

# KANTAR

GLOBAL SPOTLIGHT

## People with Learning and Thinking Differences

A global overview of People with Learning and Thinking Differences, including a look at new marketplace solutions that are trying to meet their needs.

July 2024

Global MONITOR



## About this report

### Partnership

For purposes of this report, the Kantar MONITOR team partnered with [Understood.org](https://www.understood.org), a leading non-profit that helps to empower people with learning and thinking differences. Kantar and Understood.com worked together to craft a new question, which was added to three of Kantar's existing surveys – Global MONITOR, U.S. MONITOR, and Global Brand Inclusion. For the first time, these annual surveys will include the voices of the often under-represented learning and thinking differently community.

### Survey source

Quantitative findings are from the 2024 Global MONITOR survey, unless otherwise noted. The 2024 Global MONITOR survey is collected among 37,000+ people, age 13+, in 29 markets around the world.

Additional data is pulled from Kantar's Brand Inclusion Index 2024, which surveys 23,000+ people in 18 countries analyzing the impact of discrimination.

**People with Disabilities** are classified into three types:

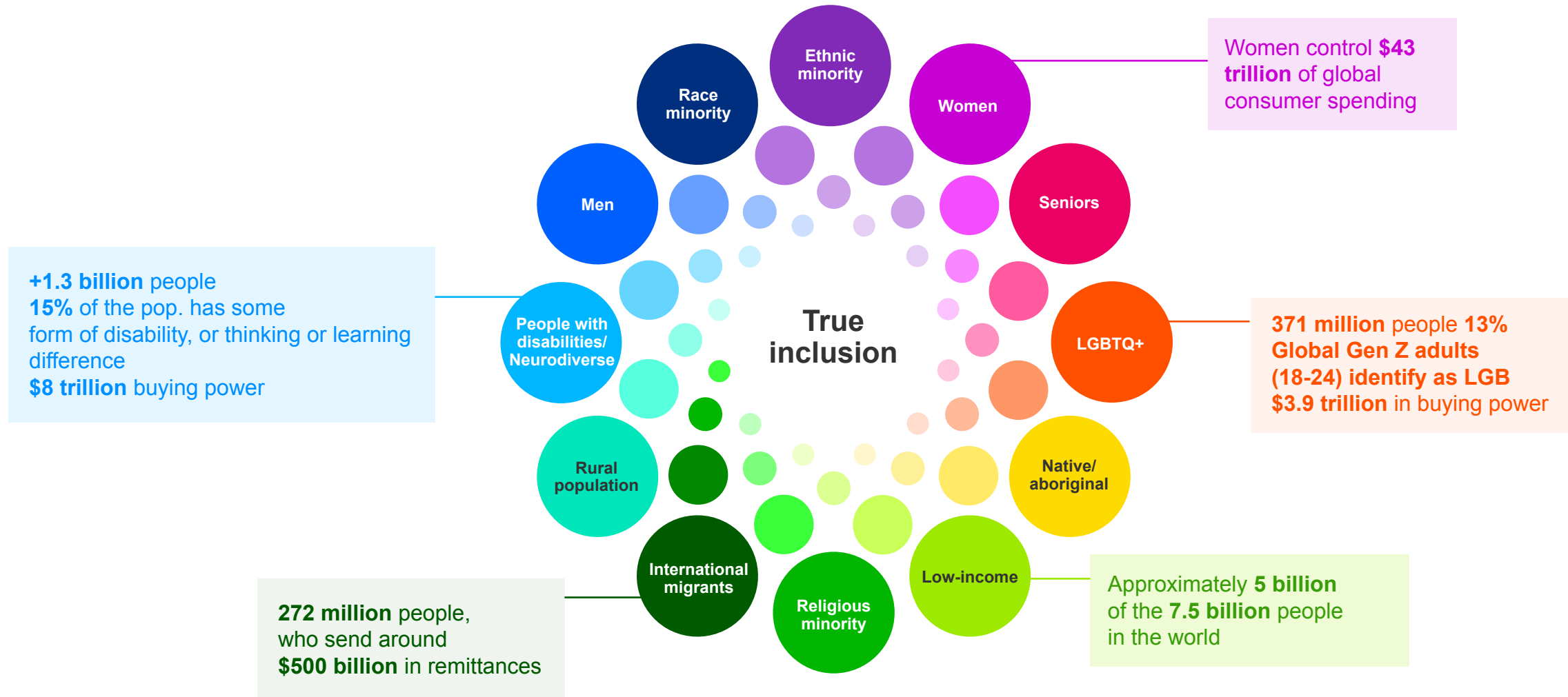
**Physical Disabilities:** Those who have, or suspect they have, physical conditions, disabilities or illnesses that limit the activity they can do (e.g., vision, hearing, mobility, dexterity or memory issues, pain, fatigue, illnesses like cancer, diabetes or heart disease)

