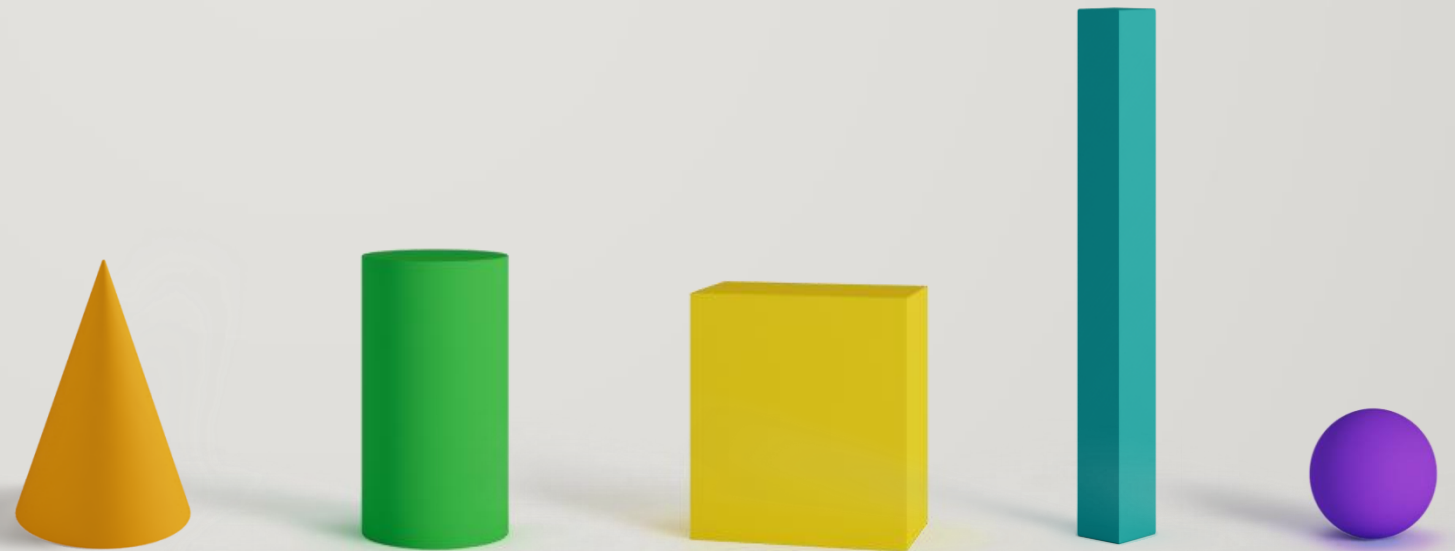


Neuroinclusivity in the Workplace

Survey Results



Introduction

Neurodiversity, or neurodivergence, refers to differences in human cognition that affect functions such as sociability, learning, or attention. It comprises a range of conditions such as ADHD, autism, and sensory processing disorders.

As diagnoses continue to rise across the world, so too does awareness. Younger generations are entering the workforce with greater knowledge and acceptance of neurodiversity than ever before.

Even with this cultural shift in understanding, typical work environments can still pose challenges for neurodivergent individuals that most people do not experience to the same degree – or at all.

With as many as 15% to 20% of the U.S. population thought to be neurodiverse, employers have a strong impetus to grasp how the workplace can evolve to serve neurodivergent people more effectively.

Our Survey

In conjunction with a [four-part blog series](#) on workplace strategy and planning for neuroinclusivity, Savills issued an anonymous survey to better understand how workplaces function for neurodivergent employees today. Our survey consisted of 25 questions about employee experiences and preferences in their work environment.

Our aim in collecting this data was to provide employers with a snapshot of how well workplaces are adapting to the needs of their employees, both neurotypical and neurodivergent. With this information, we hope to expand our understanding of what an inclusive workplace looks like.

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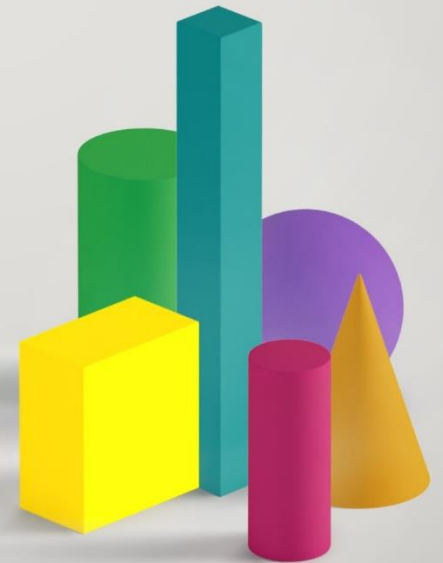
01

Methodology and Respondent Demographics

To preserve space, we have abbreviated the following terms throughout the text:

Neurodivergent or neurodiverse will be labeled as “**ND**”

Non-neurodivergent or non-neurodiverse will be labeled as “**non-ND**”



Why Neuroinclusivity?

In our [four-part blog series](#), we shared our perspective on planning, design, and change management principles that can help employers create a more productive workplace for neurodiverse employees. Our research revealed a knowledge gap in understanding how neurodiverse individuals experience the workplace today and whether employers are meeting needs appropriately.

We believe there is an urgency for employers to comprehend neurodiversity and how it will impact the workplace.

Why Now?



Increased diagnoses

As of 2020, 1 in 36 children was diagnosed with Autism Spectrum Disorder (ASD) compared to 1 in 150 in 2000.* As these generations progress and join the workforce, employers will need to understand what helps ASD and other neurodiverse employees stay productive at work.



Persistent unemployment

Eighty-five percent of college graduates with autism were unemployed as of 2019**, creating missed opportunities for companies to hire skilled labor.



Competitive advantage

Neurodivergent employees offer companies a diverse range of exceptional skills, from attention to detail, to creative aptitude and advanced mathematical comprehension. Studies, such as one from JPMorgan***, have shown improved team and company performance where neurodivergent employees were hired.

