveloped destinations are expected to flourish, particularly those in surrounding areas of conservation land. Hundreds of micro and small ecotourism destinations, currently incipient and with precarious services, will not meet demand standards.

Rare exceptions will be destinations of invaluable attractiveness such as "untouched" conservation areas, extraordinary landscapes, or particular geological accidents, regardless of their location as long as quality and sustainability-driven hospitality services are made available. Thus, the dissemination of practices more closely connected to the purpose of ecotourism, such as the engagement of local populations, environmental interpretation, and nature conservation funded by tourism (Wearing; Neil, 2014; Martins, 2018; Fennell, 2022) will expand, but remain incipient and isolated (only a few outstanding cases).

Scenario 1 risks and points for intervention

Three critical points for intervention were identified:

I. A creative diagnosis to identify resources in each destination seeking competitive and sustainability differentiation.

II. The need to invest in training entrepreneurs and in facilitating entrepreneurship.

III. The governance, focusing on delivering quality public policies, responsible business, and promoting new destinations, to avoid massification and damage to ecosystems.

Among the serious risks, ecotourism uncoordinated growth consequences such as environmental degradation and pollution, especially air from carbon emissions and waters from waste, require attention. Ecotourism is not able to present itself as a robust force to oppose perceptions that other economic sectors offer short-term greater financial gains, especially for those who favour low-investment and "high-return" practices. Another risk is the massification of ecotourism destinations close to major cities, with possible rapid degradation of these areas.

Scenario 2: Brazil Land of Ecotourism

Scenario 2 Philosophy

The vigour of ecotourism entrepreneurs and confidence of policy makers benefit from the opportunities arising from Brazil's new economic dynamism, driven by a robust public-private governance and the avid demand of travellers in search of well-being, novelties, and giving back to communities through traditions and nature conservation. Ecotourism becomes a way of financing biodiversity regeneration.

Scenario 2 description and objectives

The resumption of growth in the global economy, with solid investment flows to Brazil, drives a new and sustained cycle of economic growth - between 3 and 3.5% per year. Anchored in efficient public-private governance, policies, and result-oriented initiatives, this scenario envisions improvements in Brazilian household income, more qualified public investments, and simpler bureaucratic processes. It becomes safer and more lucrative to invest in Brazil.

Capital markets availability impacts on better infrastructure and communication, facilitating innovation and technological development. Tourism destinations have better means of access, most of them with quality communications and services constantly under improvement. With economic dynamism and effective socio-cultural policies, unemployment and inequalities are reduced.

Moreover, public security improves, and crime rates fall. Middle-class segments have more disposable income for leisure and travel, and the growing appreciation of self-care, well-being, and health stimulates proximity to nature. Ecotourism destinations are diversifying with innovation, services expansion, and consolidation throughout the country's six biomes. Improving the qualification of professionals contributes to the dynamics of the sector.

New destinations have been consolidated, with high-value services and diverse activities. New businesses are created along 20,000 kilometres of long-distance trails (Omena; Bregolin, 2020; Menezes et al., 2022; Rede Trilhas, n.d.), which have become safer and more integrated with local community services along the way. Movements indicate the sector decentralization, based on biodiversity and regeneration practices in areas where there was no previous tourism interest. Middle and upper-middle-income tourists from Brazil's urban areas gained confidence in Brazilian ecotourism services and reiterate visits internally more than travel overseas.

The increase in domestic and international tourists aligns with facilities that have incorporated new technologies, engaged with local communities and authorities, and sought efficient promotion mechanisms. Meanwhile, greater awareness of the ecological crisis and a larger presence of international tourists are fuelling new sustainability and regeneration practices, especially in the most degraded areas. Whether near or far from large and medium-sized centres, destinations are seeing sustainable businesses expand, and tourists travel especially to where they feel involved in nature conservation.

Modern concessions of protected areas, such as the Iguaçu National Park, which will receive over US$100 million in private investment over the next three decades (Fernandes, 2022), have become a reference in public-private management of nature reserves, expanding throughout the country in large or small units. Conservation science is increasingly aligning with best tourism practices, supporting ecotourism over other forms of land use. Concessions in Brazilian conservation units are getting closer to impact the national GDP by approximately US$10 billion, generating one million jobs (Instituto Semeia, 2021). Ecotourism becomes an agent capable of providing high returns on investments made in nature conservation and regeneration. Brazil's potential as the world's third best destination in natural resources will not be fully realised, but it will never have come so close.

