



Neurodivergent shoppers are not opting out of physical retail by preference. New research from Inclusive Change and Nature shows the scale of the sensory gap – and what retailers can do about it.

By Inclusive Change founder Natalie Phillips-Mason.

For years, I've been in conversation with neurodivergent adults and carers of neurodivergent children about what it feels like to shop. The same themes kept coming up. Physical retail, something many people move through without much thought, can be draining, overwhelming, and at times painful. Too often, store environments are still not designed with sensory differences in mind.

When I launched Inclusive Change in 2022, addressing this inequity in shopping experiences was a priority. I wanted to spotlight a different conversation in the retail sector shaped not only by stories – but also by research.

What was missing when I started this work was quantitative data. The lived experiences of neurodivergent shoppers are well documented in community conversations, and have also appeared in mainstream coverage, including *Vogue Business*,¹ but rarely in research. The Retail Sensory Experience, produced in partnership with independent strategic advisory firm Nature, set out to quantify the experiences I'd been hearing about. With 1206 respondents surveyed across two waves (2023 and 2025), it's the most comprehensive dataset on this topic in Australia.

At least one in five Australians is neurodivergent: a broad and diverse population including autism, ADHD, dyslexia, acquired brain injury and PTSD, among others. The research shows, consistently and clearly, that neurodivergent shoppers are having a materially worse experience in physical stores. For retailers, this has real implications when people avoid stores or spend less time in them.

The gap is wide, and it's widening

Thirty-four per cent of surveyed neurodivergent shoppers say they find grocery shopping difficult. Among non-neurodivergent shoppers, that proportion is five per cent. Fifty-three per cent of surveyed neurodivergent shoppers find the pre-Christmas period difficult, compared with 41 per cent of other shoppers. For many neurodivergent shoppers, peak retail periods are difficult enough that avoidance becomes a practical coping strategy.

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|------------------------------------------------------------|----------------------------------------------|
| 34% | 5% |
| of neurodivergent shoppers find grocery shopping difficult | of non-neurodivergent shoppers find the same |

These are not edge cases. A large group of shoppers, including carers, are making a rational decision to avoid stores that are too difficult to be in. The research also suggests this group is less likely to spend time in shopping precincts. Across every category measured, the in-store experience was rated significantly lower than the experiences of non-neurodivergent shoppers. The opportunity retailers are missing is clear, even if the precise revenue impact is harder to quantify.

Noise, light, screens, clutter: the triggers are known

Loud music or **competing sounds** is the top sensory barrier cited by 55 per cent of surveyed neurodivergent shoppers as difficult, compared with 30 per cent of others. Other sensory barriers are strong smells (34 per cent versus 21 per cent), screens playing video content (29 per cent versus eight per cent), fluorescent lighting (28 per cent versus 16 per cent), and excessive signage (26 per cent versus 13 per cent).

In most retail spaces, all these elements are activated **at the same time**.

Many of the levers that retailers use to drive attention and purchase, such as music, screens, lighting, and clutter, can start to work against them when too much is happening at once. Alongside sensory overload, 68 per cent of surveyed neurodivergent shoppers find it hard to ask staff for help (vs 33 per cent). Nearly as many feel pressured when staff approach them to sell (66 per cent vs 35 per cent). More than half struggle to navigate stores, especially when familiar categories have shifted their position (58 per cent vs 33 per cent).

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The changes shoppers want are not complicated

Sixty-five per cent of surveyed neurodivergent shoppers say they would be more likely to visit a retailer with staff who are familiar with neurodivergent and sensory needs. The same proportion would respond to quieter shopping hours on both weekdays and weekends. Clutter-free layouts are the top request in health and beauty (43 per cent). Sensory-friendly hours lead in technology (45 per cent). Self-checkouts, reduced lighting, and wayfinding tools – simple, low-cost changes – also rank consistently across categories.

And the case for action extends beyond the neurodivergent segment. Forty-eight per cent of surveyed **non-neurodivergent** shoppers are put off by layouts that keep changing. Forty-three per cent are frustrated by cluttered floors. Fifty-eight per cent say a quiet shopping hour would benefit them – a figure only marginally below the 70 per cent of the neurodivergent shoppers who say the same. Accessibility improvements, as is so often the case, turn out to be improvements for everyone.

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For brands looking to improve the in-store experience, the first steps are fairly clear: train staff in neuroinclusive customer experience, test quieter hours, review sensory load in-store, and look closely at layout and navigation.

And, as the research makes clear, changes will deliver wholesale benefits for a broader customer base including migraine sufferers, older shoppers, parents navigating busy centres with children – and for neurodivergent staff too.

I launched Inclusive Change because I believed that retail environments could be better for customers and for staff – more human, more considered, more genuinely welcoming. This research tells us that the gap is significant and the case for action is strong. What it needs now is brands, retailers, and shopping precinct developers willing to act on it.

Small changes have the potential to deliver meaningful impact. This has always been true. Now there's the data to back it up.

Download the Inclusive Retail Pulse report here: [Our Research - Inclusive Change](#) and inquire about the 'Sensory-friendly Retail Masterclass'.

About the research

The Inclusive Retail Pulse: The Retail Sensory Experience is a two-wave study conducted by strategic advisory firm Nature in August 2023 and October–November 2025, covering 1206 respondents in total. Each wave included neurodivergent Australians (self-identified, or parents/carers of neurodivergent individuals) and non-neurodivergent Australians aged 15 and over. Research was conducted to ISO 2052:2019 and ISO 27001:2013 standards. All figures cited are statistically significant at the 95 per cent confidence level unless otherwise stated. The research has been endorsed by Aspect Autism Friendly and Hidden Disabilities Sunflower Australia & New Zealand.

Reference

1. Abigail Howe. 'Retail and neurodiversity: Why shops should turn down the volume'. *Vogue Business*, 6/8/21.



About Natalie Phillips-Mason

Natalie Phillips-Mason is the founder of Inclusive Change, a specialist consultancy creating inclusive employee and customer experiences. Inclusive Change offers masterclasses, leadership programs and change management solutions grounded in neurodiversity and proprietary research. Natalie is a speaker and panel moderator, and was recently named one of ReTHINK Retail's Top Retail Experts for 2026.



About Nature

Nature is a strategic insights consultancy. We're in the business of informing tomorrow for our clients and having a positive impact on the tomorrow of our people, our community, and our environment. Our work helps clients develop and maintain the best brands, products, and experiences in an evolving consumer landscape. We do this by providing evidence-based insights and advice to help our clients make more informed decisions.

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