*Centers for Disease Control and Prevention

**MarketWatch

***Chartered Institute of Personnel and Development

Methodology and Geographic Distribution

579

Respondents

25

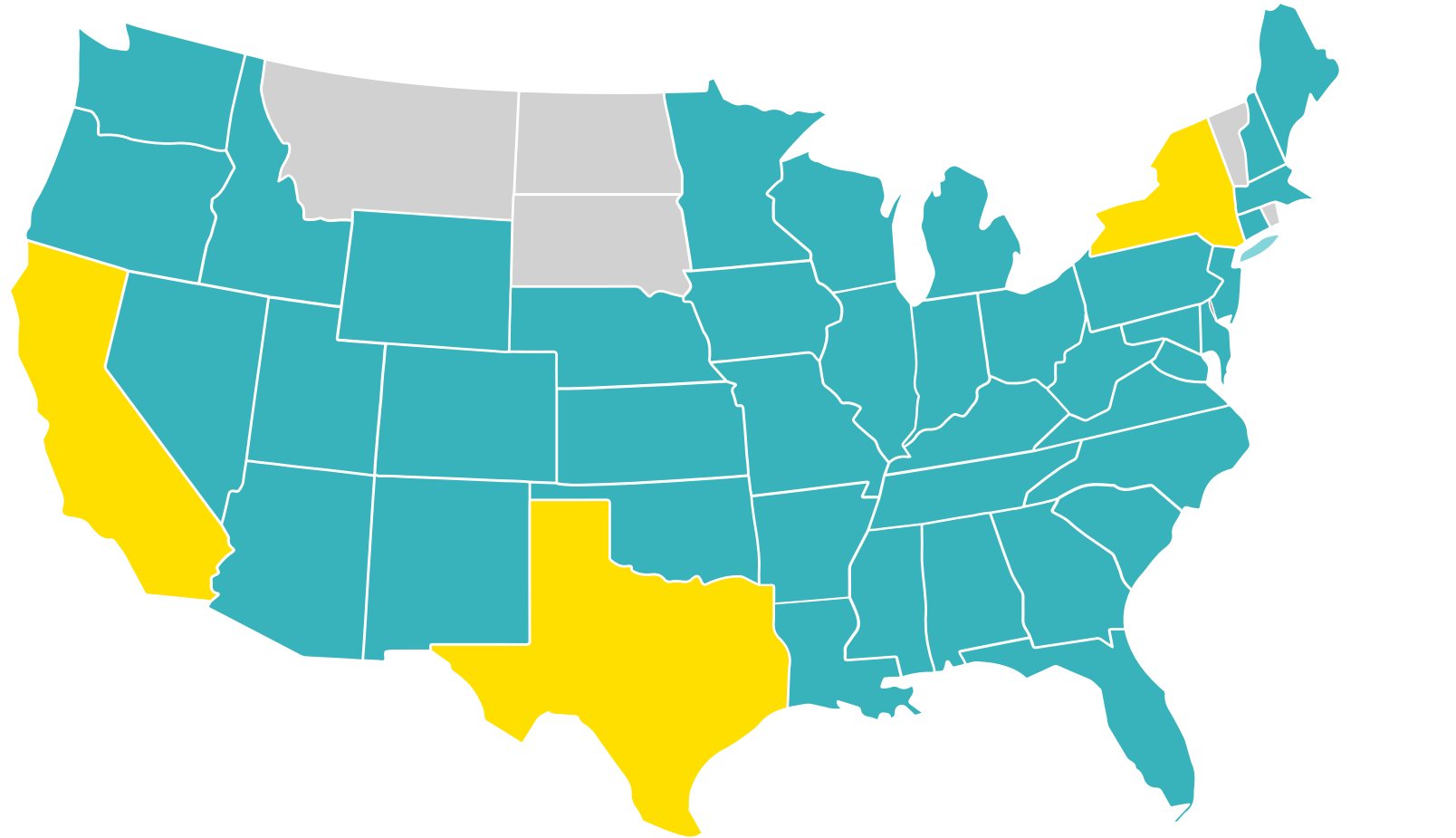
Survey Questions

Timeline

April to June 2023

Process

We developed an online survey of 25 questions focusing on people’s existing and desired workplace environments. We aimed for a 50% response rate from individuals who identify (either from a medical or self-diagnosis) as neurodivergent with the goal of comparing neurodivergent respondent preferences with those of neurotypical respondents.



Geographical Coverage

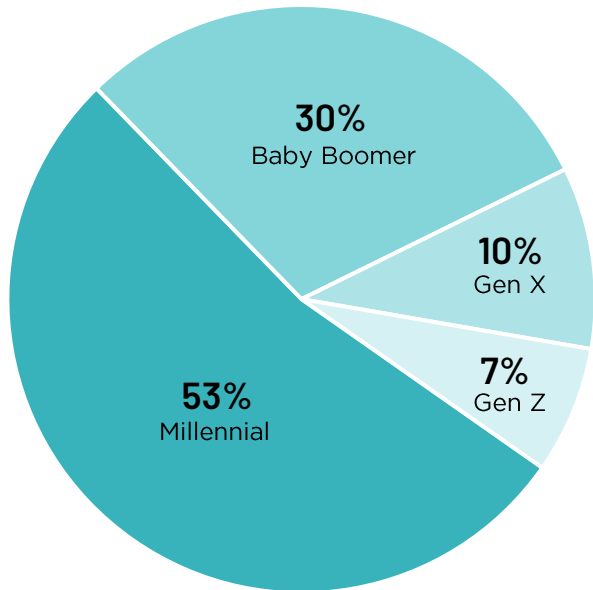
■ 45 Surveyed States plus Puerto Rico ■ Top 3 States ■ States Without Respondents

Respondent Demographics: Generation and Neurological Type



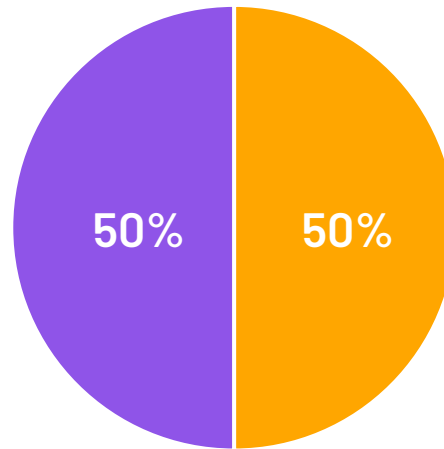
Generational Groups

% of total respondents

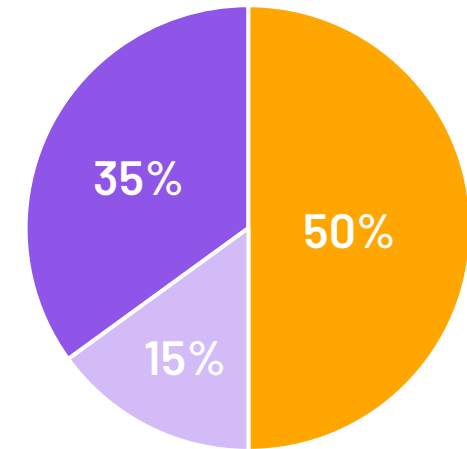


Baby Boomer	1946-1964
Gen X	1965-1980
Millennial	1981-1996
Gen Z	1997-2012

Respondent Neurological Type



■ ND ■ Non-ND



■ Medically diagnosed with a neurodivergent condition ■ Non-ND
 ■ Self-diagnosed or identifies as neurodivergent

50%

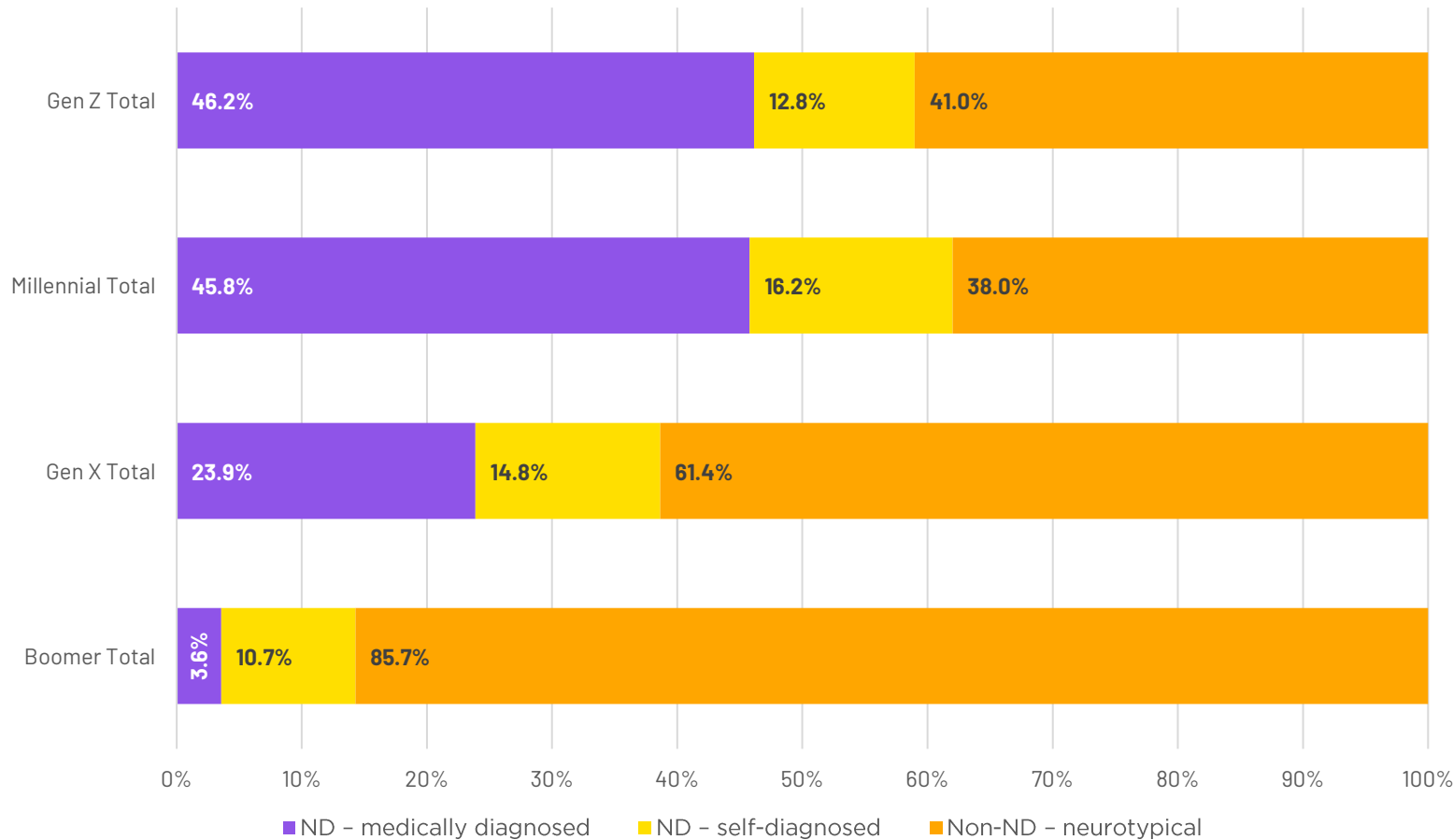
of respondents in this survey identify as neurotypical and **50%** indicated "neurodivergent"

We asked respondents who chose "neurodivergent" to further describe if they had been medically diagnosed with a neurodivergent condition or if they personally identify with being neurodivergent. The chart above shows a breakdown of all categories as a percentage of overall respondents.

