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Australia

# BAD ROMANCE

**Coal, gas, and  
oil sponsorship  
in the Australian  
Arts Industry**



REPORT PREPARED BY  
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# Executive Summary

The Arts sector contributes

**\$14.7B**

to the Australian economy each year

The Arts sector employs

**193,600**

Australians  
(Australian Institute, 2020)


**9.3m**

Australians create, produce or collaborate in the making of art  
(Australian Institute, 2020)

The arts sector is a crucial cultural component of Australian society, with hundreds of thousands of individual artists, arts organisations, and major institutions located throughout the country.

Nearly every single Australian engages with the arts through the radio, television, and digital media, as well as via attendance at arts and cultural events, collectively generating significant economic impact. The Arts sector contributes over \$14.7B to the Australian economy each year and employs 193,600 Australians (Australian Institute, 2020). The community level impact of the sector is also significant, with 9.3 million Australians (or 45% of the population over the age of 15) creating, producing, or collaborating in the making of art (Australia Institute, 2020).

In addition to public funding support from Governments at all levels, private financial support via organisational sponsorship and patronage is common in the arts sector and represents a significant revenue stream (Daellenbach, 2012). Sponsoring organisations and brands seek to align their businesses, products or services with arts and cultural organisations and events. However, when leveraging these partnerships, it is critical that arts organisations are cognisant of public attitudes towards different organisations and industries, in order to ensure positive brand alignment to preserve both the value of their brands and the reputation of their organisations.



**Sponsorship arrangements  
with companies that extract  
or sell coal, gas, and oil are  
now subject to  
intense scrutiny**

The extraction and burning of fossil fuels is a significant contributor to climate change, and sponsorship from coal, gas, and oil corporations poses a reputational risk for Australian arts events, artists, and organisations. By sponsoring arts organisations, fossil fuel companies can present themselves as socially responsible partners, leveraging the positive image, public trust, and reputation of the arts sector to boost their own image and continue to secure their social licence to operate within Australia.

As the public becomes increasingly aware of the environmental harm caused by certain products and services, other sectors are moving away from fossil fuel corporate sponsors. Sponsorship arrangements with companies that extract or sell coal, gas, and oil are now subject to intense scrutiny as concerns over the impact of climate change on human health, economic inequality, extreme weather, and the environment grow.

Driven by both their own commitment to sustainability and climate action as well as public sentiment and social pressures, many Australian arts and cultural organisations are taking action to reduce their association with the fossil fuel industry. Much like decisions made about funding from other sectors, this requires a reconsideration of the appropriateness of coal, oil, and gas sponsorship and partnerships.

This report examines the current involvement of coal, gas, and oil corporations in arts sponsorship in Australia. By mapping and understanding the nature of these sponsorships, arts institutions can evaluate the impact of fossil fuel sponsorship on their operations and values. Following this, art institutions should develop clear policy that outlines their stance on fossil fuel sponsorship, which is then clearly communicated to stakeholders. To fill the financial void, art institutions should seek alternative funding from organisations that better align with their values and look to build new relationships. Federal and state governments can support this transition, by providing grants and supporting further climate-positive initiatives and actions.

## Summary of Results

Our research shows that from 952 partnerships across 127 Australian arts organisations in 10 major categories, 16.5% of Australian arts organisations have a current sponsor or partner directly linked to the mining (ANZSIG B) and electricity, gas, water, and waste (ANZSIG D) sectors. This represents 21 organisations in total and 2.4% of the total partnerships examined in this report.

Within this wider classification, we find 6.3% of the 127 arts organisations examined in this report have partnerships with fossil fuel companies who undertake coal, gas, and oil extraction. Partnerships with coal, oil, and gas miners include those with symphony orchestras, major festivals, museums and galleries, and dance and theatre companies. The arts organisations are primarily located in Western Australia and the Northern Territory with other organisations based in the Australian Capital Territory, Queensland and South Australia.

For arts organisations, financial benefits present as the most tangible outcome from these partnerships. It is estimated the total value of all sponsorships in the Australian arts sector is between \$220m and \$320m. While fossil fuel sponsorship is only a portion of this, arts organisations risk reputational damage posed by being associated with fossil fuel companies given shifts in public sentiment.