This is a scenario of significant growth in the flow of tourists seeking quality and principles-led ecotourism. Efficient promotion policies meet ecotourism marketing best practices and communicate well with experienced travellers. Emerging destinations grow and contribute to diversifying tourism offerings, bringing with them sustainability-driven business models. Ecotourism activities deliver economic returns and fund nature conservation and biodiversity regeneration more widely. This is the scenario with the greatest dissemination of practices aligned with the principles of ecotourism - inclusion of communities, environmental education, and conservation of nature (Wearing; Neil, 2014; Fennell, 2022; Cobbinah, 2015).

Scenario 2 risks and points for intervention

Three critical points for intervention were identified:

I. The major obstacle for this scenario to flourish is the qualification of ecotourism professionals.

II. Investments in infrastructure for access and communication (essential to ensuring diversification).

III. Adoption of sustainable and regenerative practices as new business models, maintaining the wealth of ecotourism destinations and attracting experienced travellers.

The major risk lies in overtourism at nature destinations close to large consumer markets or destinations with international reputation among nature lovers. The bottlenecks to sustained growth are (i) lack of qualified workforce; (ii) insufficient infrastructure to support the growing poles; (iii) poor adoption of sustainability practices into business models; (iv) financial difficulties with business models in which ecotourism finances nature regeneration.

Scenario 3: Many Oases

Scenario 3 Philosophy

Low economic growth is a major challenge for the development of ecotourism attractions in Many Oases. Addressing this challenge requires a strong entrepreneurial capacity, combined with good governance, to develop

and maintain the quality of some destinations' tourism chain. In these locations, ecotourism may finance nature conservation, but under the heavy efforts of individual passionate entrepreneurs.

Scenario 3 description and objectives

The world remains unstable, thus hindering economic growth to a slow pace. Brazil's economy perpetuates the pattern of the last 40 years: grow, stagnate, and decline at a stop-and-go pace, with an average of 1 to 1.5% GDP growth per year. Light advances in governance deliveries are disturbing, with public policies lacking continuity and results, alongside malfunctioning public-private partnerships. Influenced by legal uncertainties, private investments are not convinced to expand. Credit is scarce for small and medium entrepreneurs (the vast majority in the ecotourism sector). However, this is not the case for large companies, which are rare in ecotourism but central to Many Oases.

Despite instability, improvement processes persist. Partnerships with research centres provide knowledge and, even with difficulties in financing studies, contribute to innovation. Enterprises, especially small and medium-sized, find it difficult to absorb these innovations, with a few exceptions: ecotourism safety operation, plant-based gastronomy, and sustainability/ecosystems regeneration initiatives. Destination access infrastructure and services, as well as public safety, improve very slowly.

Criminality persists, though ecotourism is restricted to localities that manage to show minimum rates in this regard. Ecotourism is making better progress with the commitment of locals in some areas, mainly towards the improvement of quality services and infrastructure. The fastest-growing ecotourism venues are those targeted at high-income segments and those close to major consumer urban centres, attracting nature lovers with abundant to medium income resources. Destinations also attract the well-being seekers and the elderly, looking for calm and relaxation practices within nature.

No major ecotourism projects are launched to build destinations from zero, but there are improvements in the tourism chains around matured areas. Examples are nature refuges or lodges, where the communities in surrounding areas get involved to make the traveller's interaction more authentic, via gastronomy, handicraft workshops, and wellness services (e.g., The Caiman Refuge in Pantanal or the Cristalino Lodge in the Amazon).

The scenario indicates that this direction is not enough to fulfil Brazil's biodiversity potential. There are great efforts made by local governance in which anchor-enterprises manage to attract high-income tourists, national and international. Sustainability and nature conservation practices through ecotourism are restricted to the oases, which endeavour to ensure occupancy in shoulder seasons.

Despite few, there are entrepreneurs dedicated to nature conservation. Ecotourism grows concentrated in areas close to consumer markets, with the strengthening of only few more distant centres, where quality abounds in great scenic landscapes, luxury hospitality or innovative experiences. These

destinations should continue to attract domestic and, to a lesser extent, international visitors, especially niche-driven such as bird watchers or biomes explorers like the Amazon seekers.

