

KANTAR

U.S. MONITOR

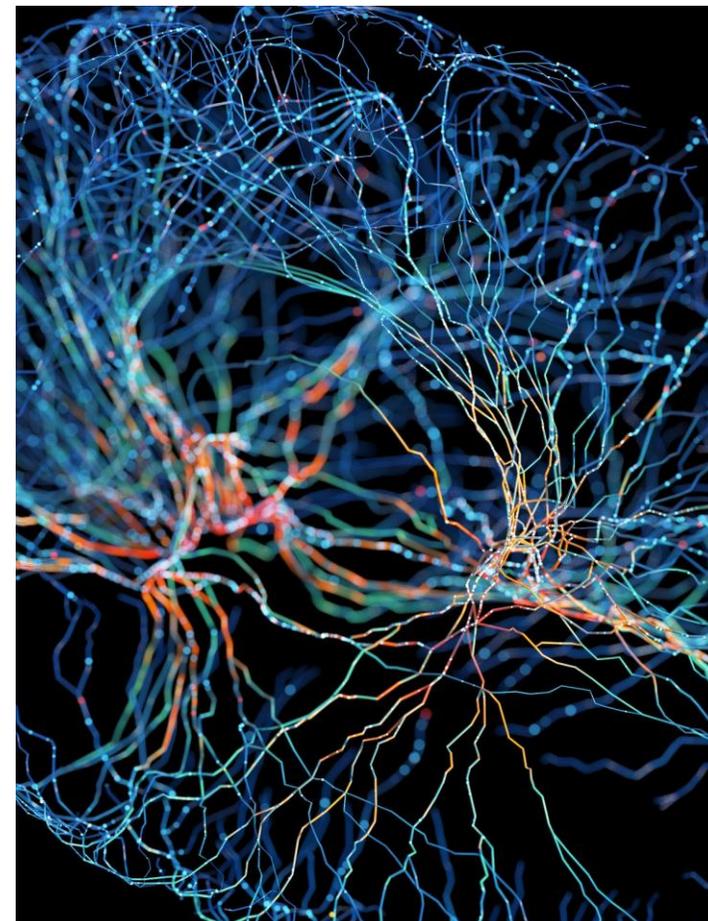
**Spotlight on
Neurodiversity**

April 2025



In meaningful partnership with Understood.org

This research would not have been possible without the contributions of our partner Understood, a nonprofit dedicated to supporting individuals with learning and thinking differences through expertise and insights that promote inclusion and accessibility.

The logo for KANTAR, featuring the word "KANTAR" in a bold, black, sans-serif font. A vertical yellow bar is positioned to the left of the letter "K".

Neurodivergence is already a large part of America

More than 60 million people are considered neurodivergent, representing nearly one in five Americans.

Over

60M

people identify as **neurodivergent**

Representing around

18%

of the U.S. population

In this report, we define neurodivergent individuals as **those who identify with a learning or thinking difference**, including but not limited to Autism Spectrum Disorder, Attention Deficit Disorder, Attention Deficit Hyperactivity Disorder, and Dyslexia. However, as language and understanding around neurodivergence continues to evolve, so too will the way we define and capture this population.

What is Neurodivergence?

“Neurodivergence” is a term used to describe when someone’s brain works differently from what’s considered typical. In recent years, more conditions that affect how people think, learn, or experience the world have been included in definitions of neurodivergence.

Terminology:



Neurodivergence/neurodivergent describes people whose brain develops or works differently. It’s having differences.

Example:

“A neurodivergent student may need accommodations.”



Neurodiversity is a concept and viewpoint that started in the autism community but is now being used more broadly. The idea is that there’s diversity in human minds and brains, and that neurological differences are normal variations, not deficits.

“Workplaces that value neurodiversity are more successful.”



Neurodiverse describes an environment or group in which at least some of the people are neurodivergent.

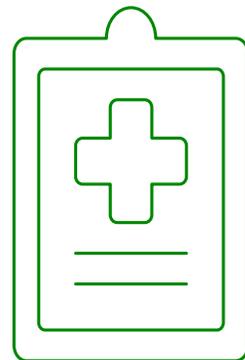
“Having a neurodiverse workplace is good for everyone.”



Neuroinclusive/neuroinclusion involves cultivating an environment that supports neurodivergent individuals, enabling them to thrive.