Respondent Demographics: Neurological Type by Generation



Response by Generation



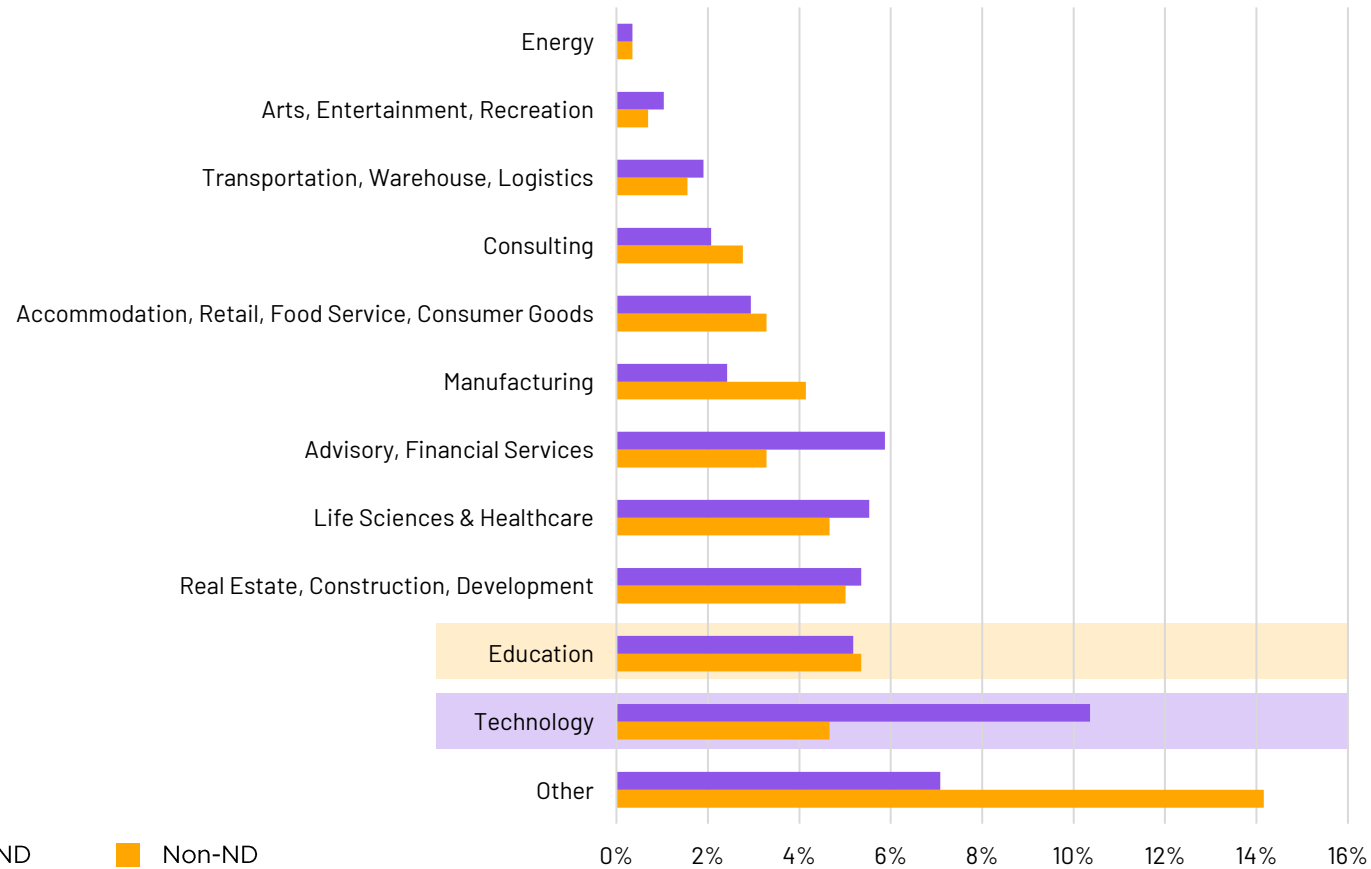
Neurological Types: By Generation

- Both Millennial and Gen Z had the highest rate of identifying as ND at **62%** and **59%** respectively.
- Gen X had **39%** responding as ND and **14%** of Baby Boomer respondents indicated they are ND.
- The generation with the highest rate of medical diagnoses were Millennial and Gen Z at **46%**.
- The generation with the highest rate of self-diagnoses was Millennial at **16%**.

Respondent Demographics: Industry



What best describes the industry that you work in?



Industry

Top 3 industries for ND respondents

1. Technology
2. Advisory, Financial Services
3. Life Sciences & Healthcare

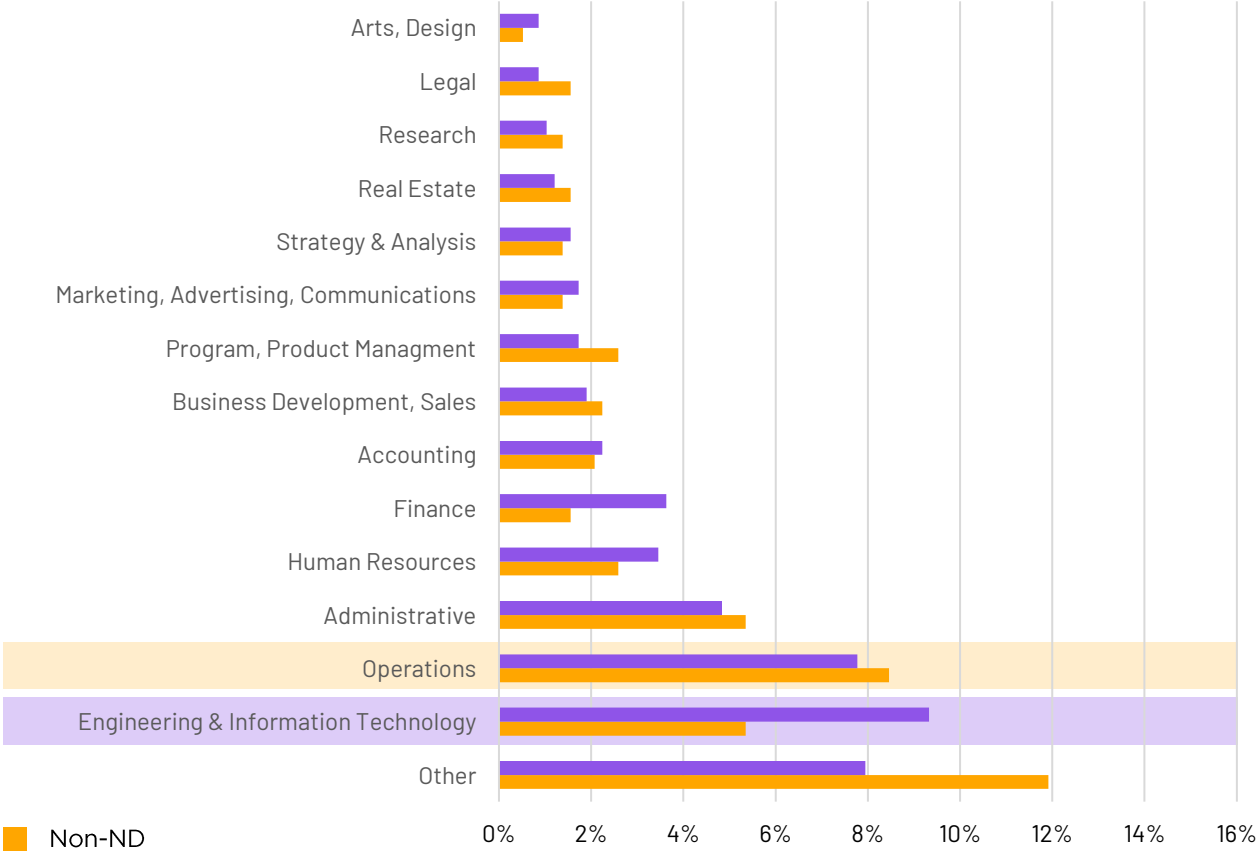
Top 3 industries for Non-ND respondents

1. Education
2. Real Estate, Construction, Development
3. Life Sciences & Healthcare & Technology (tied for 3rd)

Respondent Demographics: Job Function



What best describes your job function?



