



How neurodivergent consumers engage with media and what it means for brands

Note: Throughout, findings describe self-identified neurodivergent members of an opt-in U.S. online panel and should be read as directional signals rather than as population estimates.

Neurodivergent people represent a significant and commercially underserved share of the American consumer population. Research estimates that as many as 31% of the U.S. population identify as neurodivergent.¹ Globally, it's a population with an estimated \$2 trillion in spending power.² Yet most media strategies are built around the assumption of a neurotypical audience.

New data reveals a sharp and consistent divide between how neurodivergent (ND) consumers engage with media compared to their neurotypical (non-ND) peers. Four findings stand out:

1. ND consumers have largely abandoned traditional media — live television, radio, and print — while becoming significantly more likely to be heavy users of digital alternatives.
2. They concentrate on a small number of specific media platforms that share common structural features.
3. They're significantly more likely than their non-ND peers to pay for premium, ad-free experiences.
4. They're overrepresented as content creators. ND men in particular are significantly more likely than their non-ND peers to identify as social media influencers.

Understanding this audience is a strategic opportunity. Brands that learn to reach ND consumers — in the right formats, in the right environments — will access a market that conventional media and marketing strategy is likely to miss.

How we did this research

To understand the media habits of neurodivergent consumers, [Understood.org](https://www.understood.org) conducted a secondary analysis of data from the Toluna Health Profile Panel, a large-scale U.S. opt-in consumer panel.

- **Toluna Health Profile Panel**³ surveyed 112,799 U.S. adults who responded to the Health Profile gateway question from November 2024 onwards. The neurodivergent group was defined as panel members who self-reported at least one learning or cognitive condition, yielding an ND sample of 1,684 individuals (ADHD 93.7%, autism 17.2%, dyslexia 12.5%). The non-ND comparison group comprised the remaining 111,115 members.
- Behavioral differences are expressed as an index. A score of 100 represents parity between ND and non-ND consumers. Scores above 100 indicate ND overrepresentation; a score of 200 means ND consumers are twice as likely as non-ND consumers to exhibit a given behavior.
- Findings were tested for statistical significance using Fisher's exact test with Bonferroni correction, and verified against both age-weighting and gender-stratified analyses to confirm that they reflect genuine ND behavioral patterns rather than demographic artefacts.
- Toluna donated the data to Understood.org. Understood's Population Research team used this dataset to conduct a dedicated analysis. These findings are not included in any Toluna-published report.



Key insight #1

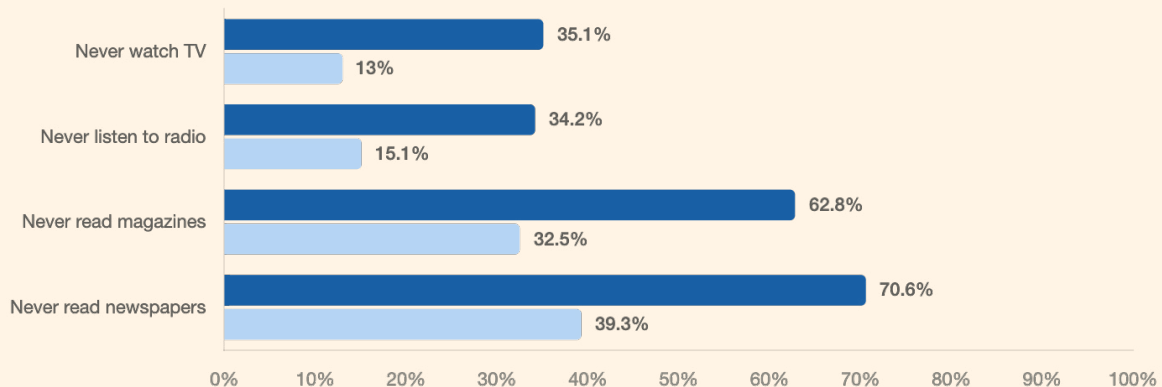
Neurodivergent consumers have largely walked away from traditional media and become heavy users of digital alternatives.

ND consumers have largely abandoned scheduled, passive, and interrupted media at rates far higher than their non-ND peers.

- 35.1% never watch **live television**, compared to 13% of non-ND consumers (Index 270).
- More than a third (34.2%) have completely abandoned **radio** (Index 227).
- Nearly two-thirds (62.8%) never read **magazines** (Index 193).
- 70.6% never read **newspapers** (Index 180).