We suggest the relatively small financial value provided by fossil fuel sponsors and partners is important, but could be replaced by arts organisations over time, particularly with increased financial support from governments across Australia into the arts sector. The benefits provided to the coal, oil and gas sector are varied, and include exposure benefits, as well as branding and corporate benefits. However, much like the setting of other sectors, the benefits that arts provides to coal, oil, and gas corporations would be much more difficult to replace for these corporations.



**We suggest the relatively small financial value provided by fossil fuel sponsors and partners is important, but could be replaced by arts organisations over time...**

## A NOTE ON CLASSIFICATION WITHIN THIS REPORT

This report focuses on the current involvement of coal, oil and gas companies in arts sponsorship in Australia. In classifying the industry for this report, we identify coal, oil and gas companies within two areas aligned with Australian and New Zealand Standard Industrial Classifications (ANZSIC):

**Companies aligned with oil, coal, gas mining and extraction. This is located within the ANZSIC Subclassification B. This industry classification group also includes other mining and exploration activities including those related to metal ore and other mining support services.**

**Retail or providers focused on delivery of gas and electricity services to consumers and business at a retail level. This is located within ANZSIC Subclassification D, and broadly includes electricity, gas, water and waste services.**

Noting the above, there is not a perfect local market classification exclusively for fossil fuels. In our analysis, we identify all sponsors across these wider two ANZSIC classifications. However, our discussion of 'fossil fuels' (at mining/extraction or retail provision within the supply chain) are limited to specific hydrocarbon classes including coal, petroleum, natural gas, oil shales, tars and heavy oils (we refer to these as 'coal, oil and gas' in the following sections of the report).

ANZSIC Classification	ANZSIC Subclassification B - MINING	ANZSIC Subclassification D - ELECTRICITY, GAS, WATER AND WASTE SERVICES
Included as 'fossil fuels' in this report (also termed 'coal, oil and gas') in the report	Coal mining (06), oil, petroleum and gas extraction (07)	Electricity supply (26) and gas supply (27)
Not included as 'fossil fuels' in this report	Metal ore mining (08), non-metallic mineral mining (e.g. construction) (09)	Water supply and sewerage, waste (28), collection/treatment/disposal (29) and companies in 26/27 but exclusively retailing solar or hydro services

As a final caveat here, we note and understand there may be organisations and brands with operations across different related business classifications or services (i.e. where an organisation might engage in both extraction and retail services, or in oil supply as well as renewable energy). In addition, there may be cases where ownership of non-fossil fuel classified businesses may be partially held by companies involved in fossil industries. Where possible, we have classified companies on their primary business classification via the companies' own communications.

# Introduction

## Background

The fundamental premise underpinning this report is that the coal, oil, and gas extraction industry—particularly coal, oil, and gas corporations—use sponsorship of the arts to greenwash their climate-damaging activities (Evans, 2015).

When engaging with high-carbon polluting brands, arts organisations play a role in legitimising these industries by providing a platform of support for their businesses. The positive associations with the arts sector via partnerships can mean the contribution of fossil fuel organisations to the climate crisis is hidden, masking the urgency and legitimacy of positive actions taken in other areas related to environmental sustainability, climate action and transition from fossil fuels.

Australia has a thriving arts, culture, media and entertainment industry. 98% of Australians engage in the arts industry and more than 45% creatively participate in arts related activities (Australia Institute, 2020). In a mass of networked connections between and across arts organisations, festivals, galleries, museums and other cultural institutions that include sponsorships, partnerships and shared board directorships among others, fossil fuel companies leverage their engagement with the arts to project a better image of themselves, gaining social license to operate<sup>1</sup> (Kuch et al., 2018). Not only do these sponsorships play a role in enhancing the legitimacy of fossil fuel companies, but partnering with the arts industry provides access to a political network, to influence political messaging, social capital, and how art shapes cultural agendas. In addition, the implications of the sponsorship may result in arts organisations engaging in self-censorship across curatorial decision making to protect the benefits of the sponsors.