Job Function

Top 3 job functions for ND respondents

1. Engineering & IT
2. Operations
3. Administrative

Top 3 job functions for Non-ND respondents

1. Operations
2. Engineering & Information Technology & Administrative (tied)

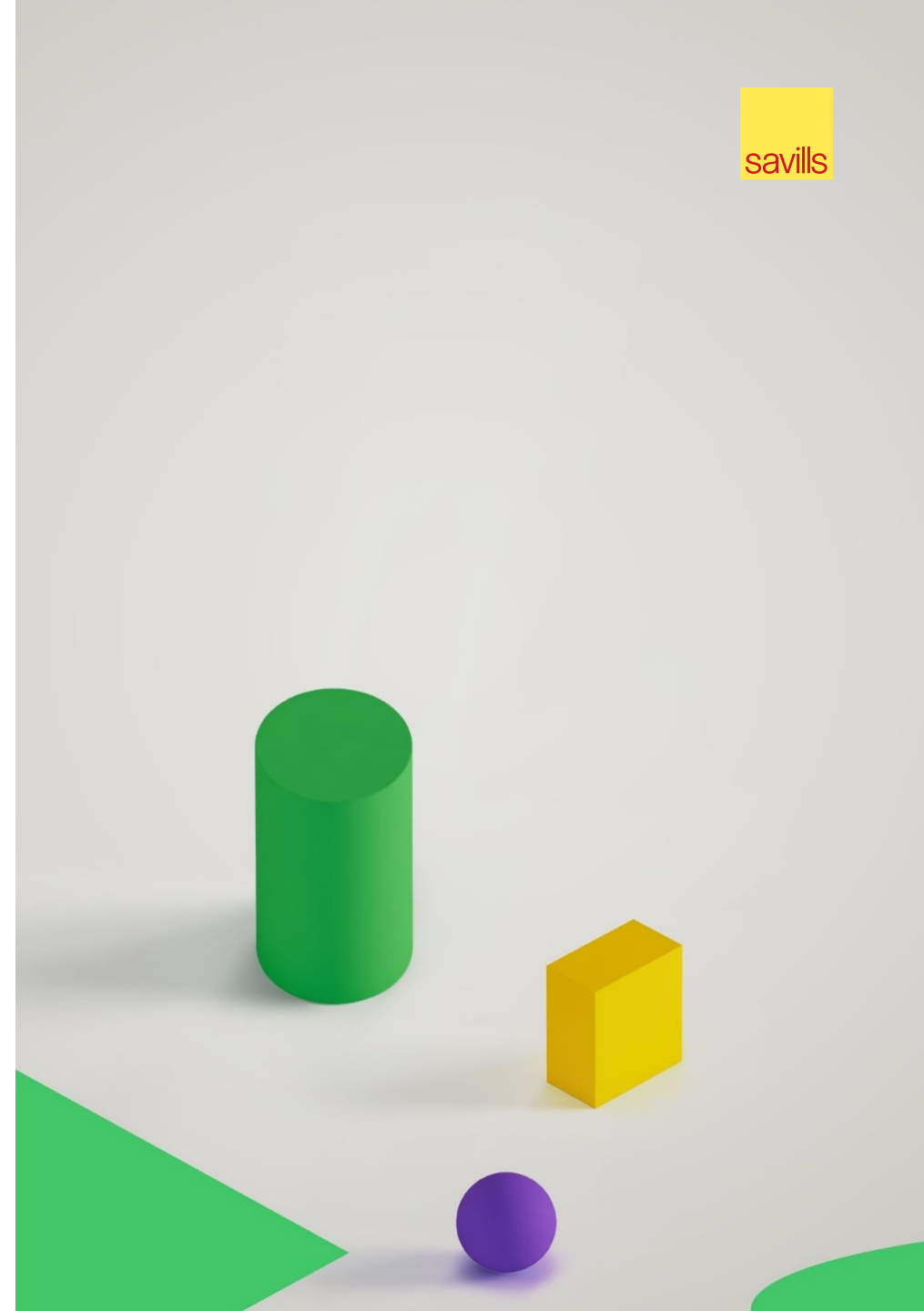
02

Survey Insights

To preserve space, we have abbreviated the following terms throughout the text:

Neurodivergent or neurodiverse will be labeled as “**ND**”

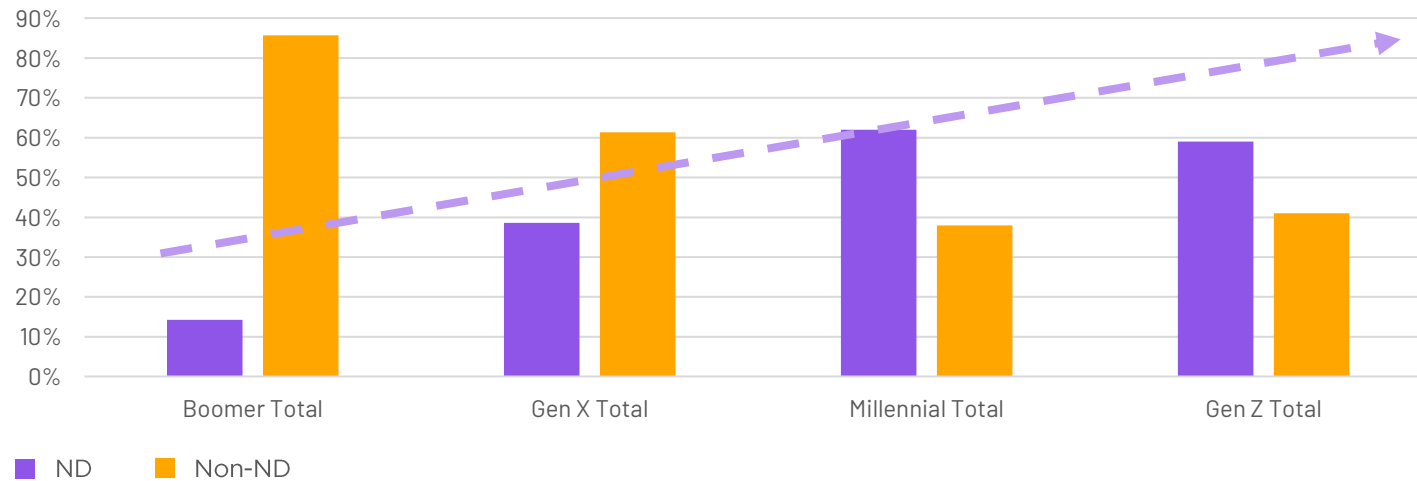
Non-neurodivergent or non-neurodiverse will be labeled as “**non-ND**”



Survey data confirms that diagnoses of neurodiverse conditions are on the rise, which will impact workplace planning for years to come



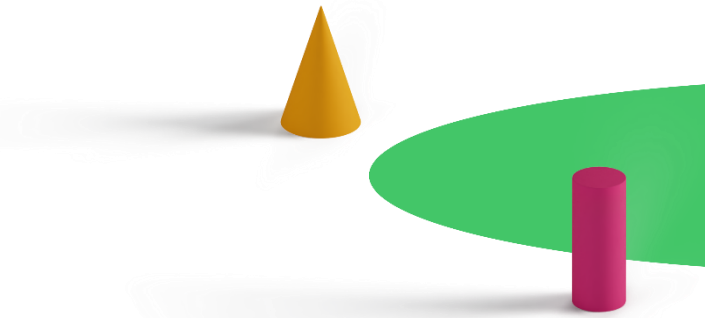
Generation breakdown: % of ND vs. Non-ND



62% of Millennials and **59%** of Gen Z identified with being neurodiverse in our survey
VS.
39% of Gen X and **14%** of Baby Boomers

Our data confirms a well-documented trend: the rate of those identifying as neurodivergent, either through medical or self-diagnosis, is increasing.

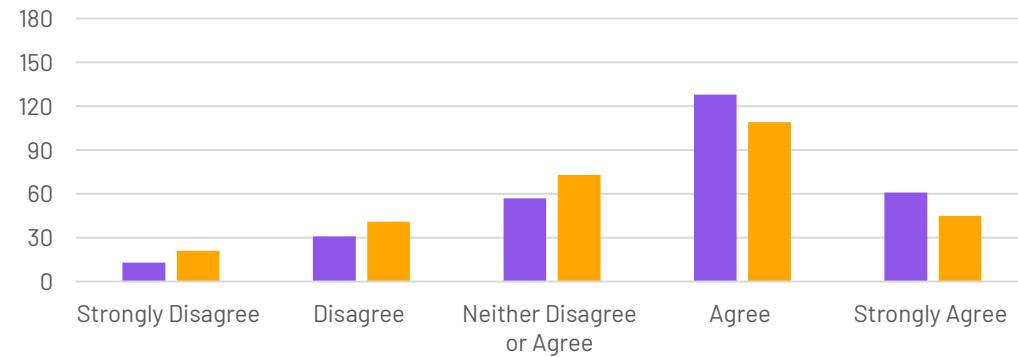
As older generations retire, Millennials progress in their careers, and Gen Z builds a larger presence in the workplace, all employers will need to foster a greater understanding of what neurodiversity is and how work environments can adapt to maximize comfort, inclusivity, and ultimately, productivity for neurodivergent employees.



The workplace is an important social hub for neurodivergent employees...