Scenario 3 risks and points for intervention

Two critical points for intervention were identified:

I. Improved governance to diversify supply and enhance the quality of services within the supply chain.

II. Availability of credit and microcredit for small entrepreneurs operating in oases regions.

The major risk is that without significant growth and ecotourism diversification, environmental degradation would increase. Economic benefits generated by ecotourism would remain restricted and concentrated with a small group of entrepreneurs and communities able to adapt to the demands of certain consumer niches.

Scenario 4: Slowly, About to Stop

Scenario 4 Philosophy

Low economic growth and the existence of only few entrepreneurs and creative professionals in the ecotourism sector hinder the growth of ecotourism and its diversification. There is no funding available, nor profits directed to nature conservation through ecotourism.

Scenario 4 description and objectives

The world remains unstable, reflecting global warming and financial crisis, with implications on Brazil's economy (GDP growing no more than 1% per year). Energy and transportation costs remain high, with limited capacity for investments in low emissions solutions, inhibiting travel growth especially over long distances. Volume short-distance trips are mainly made by middle or lower-middle-income families, which imposes limits on entrepreneurs who need to undertake commercially driven viable actions that do not facilitate sustainability nor innovation in business models.

The weak economic dynamism does not attract investment to ecotourism neither credit is accessible to the few efficient businesses of the sector. Demand pressing for improvements in destinations is insufficient or isolated, therefore keeping their preferences for familiar places. As concentration of visits to few destinations persists, massification and environmental degradation are likely to overshadow ecotourism benefits.

Brazil continues to be a country with considerable criminality rates. Its infrastructure and communications are growing slowly. The value of well-being and health continues to grow, but not sufficiently to give nature connectivity and ecotourism a decisive boost. A prevailing inefficient governance influences this mediocre growth.

Local populations engage with tourism activities in a few places only. Innovative technologies or sustainability initiatives are not widespread. Vulnerability impacts of climate change are felt as protection and adaptation programmes to communities and territories are not implemented. Few destinations flourish to the extent that they manage to attract middle and upper-middle class tourists with parsimonious sustainability practices. Growing biodiversity loss added to plateaued average qualifications of tourist guides make activities like wildlife watching less interesting.

Brazil's potential in terms of natural resources and their interaction with tourism remains underutilized. There is no sustainable growth of new businesses in this environment. The difficulties vary from poor governance to impacts caused by drought, fire or floods - more frequent events and without the appropriate actions to minimise their consequences.

This is the scenario with the slowest ecotourism growth, where it only moves up within a certain added value niche, coming mainly from working-age individuals from urban centres who carry out stressful routines, make comfortable livings and care for well-being and travel. Most of the incipient and developing ecotourism hubs across the country do not flourish. The purpose of ecotourism becomes increasingly unattainable for the largest flow of travellers interested in contact with nature within a limited budget availability.

Scenario 4 risks and points for intervention

Two critical points for intervention were identified:

I. The promotion of accessible forms of ecotourism, especially around cities.

II. Investment in entrepreneurs and professionals training by the public and private sectors.

This scenario presents two major risks: (i) failure to take advantage of opportunities due to a lack of efficient policies and entrepreneurship facilities, opening space to environmental degradation activities; and (ii) the massification of existing destinations, with negative impacts on nature, while democratic access to quality natural spaces is limited.

Empirical framework

The empirical framework (Figure 2) presents the outcomes of the scenarios, with a focus on ecotourism principles and sustainability strengthening. It demonstrates how scenario planning can be used as a theory builder and as an empirical modelling for ecotourism futures. The four scenarios are based on two key vectors: the dynamism of the national economy and the capacity of ecotourism stakeholders to undertake diversification initiatives, which may or may not increase their capacity to develop opportunities offered by each context.