Arts sponsorship provides brands and corporations with unique opportunities to align and associate their products and services within personal and targeted arts settings (Toscani & Prendergast (2019). Support from, and engagement and collaboration with the private sector and philanthropic connections is encouraged, with 'Revive', the 2023 national cultural policy acknowledging a 'spectrum of institutions which sustain our arts, culture and heritage' (Office for the Arts, 2023). However, sponsorship by partners, including the coal, oil, and gas industry or other partners seen as promoting products which damage the health of people, or the planet can become particularly problematic.

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<sup>1</sup> A 'Social License to Operate' is held when a project is legitimated by state regulatory agencies and all other social actors who could affect its development and profitability; and when the expectations of proponents with regard to risks and benefits are successfully managed. It is only then that proponents are trusted and seen as legitimate and credible" (Kuch et al., 2018, p.4)



## Scope of Report

The scale and complexity of the Australian arts industry is large. While there is limited evidence of a consistent definition of “arts sponsorship” (Toscani & Prendergast, 2019), this report considered existing scope for arts and cultural sponsorship research that has focused on museums (Olkkonen & Tuominen, 2008) as well as orchestras, museums, dance companies, and theatre groups (Gardner & Shuman, 1987). As such, the scope of this report was narrowed to provide a focus on sponsored organisations across the arts sector in ten categories.

- Dance companies
- Festival (Film)
- Festival (Literary/Writing)
- Festivals (Major)
- Festivals (Music)
- Festivals (Other)
- Library (State)
- Museums/Galleries (Arts)
- Symphony Orchestra
- Theatre Companies

Within these categories, we have specifically focused on arts organisations that are major funded organisations or are nationally focused or of national significance<sup>2</sup>. While this does not represent exhaustive coverage of the arts, it provides coverage of the major Australian arts organisations, and importantly the areas of the arts sector that typically attract corporate sponsorship. A caveat here is that given a focus on major or national organisations, there is a more acute focus in the sample on organisations based in the capital cities or regional cities. We note that a number of additional sponsorships do exist in regional areas, especially where fossil fuel production takes place. These may be smaller in scale but can be highly visible and influential in those places. Examples of these are provided in a case study later in the report.

In defining energy and mining sector investment, **we focus primarily on companies that mine or produce fossil fuel emissions from coal, oil, and gas as the major component of their business**. Included here are mining companies active in coal, oil, and gas extraction, as well as wholesale or retail providers of energy services. While included in the report, we do exclude focus on sponsorship from car and aviation companies while noting that transport (including aviation, cars, commercial trucks, buses, and rail) currently represents 18% of Australia's total climate pollution (Climate Change Authority, 2021) and is expected to grow a further 6% by 2030. Also excluded is analysis of the arts' own contribution to climate pollution from air travel, infrastructure, and other energy consuming activities.

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<sup>2</sup> The list of organisations was developed in conjunction with input from academics and industry experts with strong knowledge of the sector and specific organisations within it.

# Coal, gas and oil sponsorship in the Australian arts

## Mapping the problem

To understand where partnerships between the arts and coal, oil and gas companies are found, we undertook a detailed analysis of organisations and industries that undertake sponsorship and partnerships with the Australian arts sector. Further, we explored how coal, oil and gas companies explained their involvement with the arts. We focused only on corporate sponsorship or partnerships, and not funding provided by individual benefactors or foundations.

<b>Dance Companies</b> (11 organisations, 72 partnerships)	<b>Festival (Film)</b> (14 organisations, 131 partnerships)	<b>Festival (Literary/Writing)</b> (15 organisations, 98 partnerships)	<b>Festivals (Major)</b> (8 organisations, 80 partnerships)
	<b>Festival (Music)</b> (7 organisations, 52 partnerships)	<b>Festivals (other)</b> (12 organisations, 79 partnerships)	<b>Library (State)</b> (10 organisations, 49 partnerships)
	<b>Museum/ Galleries (Arts)</b> (21 organisations, 151 partnerships)	<b>Symphony Orchestra</b> (13 organisations, 114 partnerships)	<b>Theatre Companies</b> (16 organisations, 126 partnerships)

Following consultation with arts organisations and groups, in total, we assessed 952 partnerships across 127 arts organisations in 10 categories that included:

Within each organisation, we used publicly available partnership portfolios to investigate links to the coal, oil, and gas industries<sup>3</sup>. Data was taken from arts organisations' and sponsors' websites as well as other public documents (e.g. annual reports, strategic plans, media releases and statements) and is current as of April 2023.