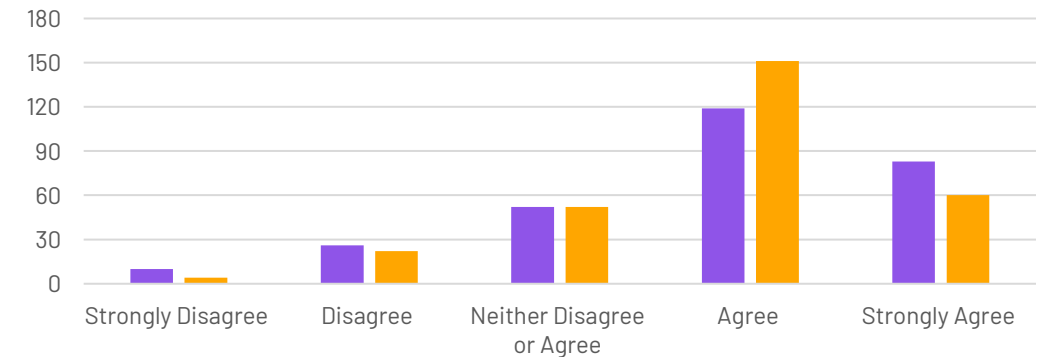


I like to participate in social functions at work



■ ND ■ Non-ND

It is easy for me to make friends at work



■ ND ■ Non-ND

In contrast to common perceptions that ND individuals are averse to socializing, our survey found that more ND people than non-ND people enjoy participating in social functions at work. More ND respondents than non-ND overall indicated that it is easy for them to make friends at work (choosing either “agree” or “strongly agree”).

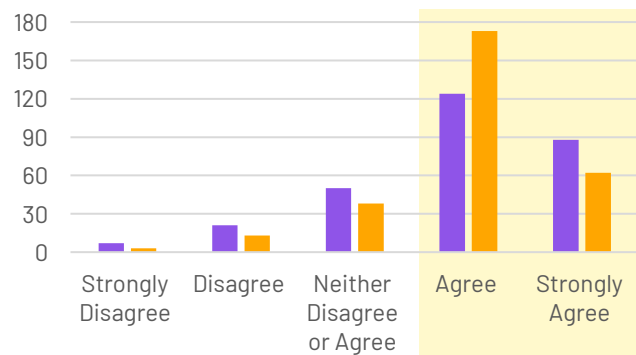
The data shows that the workplace can provide important social structure for ND employees, serving as a valuable outlet for connecting with others and building relationships.

...but more neurodivergent employees struggle with communication at work



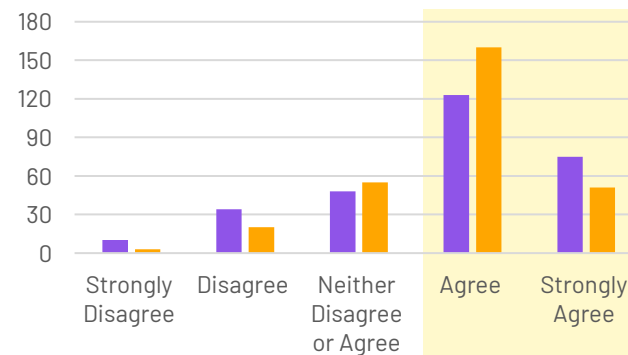
Despite ND employees gaining social benefits from the workplace, they still report experiencing greater difficulty communicating with peers, leadership, and managers. Employers may consider that additional support, training, and professional development around workplace communication may benefit all employees, but ND employees in particular.

Communication with my peers is easy for me



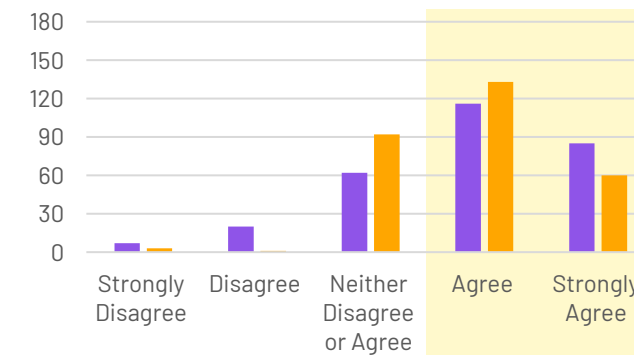
With peers: Overall, more non-ND (81%) than ND (73%) respondents agreed that communicating with peers is easy for them (choosing either “agree” or “strongly agree”).

Communication with leadership/managers is easy for me



With managers: Overall, more non-ND (73%) than ND (68%) respondents agreed that communicating with leadership/managers is easy for them (choosing either “agree” or “strongly agree”).

Communication with those I manage is easy for me



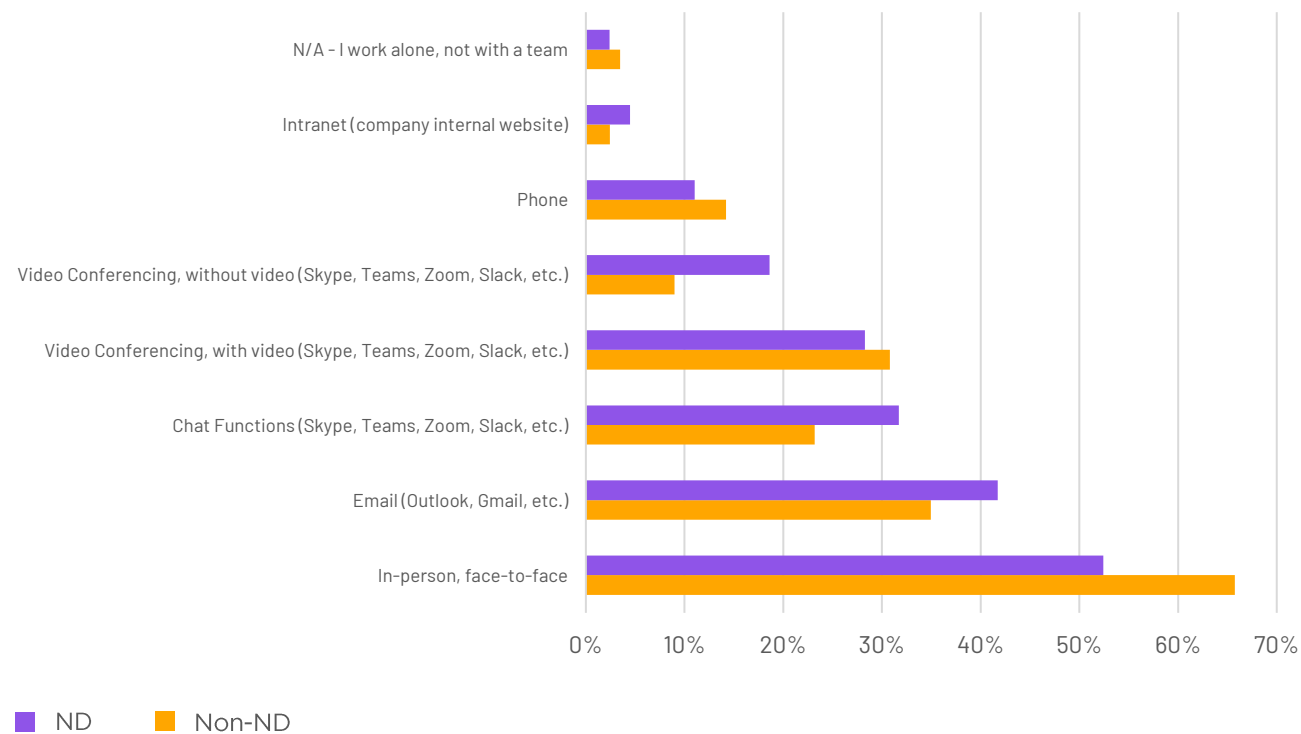
With direct reports: Here, more overall ND respondents (69%) than non-ND respondents (67%) find communicating with those they manage to be easy (choosing either “agree” or “strongly agree”).

■ ND ■ Non-ND

Neurodivergent respondents prefer virtual communication (e.g., emails or chat messaging) for collaboration while neurotypical respondents prefer in-person or face-to-face communications



What type of collaboration do you find most useful when working with a team?