**Mental Disabilities:** Those who have, or suspect they have, mental health conditions, issues or illnesses (e.g., anxiety, depression, post-traumatic stress disorder, obsessive compulsive disorder, addiction, phobias)

**Learning and Thinking Differences:** Those who have, or suspect they have, learning and thinking differences that may impact reading, writing, focus, math or communication with others (e.g., attention-deficit hyperactivity disorder, dyslexia, autism spectrum disorders, dyspraxia, dyscalculia, dysgraphia)

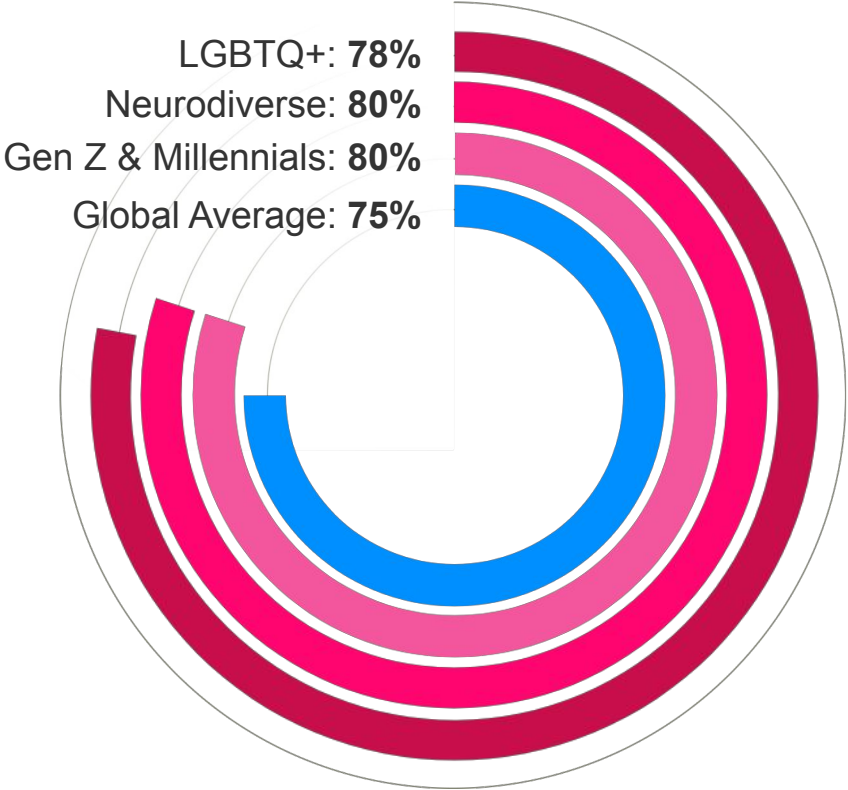


