



RIDE THE

WAVES

PART ONE

Are we ready
for the next spike
of sustainability
buzz?

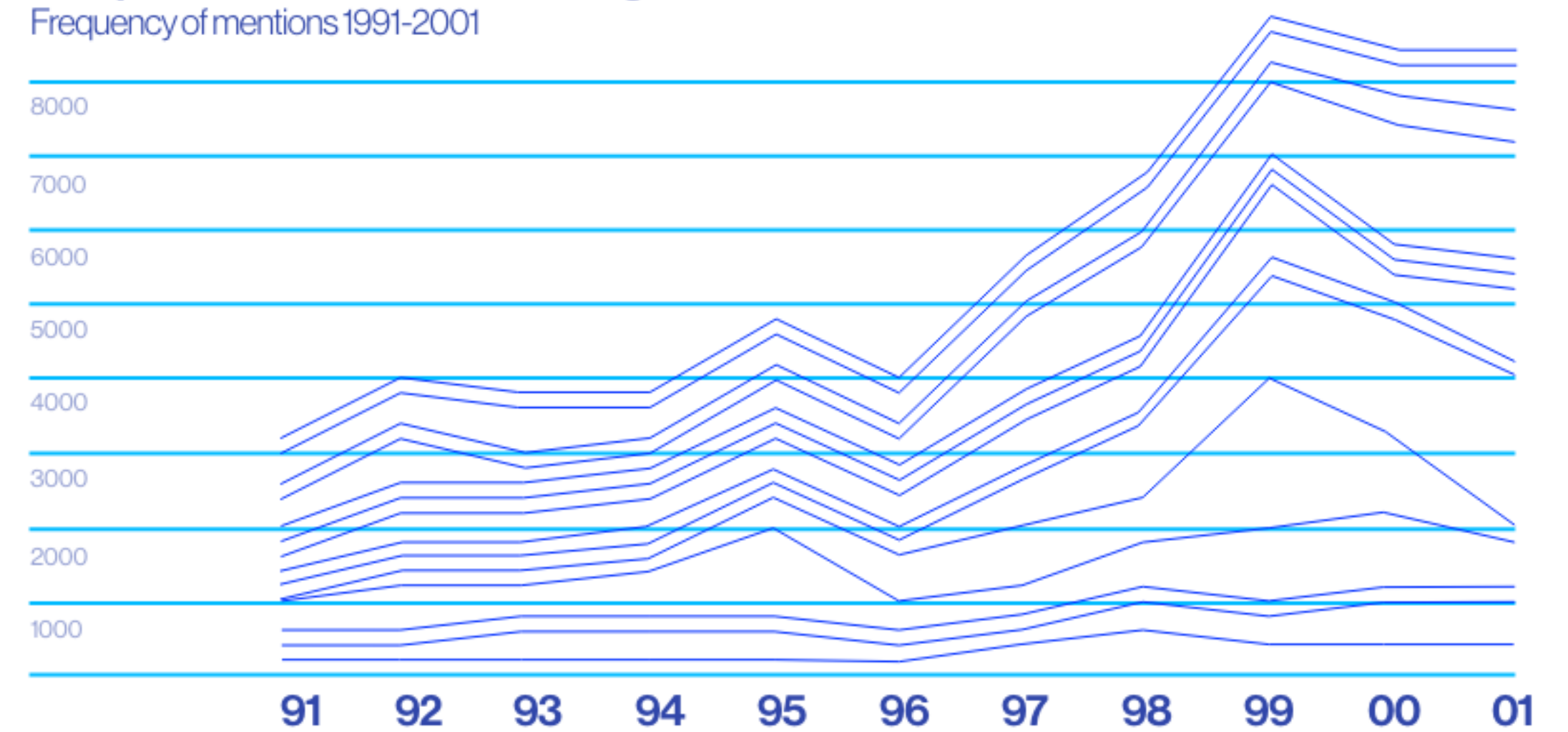
Back in 2001, sustainability guru **John Elkington's** team identified 'waves' in media interest in sustainability between 1991 to 2001.

They investigated these waves in the breakthrough report '**Good News & Bad**'.

Graph Source:
SustainAbility & Ketchum (2002) Good News & Bad: The Media, Corporate Social Responsibility and Sustainable Development.