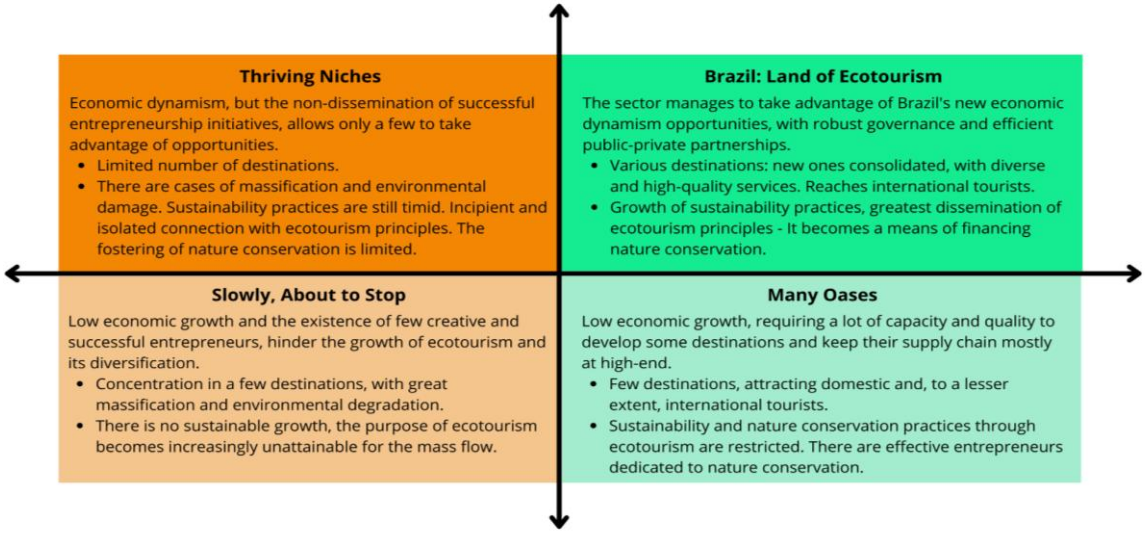


Figure 2: Empirical framework of the future of ecotourism in Brazil
Source: Elaborated by the authors (2023)

The first vector allows growth, at different rates, of social groups with disposable income for travelling and enjoying new experiences, while the second indicates the degree to which they take advantage of the opportunities that arise from this economic dynamism. The economic factor was also highlighted in previous tourism research as a key future driver (Frost et al., 2014; Komasi et al., 2022).

The mutual interdependence of the economic and sociocultural dimensions of ecotourism and nature conservation (Das; Chatterjee, 2015) are essential in this debate. Considering that the participation and empowerment of communities are key factors (Silva, 2013; Das; Chatterjee, 2015), an important and transversal future condition that impacts the four scenarios is governance. The articulation and partnerships among stakeholders (Gössling et al., 2012; Ernst; van Riemsdijk, 2013) are essential for the management, investment, and promotion of ecotourism and nature conservation, supported by focused, consistent public policies and efficient initiatives. Governance will be successful if actions are of high quality, stimulating the development and the diversification of ecotourism.

This diversification is essential to avoid concentration and massification of activities, with harmful consequences for the environment, the local communities, and the principles of ecotourism itself. Governance has a key role in avoiding the risk of uneven distribution of profits, conflict mediation and cooperation. Effective environmental and sociocultural sustainability actions, plus diversification, are essential to avoid the paradox of ecotourism (growth x conservation), likewise the discussed case of Costa Rica (Van Tassell; Daniel, 2006).

Two future drivers that slightly vary but are fundamental to the scenarios are: the valuing of health, well-being, and nature; and the demographic aging of the population - also key drivers in other studies (Frost et al., 2014). The first

driver relates to the growing awareness of the ecological crisis and the need to seek greater balance in increasingly stressful routines, especially in large urban centres. The second highlights the demographic transition that the country is experiencing, with segments of the population having more free time and financial resources.

