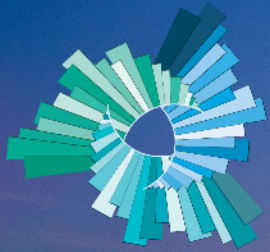


# CAN TOURISM BE SUSTAINABLE?

Rethinking resilience, risk, and competitiveness in a changing world

Guy Bigwood, CEO and Chief Changemaker

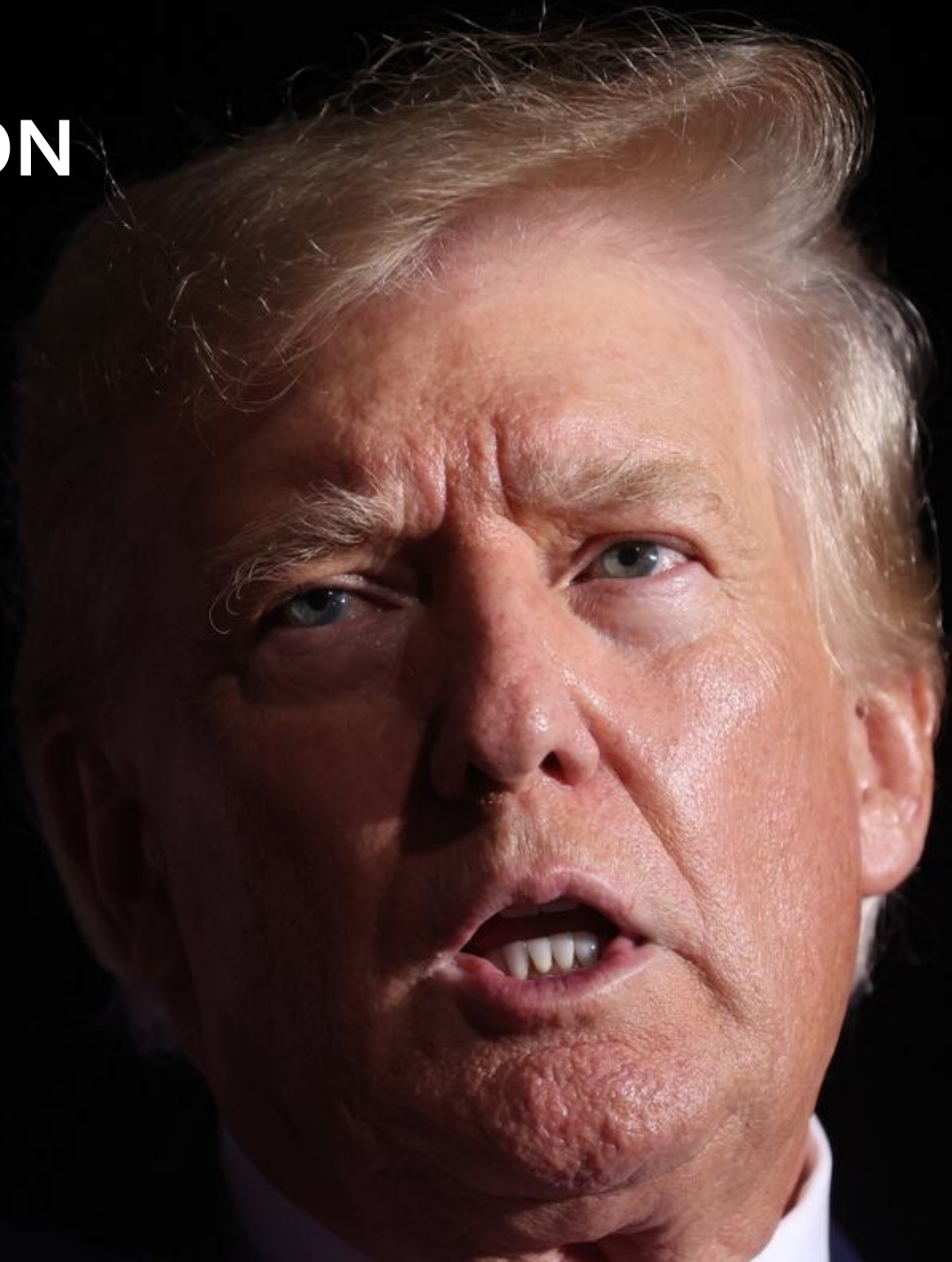


GLOBAL  
DESTINATION  
SUSTAINABILITY  
MOVEMENT



# UNINTENDED ACCELERATION

Thank you President Trump



# ENERGY SHOCKS ARE REWRITING THE SYSTEM



ONE DISRUPTION HERE CHANGES COSTS EVERYWHERE



**20%**

OF GLOBAL ENERGY  
FLOWS THROUGH  
THIS CHOKEPOINT

**STRAIT OF  
HORMUZ**



**OIL**



**GAS**



**FERTILIZER**

ALL DEPEND ON  
THIS SINGLE  
CHOKEPOINT



WHAT HAPPENS HERE  
DIRECTLY IMPACTS ENERGY PRICES IN **HELSINKI**.