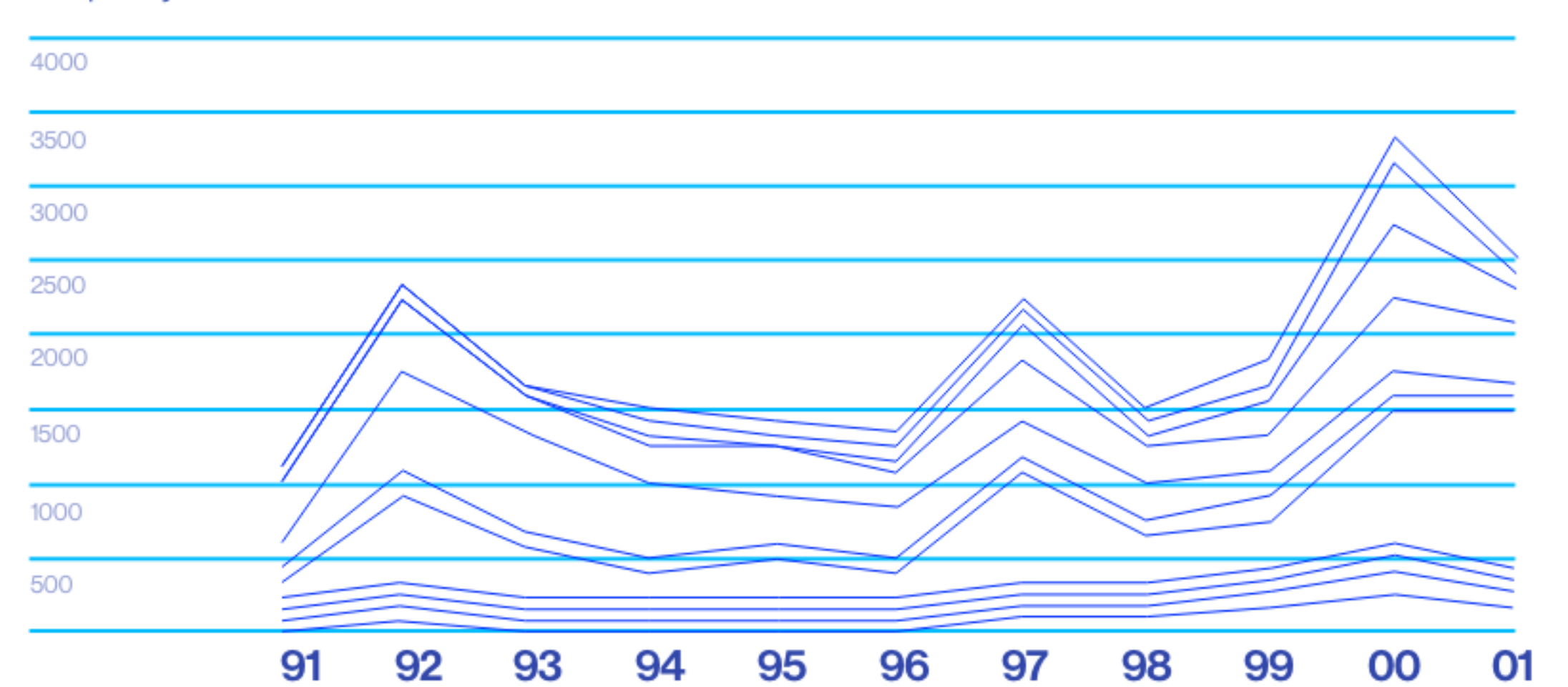
European Waves in Media Coverage

Frequency of mentions 1991-2001



USA Waves in Media Coverage

Frequency of mentions 1991-2001

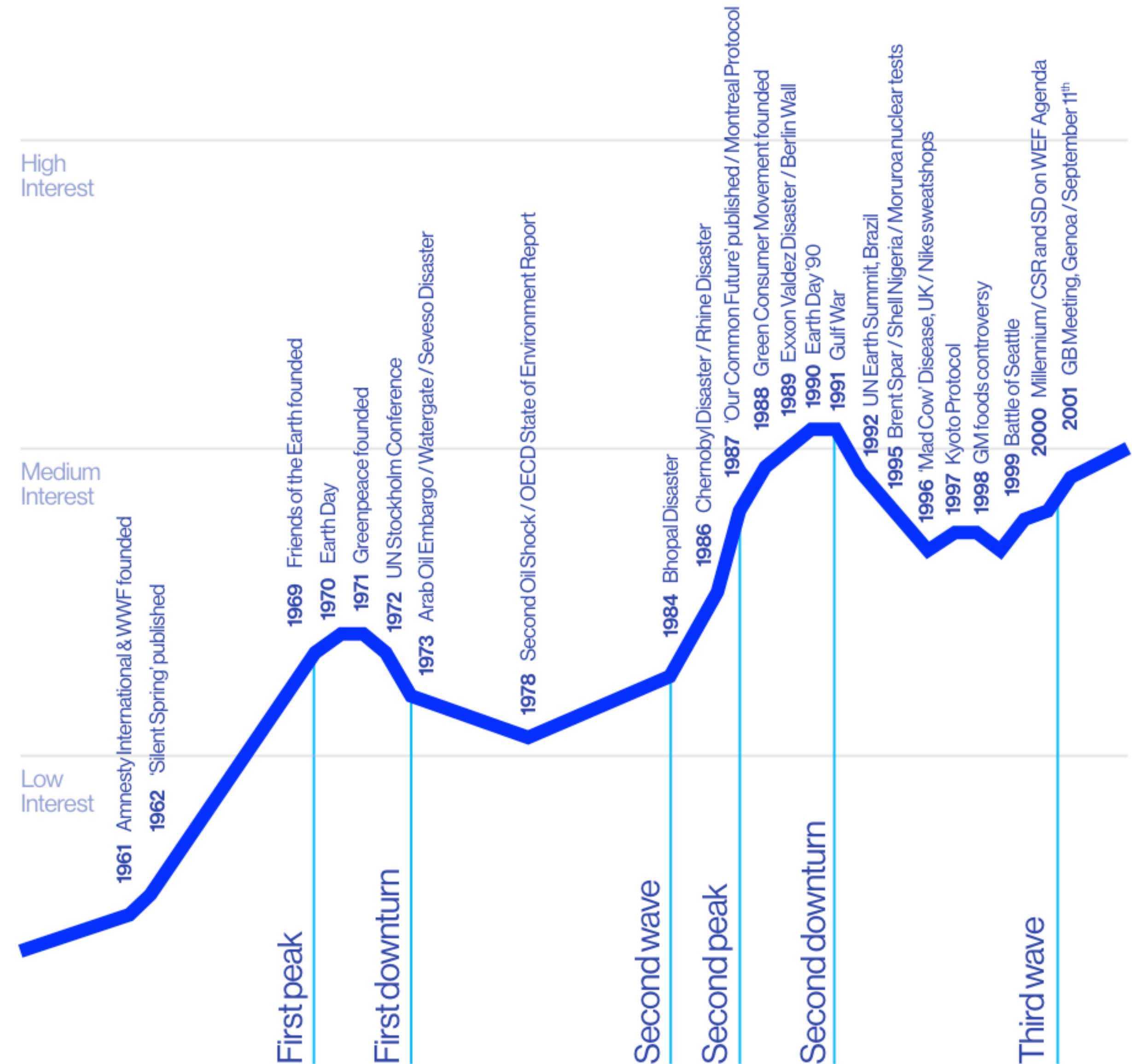


They also noted that the waves of media/public interest began long before the 1990's.

In fact, the report tracked peaks and drops of sustainability interest trackable **back to the 1960's.**

And these waves never stopped.

Graph Source:
SustainAbility & Ketchum (2002) Good News & Bad: The Media, Corporate Social Responsibility and Sustainable Development.