■ ND consumers ■ Non-ND consumers

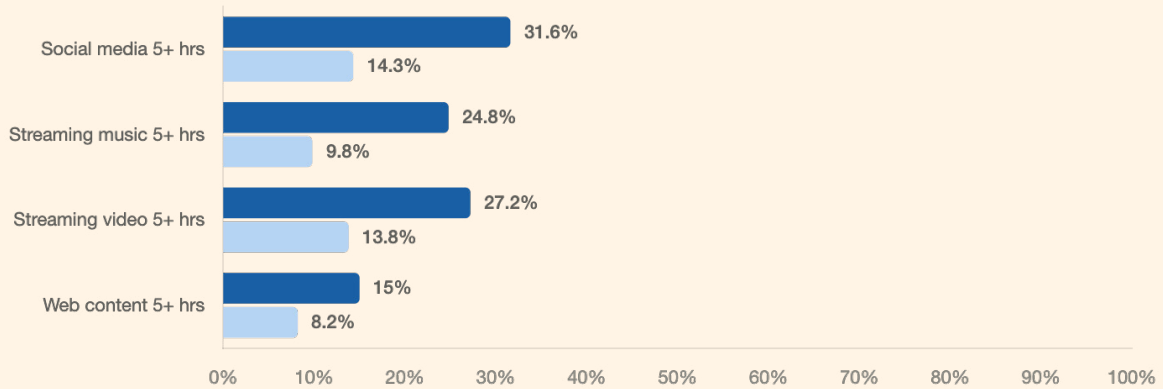
ABANDONMENT — NEVER USE



The same consumers who have stepped away from broadcast and print are deeply immersed in digital alternatives.

- 27.2% **stream video** five or more hours per day, compared to 13.8% of non-ND consumers (Index 197).
- 31.6% use **social media** five or more hours a day (Index 222).
- 24.8% **stream music** five or more hours per day (Index 253).

IMMERSION — 5+ HOURS PER DAY



Source: Toluna Health Profile Panel, US. ND n=1,684 / Non-ND n=111,115. Age-weighted to 2023 US Census adult population targets. All findings Verified (index ≥ 150 , $p < 0.001$, ND $n \geq 100$).

ND consumers are not a hard-to-reach audience. But any brand relying on television, radio, or print to reach this audience is largely looking in the wrong place.



Key insight #2

ND consumers concentrate on a small number of platforms, and those platforms share a common logic.

ND consumers are highly concentrated on a small number of platforms – at rates significantly higher than those of their non-ND peers. They're 2.6 times more likely than non-ND consumers to use Reddit (Index 262). They also over-index significantly on Crunchyroll (Index 234), Tumblr (Index 231), Spotify (Index 233), and Audible (Index 194). The effect is even more pronounced among ND men, who are nearly four times more likely than their non-ND male peers to be Reddit users (Index 388).

These are not coincidental preferences. The platforms where ND consumers concentrate appear to share a common logic across three dimensions:

- 1. Depth of community:** spaces organized around shared identity and interest rather than broad social connection
- 2. Interest-driven navigation:** content organized around topics and communities the user actively chooses
- 3. Freedom from scheduled interruption:** on-demand access rather than broadcast formats that impose timing and break focus

This pattern is consistent with longstanding observations about autistic communities and online spaces. Researchers noted as early as 2008 that the internet offered distinctive communication and community-building possibilities for autistic individuals that other media did not.⁴ While this literature is autism-specific, the platform concentration observed in the Toluna data is directionally consistent with these findings.

