

Inclusive production isn't a values decision.  
It's a commercial one.

**THE**  
**INCL**  
**US**  
**ION**  
**IMPERATIVE**

Presented by



**ATOMIC 212°**

# THE INCLUSION IMPERATIVE

The commercial case for authentic disability representation

## EXECUTIVE SUMMARY

# The Market Has Already Decided. Have you?

Across Australia, brands are losing customers they don't even know they're losing. Not because of price. Not because of product. Because people don't see themselves in the advertising.

A national survey of 2,539 Australians delivers one clear verdict: **inclusive advertising drives brand switching, recommendation, and purchase intent at a scale most marketing leaders haven't accounted for.**

The brands moving now are gaining ground. The brands waiting are losing customers quietly - at the checkout, at renewal, one decision at a time.

15%

of Australians switched to a brand with inclusive advertising in the last 6 months.

Not "considered it."

**Switched.**

53%

are more likely to recommend a brand that advertises inclusively.

That's not a brand sentiment score...  
**that's an NPS driver.**

49%

cannot name a single brand doing disability inclusion well.

The demand is real.

**The competitive space is wide open.**

This report gives marketing leaders what they need to act: the data, the proof points, and a clear path to execution.

The brands that move now aren't just leading. They're shaping the market, claiming a positioning their competitors will spend years trying to replicate.

**The window to lead is now.**

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## Foreword



When I was growing up, I rarely saw myself reflected in the media. Like many people with disability, I watched films, television, and advertising that seemed to exist in a world where people like me simply didn't participate.

That absence sent a powerful message... not about my capabilities, but about the barriers our industry had built, often without realising it.

Today, as CEO of Inclusively Made, I witness a different conversation emerging. Brands and agencies increasingly recognise that authentic disability representation isn't a compliance exercise or charitable gesture. It's a strategic imperative driven by audience expectations and commercial opportunity. The question is no longer whether to prioritise inclusion, but how quickly organisations can embed it into standard practice.

This research provides the evidence base for that transformation. The findings are unequivocal: consumers expect accessible media and authentic disability representation.

They respond positively, and with their spending choices, when brands deliver it. And they react negatively when it feels tokenistic or poorly executed.

I encourage you to read these findings not as a report on what consumers think about disability representation, but as clear market intelligence about how inclusion drives business performance. The brands and agencies that recognise this opportunity today will lead the industry tomorrow.

**Paul Nunnari PSM**  
CEO, Inclusively Made

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# THE INCLUSION IMPERATIVE

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THE OPPORTUNITY

## 1 Why Inclusion Is Your Biggest Untapped Growth Lever

One in five Australians have disability. Their combined household spending conservatively exceeds **\$13 trillion annually** - and that's before you factor in the ageing market.

Together, they don't add to the opportunity: they multiply it.

The \$13 trillion figure predates the significant rise of the neurodivergent community - meaning the true market size is almost certainly larger.

And the ageing population compounds it further. Older Australians are one of the fastest-growing consumer groups in the

world, with significant spending power and increasing prevalence of disability-adjacent needs: hearing loss, vision impairment, reduced mobility.

The brands that act now aren't just responding to demand. They're shaping the market.

## → The Easiest Content Strategy **WIN** Is One You're Probably Missing

# 70%

of Australians say it's important that media content is accessible

Captions, audio descriptions, alt text. This is not a niche request. It is a mainstream expectation — and it extends far beyond people with disability.

The commuter watching on the train with their phone on silent. The parent with a toddler on their lap. The person in a noisy café or a quiet office. Accessible content serves all of them, every day. Which means every dollar you invest in accessible production works harder across your entire audience, not just a segment of it. Accessibility isn't a cost of inclusion. It's a multiplier on every piece of content you make.

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## → Your Customers Are **ALREADY SWITCHING**

**15%** switched to brands with inclusive advertising in the last 6 months

### Read that again.

Not 'said they might consider switching' or 'expressed a preference.' Switched. In six months. Because of inclusive advertising. This is brand churn happening in real time, and most marketing leaders have no line of sight on it.

One in seven of your customers is already evaluating your brand through the lens of inclusion - **and voting with their wallets.** They're not filing complaints or posting about it. They're making a quiet decision at the moment that matters most: the checkout, the renewal, the next purchase. They walk to a competitor who made them feel seen, and they don't come back. And because it happens silently, it won't show up in your dashboard until the damage is already done.

