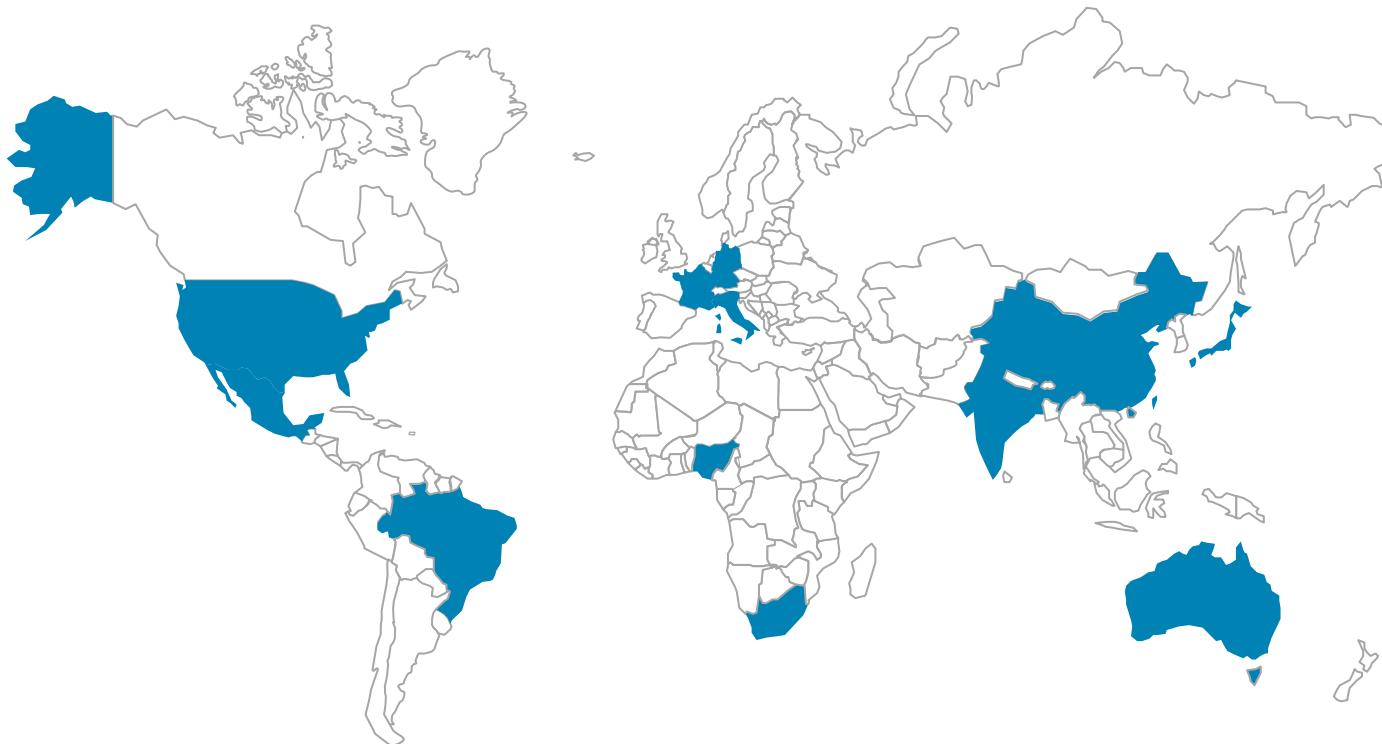




How Society Feels About Breakthrough Science Concerning Climate Change

This snapshot report explores how global concerns around climate change correlate with attitudes towards Breakthrough Science. The data is drawn from a landmark study on public sentiment toward AI in healthcare, cell and gene therapies, cultivated meat, and new genomic techniques in agriculture, conducted across 13 countries.