# High-growth populations around the world are driven by diversity and inclusion



# Diversity and inclusion drive purchase decisions among almost 8 in 10 people worldwide

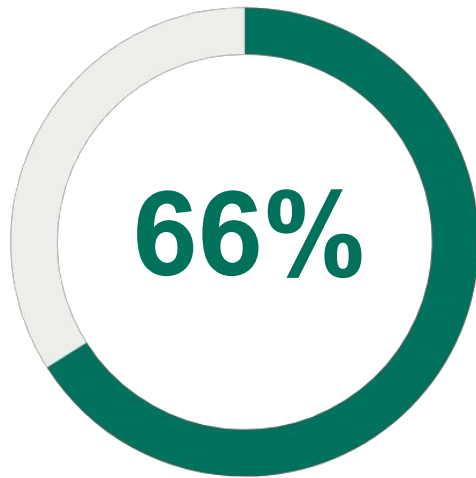
**“It is important to me that the companies I buy from actively promote diversity and inclusion in their own business or society as a whole.”**



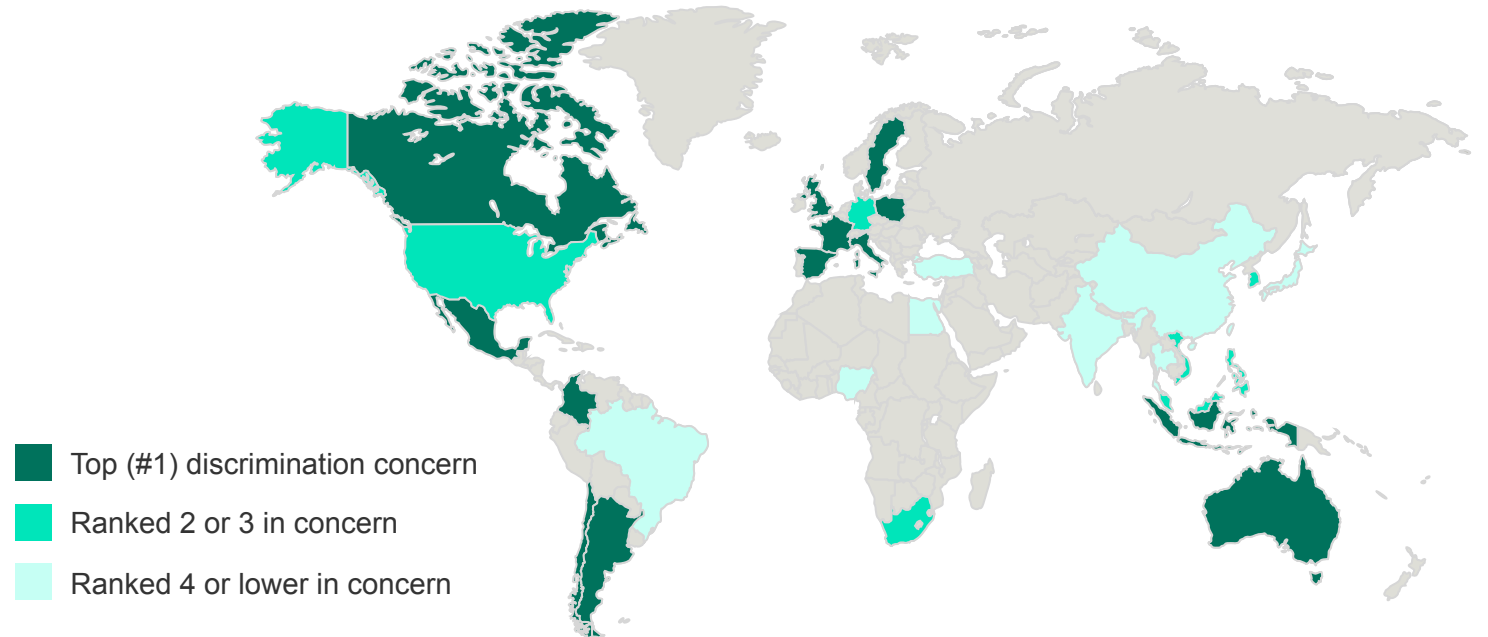
## Discrimination based on having a disability is a top global concern