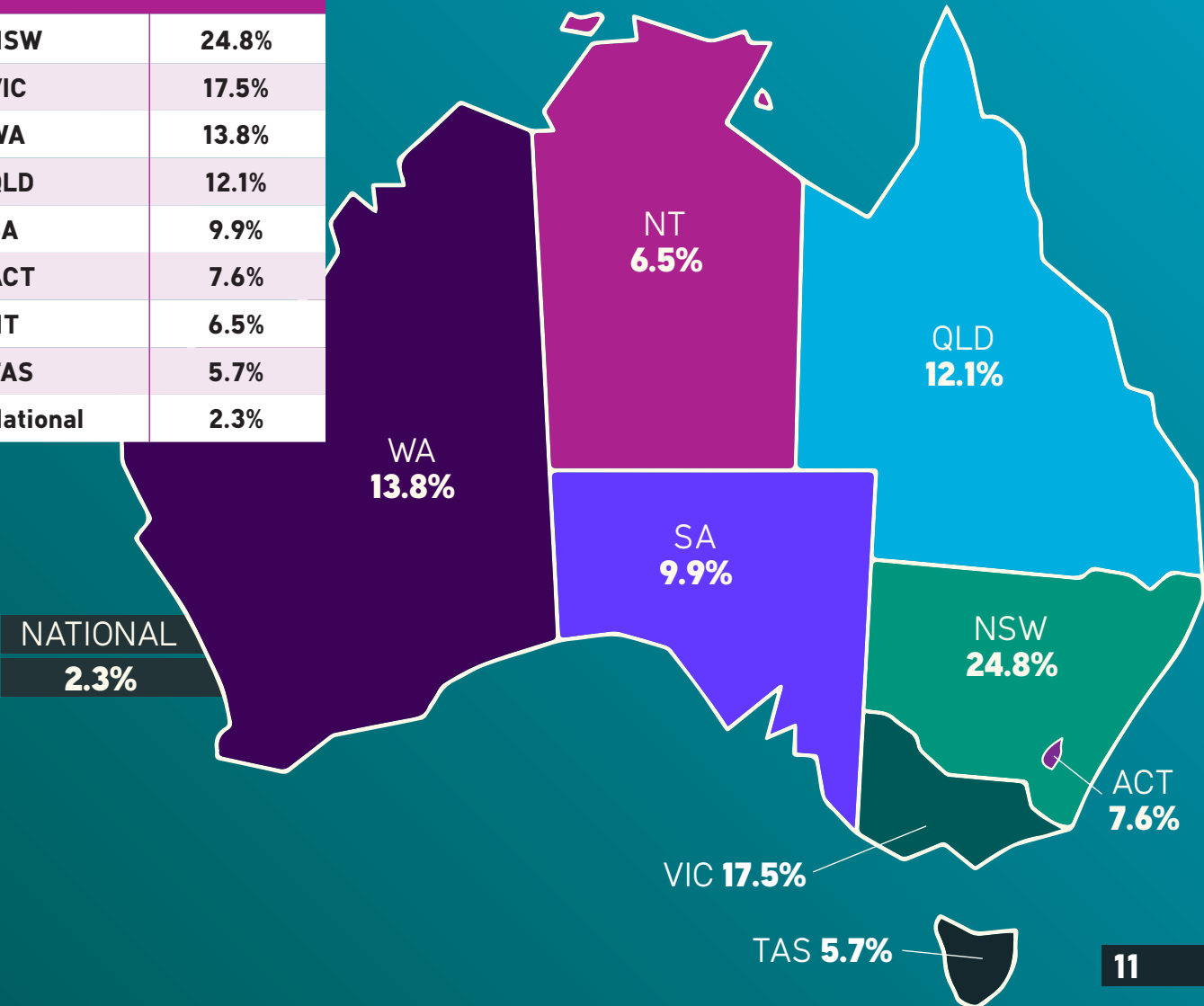
<sup>3</sup> In very few cases where a property had more than 10 partners, we included a maximum of 10 partners, according to the order listed in publically available materials.