ND respondents showed a clear preference for virtual forms of collaboration:

- Email: 42% ND vs. 35% non-ND
- Chat messaging: 32% ND vs. 23% non-ND
- Video conferencing *with the video turned off*: 19% ND vs. 9% non-ND

Non-ND respondents preferred either in-person or face-to-face communication:

- In-person, face-to-face: 66% non-ND vs. 52% ND
- Video conferencing *with video turned on*: 31% non-ND vs. 28% ND

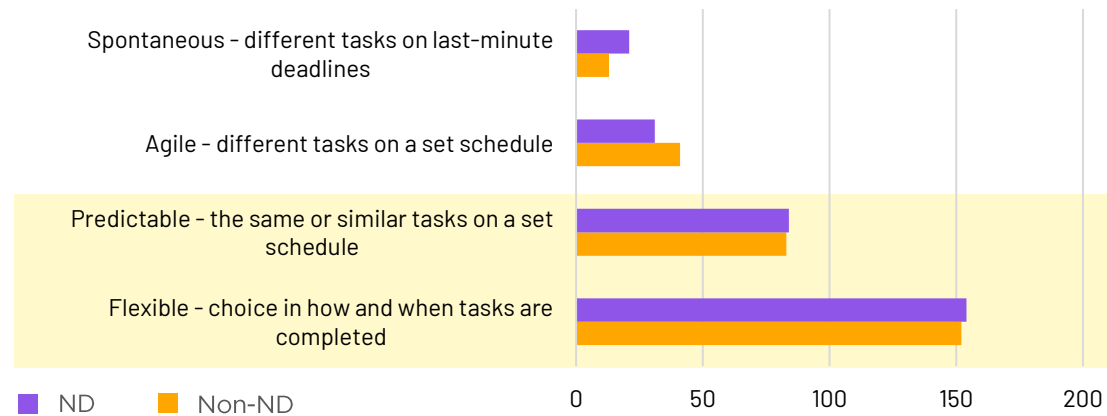
The clear split in preferences illustrates the importance of employers keeping communication options diverse as well as offering flexibility in modes of collaboration. For example, many companies that have adopted hybrid models have had to implement meeting solutions (using both space and technology) that accommodate in-person attendees as well as virtual participants. Flexibility and diversity in communication tools offered will help all employees collaborate in a manner that suits them best.

Autonomy in completing work tasks is important to both ND and non-ND groups

A clear majority of both ND and non-ND employees reported preferring flexibility / choice in how and when tasks are completed. About half as many ND and non-ND respondents preferred predictable, scheduled tasks. ND respondents were also slightly more in favor of spontaneous tasks than non-ND respondents.

Workplaces that adopt flexible work policies may accommodate the greatest number of employees.

Ideally, I work best when my work tasks are:



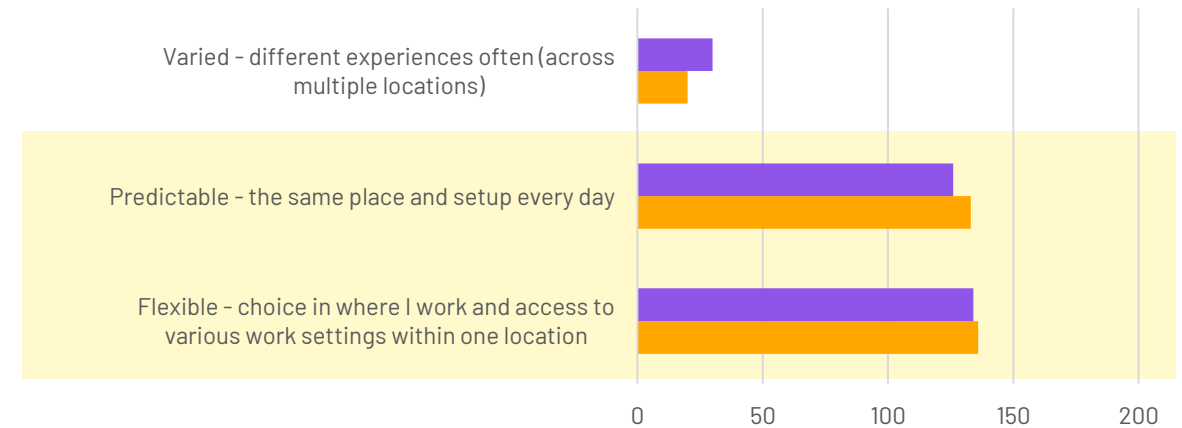
Flexibility and predictability in work setting appeal nearly equally to both ND and non-ND groups



While a slight majority of both ND and non-ND respondents indicated a preference for flexibility in their work environment (defined as a choice in work settings within one location), predictability (defined as same place and same setup every day) was close behind. Notably, whether ND or non-ND, preferences were similar.

While every workplace and employee population are unique, workplaces that are planned to include a range of settings that give people choice, flexibility, and structure, if desired, may accommodate most preferences.

Ideally, I work best when my work environment is:



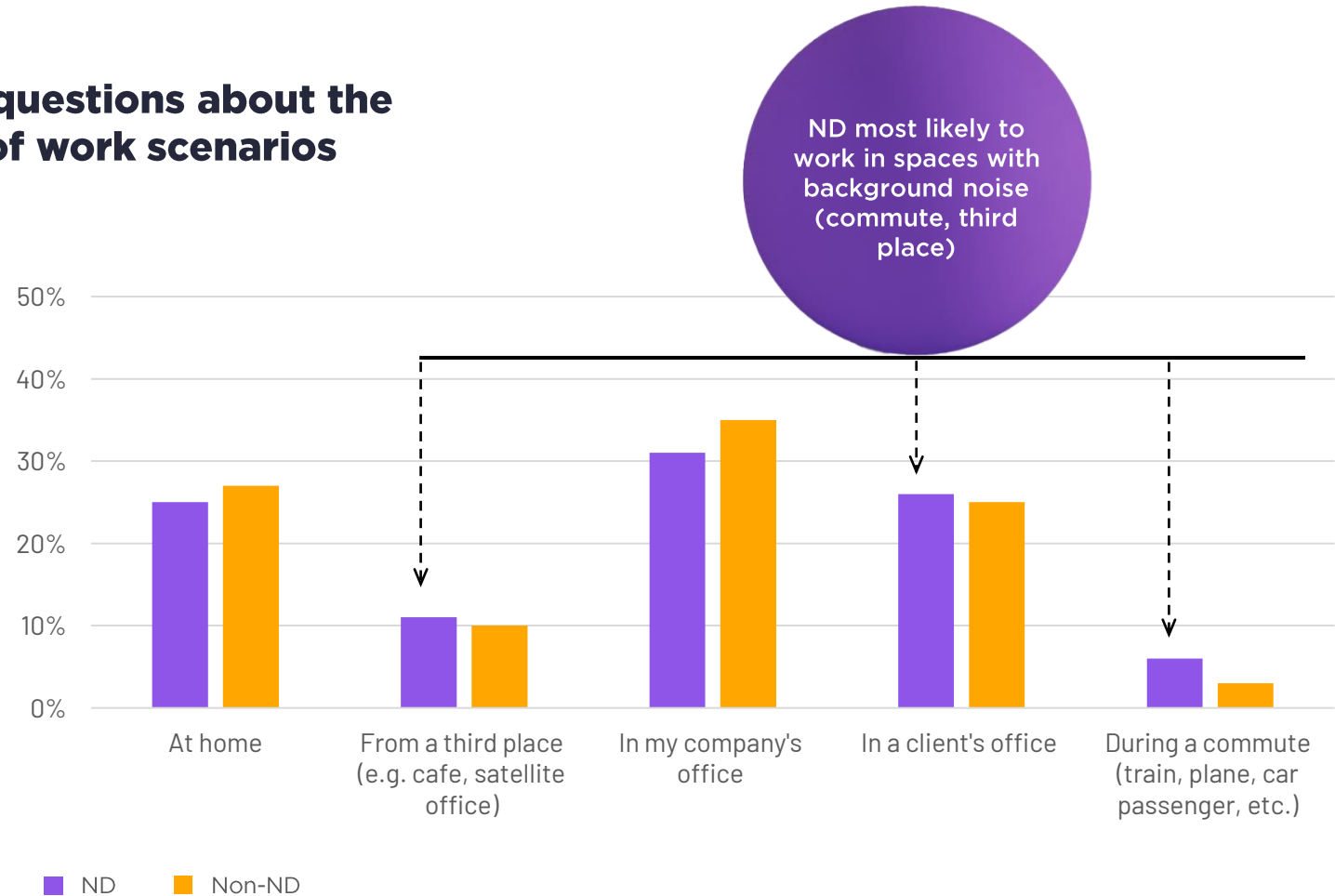
Workplaces could benefit from having a mix of “quiet zones” as well as “background noise zones”

Respondents were asked a series of questions about the level of noise they prefer in a range of work scenarios

For each scenario, ND respondents showed a preference for background noise, such as white noise, chatter, music, or TV. Aligning with this preference, ND individuals were more likely to work on a commute or in a third place such as a café, settings where background noise is common.

Each group still expressed a preference for silence in high numbers across each work scenario, notably for video conferences.

Employers may consider establishing deliberate zones for quiet as well as background noise – such as a café-inspired common space – where ND and non-ND employees alike may choose to work.