Awareness and improved diagnosis methods mean more people are identified

Growth in awareness and accessibility to evaluations contribute to the growth of this population. This significant segment doesn't exist in isolation — it shapes families, influences communities, and drives shifts in consumption patterns.



Autism Spectrum Disorder diagnoses increased from:

1 in 150 in 2000 to
1 in 36 in 2023

New ADHD Diagnoses

nearly doubled

among women ages 23–49
between 2020 and 2022



“Conditions like autism, dyslexia, and attention-deficit/hyperactivity disorder (ADHD) should be regarded as naturally occurring cognitive variations with distinctive strengths that have contributed to the evolution of technology and culture rather than mere checklists of deficits and dysfunctions”

– **Steve Silberman**

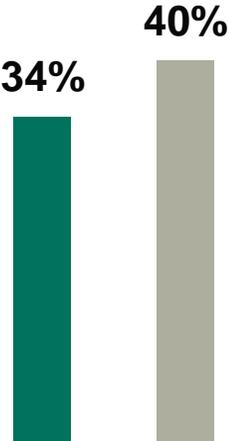
Author, ‘NeuroTribes: The Legacy of Autism and the Future of Neurodiversity’

A demographic screenshot

The demographics of the neurodivergent community tell a strong story of motivated individuals. Over one in three have a bachelor's degree or higher and more than half are employed. Their demographics also tell an interesting story. They skew slightly more male, possibly because of the higher likelihood of early diagnosis among boys, compared to girls. Women and girls are more often undiagnosed, or aren't diagnosed until later.

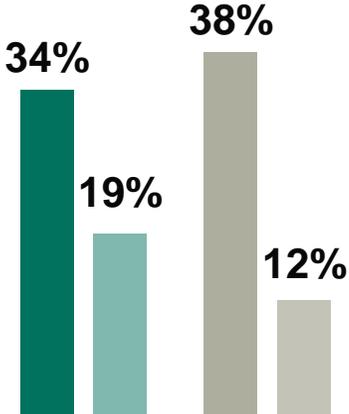
■ Neurodivergent Americans ■ Rest of the Population

Education* Bachelor's degree or higher

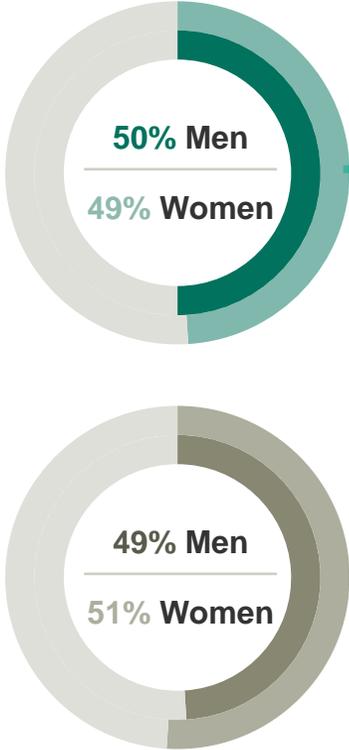


Employment

■ Full-time
■ Part-time



Gender



“In childhood, the ratio of boys to girls with ADHD is about **3:1**, whereas in adulthood it is closer to **1:1**”