How Society Feels About Breakthrough Science Concerning Climate Change



Leaps by Bayer (the company's impact investment arm) and BCG, together with Ipsos (a leading market research agency), conducted one of the largest surveys to date on global public sentiment towards four transformative technologies of our time: artificial intelligence (AI) in healthcare, cell and gene therapies, new genomic techniques in agriculture, and cultivated meat. This study collected insights from over 13,000 participants aiming to build a comprehensive view of public understanding, fears, hopes, and priorities surrounding these innovations. The findings are published in a series of reports:

1. How Society Feels About Breakthrough Science (Main Report)
2. How Society Feels About Breakthrough Science in the USA (Snapshot of US-specific findings)
3. How Society Feels About Breakthrough Science Across Generations (Snapshot of generational differences)
4. How Society Feels About Breakthrough Science Around the World (Snapshot of country-specific insights)
5. **How Society Feels About Breakthrough Science Concerning Climate Change**

How Society Feels About Breakthrough Science Concerning Climate Change looks through the lens of concern about climate change to examine correlated attitudes in findings across all 13 countries. Concern for climate change is globally high (82%), though lower in high-income countries and among less educated respondents. Individuals concerned about climate change are significantly more optimistic about the future of science and technology, more trusting of health authorities, and more likely to feel their views on innovation are reflected in government policy. On average, they are more positive about advances like new genomic techniques (NGTs) and cultivated meat. Together, these patterns reveal a mindset rooted in trust in science and a belief that innovation can drive meaningful progress.

Base: Total n = 17,111 online adults aged 18+ (n = 1,000 in each US, Germany, Italy, France, and Australia; n = 1,001 in each Brazil, Mexico, Nigeria, India; n = 1,002 in each South Africa and Japan; n = 1,003 in Singapore; and n = 1,100 in China). Very + Fairly concerned about climate change = n = 10,730. Not very/Not at all concerned about climate change = n = 2,139. 95% Confidence interval. I Q To what extent, if at all, would you say you are concerned about climate change? (Note: Concerned = only positive answers, very and fairly concerned.)

Climate change concern is high across countries surveyed, with the highest levels of concern found in lower-middle income nations.

Level of concern about climate change

Global Average



% Concerned

World Bank Income Classification

High income



Upper-middle income

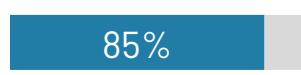


Lower-middle income



Educational Level

High education



Middle education



Low education



% Concerned

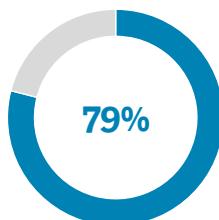
% Concerned

Women and parents are slightly more concerned compared to other groups.