Key insight #3

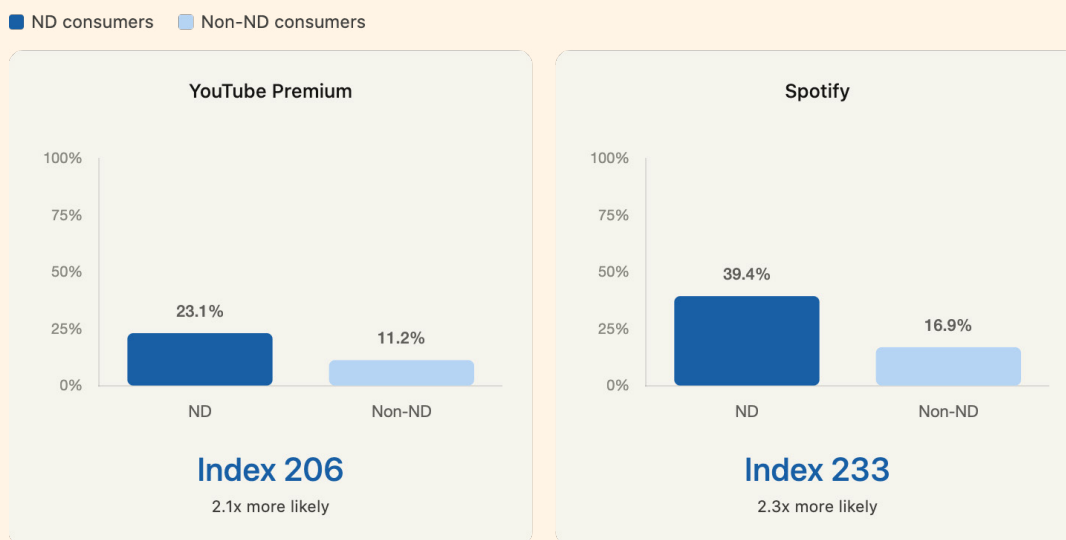
ND consumers are willing to pay for experiences that work for them.

Neurodivergent consumers are far more likely than their non-ND peers to pay for premium, ad-free subscriptions. This holds true regardless of age or gender. They're significantly more likely to pay for YouTube Premium (Index 206), Spotify (Index 233), and Audible (Index 194). This is deliberate, need-driven spending — not simply a preference for convenience.

Research points to a plausible mechanism:

- A 2025 meta-analysis of 30 studies found that individuals with ADHD show significantly higher **sensory sensitivity and avoidance** than controls.⁵
- Separately, research on forced ad exposure finds that the more focused a consumer is when an ad interrupts them, the more irritating and avoidable that ad becomes. **Irritation and avoidance** are direct responses to perceived intrusiveness during high-engagement tasks.⁶

Taken together, these findings suggest that for many ND consumers, a forced ad interruption during a state of deep, intentional engagement may function less like a minor inconvenience and more like an aversive sensory experience. When that cost is high enough, people pay to eliminate it entirely. The Toluna data is consistent with that pattern.



Source: Toluna Health Profile Panel, US. ND n=1,684 / Non-ND n=11,115. Age-weighted to 2023 US Census adult population targets. Verified (index ≥ 150 , $p < 0.001$, ND $n \geq 100$).

Key insight #4

ND consumers over-index on being creators, influencers, and cultural amplifiers.

Nearly 1 in 7 ND consumers identify as social media content creators – nearly double the rate of their non-ND peers (14.3% vs. 7.8%). They are not passive media consumers. They are participants in the culture that shapes what others see, share, and engage with.

The creator identity runs across genders. Both ND men and ND women are significantly more likely than their non-ND peers to identify as content creators – a finding that holds independently for each gender. ND men go a step further: They're also significantly more likely to identify as social media influencers (Index 190). That means they're not just creating content. They're actively shaping what others think, what they pay attention to, and what they choose to buy.

The organizations that recognize this are already ahead. Companies that lead on disability inclusion outperform their industry peers with 1.6 times more revenue, 2.6 times more net income, and 2 times more economic profit.⁷ Cognitive diversity is a competitive advantage.

Implications for brands and media planning

This research quantifies where neurodivergent consumers are, and equally, where they are not. The data makes clear that standard media strategies built around broad reach and passive formats are substantially under-reaching this audience. A set of principles follows directly from the findings.

Meet ND consumers where they are.

ND consumers have walked away from live TV, radio, and print at rates far higher than those of their non-ND peers. Brands that rely on these formats as their primary vehicle for reaching ND consumers are likely to under-reach this audience. Brands that make a shift – from broadcasting at an audience to **showing up where ND consumers are already gathered** – are better positioned to reach this audience. That means Reddit, Crunchyroll, Tumblr, Spotify, and Audible, in formats that fit how those environments work, with creative designed for how this audience actually engages.

Design for attention, not interruption.