– Miss. Diagnosis: A Systematic Review of ADHD in Adult Women

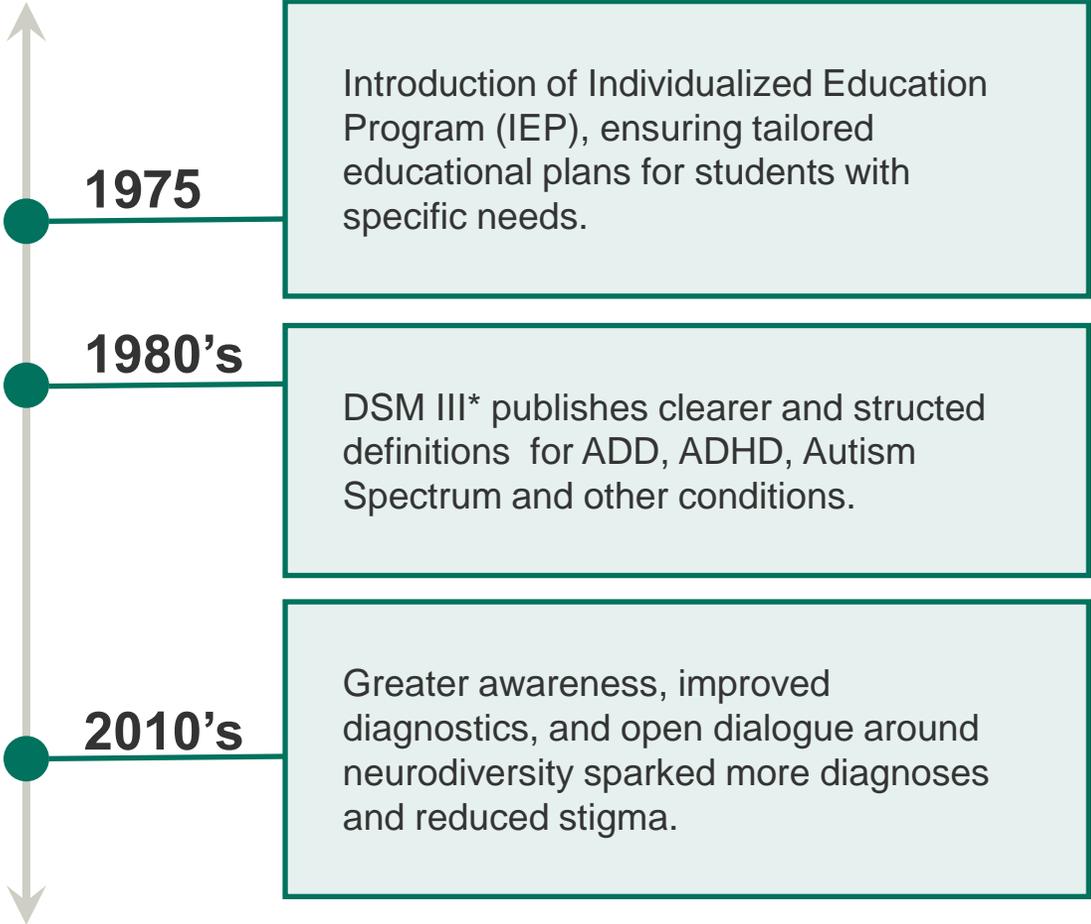
Neurodivergence shapes the next generation

Many in America’s younger generations identify as neurodivergent. This increase in identification among younger generations is partly due to the evolution of diagnostic practices. Some forms of neurodivergence, were not well studied or consistently tracked. Early diagnosis and access to online communities have made today’s youth more aware and empowered about being neurodivergent.



of **Gen Z** identify as **Neurodivergent**

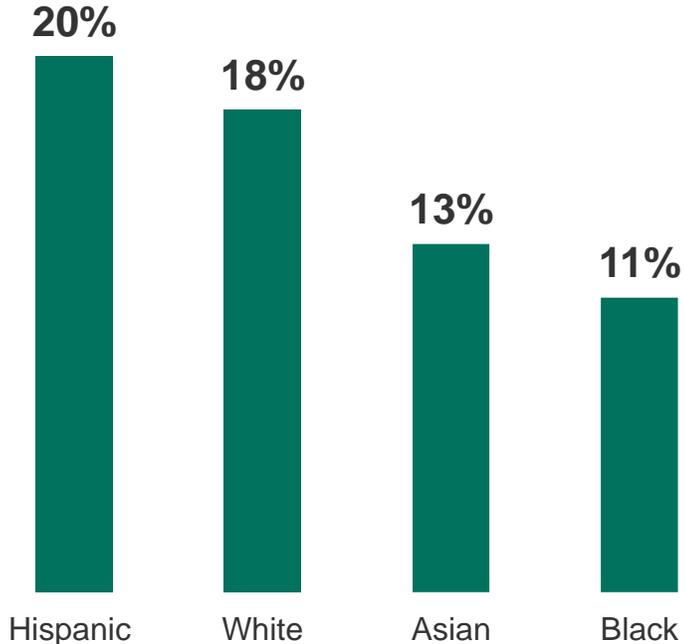
vs. 12% Xers and 4% Boomers



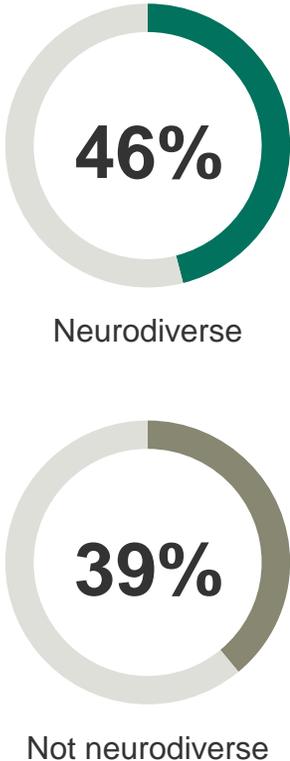
A community of multifaceted identities

The neurodivergent cohort is predominantly young, and they embody the diverse identities that define Gen Z. Almost half of LGBTQ+ adults identify as being neurodivergent. When looking at the racial diversity of this cohort, they're more likely to be Hispanic or White. One in four of those diagnosed with a mental health condition identify as neurodivergent, a common experience for a marginalized and misunderstood community.