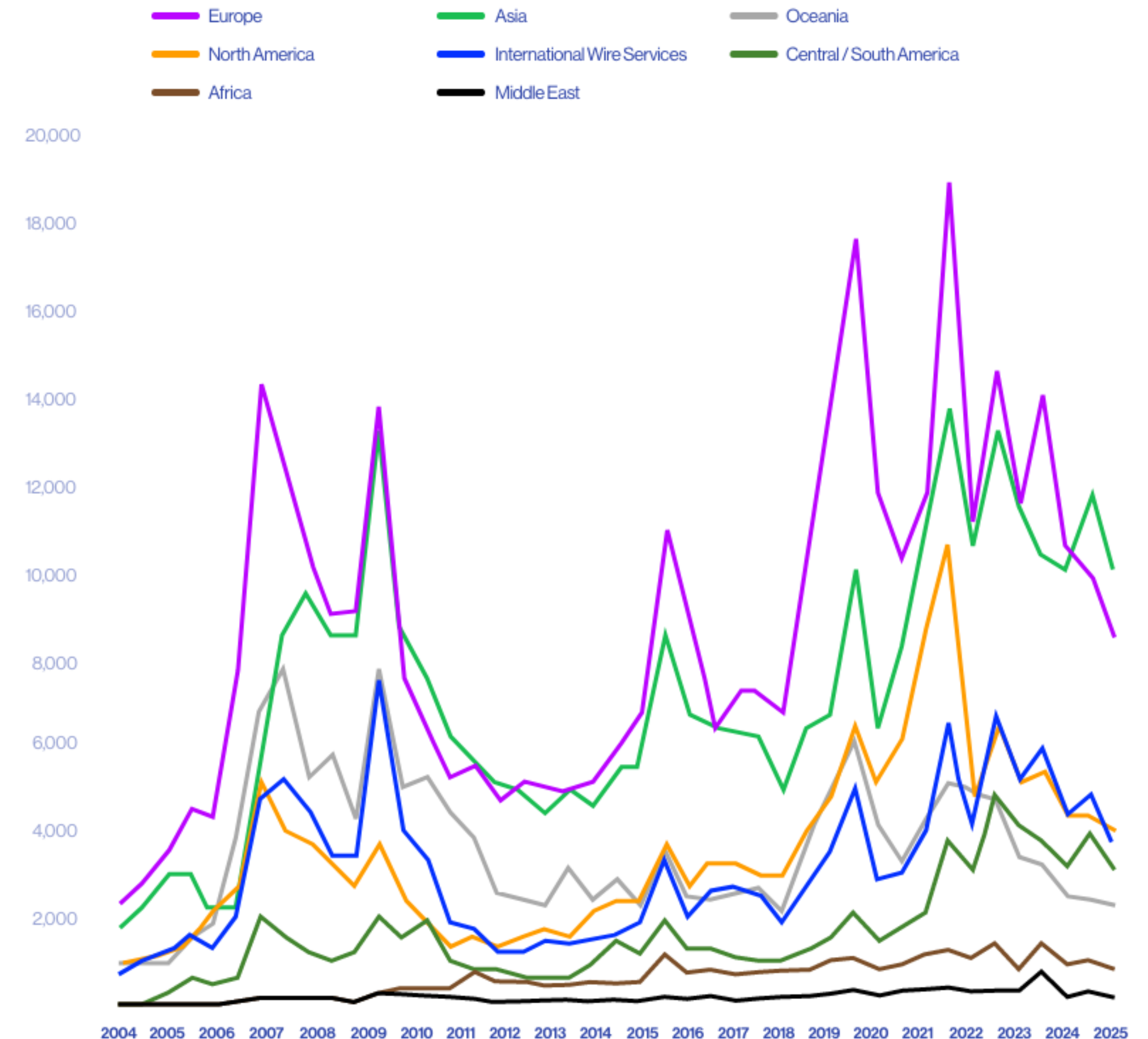
Today, the up and down waves have continued...**becoming more intense.**

Between 2004 and 2025 we've experienced higher highs of media and public interest in sustainability, followed by sharper drops.

Why? Likely because **the media 'cycle' has sped** up across all issues.

Graph Source:
Media and Climate Change Observatory

Total media articles mentioning climate change or global warming



The USA trend is the clearest:

2001

International Year of Biodiversity and the Marrakesh Partnership signed.

2004-2008

Upward wave as 'CSR' and brand purpose became mainstream.