A core set of environmental workplace elements are important to all

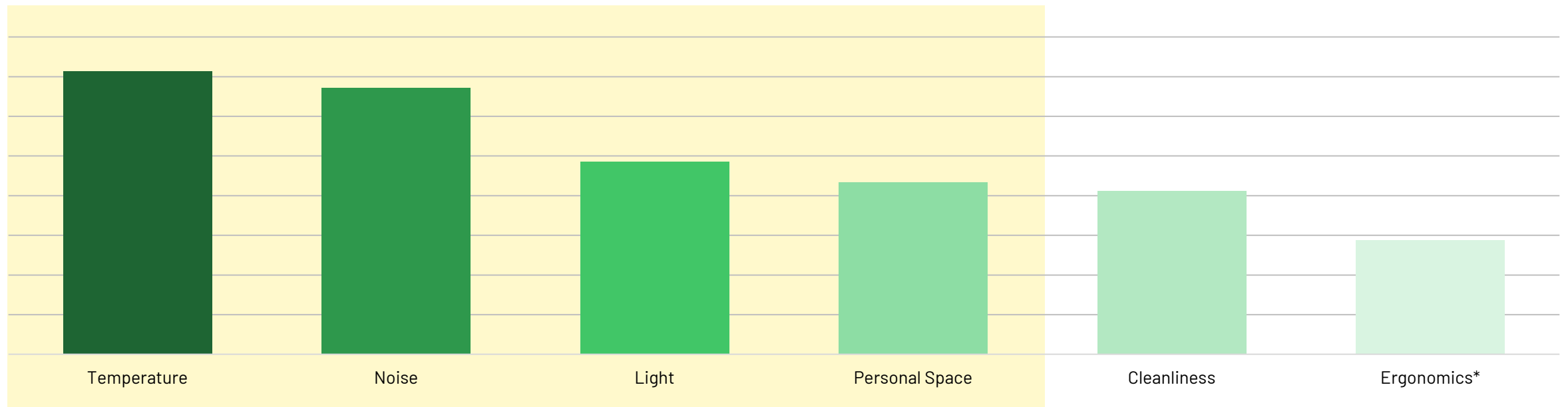


Several environmental factors at work stood out as universally desirable across ND and non-ND groups in our data:

- All respondents ranked temperature, noise, and light as the top three conditions **necessary** for comfort in the workplace.
- All respondents rated spaces for privacy and personal-use technology as **important** features when working.
- All groups indicated natural light was their **preferred** lighting for most tasks.

Workplace conditions ranked in order of importance related to comfort:

Number of Rankings: 579



*Task chair, desk, keyboard, mouse, etc.

Increased access to and awareness of assistive communication tools could help both ND and non-ND individuals with their work

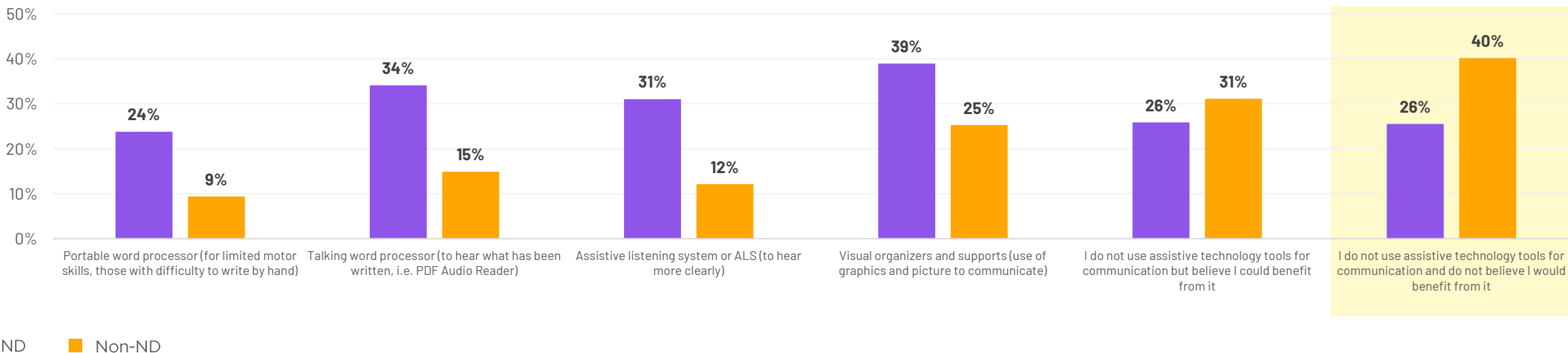


Assistive technology and communication tools for the workplace are wide-ranging. They can help users function more efficiently, such as with reading documents or maintaining focus on tasks. Our survey showed that:

- 39% of ND respondents (and 25% non-ND respondents) use visual organizers and supports.
- 34% of ND respondents (and 15% non-ND) use talking word processors.

26% of ND respondents and 31% of non-ND respondents do not currently use assistive tech but **believe they could benefit from it.**

What assistive communication tools do you use for your work?



Neurodivergent respondents feel more strong and perhaps less flexible in their preferences

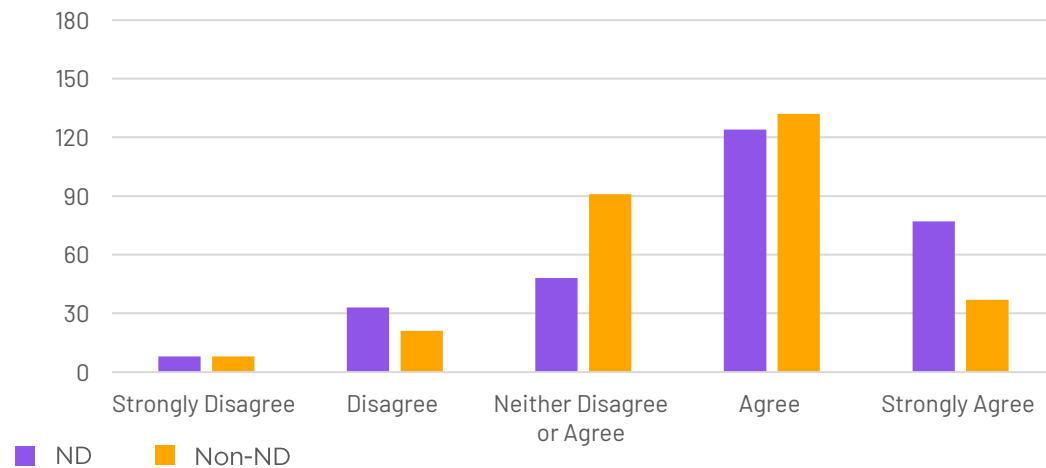


For all questions in our survey, we found that ND individuals tended to respond toward the extreme affirmative. Compared to the non-ND group, the ND group was more likely to indicate “strongly agree” or “very important” versus just “agree” or “important.” Concurrently, we also found that **69%** of ND and **58%** of non-ND respondents agreed that their companies give them opportunities to express their needs. While this is positive, there is still clear room for improvement.

Because many ND conditions comprise a range of symptoms, such as over- or under-stimulation of various senses, ND individuals may feel a stronger need to control or moderate environmental factors that trigger these experiences (for example, feeling overstimulated by bright colors).

The ND group’s stronger expression of workplace preferences across the board may mean that employers will be better prepared to accommodate needs by checking in with employees regularly. Holding listening sessions, establishing advocacy or affinity groups for ND employees, and/or surveying employees at consistent intervals will ensure that all employees, ND and non-ND alike, will have a reliable platform for communicating preferences.

My company provides me with opportunities to express my needs



While most ND respondents (**69%**) and non-ND respondents (**58%**) agreed or strongly agreed that their company provides opportunities to express needs, **companies have ample room to increase engagement** to gain a better understanding of their employees’ preferences.