Partnerships by organisation type and location can be seen in Table 1. Each state is represented by at least 6% of the sample organisations, with New South Wales (25%) and Victoria (18%) dominant in the sample.

**Table 1:** Partnerships by organisation type and location

Organisation type	%
Museum/Galleries (Arts)	16.2%
Festival (Film)	14.0%
Theatre Companies	13.5%
Symphony Orchestra	12.2%
Festival (Literary/Writing)	10.6%
Festivals (other)	8.5%
Festival (Major)	8.0%
Dance Companies	7.8%
Festivals (Music)	5.6%
Library (State)	5.3%

State	%
NSW	24.8%
VIC	17.5%
WA	13.8%
QLD	12.1%
SA	9.9%
ACT	7.6%
NT	6.5%
TAS	5.7%
National	2.3%



# Understanding sponsorship benefits in the arts industry

## Sponsorship and Partnerships

Sponsorship represents a key revenue stream for the arts sector and cultural institutions (Daellenbach, 2012). Sponsorship is defined as an investment in an activity (whether in cash or in kind) in return for access to the exploitable commercial potential associated with that activity (Meenaghan, 1991; Roy & Cornwell, 2003). Given the profile and interest in the arts sector, corporate spend is significant across the arts sector, both locally and globally, with private support and industry collaboration a focus of ongoing funding and policy discussions across the sector.

Sponsorships are different to other types of partnerships. Specifically, sponsors expect direct and tangible business benefits in return for their investment. This is distinct from relationships like patronship, donations or philanthropic contributions where an asymmetric relationship exists (i.e., one party does not expect, nor receive, a tangible or business benefit). As such, sponsorship is a reciprocal business relationship (both parties exchange something of value), where commercial advantage is sought by one or both parties (Meenaghan, 1991).

Sponsorship of the arts aims to promote target-audience behaviour that benefits society as well as individuals, with broad societal gains the aim when an arts institution is sponsored (Lee & Kotler, 2011). Importantly, there is evidence that sponsorship of the arts is viewed as significantly different from other forms of sponsorship, such as sport sponsorship (Quester & Thompson, 2001). While a grounding in social exchange theory (Tyrie and Ferguson, 2013) and aspects of sponsor-object fit and sponsorship effects are often consistent across contexts (Olsen, 2010), sponsorship of the arts is positioned as being more philanthropic than commercial (Toscani & Prendergast 2019).

The arts industry plays a central role in shaping cultural agendas, as well as political and social change. It is perceived to provide powerful consumer experiences and elicit different emotions (Toscani & Prendergast, 2019). Compared to other sectors such as sport, sponsor benefits in the arts are less influenced by the associated organisation performance (i.e., scandals, athlete mishaps, losses, and league performance), reducing the risk of negative impacts on consumer

