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News Release

Leaps by Bayer and BCG:

New study highlights societal optimism toward breakthrough science, and rising anxiety about how fast the world is changing

- The Latest Breakthrough Study reveals why optimism varies by technology, region, and context, with varying trends in China, Germany, and the US
 - Younger generations experience the strongest tension between optimism and concern, especially regarding AI
 - Public perception of breakthrough science is shaped largely by deeply held beliefs rather than technical details and knowledge
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Berlin, April 29, 2026 – A new report by Leaps by Bayer, Boston Consulting Group (BCG), and Ipsos UK provides a deeper understanding of why people respond differently to emerging technologies and what innovators can do to build trust and legitimacy. Based on in-depth interviews in China, Germany, and the United States, the report explores the drivers of public optimism, caution, and resistance toward AI in healthcare, cell and gene therapies (CGT), new genomic techniques (NGTs) in agriculture, and cultivated meat. The report, *“How Society Feels About Breakthrough Science: Decoding the ‘Why,’* builds on findings from *“How Society Feels About Breakthrough Science”*, a 2025 quantitative study across 13 countries with over 13,000 participants.

Key findings

- **Optimism about the direction of science and technology is high**, particularly in lower- and middle-income countries, according to the initial report. Breakthroughs in health are seen more positively compared to those in food and agriculture. The new study shows that participants in high-income countries perceive serious disease and strained health systems as pressing threats, whereas food scarcity and climate

change are seen with less urgency. Distance from food production in high-income nations may play a role; approximately 1 percent of the population work in agriculture in Germany and the US.

- *“We can’t change these [climate] challenges. [...] If ordinary seeds struggle to survive, we definitely need to use new technologies to ensure sustainable development.” Female Gen Z, China*

- **AI Is Least Favored in Geographies Where It Is Most Advanced—especially among Gen Z.** 72 percent of Gen Z respondents outside the US feel positive about AI’s impact on the future of human health, compared with just 42 percent of Gen Z in the US, according to the quantitative report. The new study underscores how Gen Z optimism about the potential of AI in healthcare is informed by deep experience with AI, including inaccuracies and fake images, alongside growing social concern over job loss, diminishing of human skills, and lack of accountability. US Gen Z shows high exposure to AI, but notably lower confidence in the institutions responsible for governing it.
 - *“It’s always been like, the AI as compared to the best standard of care, but most people aren’t getting a good standard of care. And so, if the alternative is nothing, then I think in almost every case a chatbot is probably better, even at current levels of regulation and current levels of accuracy”.* Male Gen Z, US
- **Acceptance of AI in healthcare hinges on visible human accountability.** According to quant data, 64 percent of global respondents feel positive about AI’s impact on human health. New research shows that across regions, people broadly welcome AI when it clearly supports, rather than replaces, human clinicians. What people want is ‘augmented care’, not ‘algorithmic care’.
 - *“I think that if we use AI, we can treat patients more quickly, maybe also more efficiently, and then save the time that we can use to do what currently isn’t possible. Perhaps to treat more patients, or maybe to spend more time with individual patients.”* Female Gen X, Germany
- **Perception of breakthrough science is shaped by mindset, not mechanics.** People rarely evaluate innovations on technical details alone; instead, deeply held beliefs such as fairness, safety, and naturalness drive attitudes. Three mindsets—Optimists, Rationalists, and Skeptics — shape reactions to breakthrough innovation. These emotional worldviews cut across age, education, and geography. Mindsets are

not static categories - they behave like emotional positions people move between depending on technology.

- For example, when CGT Skeptics imagine a loved one facing serious disease with no effective treatment, many say they would "probably try" a well-established CGT if recommended by their doctor.
- **Amidst a crisis in trust, transparency matters more than ever.** According to quant data, 62 percent of respondents trust health authorities to act in the public's best interest, with trust levels significantly lower in the high-income West (Germany at 52 percent and the U.S. at 56 percent) compared to middle-income countries (e.g., China at 73 percent).
 - An essay featured in the new report from The Aspen Institute for Science & Society underscores how transparent and consistent communication, and the inclusion of scientists in the public discourse contribute to building trustworthiness.

Why this research matters now

A deeper understanding of why people hold hopes and fears is critical to building societal acceptance for technologies that can deliver significant human benefit. By combining BCG's strategic framing, Ipsos UK's qualitative research expertise, and Leaps by Bayer's long-term commitment to breakthrough innovation, the study provides actionable guidance for innovation and industry leaders to engage the public effectively.

"We see it as part of our responsibility at Leaps by Bayer to engage society and help build the trust required for transformative ideas to take root," said Juergen Eckhardt, Executive Vice President and Head of Leaps by Bayer. "Understanding public sentiment, and the mindsets and emotions behind those views, is a critical first step towards building acceptance for technologies that could drive significant impact."

About the breakthrough study

- The **2025 global quantitative survey**, *How Society Feels About Breakthrough Science*, spanned more than 13,000 respondents across 13 countries (Australia, Brazil, China, France, Germany, India, Italy, Japan, Mexico, Nigeria, Singapore, South Africa, and the USA).

- The **2026 global qualitative survey**, *How Society Feels About Breakthrough Science: Decoding the “Why”*, is based on qualitative data and twenty-one interviews conducted across China, Germany, and the United States, 12 of them with Gen Z participants.

Note:

Read the new report here:

<https://leaps.bayer.com/breakthroughstudy-decoding-the-why.pdf>

Read the 2025 report here:

<https://leaps.bayer.com/news/breakthrough-report>

About Bayer

Bayer is a global enterprise with core competencies in the life science fields of health care and nutrition. In line with its mission, “Health for all, Hunger for none,” the company’s products and services are designed to help people and the planet thrive by supporting efforts to master the major challenges presented by a growing and aging global population. Bayer is committed to driving sustainable development and generating a positive impact with its businesses. At the same time, the Group aims to increase its earning power and create value through innovation and growth. The Bayer brand stands for trust, reliability and quality throughout the world. In fiscal 2025, the Group employed around 88,000 people and had sales of 45.6 billion euros. R&D expenses amounted to 5.8 billion euros. For more information, go to www.bayer.com.

About Leaps by Bayer

Leaps by Bayer aims to solve ten huge challenges or ‘Leaps’ through scientific breakthroughs. As the strategic investment unit of Bayer, Leaps has invested over \$2.1 billion in more than 65 companies innovating emerging platforms and technologies in health and agriculture. www.leaps.bayer.com

About Boston Consulting Group (BCG)

Boston Consulting Group partners with leaders in business and society to tackle their most important challenges and capture their greatest opportunities. BCG was the pioneer in business strategy when it was founded in 1963. Today, we work closely with clients to embrace a transformational approach aimed at benefiting all stakeholders—empowering organizations to grow, build sustainable competitive advantage, and drive positive societal impact.

Our diverse, global teams bring deep industry and functional expertise and a range of perspectives that question the status quo and spark change. BCG delivers solutions through leading-edge management consulting, technology and design, and corporate and digital ventures. We work in a uniquely collaborative model across the firm and throughout all levels of the client organization, fueled by the goal of helping our clients thrive and enabling them to make the world a better place.

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Forward-Looking Statements

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