The brands hemorrhaging these customers right now aren't failing on price or product. They're failing on relevance. And inclusion is increasingly where relevance is won or lost.

“ If you want us to buy your product or watch your films, we're going to be more likely to do it if we see people like us. ”

Madeline Stewart, Actress & Comedian

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## → Inclusion Is An **NPS DRIVER**. Full Stop.

More than half your audience is ready to become an active advocate for the brand that gets this right. Not a passive supporter - an active recommender.

**53%** of Australians are more likely to recommend a brand that advertises inclusively.

In a media environment where paid reach is getting more expensive and organic trust harder to earn, that is an extraordinary return on a creative decision.

For any marketer who reports on NPS, this is your number. Net Promoter Score is built on one question: how likely are you to recommend this brand?

A 53% lift in recommendation intent, driven directly by inclusive advertising, is not a soft cultural metric. It is a growth signal. Brands with high NPS grow revenue nearly 2.5x faster than competitors. If inclusive advertising moves recommendation at this scale, the business case writes itself.

## → The Next Gen Of **BRAND LOYALTY** Is Already Being Decided.

**53%** of **18-24 yr olds** more likely to switch to inclusive brands

**50%** of **25-44 yr olds** more likely to switch to inclusive brands

**Younger Australians don't just prefer inclusive brands - they act on it.**

53% of 18-24 year olds and 50% of 25-44 year olds say they are more likely to switch to a brand that advertises inclusively. Together, they represent the dominant consumer cohort of the next two decades, and they are forming brand loyalties right now based on what they see in your advertising.

The brands that show up authentically now are the ones that will earn the loyalty of younger audiences early, and keep it.

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## → The Most **ENGAGED** Audience Is The One You're Not Talking To. **YET.**

**49%** of people with disability consume over 3 hours of media every day - significantly more than the general population.

They are watching more, engaging more, and noticing more than almost any other audience segment.

This is not a passive or occasional media consumer. This is a high-frequency, high-attention audience that is actively engaged

with the content and the advertising they encounter every single day.

And yet advertising continues to overlook them. Not because the reach isn't there. Not because the spending power isn't real. But because the industry hasn't caught up to what the data has been saying for years.

The most loyal customers are often the ones who feel genuinely seen by a brand. This audience is waiting to feel that. Most brands haven't shown up yet.

“ When I was doing my rehabilitation, I didn't really know what I could be. Seeing people with disability showed me the potential of what I could be. ”

Curtis McGarth OAM, Paracanoeist



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BRAND IN ACTION

## BIG W

### BIG W: Making Inclusion Business As Usual

BIG W didn't run one inclusive campaign. They made every production Inclusively Made certified, and never looked back. Inclusion is embedded into standard operating procedure: certified from the outset, not retrofitted at the end. Their studio underwent a full inclusion and accessibility audit, ensuring people with disability can participate fully in the production environment, not just appear in it.



**“ We made every production Inclusively Made from the start... it's so much easier than I anticipated. The framework is so clear and simple that you can confidently pass it on to all team members. ”**

**Vanessa Rowed**, Former Marketing Director; BIG W

Their production partner Hogarth has seen the difference firsthand. As Executive Producer Sofie Matula put it, “partnering with Inclusively Made has helped our production teams better understand what inclusive production looks like in real settings. It's highlighted the everyday barriers people face when accessing work and the importance of creating space for different needs.”

The result is a production culture that is more skilled, more aware, and more capable across every brief. And for BIG W's marketing leadership, the process proved far simpler than anticipated.

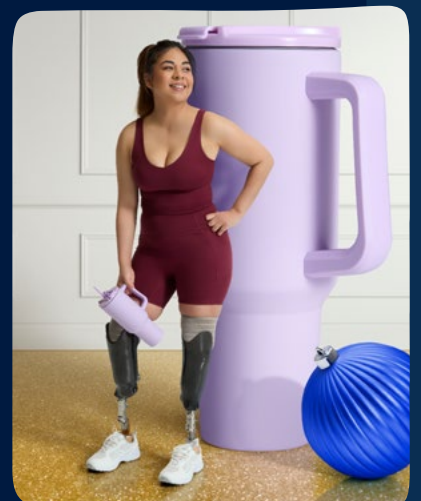


**“ It speaks to who we are as a brand and the future we're building: where inclusion isn't a 'nice to have', it's how we operate. ”**

**Doug Sexton**, Senior Marketing Manager; BIG W



BIG W was named  
**2025 Most Inclusive Brand**



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CONTEXT

## 2 What Consumers See, What They Want, & Where Brands Are Falling Short.

Australians have made their expectations clear:

- They want to see themselves reflected in advertising.
- They want media they can actually access.
- They are paying close attention to which brands are meeting that expectation... and which ones aren't.