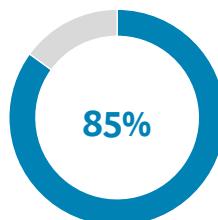
Level of concern about climate change

Gender

Male



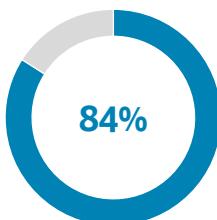
Female



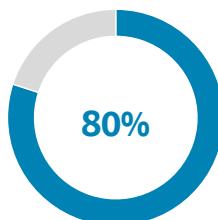
% Concerned

Parental Status

Parents



Non-parents

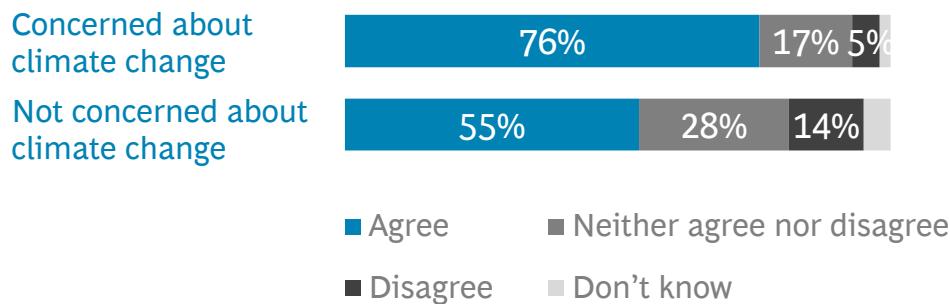


% Concerned

Base: Total n= 13,111 online adults aged 18+. (n= 1,000 in each US, Germany, Italy, France, and Australia; n= 1,001 in each Brazil, Mexico, Nigeria, India; n= 1,002 in each South Africa and Japan; n= 1,003 in Singapore; and n= 1,100 in China). Very / Fairly concerned about climate change n= 10,730, Not very / Not at all concerned about climate change n= 2,139. 95% Confidence interval. Q. To what extent, if at all, would you say you are concerned about climate change? Note: Concerned = only positive answers, very and fairly concerned. Base: Country income levels determined as per World Bank Income Classification 2024-2025. High Income Nation (US, Germany, Italy, France, Japan, Singapore, Australia): n= 7,005; Upper Middle-Income Nation (Brazil, China, Mexico, South Africa): n= 4,104; Lower Middle-Income Nation (India, Nigeria): n= 2,002. Q. In which country do you live? Base: High Education: n= 6,766; Middle Education: n= 4,776; Low Education: n= 1,483; Prefer not to say: n= 86. Q. What is the highest level of education that you have completed? Base: Male: n= 6,327; Female: n= 6,784. Base: Parent / legal guardian: n= 7,562; Not a parent / legal guardian: n= 5,454; Prefer not to say: n= 95. Q. Are you a parent or legal guardian?

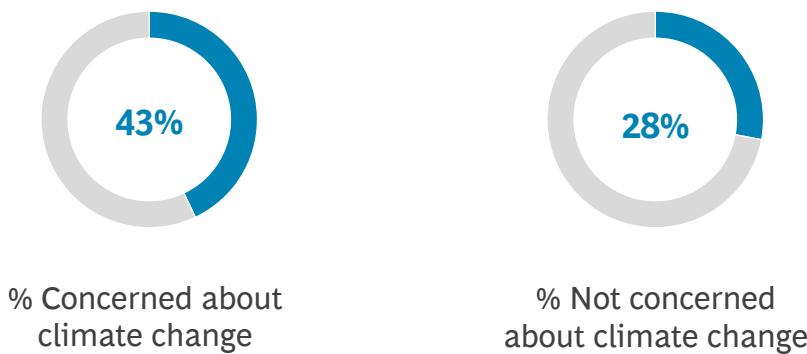
More people concerned about climate change are optimistic about science and technology.

Optimism about the direction in which the world is heading in terms of science and technology



While still in the minority, more of those concerned about climate change agree that companies pursuing innovation are transparent.

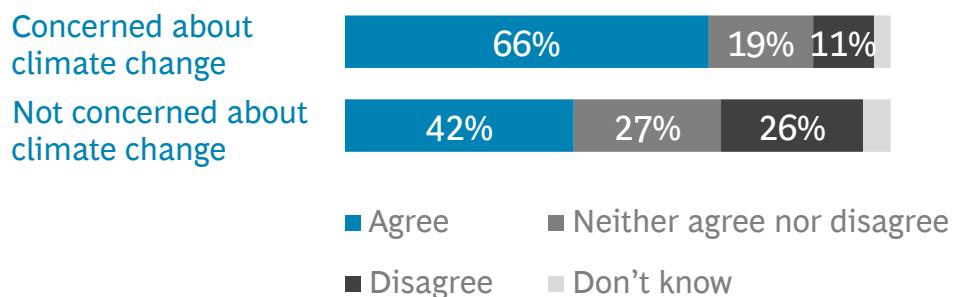
Agreement that companies pursuing scientific innovation are transparent on risks and opportunities



Base: Total n= 13,111 online adults aged 18+. Very / Fairly concerned about climate change n= 10,730, Not very / Not at all concerned about climate change n= 2,139. Q. To what extent, if at all, would you say you are concerned about climate change? Note: Concerned = only positive answers, very and fairly concerned, Not concerned = only negative answers, not very and not at all concerned. Q. At this moment, to what extent are you optimistic or pessimistic about the direction in which the world is heading in terms of: "Science and technology". Note: Optimistic = only optimistic answers, very and fairly optimistic, Pessimistic = only pessimistic answers, very and fairly pessimistic. Q. To what extent do you agree, or disagree, with each of the following statements? "I feel companies pursuing scientific innovation are transparent on risks and opportunities".