2008-2016

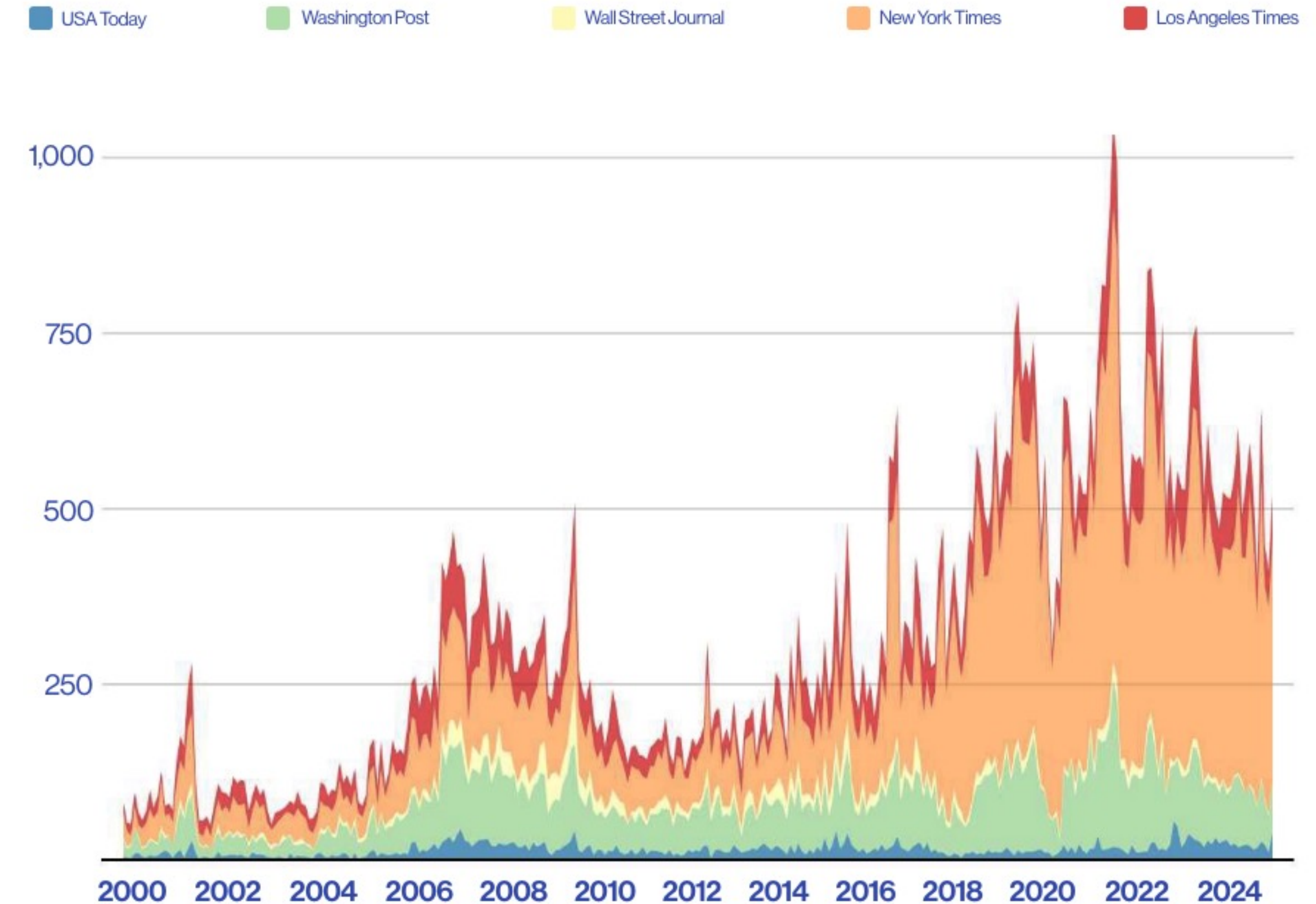
OUCH – financial crash followed by global recession, austerity and almost a decade long slow slog on sustainability.

Graph Source:

Boykoff et al, 'United States Newspaper Coverage of Climate Change or Global Warming, 2000-2025,' University of Colorado,

Growing US newspaper coverage of climate change, 2000 through early 2025

The New York Times and Washington Post contribute the largest number of articles



Data shows the number of articles per month, based on NexisUni searches for articles mentioning either 'climate change' or 'global warming'



Then, 2019 to 2022 were boom years for sustainability:

Public interest in sustainability-relevant topics soared. Purposeful brands thrived. Millennials and Gen Z were poised to usher in a green revolution.

ESG started to transform markets, green energy outpaced expectations, universities trained up thousands of sustainability experts and business sustainability rocketed.

Good years.

But the waves will keep coming.
In 2023 the crash started.

By late 2024/25, the wave had swung
way down..