Discrimination against people with disabilities is a top discrimination concern around the world, and higher than other notable exclusion concerns such as gender, race, age and religion. In fact, it is the #1 discrimination concern across most of Europe, Latin America and parts of Southeast Asia. As Western Europe has an aging population, their governments are grappling with the increased demands of supporting an elderly society and improving accessibility of transportation and services. And with often inadequate government support, many people with disabilities in Southeast Asia and Latin America struggle to get help with employment and independent living.

Very/somewhat concerned about discrimination based on physical and mental disabilities in their societies (% total global)



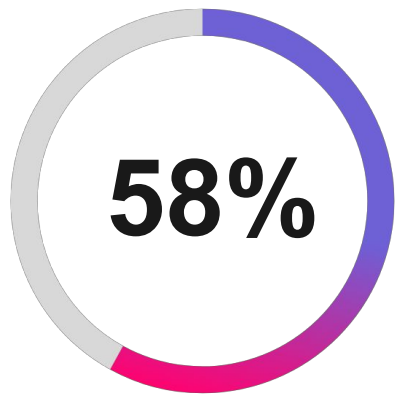
Ranking of discrimination concern based on physical/mental disabilities (out of 8 different discrimination concerns)



# Businesses have a responsibility to end discrimination, it most often happens in places of business

And 6 in 10 people experience it at a commercial location

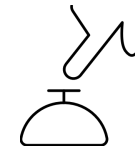
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Of those who experienced discrimination, 58% report it happened in commercial locations



**18%**  
while shopping



**14%**  
social at hospitality place  
(restaurant, hotel, etc.)

## Globally, physical and mental disabilities are equally present

Discrimination against people with disabilities is a top concern but addressing this concern can be difficult as there are a multitude of different types of disabilities.

In the 2024 Global MONITOR survey we are striving to better understand people with disabilities by identifying three key disability types: physical disabilities that limit activity, mental health conditions and learning and thinking differences (or neurodivergence).

Physical and mental health conditions are reported by roughly one in five people globally. Learning and thinking differences are claimed by half as many people but may be largely undiagnosed in some markets.

### Have, or suspect they have, any of the following conditions that have lasted or are expected to last for 12 months or more

(% total global)

Physical conditions, disabilities or illnesses that limit the activity you can do (e.g., vision, hearing, mobility, diabetes, heart disease)

22%

Mental health conditions, issues or illnesses (e.g., anxiety, depression, addiction, phobias)

21%

Learning and thinking differences (e.g., attention-deficit hyperactivity disorder, dyslexia, autism spectrum disorders)