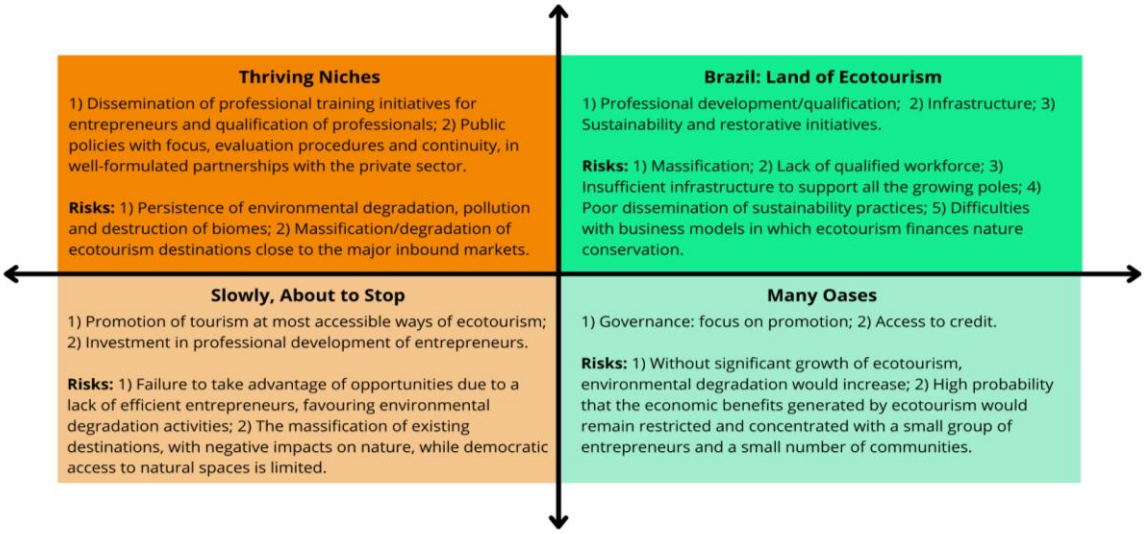


Figure 3: Scenarios points for intervention and risks
Source: Elaborated by the authors (2023)

As most of the scenarios present the risk of causing negative impacts and environmental degradation (Figure 3), the authors finally highlight the importance of constantly approximating ecotourism future practices with its original and conceptual principles, including its relevance as an effective tool for ecosystems conservation, community empowerment, and the preservation of destinations' cultural aspects (Das; Chatterjee, 2015; Cobbinah, 2015; Fennel, 2022).

Conclusions

Applying the future scenarios approach, the authors could identify the most important variables and stakeholders in the future trajectory of ecotourism in Brazil, also reflecting its sustainable development in Latin America. In addition to the four scenarios designed, 18 international and domestic drivers that can shape the future of Brazilian ecotourism were addressed, involving issues such as behaviour, technological resources, scientific research, capital availability, and decision-making within governance bodies.

The four scenarios have common elements. All of them grow, although at different rates. Moreover, they all have risks, with certain shared critical points for intervention. However, this study seeks to encourage the *Brazil: Land of Ecotourism* scenario, which enables the pursuit of the most promising opportunities, albeit unevenly across the territory. Additionally, it is the scenario that most disseminates practices aligned with the principles of ecotourism and sustainability, establishing ecotourism as the cornerstone of

sustainable tourism - it regenerates nature, creates benefits to the local communities, and boosts responsible entrepreneurship along destinations.

The theoretical implications lie, first, in the study's theoretical and methodological innovation, marked by the extensive participation of experts from diverse fields and nationalities. This research contributes to the literature on futures studies and ecotourism, offering valuable insights from a Latam country perspective. The 18 future drivers expand possibilities for other regions' analysis on key issues regarding ecotourism. The authors present a series of reflections on the uncertainty of ecotourism principles (theory and practice) and on sustainability in its different dimensions (environmental and sociocultural), represented by the benefits and negative impacts of ecotourism on local communities, governance, and local conflicts.

Practical implications emerge from the possibility of guiding strategic present decisions aiming to tackle future problems, to capture opportunities, and to restrict threats. Additionally, it contributes to the construction of public policies (e.g., focused on qualification, human-nature connections, finance conservation, regeneration, and community empowerment) that can mitigate the risks and critical points outlined before. Finally, it helps build ways of increasing resilience in destinations operating in a volatile, uncertain, complex, and ambiguous (VUCA) world.

One of the main limitations is the need to generalize the object of analysis within the scenario approach, since Brazil is a large territory that contains major differences between regions. The results showed growth as a central paradigm, which may be a contradiction for the 'strong sustainability' point of view, considering the paradox regarding environmental conservation issues and the discussion from post-development or degrowth theories. Thus, future research could investigate the strategic actions needed to promote a more sustainable and inclusive scenario for both Brazil and Latin American destinations.

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