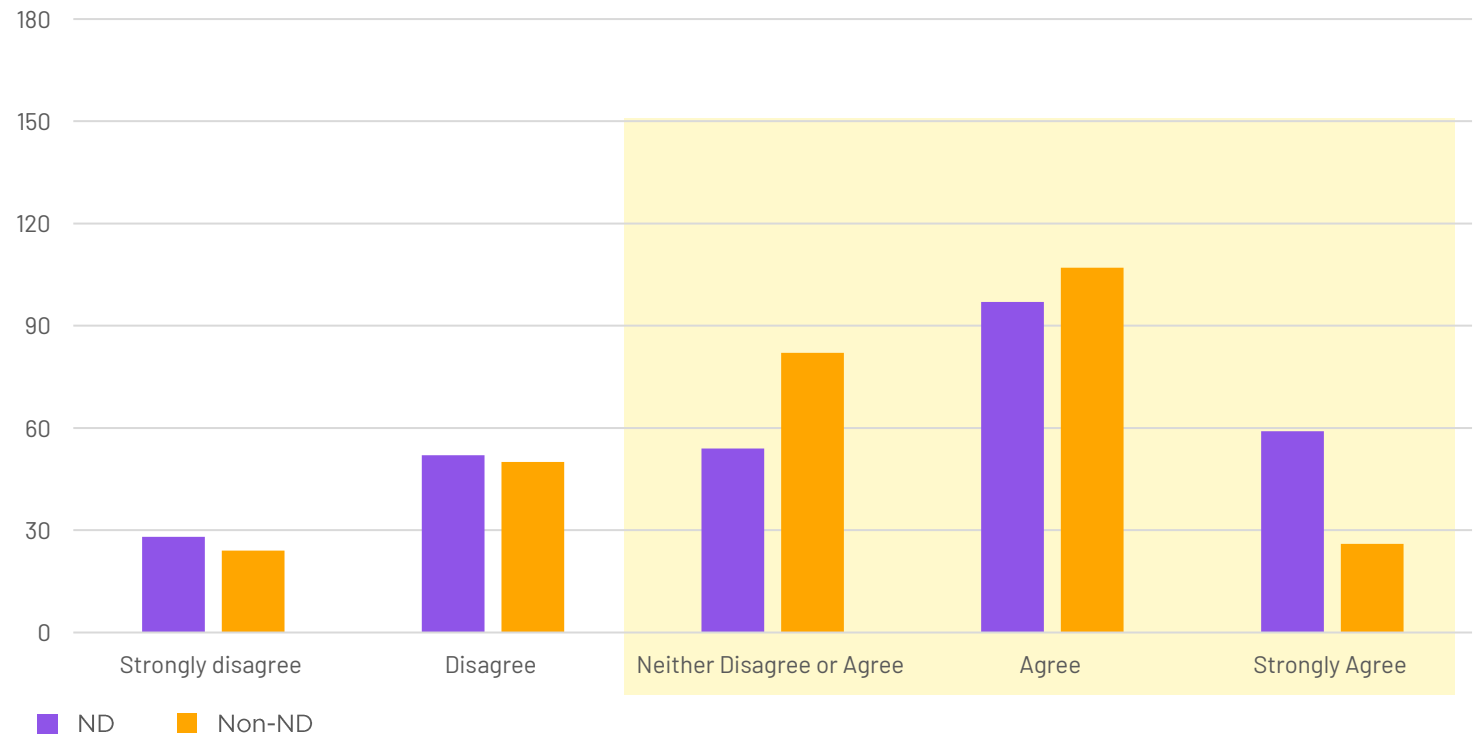
Companies have an opportunity to increase outreach & education on neurodiversity



My company provides education and training about neurodiversity

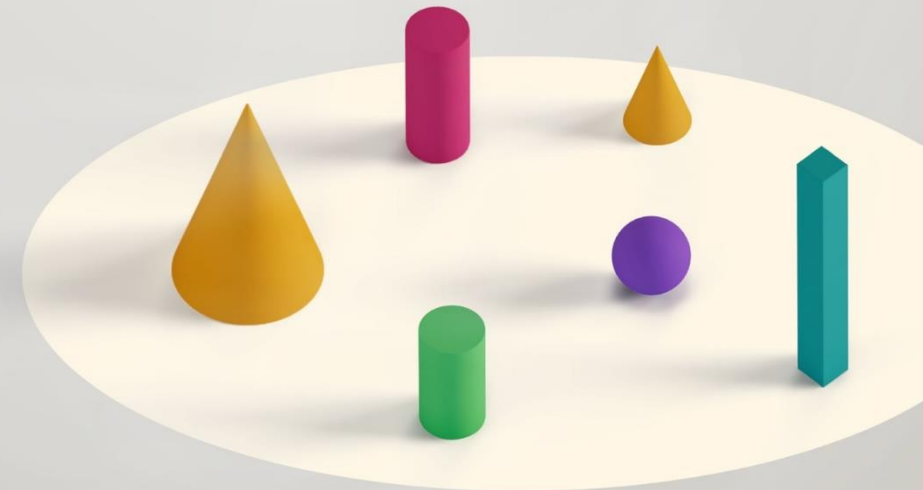
At **54%**, the majority of ND respondents “agree” or “strongly agree” that their company provides **education and training** about neurodiversity, along with **46%** of non-ND respondents.

While this is the glass-half-full scenario, it also means that half of each group had no opinion or disagreed, potentially indicating critical **knowledge gaps about neurodiversity** in the workplace.



03

Key Findings Summary and Recommendations



Key Findings Summary and Recommendations

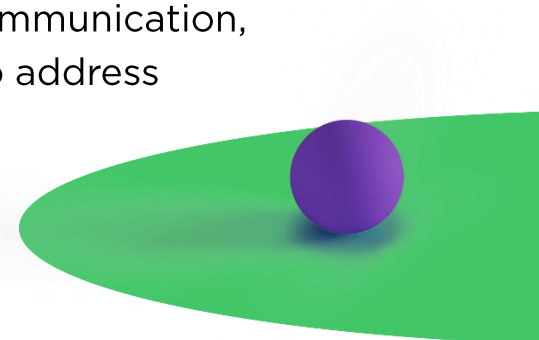


Companies that embrace and plan for neurodiversity now will be better prepared for increasing rates of employees with neurodiverse conditions.

Our data confirms the trend of increasing diagnoses of neurodiverse conditions in younger generations. As these generations enter the workplace in greater numbers and progress through their careers, **employers must take steps to cultivate a better understanding of neurodiversity.** This starts with educating both leadership and sharing knowledge with employees. Taking the time to **gather data on employee needs** and making strategic changes in work policies, workspace, and technology will enable companies to foster a more inclusive workplace that provides flexibility for varying preferences and supports productivity for all.

Close the workplace communication gap. Increase professional development resources that help neurodivergent employees perfect their workplace communication skills and offer a range of communication tools to suit all preferences.

Our survey showed that while neurodiverse employees enjoy the social opportunities of the workplace, most still **find difficulty in communicating with peers and supervisors** – a key component of productivity at work – compared with their neurotypical counterparts. Companies can offer more training opportunities that focus on soft skills, such as effective communication, collaboration, and conflict resolution, to address this gap.



Key Findings Summary and Recommendations

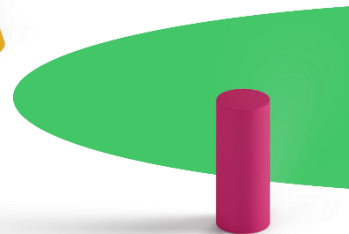


Micro-management is not popular with anyone. Give employees freedom to determine their own work patterns and choice in where they do their work.

All employees showed preference for autonomy in completing work tasks, but **both neurodivergent and neurotypical employees were split down the middle on preferring flexible or fixed, permanent work environments.** Companies should strive to adopt hands-off management styles and provide a diverse range of settings that accommodate needs for both flexibility and fixed working environments.

Background noise can serve as a productivity aid for neurodivergent workers. Deliberately plan both “background noise zones” and “quiet zones” zones to offer choice for all.

Neurodivergent individuals showed a stronger preference for background noise at work, but silence still ranked highly amongst all employees. Deliberately plan a range of spaces that offer different noise settings. Enclosed offices and dedicated quiet areas give some employees the silence they need while work café settings or seating located along the perimeter of gathering areas allows others to get work done in spaces with the ambient noise that they need.



Key Findings Summary and Recommendations



All employees like to be comfortable at work - a reminder to employers to remember the fundamentals in workspace design and planning.

Temperature, noise, and natural light were all ranked as similarly important in a workplace by both neurodivergent and neurotypical employees. Before investing in any higher-level workplace improvements, get back to basics. Do your employees have the fundamental comforts they need in their environment from day to day?

Invest in assistive communication tools and technology.

Nearly half of all neurodiverse employees surveyed are already using assistive communication tools, such as audio readers or visual organizers. One-quarter of neurodivergent and nearly a third of neurotypical respondents were interested in these tools but are not currently using them. **Employers should take the time to research and adopt these technologies that can benefit performance at work.**



Key Findings Summary and Recommendations



Neurodivergent employees may feel their environmental preferences more strongly. Take the time to check in.

Neurodivergent employees were more likely than non-neurodivergent people to **express a strong preference (“strongly agree” or “very important”) in our survey**. Regularly polling employees on workplace issues is already a best practice that employers should follow, but understanding that some employees may have more pressing needs than others is a great excuse to consistently maintain those lines of communication, in the form of town halls, listening sessions, or surveys.

Companies have an opportunity to increase awareness and education about neurodiversity at work.

Only about half of those we surveyed from both neurodivergent and neurotypical groups agreed that their companies **provide education about neurodiversity at work**. With rising diagnoses and a diverse range of conditions and needs, it is time for employers to increase their investment in this area and give all employees the resources and knowledge they need to contribute to an inclusive workplace for all.





Thank you.

For more information, please contact us:



Benay Josselson

Executive Vice President
bjosselson@savills.us



Tonya M. Williams

Managing Director
tmwilliams@savills.us



Kelly Creighton

Director
kcreighton@savills.us



Allison Hochberg

Senior Program Manager
ahochberg@savills.us