VOLATILITY IN THE STRAIT = **VOLATILITY AT HOME**



**IT HAS BROKEN THE  
GLOBAL SYSTEM**

**Fuel ↑ 30%**

**Flights ↑ 8–11%**

# IMPACT IS NOT ONLY WITH FUEL

Plastics  $\approx$  99% fossil-based

40% to +60% price increase since  
Feb



# IMPACT IS WITH ENTIRE VALUE CHAIN



Fertilizer prices +20% to +50%  
With spikes up to +100% in some markets

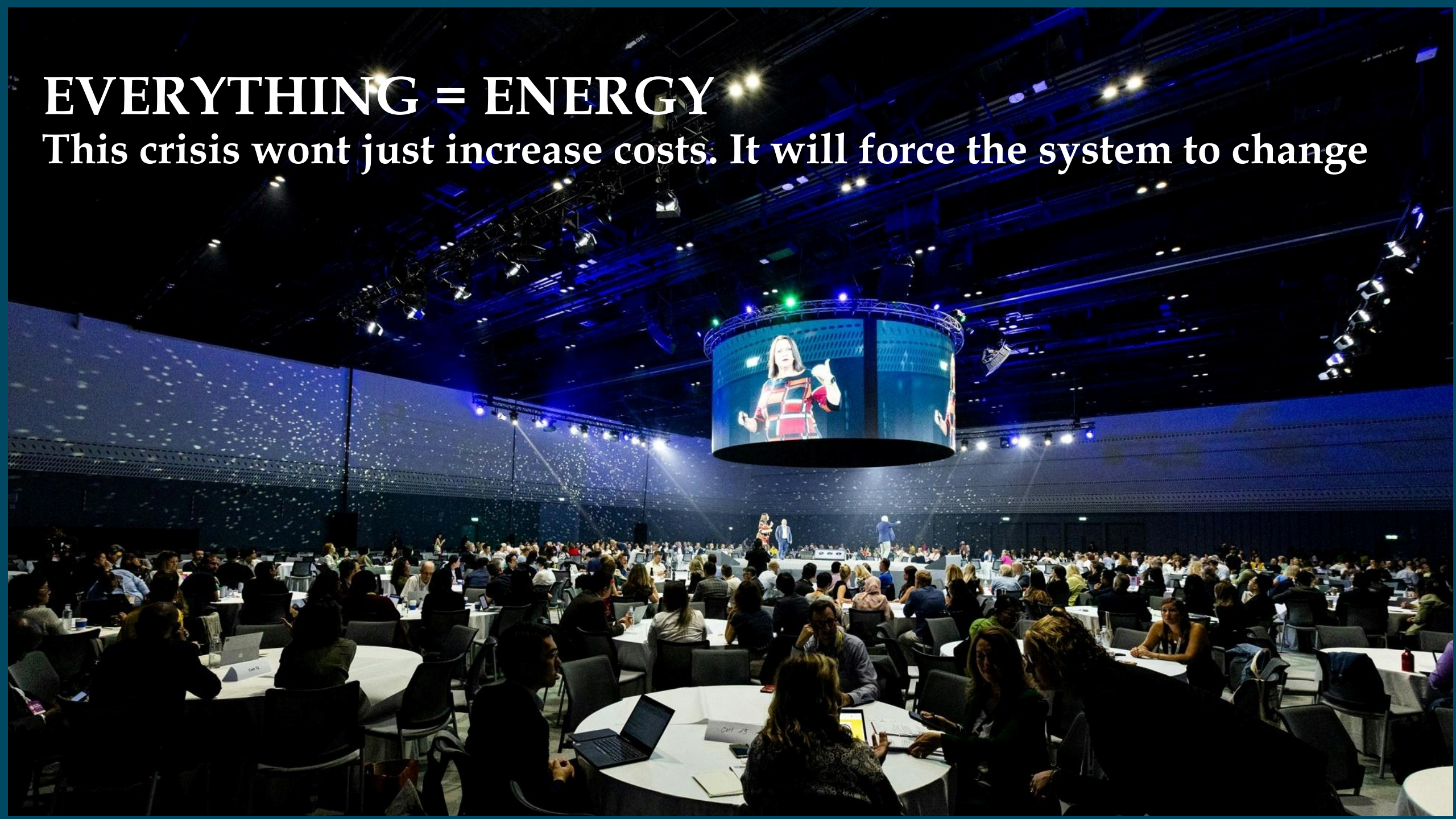
# THE BIG REVEAL

Events and Tourism built on three as assumption:  
Cheap energy, disposable materials, and stability



**EVERYTHING = ENERGY**

**This crisis wont just increase costs. It will force the system to change**



# DEMAND WILL SHIFT



It will move — to safer, smarter, more resilient destinations

OPPORTUNITY!!!!



SAFER



SMARTER



RESILIENT



READY



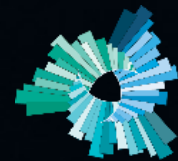
STRONGER

# PRICE CHANGES BEHAVIOUR



# MASSIVE GLOBAL RESET

Every energy crisis reshapes the economy



**1970s**  
Oil Crisis

→ **efficiency**



Small cars.  
Less energy.



**1990s**  
Gulf War

→ **globalisation**



Global supply.  
Strategic reserves.



**2021**  
Ukraine

→ **electrification**



Renewables.  
EVs.  
Heat pumps.



**2026**  
Iran

→ **resilience**



Local energy.  
Shorter supply chains.

# DISRUPTION IS ACCELERATING.

## Since Ukraine war (2022):

- Solar: +30%+ per year
- Renewables: 90%+ of new capacity
- EV sales: +20–55% annual growth

## Since Iran war (2026):

- Solar demand: +30%
- Batteries: +40–50%