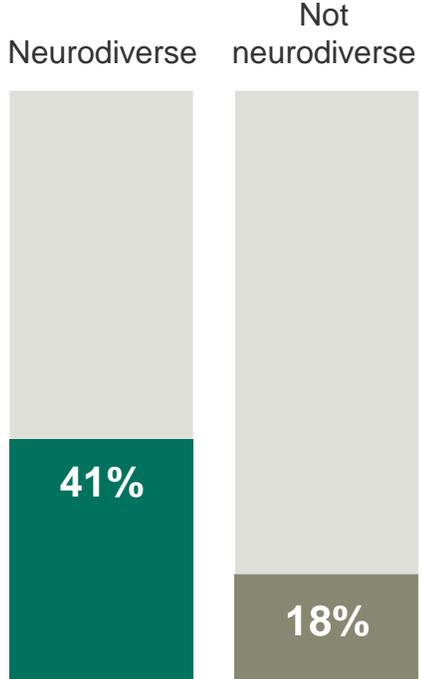
Neurodivergent prevalence among different race/ethnic groups



% of LGBTQ+ adults who identify as...



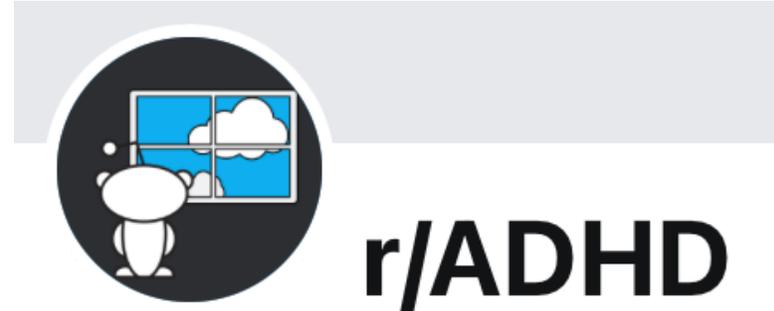
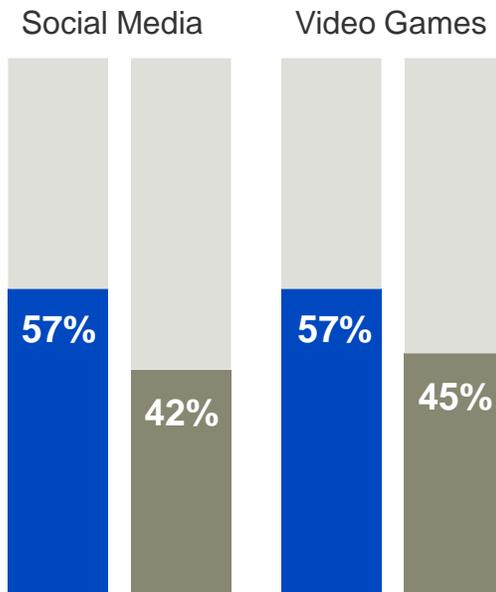
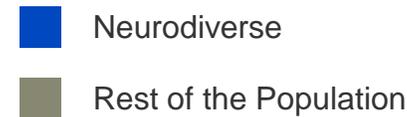
% of people with mental health conditions who identify as...



Online community builders

Neurodivergent people make up a large part of gamers and social media users, outnumbering their neurotypical peers. They have the digital fluency to make these spaces their own and build meaningful online communities. These digital spaces offer a way to connect and access resources that empower the neurodivergent community. Brands like Roblox and Reddit have played an important role in connecting with this community and fostering an environment of support.

% who engage in the following weekly or more often...



r/ADHD

2M
people with
ADHD

388
● looking right
now

Top 1%
Rank by size ↗

Reddit's r/ADHD chat is ranked in the top 1% of chats on the app based on its sheer size and traffic. With over 2 million users, this chat is an inclusive, disability-oriented peer support group for people with ADHD, with an emphasis on science-backed information.