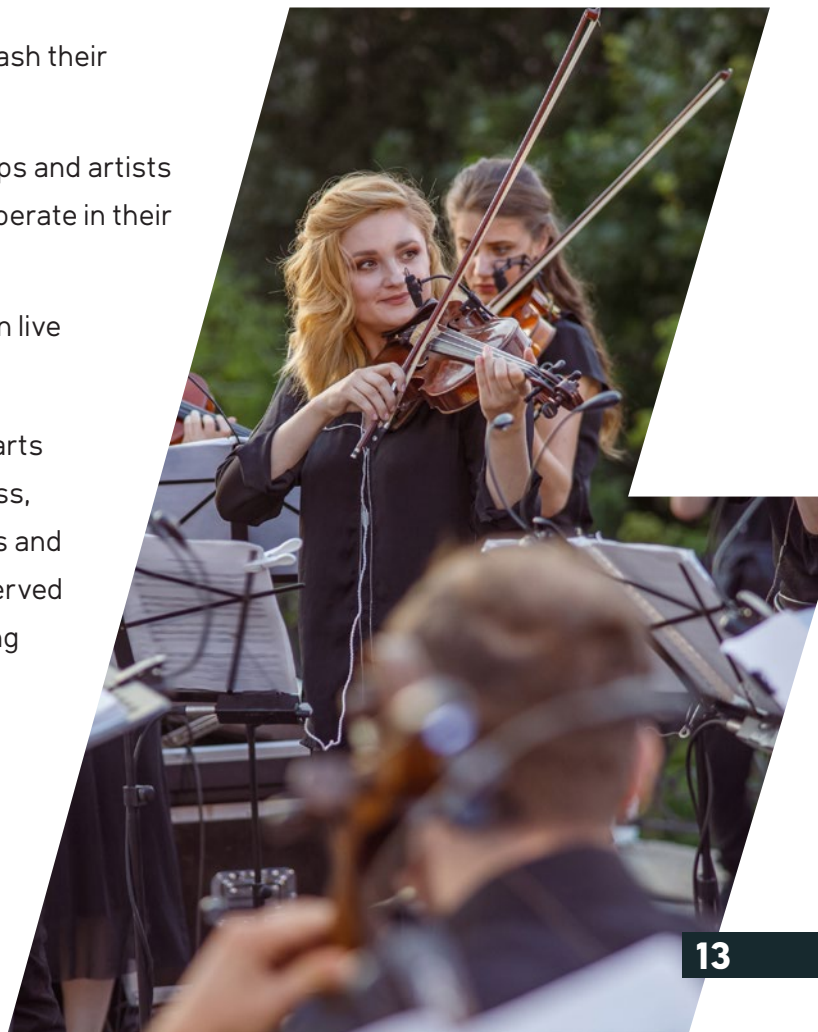
purchase intentions. The relationship between the arts and political activities is long, complex and multi-directional. Sponsors seek to leverage this, with partnerships seeking to not only transfer the positive perceptions consumers have within the arts to the sponsor or partner brands, but also to gain access to key network .

There are multiple benefits or advantages sponsoring organisations seek to capitalise on with sponsorship of arts organisations. Within the Australian market these include, but are not limited to: tangible benefits such as naming rights and brand placements within physical and digital signage and media content; digital and physical advertising opportunities; corporate hospitality benefits; access to databases event or site attendees; and branding opportunities within awards, grants and community programs. In addition, there are less tangible, but still valuable, corporate and brand image related objectives that can be fulfilled within sponsorship activities.

Within this wide mix of benefits, the coal, oil, and gas industry such as coal and gas extraction companies may use sponsorship of the arts specifically to:

- improve their corporate image and brand more generally, at times ensuring no negative associations to their brand via contractual clauses within the sponsorship,
- communicate with audiences, either to share or integrate messages or build awareness of their companies, operations, or services,
- utilise the soft power of the arts to greenwash their operations and climate action credentials,
- align their brands with community art groups and artists to build support for their social license to operate in their local communities, and
- access corporate hospitality benefits within live events.

More generally, fossil fuel sponsorship in the arts provides opportunities for companies to access, interact with and influence community leaders and politicians, while fossil fuel executives have served on the boards of arts organisations, influencing their decisions and policies.



# How extensive is coal, oil, and gas involvement in the arts?

Table 2 shows the industry type of all mapped partnerships. From 127 organisations with 952 partnerships, 16.5% of Australian arts organisations have a current sponsor or partner directly linked to the mining (ANZSIG B) and electricity, gas, water, and waste (ANZSIG D) sectors. This represents 21 organisations in total and a total of 23 partnerships, or 2.4% of the total partnerships examined in this report.

**Table 2:** Number of partnerships by industry

Industry	%
Consumer Services <sup>4</sup>	39.9%
Charity, Government, Not for Profit	30.8%
Travel (Travel, Airlines, Hotels, Agencies)	8.3%
Consumer Goods and Retail	8.3%
Financial Services	3.8%
Other	2.6%
Industrial, Construction and Transport	2.5%
Mining and Energy <sup>5</sup>	2.4%
Auto (Cars, Tyres, Sales)	1.4%

Within the combined mining and energy supply sectors, we include both fossil fuel and oil and gas mining and extraction companies. Table 3 provides an analysis of partnership by sub-industry (providing a more nuanced understanding of each industry or category).