- EV sales: +50% new cars are electric



# CLEAN ENERGY IS GETTING CHEAPER.

Fossil energy is getting more expensive

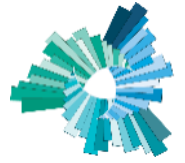
Solar cost decrease ~40% (2022 → 2024)  
75% reduction per decade (Swanson's Law)

# AI DISRUPTING ENERGY USAGE

New power management systems  
reducing energy consumption by 40%



# ENERGY = COMPETITIVE ADVANTAGE



If fuel stops,  
you have

**30**  
days.

**VS.**

If solar stops,  
you have

**30**  
years.

Is the Helsinki tourism and events sector leveraging this advantage fully?

# THE BUSINESS CASE IS CLEAR

Radisson aims for 100 Verified Net Zero Hotels by 2030.

- 100% renewable energy
- Low-carbon menus
- Minimal waste
- Third-party verified
- 20% booked because of net zero status
- Expected ROI: ~12% to 15%



# MATERIAL AVAILABILITY and COST IS A RISK CIRCULARITY IS AN ADVANTAGE



Finland is one of Europe's leaders in circular economy thinking  
But events and tourism are still largely linear

# CASE STUDY: ESCRS CONGRESS BARCELONA



## REDUCE

Less dependency on volatile raw materials

- 92% of branding made from sustainable materials

## REUSE

Stabilise your supply chain

- 86% of materials were reused, donated or repurposed

## RECYCLE

Keep value in the system

- 50% of remaining waste was recycled

## RETHINK

Decrease costs.  
Increase NPS

- 89% delegate satisfaction
- No net extra cost



# LOCAL WINS

Shorter supply chains reduce cost and risk.