35%

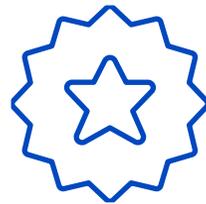
% of parents said

Online gaming has supported their children to learn other skills they could use in everyday life, including confidence and problem-solving

An early adopter

The neurodivergent consumer stands out from their peers in values that reflect a willingness to explore new ideas and try new things. As consumers, their values set them apart as early adopters.

Differentiating values with **higher ranking positions** for neurodivergent individuals compared to Rest of Pop.



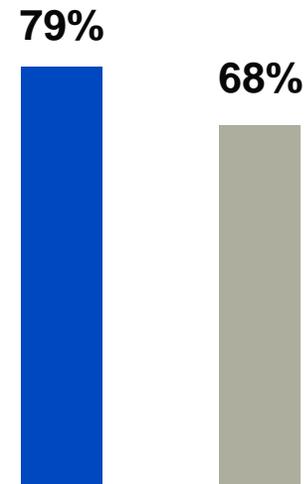
Novelty
+10



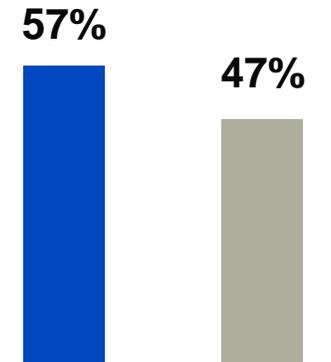
Learning
+8

■ Neurodivergent Americans ■ Rest of the Population

Family and friends often ask me for information about, or my opinion on, new brands and products



I like to discover/try new things when shopping*

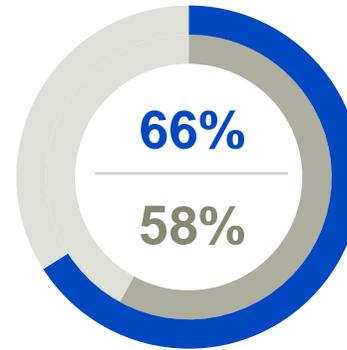


A digital tastemaker

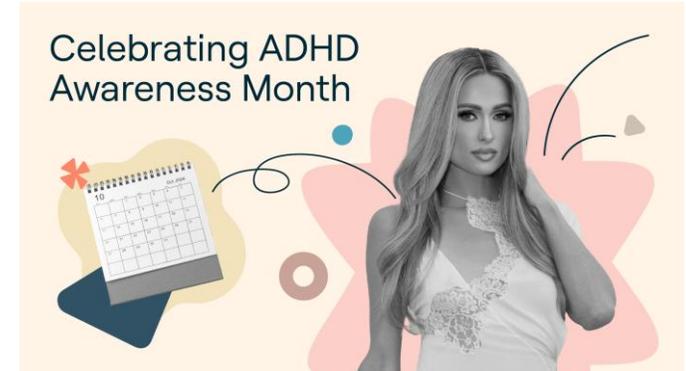
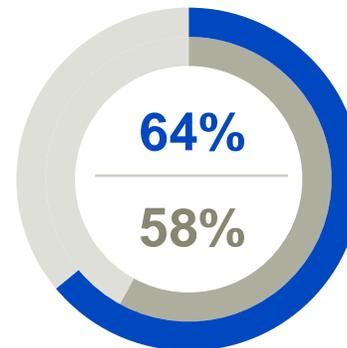
Given that brands often struggle with accurately representing neurodivergent experiences, neurodivergent influencers are filling in the gap with content grounded in authenticity and lived experience. This positions them as emerging digital tastemakers, offering fresh and culturally relevant perspectives that resonate with neurodivergent audiences. This poses an opportunity for brands to differentiate themselves with authentic storytelling.

■ Neurodivergent Americans ■ Rest of the Population

Not enough brands do a good job of representing people similar to me or my community



Watch content related to their cultural background half the time or more



Paris Hilton partnered with [Understood.org](https://www.understood.org) to raise awareness about ADHD and provide resources for women and children navigating the condition. As part of this collaboration, during ADHD Awareness Month, Understood.org took over Hilton’s social media channels to share expert-vetted tips and research, aiming to empower individuals to embrace their unique strengths and break the stigma surrounding ADHD.