11%

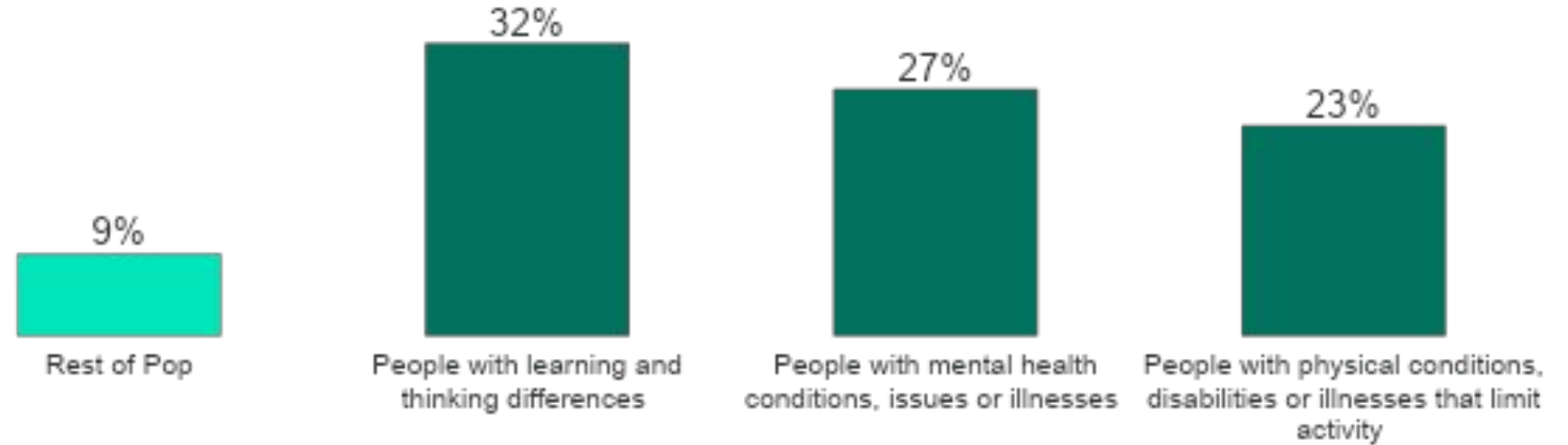
## Discrimination rates are considerably higher for people with learning and thinking differences

Although people with learning and thinking differences account for the smallest proportion of those with disabilities, neurodivergent people are most likely to report experiencing discrimination.

Additionally, people with any disability type are more than twice as likely than the average person to experience some form of exclusion.

In order to better address exclusion concerns, this report sheds light on demographic and geographic differences across the three disability types and examples of how brands around the world are trying to better support people with diverse disabilities.

### Have experienced discrimination in the past year (% total global)



### Highest discrimination among people with disabilities reported in:



**South Africa 43%**

Hong Kong 35%



**Philippines 42%**

Indonesia 30%



**India 36%**

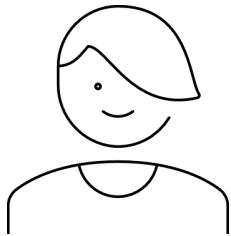
United States 28%



## Age is currently a key determinant of learning and thinking differences

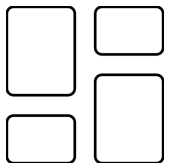
Learning and thinking differences like dyslexia, attention-deficit disorder and autism vary in prevalence around the world as research and diagnosis of these differences are still unestablished in many markets. Gen Zers are twice as likely as the rest of the population to report being neurodivergent—this is largely due to greater awareness and willingness to openly discuss these differences across social platforms. Consequently, many markets with either higher awareness like the United States and Sweden or younger populations like Turkey, Egypt, Brazil and parts of Southeast Asia report the highest incidences of learning and thinking differences.

### Groups who are most likely to have a learning or thinking difference:



Gen Z  
**18%**

(vs. 9% Rest of Pop)