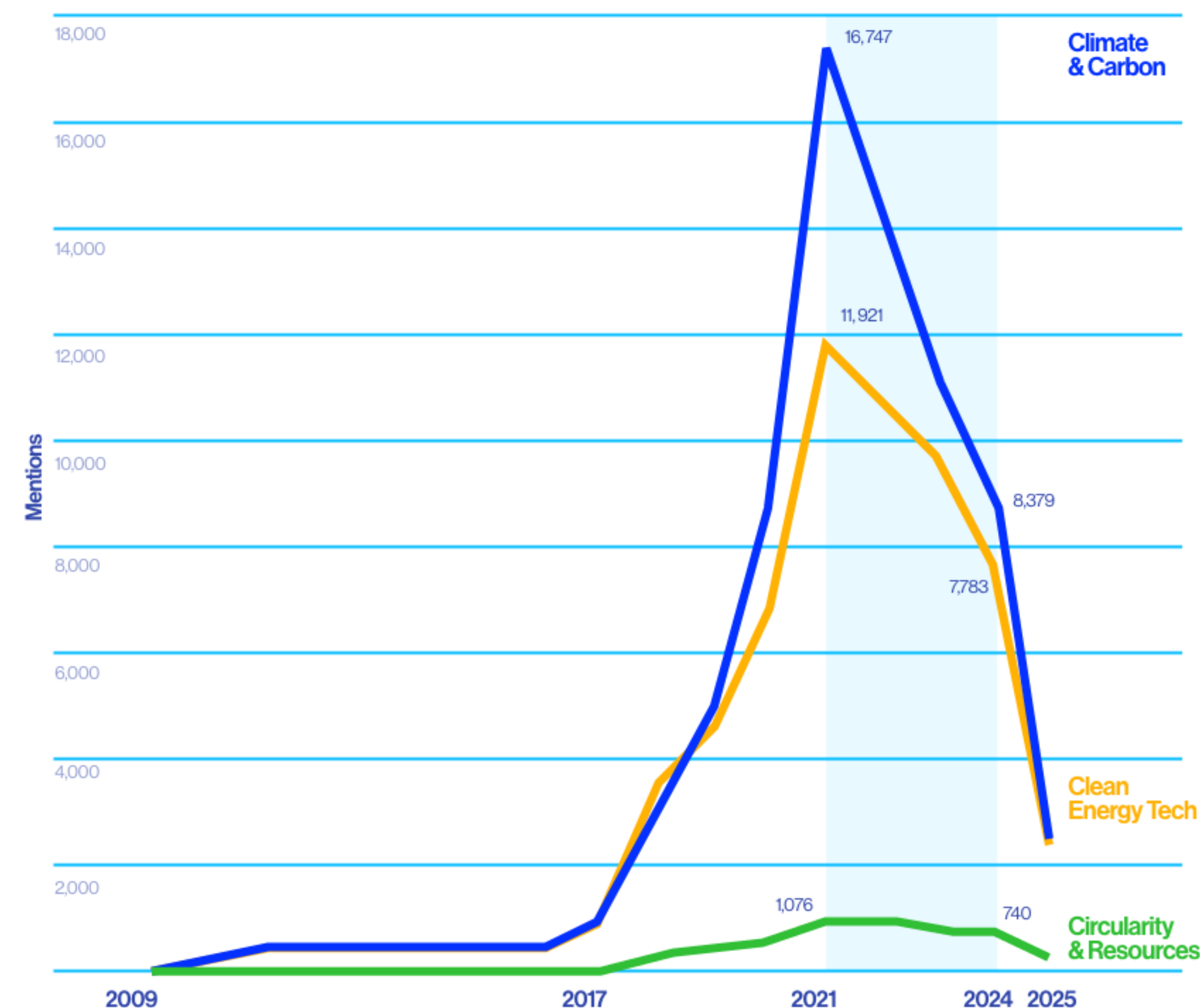
Media coverage has fallen. Investor
concern evaporated. Greenhushing
has proliferated.

And much of the world no longer
centres on sustainability.

Graph Source:
UNGC/PWC CEO survey 2025

Historical Earnings Call Analysis

Sustainability terms have faded from earnings call conversations since their 2021 peak



Down waves suck.

They feel like sustainability progress is reversing.
The world has stopped caring. Smaller impact
takes greater effort.