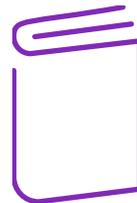
A dynamic workforce

In the context of the workforce, creativity and knowledge stand out as values that reflect how neurodivergent people are problem-solvers and forward thinkers. Their cognitive differences allow them to approach problems from unique angles, creating new solutions that add value to their work.

Differentiating values with **higher ranking positions** for neurodivergent individuals compared to Rest of Pop.



Creativity
+23



Knowledge
+8



“Perceiving and processing the world differently is an important factor in fostering innovation, and research has shown that cognitive diversity can be a critical driver of new ideas.”

– Deloitte

A force for change

Working in environments where accommodations are not built in often compels neurodivergent people to develop their own solutions. More often than not, accommodations come at little to no cost for companies. Employers have a responsibility to provide effective and meaningful accommodations for everyone. In fact, when accommodations are available to all employees, this builds flexible, inclusive workplaces that can lead to a competitive edge.

Among neurodivergent people who requested accommodations

32% say they regretted asking for an accommodation

30% said they received ones that weren't helpful.

Among employers surveyed

56% say accommodations needed by their employee cost nothing

37% Experienced a one-time cost

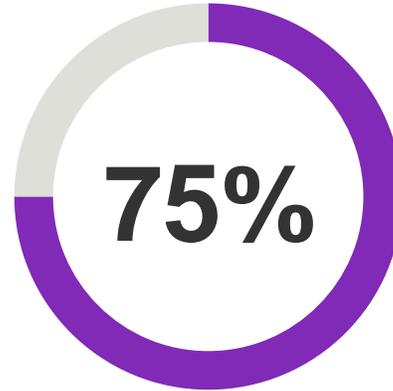
7% say the accommodation resulted in an ongoing, annual cost to the company



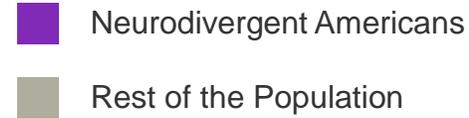
SAP is a global software corporation that is one of the pioneers in recognizing the value of neurodiverse talent. SAP's "Autism at Work" program focuses on matching the unique abilities of autistic employees with suitable roles, emphasizing their strengths in areas like data analysis, software testing, and quality assurance. Its program boasts a retention rate of over 90%, demonstrating the success of inclusive hiring practices.

A strong economic contributor

Because traditional work environments struggle to offer effective accommodations, neurodivergent talent often create their own means of work. This community has a stronger entrepreneurial mindset compared to its neurotypical peers, indicating greater potential to drive new ideas. This also inspires innovation in the marketplace, an opportunity for brands to grow offerings.

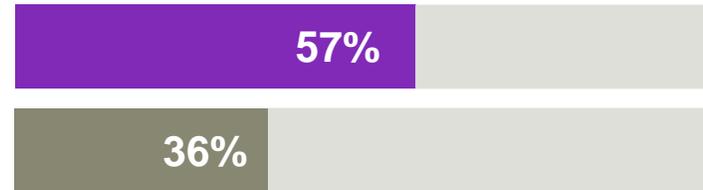


of **working neurodivergent adults** would consider leaving their company based on lack of inclusion and/or discrimination if they observe or experience it at work vs. 53% Rest of pop.



Business ownership

Currently own or aspire to own a business



Gig work

Have worked as an independent contractor, freelance worker, online seller, or gig*



38%

of **neurodivergent workers** identified entrepreneurialism as one of their strengths compared to

47%

of employers who also recognized this trait among these workers

Designs that cater to their needs serve multiple purposes

Universal design is the practice of creating solutions that accommodate neurodivergent individuals, or other people with different needs, while benefiting a broader audience through inclusive, flexible, and user-friendly design. The ROI of this practice is both measurable and far-reaching because it drives customer satisfaction, expands market reach, and improves operational efficiency.

Project teams that utilized this design yielded...

2x

Faster time-to-market

75%

Reduced design time

33%

Reduced development time

Accessibility and user improvements bring back...