Drive innovation, stability of supply, and improve margins.

Deliver bigger impact on local community = increased social license + happy staff



# KEY GLOBAL TRENDS SHAPING THE INDUSTRY



1. Demand is converting

2. The market is already shifting

3. Clients demanding more in their RFPs

4. Clients are sceptical

5. Increasing global regulation

# TREND 1: DEMAND IS CONVERTING

100m+ bookings of certified hotels in 2025. **Up 22%**

**Booking.com**



**36%**

of travellers plan to choose  
a certified hotel in 2026

## TREND 2. SUSTAINABILITY IS ON CENTER STAGE

# 73%

of eventprofs indicate that sustainability is incorporated within their event planning

*ICCA Destination Canada Sustainability Survey 2025*

70% with the 2024 AMEX Global M&E Forecast





## TREND 2. THE MARKET IS ALREADY SHIFTING

46%

of associations are prepared to pay a little (5-24%) more for sustainable event options

ICCA Destination Canada Sustainability Survey 2025

# TREND 3: CLIENTS DEMANDING MORE IN THEIR RFPS



# 58%

corporates integrate sustainability  
**criteria into supplier RFPs**

2024 AMEX Global M&E Forecast

20% with Associations (ICCA 2025)

AMEX GBT  
**Meetings  
& Events**

**2024 Global  
Meetings  
and Events  
Forecast**



# TREND 4: CLIENTS ARE SCEPTICAL

# 32%

Doubt the authenticity of sustainable products and initiatives.

*Trip.com Sustainable Travel Consumer Report 2024*



# RISE OF GREENWASHING



The EU found that 53% of green claims were vague, misleading or unfounded, and 40% were unsubstantiated  
(2020 EU Research)

# TREND 5: REGULATION IS INCREASING GLOBALLY

## *Examples*

- C59 Competition Act Canada
- United Kingdom – Green Claims Code (CMA)
- Empowering Consumers for the Green Transition Directive (EmpCo)
- Australia – ACCC Greenwashing Enforcement
- Japan – Green Claims Guidelines
- Singapore – Advertising Standards Authority (ASAS)



# THE HELSINKI DILEMMA

How do you communicate sustainability without greenwashing?

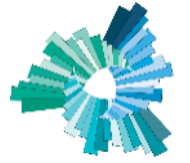
How do you lead without appearing arrogant?

How do you stay competitive under regulation?

**The higher you rank, the higher the burden of proof**



# ALIGNING WITH EMPOWERING CONSUMERS FOR THE GREEN TRANSITION DIRECTIVE (EmpCo)



Directly affecting Finish businesses from September 27<sup>th</sup> 2026

5 key hacks

Be humble

No vague  
claims

Claims must be  
objective and  
verifiable

Evidence must  
exist before  
the claim

Certifications  
must be  
independently  
verified

If you cannot prove it, you should not say it.

# GOLDEN RULES

*No vague sustainability claims*



Bad  
claim

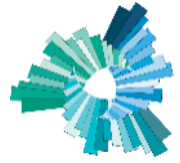
"Our hotel is  
the most  
sustainable in  
Finland."

Better  
claim

"Our hotel  
uses 100%  
renewable  
electricity and  
reduced water  
use by 30%  
since 2021."

# GOLDEN RULES

*Claims must be objective and verifiable*



**Bad  
claim**

“Our destination is the most sustainable in the World.”

**Better  
claim**

“Ranked Number One in the Global Destination Sustainability Index 2025”

# GOLDEN RULES

*Evidence must exist before the claim*



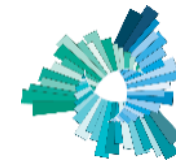
**Bad  
claim**

"Our event will be  
net zero."

**Better  
claim**

"The event's  
carbon footprint  
was measured,  
emissions were  
reduced by 38%,  
and the remaining  
emissions were  
offset."