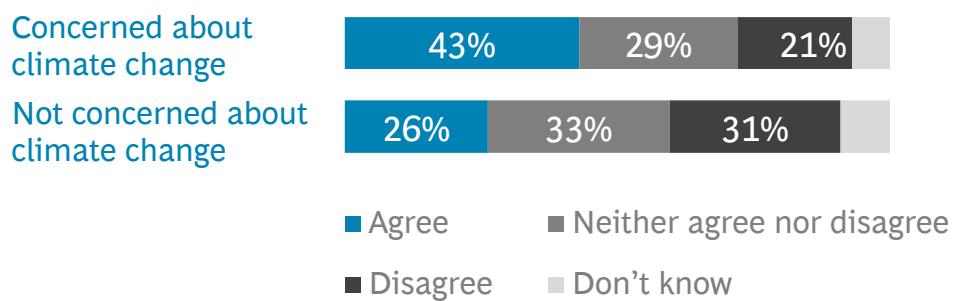
More of those concerned about climate change agree they trust health authorities to act in the public's best interest.

Trust in health authorities to act in the public's best interest



Respondents concerned about climate change are more likely to agree their own views on innovation are reflected in policy.

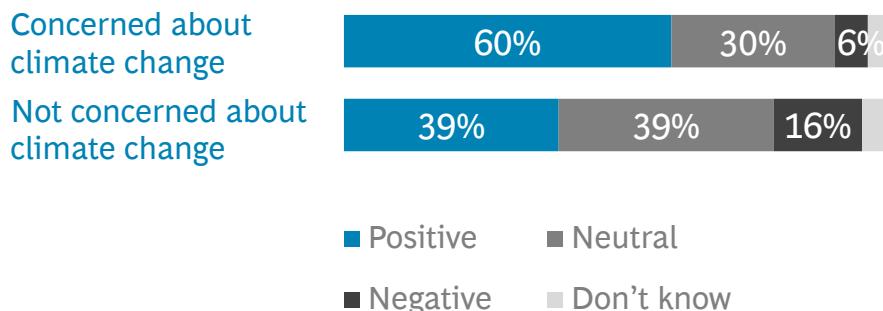
Agreement that own views on scientific innovation are reflected in government policy



Base: Total n= 13,111 online adults aged 18+. Very / Fairly concerned about climate change n= 10,730, Not very / Not at all concerned about climate change n= 2,139. Q. To what extent, if at all, would you say you are concerned about climate change? Note: Concerned = only positive answers, very and fairly concerned, Not concerned = only negative answers, not very and not at all concerned. Q. To what extent do you agree, or disagree, with each of the following statements? "I trust health authorities to act in the public's best interest", "I feel my views on scientific innovation are reflected in government policy". Note: Agree = only positive answers, strongly and tend to agree, Disagree = only negative answers, strongly and tend to disagree.

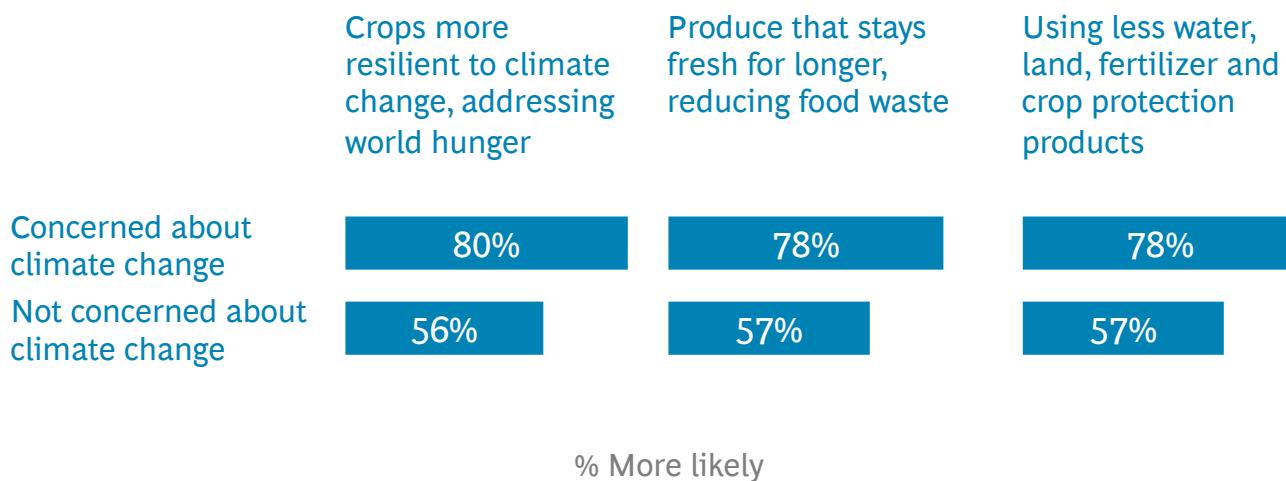
More of those concerned with climate change are positive towards new genomic techniques.