\$100

for every



\$1

invested

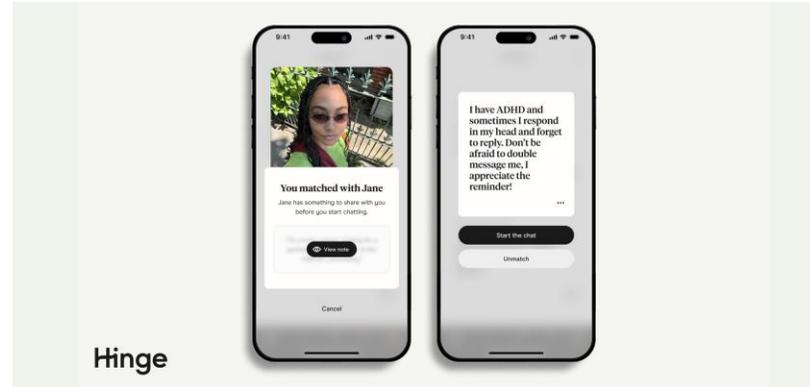
“

Creating an accessible and inclusive future requires continuous improvement. From addressing the accessibility of our spaces to adding vendors' commitments to accessibility to our Supplier Code of Conduct, we're excited to share some of our progress over the past year. Get all the details about the ways we're transforming how we work with partners, Trailblazers, and customers in this year's Social Equality Report.”

– Salesforce

Improving brand experiences for neurodivergent consumers benefits everyone

As mentioned earlier, universal design intended for people with specific needs has evolved to serve a broader audience. Brands that embrace universal design see growing use of these implementations, enjoying more consumer engagement while also offering services or products that enhance accessibility.



Hinge launched the "Match Note" feature in February 2025, allowing users to privately share personal details, such as communication preferences, with their matches. This feature aims to create a more inclusive dating environment by reducing misunderstandings and fostering better connections.

The opportunity for competitive advantage



Brands like SAM Sensory, Cloud Nine, and Thera are offering sensory-friendly clothing featuring tagless, seamless, and weighted designs that aim to provide comfort and reduce anxiety for those with Sensory Processing Sensitivity (SPS) who often experience heightened sensitivity to stimuli like itchy tags and tight garments. While intended for those with SPS, these innovations can benefit anyone by offering enhanced comfort, reducing daily stressors like scratchy fabrics or restrictive fits.

Turning unmet needs into a competitive edge

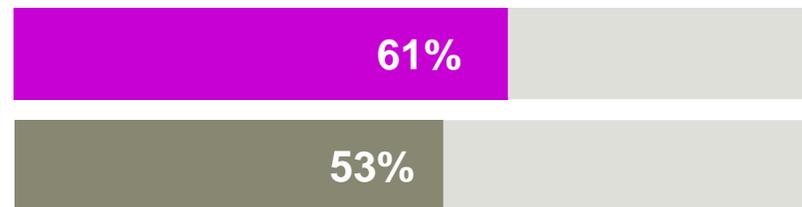
Neurodivergent consumers often face a gap between their needs and what's available. As a result, their early adoption stems from the need to find products and services not yet designed with them in mind. Once these solutions are adopted and introduced by brands, they often evolve to benefit a wider audience, an opportunity to innovate offerings that serve both niche and mainstream markets.

- Neurodivergent Americans
- Rest of the Population

I am frustrated by brands that treat people like me as an afterthought



Tailor products to better fit the needs of people from diverse communities*



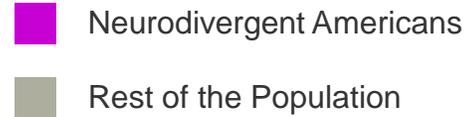
The opportunity for competitive advantage



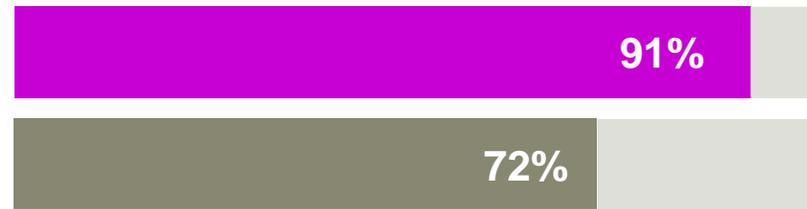
Marriott International partnered with The Neu Project, an initiative from Google's Experience Institute (Xi), to make their events more neuroinclusive. They introduced features like dedicated quiet rooms, sensory tools, real-time captioning, and detailed agendas highlighting sensory triggers to better accommodate neurodivergent attendees. These practices have already been implemented at major events like THE EXCHANGE and IMEX America.