# REPORT LAUNCHED 30<sup>TH</sup> APRIL



GLOBAL  
DESTINATION  
SUSTAINABILITY  
MOVEMENT

EUROPEAN  
TRAVEL  
COMMISSION



NECSTour  
European Regions for  
Competitive and Sustainable Tourism



## Proof, Not Promises

A Practical Guide to the EU Empowering Consumers Directive for Destinations

APRIL 2026



SCAN ME

<https://www.gds.earth/events/>

# HELSINKI

*Keep building a stronger system*



A PATHWAY FROM LESS HARM TO MORE IMPACT



**STOP DOING HARM**

Eliminate what damages  
people and planet

**DEGENERATIVE**



**MINIMIZE IMPACTS**

Use resources wisely and  
reduce our footprint

**SUSTAINABLE**



**CREATE POSITIVE IMPACT**

Regenerate nature and  
strengthen communities

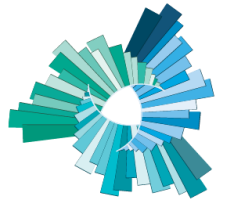
**REGENERATIVE**



*Built on Finland's strengths in education, innovation, and trust.*

# HELSINKI

*Build the skills for resilience*



FROM CAPABILITY → TO COMPETITIVE ADVANTAGE

## 4 CRITICAL CAPABILITIES FOR A RESILIENT SYSTEM

1.



**Data &  
Measurement**

2.



**Verification &  
Compliance**

EMPCO READY

3.



**Circular  
Design**

4.



**Strategic  
Communication**

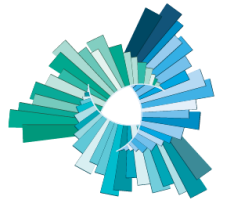
**Resilient systems need people  
with the skills to design, measure, and prove them**



*Built on Finland's strength in education, innovation, and trust*

# HELSINKI

*Scale your competitive advantage*



FROM LEADERSHIP → TO SYSTEM ADVANTAGE

## 5 SYSTEM SHIFTS TO STAY COMPETITIVE

1.



### Energy Independence

Accelerate electrification and maximise Finland's renewable advantage

2.



### Circularity

Eliminate waste, reduce reliance on imports, and scale circular innovation

3.



### Local & Regenerative Systems

Strengthen local sourcing, regional value, and regenerative partnerships

4.



### Climate Adaptation

Build resilience and skills to adapt to climate and geopolitical disruption

5.



### Standards & Communication

Be transparent, lead on verified claims, and turn data into competitive storytelling

Your license to operate depends on it.



*Built on Finland's strengths in energy, innovation, and trust.*

# HELSINKI

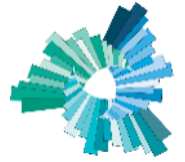
## *Keep Communicating*

*"If we hope to bring about transformative, paradigm-shifting change, we must replace the old stories with new ones, embodying the beliefs, values, norms, and ethics of a regenerative future."*

*- Sahana Chattopadhyay*



# WHAT REGENERATIVE LEADERSHIP LOOKS LIKE



More resilient  
places



Stronger  
communities



More  
competitive  
businesses



Transformed  
Visitors and Clients



**INCREASED SOCIETAL  
VALUE**



# CAN TOURISM IN HELSINKI BE SUSTAINABLE

in a world of energy shocks,  
geopolitical tension, and rising  
scrutiny?

Sustainability = Resilience + Innovation

It is your competitive edge





GLOBAL  
DESTINATION  
SUSTAINABILITY  
MOVEMENT

The GDS-Movement is a data-driven international change agency that acts to catalyse socio-economic and environmental transformation in events, cities and regions across the world.



## Our Services



### GDS-Index

Benchmarking destinations and leveraging data to drive performance and impact



### GDS-Consulting

Facilitating strategies, narratives, and innovation for destinations & events (for the visitor economy)



### GDS-Academy

Educating and developing changemakers



### GDS-Forum

Building a dynamic, collaborative global community

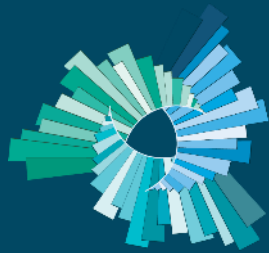


### GDS-Insights

Researching trends to uncover and define next practices

For more info:

[guy@gds.earth](mailto:guy@gds.earth)  
[www.gds.earth](http://www.gds.earth)



GLOBAL  
DESTINATION  
SUSTAINABILITY  
MOVEMENT



100+ destinations