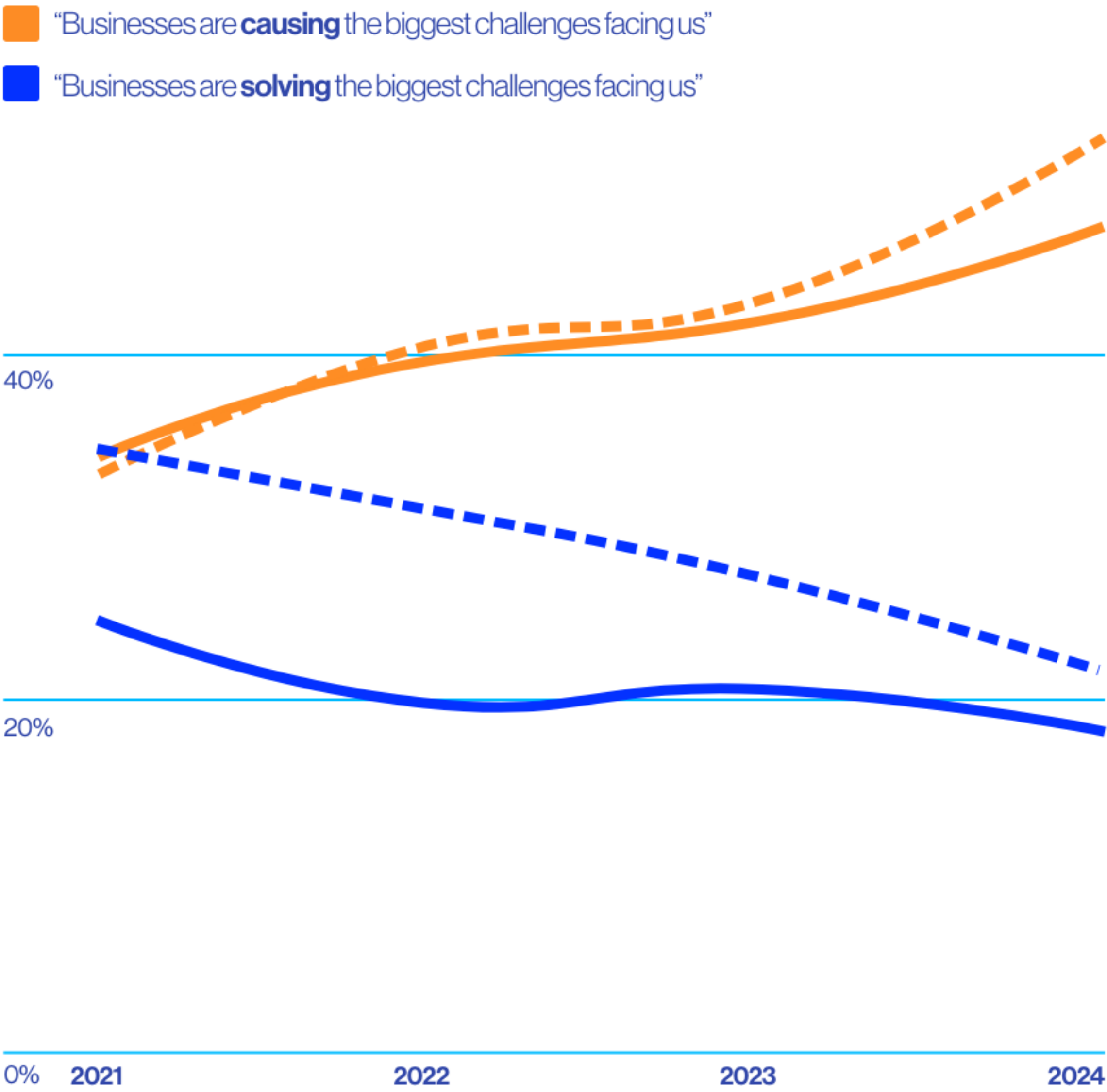
Careers tremble.

For business, the drop in sustainability buzz has had consequences.

Business followed the media trend and stopped talking about their sustainability progress, brand purpose or social impact.

And so **public trust in business has also dropped**. Licence to operate is eroding, but has business even noticed...

Graph Source:
Sustainability Sentiment Tracker 2024/5 – Public First



So, what happens next?