The gap between what consumers want and what the industry is delivering has never been more visible. Or more commercially significant.

→ Consumer **DEMAND** Is There.  
Brand Delivery Isn't. That's Your Opportunity.

**49%**

of Australians cannot name a brand doing inclusive advertising well

More than two in five Australians want more disability representation in advertising - rising to nearly half among people with disability. And yet when asked to name a brand they associate with doing it well, half the market

draws a blank. The most common answers are 'none', 'don't know', and 'can't think of any'.

For marketing leaders, this is one of the most significant brand differentiation opportunities available right now.

The consumer desire is proven and the competitive space is wide open. **The brands that move now don't just win a campaign - they win a positioning that is extraordinarily difficult for competitors to replicate.**

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## → Authentic Representation **DRIVES** Purchase Intent.

# 74%

purchase intent increase  
for **25–44 yr olds**

When representation is done right, it moves the commercial needle. For people aged 25–44, authentic disability representation increases purchase intent by 74%. For 18–24 year olds, it's 69%. These are conversion-level impacts, achieved through casting and storytelling choices that cost no more than what you're already spending.

## → The Tokenism trap - And Why It's A **BRAND RISK**, Not Just A PR One.

**Getting disability representation wrong is not neutral: it puts you in the red. The answer isn't to avoid it. It's to do it properly.**

Tokenistic representation actively damages brand trust — and Australian consumers are more sophisticated at spotting it than most marketers realise. The results reveal that consumers aren't just reacting to what they see on screen. They're reading the whole brand.

**13%** of consumers actively avoid brands due to poor disability representation. **That number is growing.**

Two patterns stand out. The top two factors are about what's visible in the ad itself — the casting, the portrayal, the framing. The bottom three go deeper: whether a brand's broader behaviour matches its message. Consumers aren't just watching your ads. They're watching whether you mean it.

### Top 5 ways brands get called out for tokenism:

- #1** Stereotypical or inaccurate representation
- #2** Using diversity for optics or publicity
- #3** Inconsistent actions versus messaging
- #4** Overemphasis on inclusion without substance to back it up
- #5** Lack of lived-experience involvement or consultation

This is precisely what certification addresses. Inclusively Made doesn't just improve what appears on screen - it changes how content is made, embedding lived experience, consistency, and substance into the production process itself. That's the difference between representation that lands and representation that backfires.

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## BRAND IN ACTION



## Bupa Australia: Beyond The Games

Knowing they had the privilege of sponsoring the Australian Paralympic Team in a Games year, Bupa knew the work had to be built on genuine lived-experience insight, not retrofitted with inclusion at the end. They engaged Inclusively Made from the very beginning, going through the full certification process alongside agency partner Thinkerbell to ensure the campaign was created with authenticity and respect.



“ The biggest challenge is fear of speed, cost and quality. Working with Inclusively Made really helped us understand how hard – or not, as it turns out – creating this inclusively was going to be. ”

**Naomi Driver**, General Manager, Marketing & Brand; Bupa Australia

The campaign featured Paralympic athletes not as inspirational symbols, but as people living full lives, with Bupa’s healthcare support as an everyday enabler. The results proved what the data in this report already shows: authentic representation drives brand trust at a measurable scale.

Brand health metrics moved significantly across the campaign period: trust increased from 33% to 37% and consideration from 35% to 39%. Bupa’s association as a healthcare organisation rose from 29.5% to 38%. Among those who recalled the campaign, 78%+ found the message authentic and 69%+ liked the ads. Verbatim feedback captured the impact: *“Bupa is for all Australians... regardless of background.”*



Bupa’s Paralympic Campaign won **Bronze for Inclusivity at the 2025 Cairns Crocodiles Awards**

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SOLUTION

## 3 Who's Doing It Right, & What You Can Learn From Them

The good news: the proof of concept is already in market.