Overall opinion of New Genomic Techniques (NGTs)



Those concerned are also more likely to say the benefits of NGTs could increase positivity towards the technology.

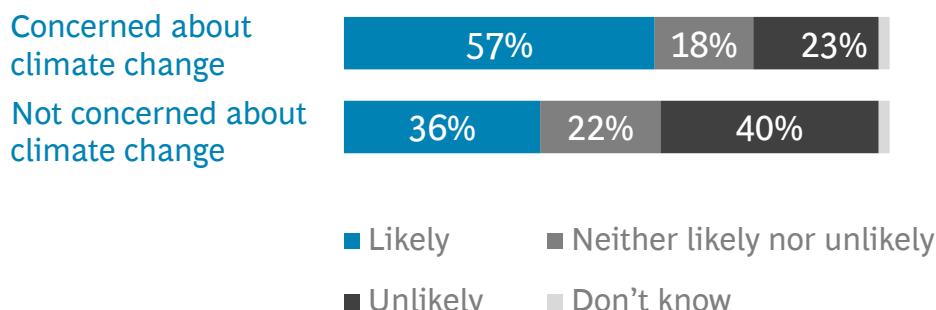
Likelihood for each of the following to increase positivity towards NGTs



Base: Total n= 13,111 online adults aged 18+. Very / Fairly concerned about climate change n= 10,730, Not very / Not at all concerned about climate change n= 2,139. Q. To what extent, if at all, would you say you are concerned about climate change? Note: Concerned = only positive answers, very and fairly concerned, Not concerned = only negative answers, not very and not at all concerned. Q. How likely or not is each of these benefits to make you feel positive towards new genomic techniques (NGTs)? "Crops more resilient to climate change, addressing world hunger", "Produce that stays fresh for longer, reducing food waste", "Using less water, land, fertilizer and crop protection products". Base: Online adults aged 18+ stating they understood or somewhat understood the definition of the topic (after being shown a description) Total n= 11,951; Very / Fairly concerned about climate change n= 9,939, Not very / Not at all concerned about climate change n= 1,860. Q. Overall, is your opinion of new genomic techniques (NGTs such as genome editing tools like CRISPR) positive, negative or neutral? Note: Positive = only positive answers, Negative = only negative answers.