Formats that force interruption during focused engagement are likely to generate irritation and avoidance in this segment. This may actively create negative associations with the brands behind the interruptions. Pre-roll and mid-roll placements in particular are likely to generate avoidance rather than attention in this audience. The data points toward a hypothesis about what ad receptivity may require for this audience: creative that prioritizes **clear visual hierarchy, controlled pacing, and freedom from forced interruption.**

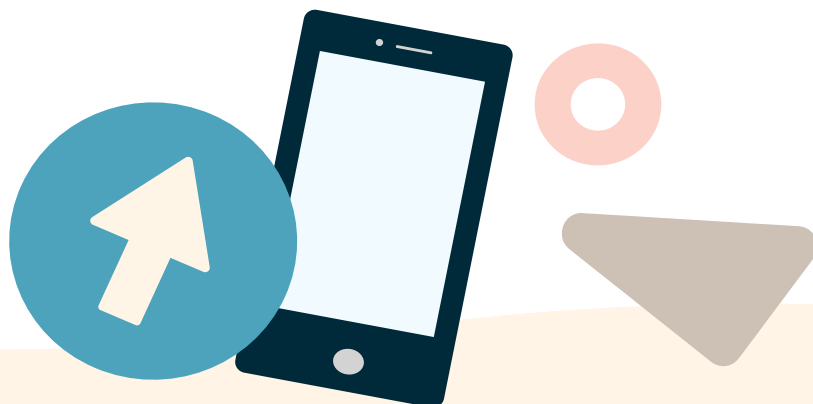
These findings align with a broader universal design principle: creative formats that reduce cognitive friction and support sustained engagement are likely to resonate beyond neurodivergent consumers. For advertisers, designing for more interruption-sensitive audiences may produce creative that earns attention more effectively across all audiences.

Partner with ND creators as a reach strategy.

Neurodivergent consumers are nearly twice as likely as their non-ND peers to identify as content creators. And ND men are significantly more likely to identify as social media influencers. Brands that partner with ND creators are accessing a population that's disproportionately represented as creators and influencers — **who are shaping what others think, what they pay attention to, and what they choose to buy.** That's an underleveraged asset.

Design for ND needs and capture spending that's already there.

ND consumers are active, intentional spenders who have already shown what they're willing to pay for. They're choosing YouTube Premium, Spotify, and Audible at rates significantly higher than those of their non-ND peers, specifically to get **experiences that work for them.** This is a behavioral signal: When a product or service is designed around how this audience engages with the world, they're significantly more likely to pay for it. Brands that build for ND needs are not just serving an underserved audience. They're reaching a highly engaged audience.



Connect with us

We're always looking to collaborate and partner with others on our research! Reach out to our team at knowledge@understood.org to learn more.

Methodology

This research is based on a secondary analysis of data from the Toluna Health Profile Panel, a large-scale U.S. opt-in consumer panel. The analysis extract comprises 112,799 members who responded to the Health Profile gateway question from November 13, 2024 onwards. The neurodivergent (ND) group was defined as panel members who self-reported at least one learning or cognitive condition – ADHD or ADD, autism spectrum disorder, dyslexia, or a related condition – and did not select “None of the above.” This yielded an ND sample of n=1,684 (ADHD 93.7%, autism 17.2%, dyslexia 12.5%). The non-ND comparison group comprised the remaining 111,115 members who either did not answer the ND question or selected “None of the above.”

Behavioral differences are expressed as an index: $(\text{ND response rate} \div \text{non-ND response rate}) \times 100$, where Index 100 represents parity. Fisher's exact test was used to assess statistical significance, with Bonferroni correction applied across 392 simultaneous tests (corrected threshold: $\alpha=0.000128$). Findings designated “Verified” satisfy three simultaneous conditions: Index ≥ 150 , ND cell size ≥ 100 , and Bonferroni-corrected significance. Wilson 95% confidence intervals were computed on all ND percentages.

To assess potential confounding from the panel's millennial overrepresentation (53.8% vs. 29.0% U.S. Census 2023 adult population), post-stratification age weights were applied calibrated to 2023 U.S. Census population targets. After age-weighting, 123 findings remained verified. All primary index figures cited in this brief reflect age-weighted estimates. A comprehensive gender-stratified analysis was also conducted across all 278 behavioral response options, addressing the ND sample's female skew (82% women); 172 findings were independently verified within ND men, confirming that results are not driven by gender composition. Findings should be interpreted as describing self-identified ND Toluna panel members and should not be generalized as representative of all neurodivergent adults in the United States.

While these findings are robust, several limitations warrant attention. The Toluna panel is an opt-in convenience sample and findings are not representative of all neurodivergent adults in the United States. Replication in probability samples would strengthen the evidence base. The ND sample is predominantly ADHD (93.7%), predominantly female (82%), and skewed toward millennials, limiting generalizability across diagnoses, genders, and age groups. Deeper exploration of within-ND subgroup differences by diagnosis, gender, age, and race/ethnicity would provide a more complete picture of this commercially significant and understudied audience.

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