Australian brands are producing inclusively certified content and seeing measurable results. The question is no longer whether inclusive advertising works. It's whether will you lead or follow?

➔ Certified Brands Include Some of Australia's **MOST RECOGNISED.**

Inclusive production isn't a fringe movement. It's where the country's most recognised brands already operate. Across retail, health, finance, telco, and beyond, leading Australian organisations have certified productions through Inclusively Made — not as a one-off initiative, but as the way they work now.

**\$500,990**

contributed directly to people with disability through productions certified Inclusively Made in 2025

And the impact extends far beyond the screen.



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BRAND IN ACTION



## Woolworths: Olympic & Paralympic Campaign

Woolworths' Olympic and Paralympic campaign is one of the clearest commercial proofs that inclusive production and creative excellence are not in conflict - they are the same thing.



“ Our Woolworths Olympic and Paralympics campaign was hugely successful for our brand, earning Gold for effective Olympic and Paralympic advertising. The proof is in the pudding. ”

**Hayley Mein**, Marketing Communications Manager; Woolworths

Created in partnership with Inclusively Made, the campaign seamlessly featured Paralympic and Olympic athletes together. The result: #1 brand in Australia and #3 globally for effective Olympic and Paralympic advertising, as measured by System1.



The Inclusively Made framework gave production teams clear, practical guidance, removing the need for custom problem-solving on every brief. Externally, the certification gave audiences verifiable proof of the brand's commitment.

The result: you don't have to choose between inclusivity and commercial success. Certified production gives you both.

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INCLUSIVELY MADE

## 4 The Framework That Makes Inclusion BAU

**Inclusively Made** is Australia's certification standard for inclusive production. It is not a diversity consultancy or a box to tick. **Inclusively Made** is a practical framework that trains and equips brands, agencies, and production companies to make inclusive work confidently - and as a competitive advantage.

Time to move. Here's how...



### BRAND MEMBERSHIP

#### Brand marketing leaders

Certify your productions as Inclusively Made. Get access to frameworks, toolkits, and expertise that embed inclusive practice into your production workflow from brief to delivery - with third-party validation that your audiences trust.



### AGENCY ACCREDITATION

#### Creative, media & production agencies

Accreditation trains and equips your agency with the knowledge, frameworks, and confidence to deliver inclusive work across every brief. Accredited agencies pitch stronger and lead clients rather than waiting for them to ask.



**inclusively  
made.**

#### Certification = Trust

When shown an Inclusively Made certification label, a significant proportion of consumers say it would increase their trust in a brand, across all demographics, not just people with disability.

Third-party validation cuts through the noise in a way that self-declared commitments cannot. Audiences are sophisticated. They know when a brand is performing inclusion versus practicing it.

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AGENCY IN ACTION

## THINKERBELL

### Thinkerbell: Early Adopter Advantage

Thinkerbell was the first Australian creative agency to achieve full accreditation with Inclusively Made, and the business case has proven itself many times over since.



“ Inclusively Made enabled us to implement inclusive practices seamlessly. Our work now reflects the diverse world we live in, and the feedback from our clients and our team has been overwhelmingly positive. ”

Margie Reid, CEO; Thinkerbell



Accreditation didn't just give Thinkerbell the frameworks to deliver inclusive work. It gave them the confidence to lead client conversations about inclusion, rather than waiting to be asked. They can now scope inclusive briefs more accurately, execute with less friction, and propose inclusive approaches knowing they have the capability to deliver.

They've delivered certified inclusive productions across multiple high-profile clients and categories - proving that inclusion works at scale, not just as a one-off demonstration.



The competitive reality: as brands increasingly mandate inclusive production, agencies without accreditation will be shut out of the brief entirely. The agencies building this capability now are the ones clients will turn to first.



Thinkerbell was named **2025 Most Inclusive Agency**

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NEXT STEPS

## 5 Make The Switch Before Your Customers Do

Your customers are not waiting. They're voting with their wallets.

The question isn't whether you should act. It's whether you'll act before your competitors do, or spend the next three years playing catch-up.

Most brands are waiting to react to inclusion. **The ones that will win are the ones using it to shape the market.** There is a first-mover positioning available right now that is extraordinarily difficult to replicate once it's claimed.

15%

of Australian consumers have already switched brands due to of inclusive advertising

53%

are more likely to recommend a brand that advertises inclusively



### Get started

Book a call to discuss **membership** or **accreditation** for your organisation.