High-value consumers have high expectations of brands

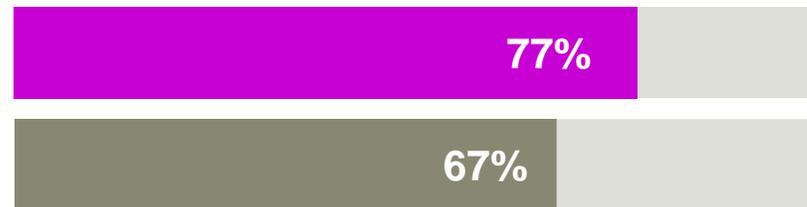
Inclusive efforts by brands are a strong way to win neurodivergent business. It signals to this cohort that brands are not only aware of their needs but are actively working to meet them. In an increasingly values-driven marketplace, this level of intentionality can foster lasting trust and loyalty, differentiating brands in a competitive landscape.



It is important to me that the companies I buy from are clear about what values they stand for



It is important to me that the companies I buy from actively promote diversity and inclusion in their own business or society as a whole



The opportunity for competitive advantage



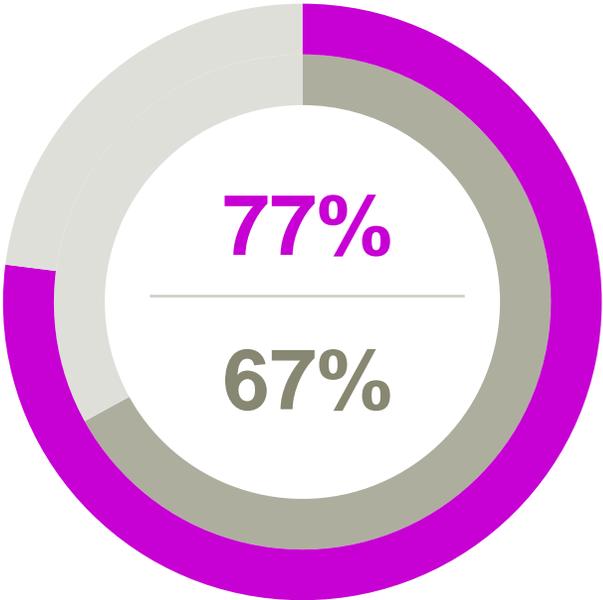
The LEGO Group launched a neurodiversity-focused campaign called “Love the Way They Think.” The initiative featured autistic creators who shared their unique perspectives and experiences, encouraging acceptance and celebration of neurodivergent thinking. LEGO also provided resources and guidance for creating sensory-inclusive play experiences. This campaign aimed to foster greater understanding and inclusivity within the LEGO community and beyond.

Meeting these high expectations means innovating for everyone

The neurodivergent community expects brands to be more hands-on, playing a more tangible role in their lives. Meeting these expectations often drives brands to adopt principles of universal design that not only meet neurodivergent people’s needs but also benefit a broader range of consumers. In doing so, brands can both foster deeper connections and appeal to a wider audience.

Provide education programs to help diverse customers*

- Neurodivergent Americans
- Rest of the Population



Sensodyne’s Sensory Inclusion Initiative aims to make dental care more accommodating for people with sensory sensitivities. By collaborating with sensory-inclusive dentists, neurodiversity experts, and advocates, the initiative develops tools and materials to assist both dental professionals and patients. Additionally, Sensodyne partners with KultureCity to promote sensory-inclusive certifications and has produced a documentary, Sensory Overload, to raise awareness about the challenges faced by people with sensory needs in dental environments.

■ Business Implications



Audience

- Digital fluency
- Community-building
- Underleveraged perspectives

This population's ability to build genuine online connections is a valuable skill that brands can learn from, particularly in a digital world where authenticity drives engagement and where neurodivergent voices are often overlooked or misunderstood. In certain community spaces, brands can meaningfully engage this audience while simultaneously bringing fresh stories to the surface.



Consumer

- Taste-making
- Creativity
- Unmet needs

The taste-making nature of the neurodivergent community should signal to brands that this cohort is capable of helping brands innovate. Their unique needs and experiences reveal long-overlooked gaps in products and services designed for neurotypical norms. When these are addressed, brands can help drive meaningful change.



Employee

- Originality
- Entrepreneurship
- Untapped potential

As a naturally curious and creative cohort, neurodivergent talent doesn't just challenge what companies must offer—they challenge how companies must operate, pushing them to reimagine both their workforce and their workplace. This drive for innovation often manifests as an entrepreneurial mindset, presenting an opportunity for brands to invest in neurodivergent talent.