**After every drop...
another peak
starts building**



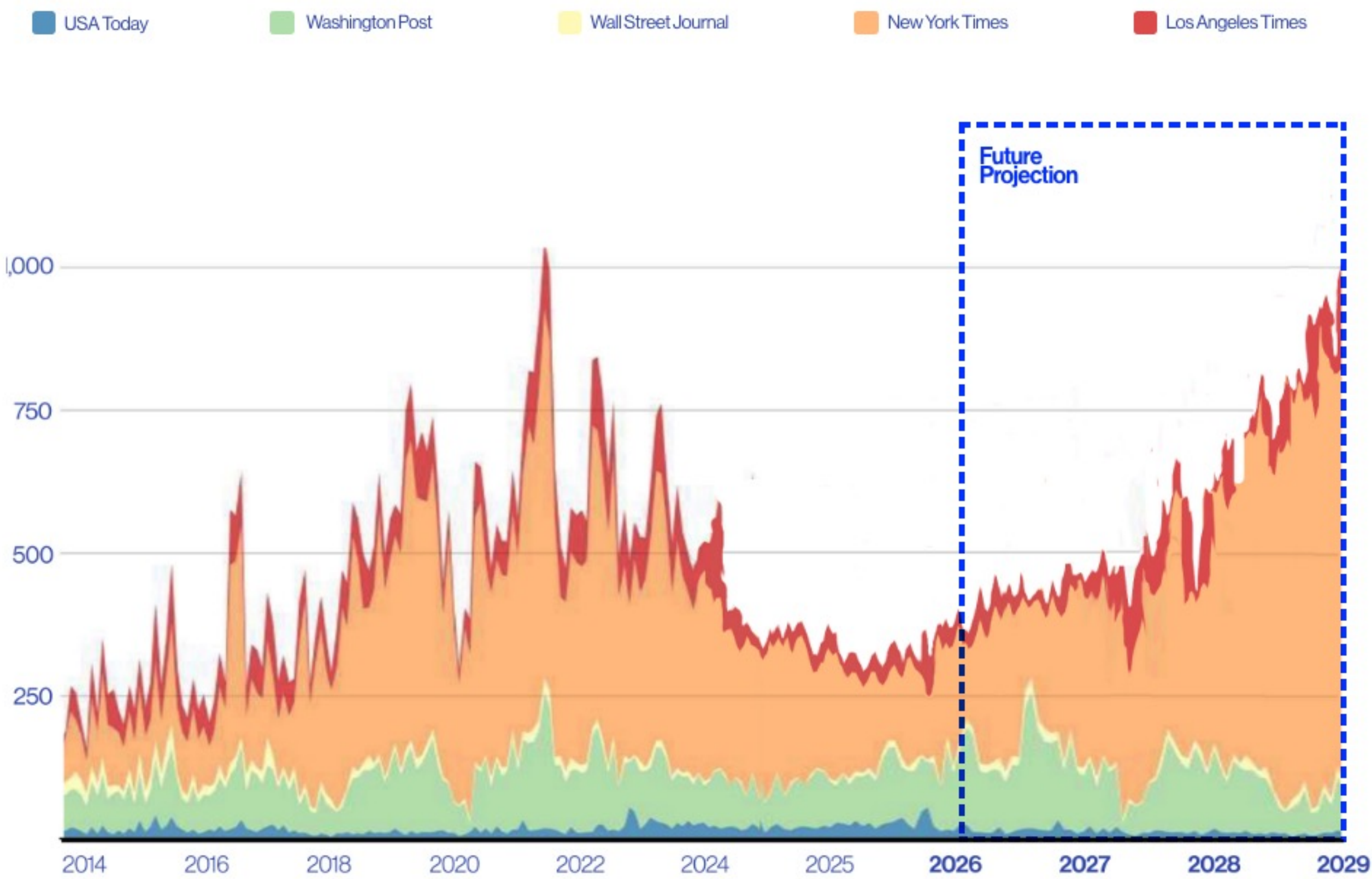
But it might get worse before it gets better

We can track these waves for over 50 years.

On that trajectory, **we won't see today's down wave reverse into an upwave until 2027**, with the climb speeding in 2028.

Graph Source:
Boykoff et al, 'United States Newspaper Coverage of Climate Change or Global Warming, 2000-2025,' University of Colorado,

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What do we do now?

The ‘down wave’ moments are hard. But also, the best time to reset.

In part two, we’ll track the transformations that started in previous down waves, and how they set the agenda for the next peak.

This is an opportunity moment, for those with vision.



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