 [inclusivelymade.com](https://inclusivelymade.com)

 [hello@inclusivelymade.com](mailto:hello@inclusivelymade.com)



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## METHODOLOGY

### How This Report Came To Be

The **2026 Inclusion Imperative Report** is based on a national survey of 2,539 Australians aged 18 and over, conducted by Inclusively Made in partnership with Bupa Australia and SONAR, the research division of Atomic 212. The survey was designed to reflect the broader Australian population, with one in five respondents identifying as a person with disability - ensuring the voices of this community were meaningfully represented throughout the data.

Quotas were applied in line with ABS population benchmarks, interlocked by gender and age. Interviews were conducted online, combining prompted and unprompted questions to capture both stated preferences and organic associations.

Throughout this report, findings reflect consumer perception and reported behaviour rather than assessments of individual brand intent or campaign execution.

### Special Thanks To

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## From Our Partners



At Bupa, our purpose is simple: helping people live happier, healthier, longer lives. A better world is one where everyone can participate fully, which is why we're committed to advancing accessibility and equity for people living with disability, not just in healthcare, but across the communities we serve.

We've been proud to work with Inclusively Made since 2023 as a Foundation Partner. This partnership has helped us challenge assumptions, build new capabilities, and embed inclusive practices into the way we create and communicate. It's shown us that true inclusion isn't about gestures, it's about the systems and habits that shape how stories are told and who gets to tell them.

**ATOMIC 212°** At Atomic 212°, we strive to empower our clients with data and insights that enable smarter and more progressive connections to their audience, in an age where authenticity is more important than ever.

One in five people have a disability in Australia, but they are significantly underrepresented in content and behind the scenes. Inclusively Made exists to change that. Through our initial conversations with Inclusively Made we saw significant opportunity to assist in improving representation and inclusivity by providing upstream insights and opportunities to advertiser.

This research confirms what many of us have long believed: audiences expect authentic representation, and brands that lead on inclusion are rewarded with stronger trust and deeper relevance. The most important insight is that inclusion must be built in from the very beginning, not an add-on, but a foundation.

I'm proud of the work our teams and partners are doing, and hopeful this report contributes to a broader shift across our industry.

### Naomi Driver

General Manager, Marketing & Brand; Bupa Australia

As our clients' media partner, we sit on a wealth of data and play a crucial role in defining how brands best reach and influence their audience, as well as how best to consider this when collaborating with media owners. By shining a light on this at the beginning of the comms or media strategy, well before the campaign moves into production, we believe we can make a huge difference in better representation and accessibility throughout the industry. We're incredibly proud to kick off our partnership by completing the research for the 2026 Inclusion Imperative report – establishing the size of the opportunity for advertisers and industry.

### Rory Heffernan

CEO; Atomic 212°

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## Key Terms

Inclusion starts with understanding. These definitions are provided to support clear, confident engagement with this report, and with inclusive practice more broadly.

**Disability** - An umbrella term covering impairments, activity limitations, and participation restrictions. Disability is the interaction between a person's health condition and the barriers in their environment; physical, social, or attitudinal. It includes conditions that are visible and non-visible, permanent and episodic, congenital and acquired. Approximately 1 in 5 Australians live with disability.

**Neurodivergence** - A term describing people whose brains function, learn, or process differently from what is considered neurotypical. This includes, but is not limited to, autism, ADHD, dyslexia, dyspraxia, and Tourette's syndrome. Neurodivergent conditions are not deficits. They represent different ways of thinking and experiencing the world. Visibility and self-identification within neurodivergent communities has grown substantially in recent years, meaning the size of this audience is likely significantly underrepresented in older data.

**Mental health conditions** - Refers to a wide range of conditions that affect mood, thinking, and behaviour, including depression, anxiety disorders, bipolar disorder, PTSD, and others. Mental health conditions may or may not constitute a disability depending on their nature, severity, and impact on daily functioning. They are distinct from disability as a category, though they can intersect with it.

**A note on age** - Ageing is not the same as disability, and it is important not to conflate the two. However, age increases the likelihood of acquired disability, and older Australians are disproportionately affected by conditions that benefit from accessible design; hearing loss, vision impairment, reduced mobility, and cognitive change. This is why the ageing market is a distinct but adjacent opportunity to disability inclusion, not a subset of it.