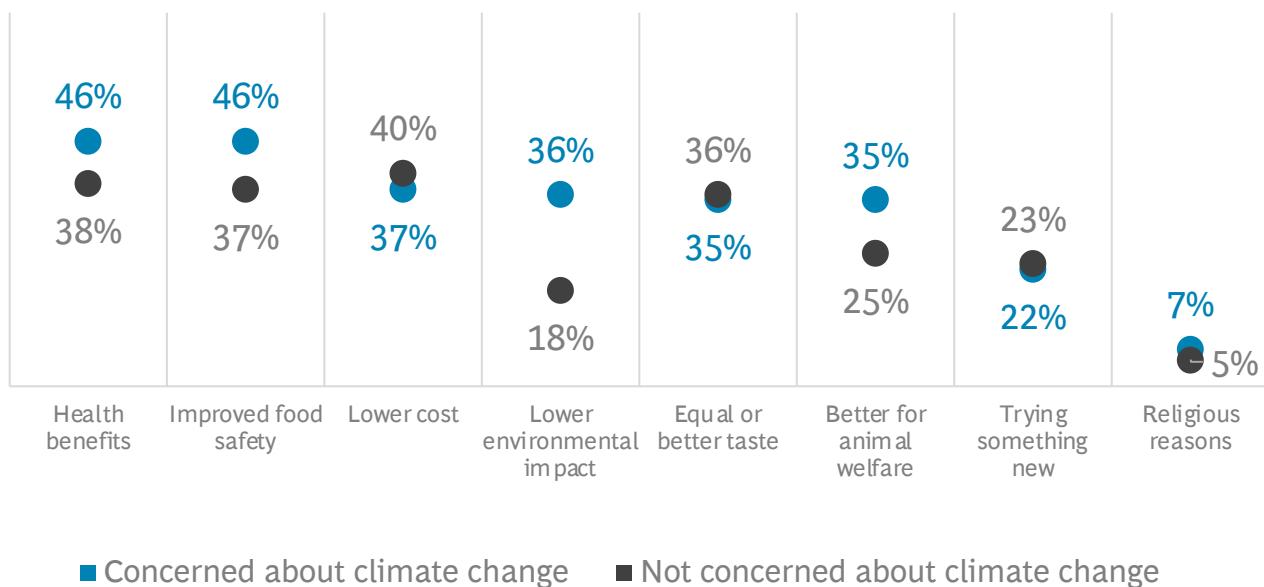
Those concerned about climate change are more open to trying cultivated meat.

Likelihood to try cultivated meat



Lower environmental impact is of greater influence on those concerned about climate change, even though other factors are the top reasons to try it.

Top influential reasons that would encourage to eat cultivated meat



Base: Total n=13,111 online adults aged 18+. Very / Fairly concerned about climate change n=10,730, Not very / Not at all concerned about climate change n=2,139. Q. To what extent, if at all, would you say you are concerned about climate change? Note: Concerned = only positive answers, very and fairly concerned, Not concerned = only negative answers, not very and not at all concerned. Q. How likely or unlikely are you to try cultivated meat if it were to become available near you? Please assume that cost, taste and nutritional value would be the same as conventional meat. Note: Likely = only positive answers, very and fairly likely, Unlikely = only negative answers, very and fairly unlikely. Q. From the list below, which of the following reasons, if any, would encourage you to eat cultivated meat? "Lower cost than conventional meat", "Lower environmental impact than conventional meat", "Health benefits", "Equal or better taste compared to conventional meat", "Better for animal welfare", "Interest in trying something new", "Religious reasons", "Improved food safety – produced without antibiotics/ lower contamination risk".

Methodology

A survey on public attitudes towards breakthrough technologies was conducted online by Ipsos on behalf of Leaps by Bayer and Boston Consulting Group (BCG). Conducted between August 27th and October 18th, 2024, the online survey collected 13,111 responses from adults in 13 countries: Australia, Brazil, China, France, Germany, India, Italy, Japan, Mexico, Nigeria, Singapore, South Africa, and the United States. The sample was weighted to ensure national representation based on region, age, gender, employment status, and ethnicity (in the US).

For AI in healthcare the sample included all survey respondents, for cell and gene therapy, new genomic techniques for crops, and cultivated meat certain questions were only shown to those who stated they understood or somewhat understood the respective definition of the topic (after being shown a description) were included in the sample size. Please refer to each page for information on base size.

Nations' income classification clusters classified as:

- High income: the United States, Germany, Italy, France, Japan, Singapore
- Upper-middle income: Brazil, Mexico, China, South Africa, Australia
- Lower-middle income: India, Nigeria

Education clusters classified as:

- Low education: Limited education/ mandatory education only – incomplete secondary education
- Middle education: complete secondary education, vocational qualifications, incomplete university education
- High education: Complete university (e.g. Bachelor's degree), Postgraduate Diploma, Masters Degree, further postgraduate degree e.g. PhD

For additional information on the study and its methodology

<https://leaps.bayer.com/breakthroughstudy.pdf>



leaps[®] + BCG