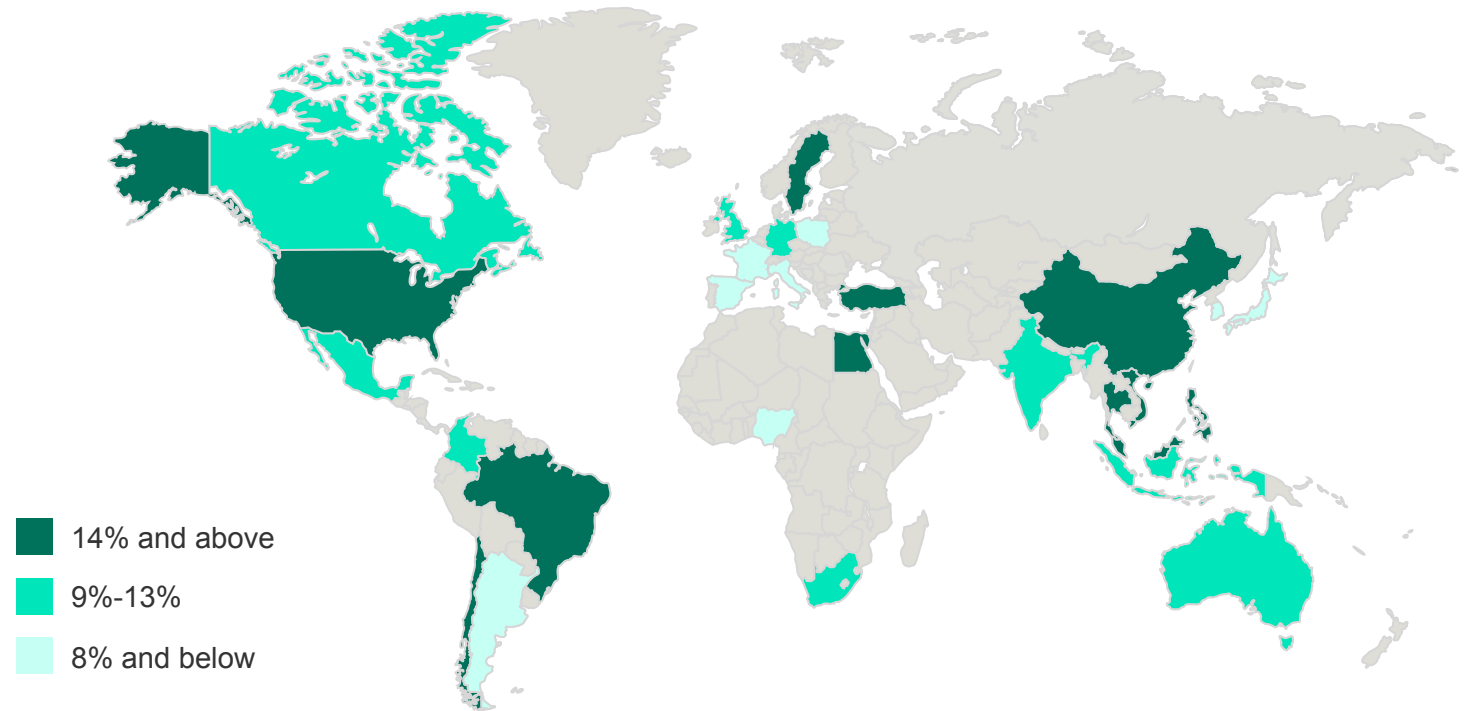


Racial/ethnic minority

**22%**

(vs. 10% non-racial ethnic minority)

### % in each market who have a learning or thinking difference



## More companies are addressing the needs of neurodivergent consumers

With increased awareness of learning and thinking differences, some brands are changing their packaging or environments to better cater to neurodivergence. Many of these changes such as clearer fonts on websites, more white space on labels or lessening certain sensory stimuli are being hailed as improvements everyone can benefit from.



**U.S.:** Last summer, during the back-to-school season, **Wal-Mart** tried to make their stores more friendly to neurodivergent consumers. They turned down the music, lowered the lights and changed the TV section to static screens. Due to positive feedback, Wal-Mart has decided to continue this program by offering sensory-friendly hours from 8am-10am. During those hours, Wal-Mart intends to make the stores more calming and easier on the eyes and ears.



**Italy: Spa pharmaceuticals** are committed to making their packaging more friendly to people with vision-related disorders, reading difficulties and the elderly. Their packaging has adopted the typeface **Biancenero** that is easier for people with dyslexia to read. They also increased the amount of white-space on their packaging and have implemented color coding for different drugs for easy recognition.



**Indonesia: Grab**, a leading rideshare service in Indonesia, recently introduced a feature called “Quiet Ride,” wherein drivers provide respectful silence throughout the ride. The feature is especially valuable for people who have auditory processing issues or who find themselves easily overstimulated—for them, Quiet Ride isn’t just a way to avoid a potentially awkward conversation. It’s a way for them to comfortably and confidently leverage ridesharing.