<sup>4</sup> Includes fast moving consumer goods, and brands and products spanning food, drinks and alcohol, electronics and retails brands and stores

<sup>5</sup> Includes four groups in ANZSIG B and D: 1) Mining/Extraction – Coal, Oil and Gas (Fossil Fuel); 2) Mining/Extraction – Metals; 3) Provider/Distributor (Gas, Electricity), and; 4) Provider/Distributor (Solar/Hydro)

Within the mining and energy sector<sup>6</sup>, the 16.5% are separated as:

- **6.2% of arts organisations with partnerships with fossil fuel (coal, oil and gas) related companies (9 partnerships in total)**
- **6.2% of arts organisations with partnerships with companies who are retail and wholesale providers of electricity and gas (9 partnerships in total)**
- A further 4.0% of arts organisations with partnerships with mining companies involved in metal and other resources mining (i.e., not directly related to fossil fuel extraction) or solar / hydro providers (5 partnerships in total)

**Table 3:** Number of partnerships by industry and sub-industry

INDUSTRY AND CATEGORY	PARTNERSHIPS	%
<b>Auto (Cars, Tyres, Sales agents)</b>	<b>13</b>	<b>1.4%</b>
Auto	12	1.3%
Auto (Tyres)	1	0.1%
<b>Charity, Government, Not for Profit</b>	<b>286</b>	<b>30.8%</b>
Charity	67	7.2%
Foreign Government	4	0.4%
Government	215	23.2%
<b>Consumer Goods and Retail</b>	<b>76</b>	<b>8.2%</b>
Products/Brands (FMCG/Goods/Other)	5	0.5%
Products/Brands (Alcohol)	40	4.3%
Products/Brands (Electronics)	2	0.2%
Products/Brands (Takeaway)	2	0.2%
Retail Brands/Stores	26	2.8%
<b>Services</b>	<b>373</b>	<b>39.9%</b>
Dating	1	0.1%
Education	48	5.2%
Employment	1	0.1%
Entertainment	107	11.4%
Gaming/Gambling	7	0.6%
Health and Fitness	6	0.6%
Healthcare	6	0.6%
Hospitality	9	1.0%
IT	9	1.0%

<sup>6</sup> We note that while the direct mining and energy sector contains 2.4% of all partnerships, we can also identify supporting industries which may, by way of funding or financial support, or provision of infrastructure or other services, contribute to the scope of the problem of coal, oil and gas emissions or impacts.

INDUSTRY AND CATEGORY	PARTNERSHIPS	%
Legal	21	2.3%
Marketing	9	1.0%
Media	81	8.5%
Professional Services	44	4.9%
Property/Real Estate	10	1.2%
Publishing	5	0.5%
Storage	2	0.2%
Telco	7	0.8%
<b>Financial Services</b>	<b>35</b>	<b>3.8%</b>
Accounts	2	0.2%
Banking	15	1.6%
Banking (Big 4)	3	0.3%
Insurance	3	0.3%
Investment	8	0.9%
Lending	2	0.2%
Superannuation	2	0.2%
Property/Real Estate	1	0.1%
<b>Industrial, Construction and Transport</b>	<b>24</b>	<b>2.5%</b>
Construction/Building	4	0.4%
Industrial	15	1.6%
Transport	5	0.4%
<b>Mining and Energy</b>	<b>23</b>	<b>2.4%</b>
Mining (Coal, Oil and Gas)	9	1.0%
Mining (Metals and Resources)	4	0.4%
Supplier/Distributor (Electricity/Gas)	9	1.0%
Provider/Distributor (Solar/Hydro)	1	0.1%
<b>Travel (Travel, Airlines, Hotels, Agencies)</b>	<b>77</b>	<b>8.3%</b>
Airlines	1	0.1%
Tourism	11	1.2%
Travel	65	7.0%
<b>Other</b>	<b>26</b>	<b>2.7%</b>
Community Group	6	0.5%
Galleries	4	0.4%
Historical Site	2	0.2%
Library	8	0.9%
Other	4	0.4%
Personal	2	0.2%

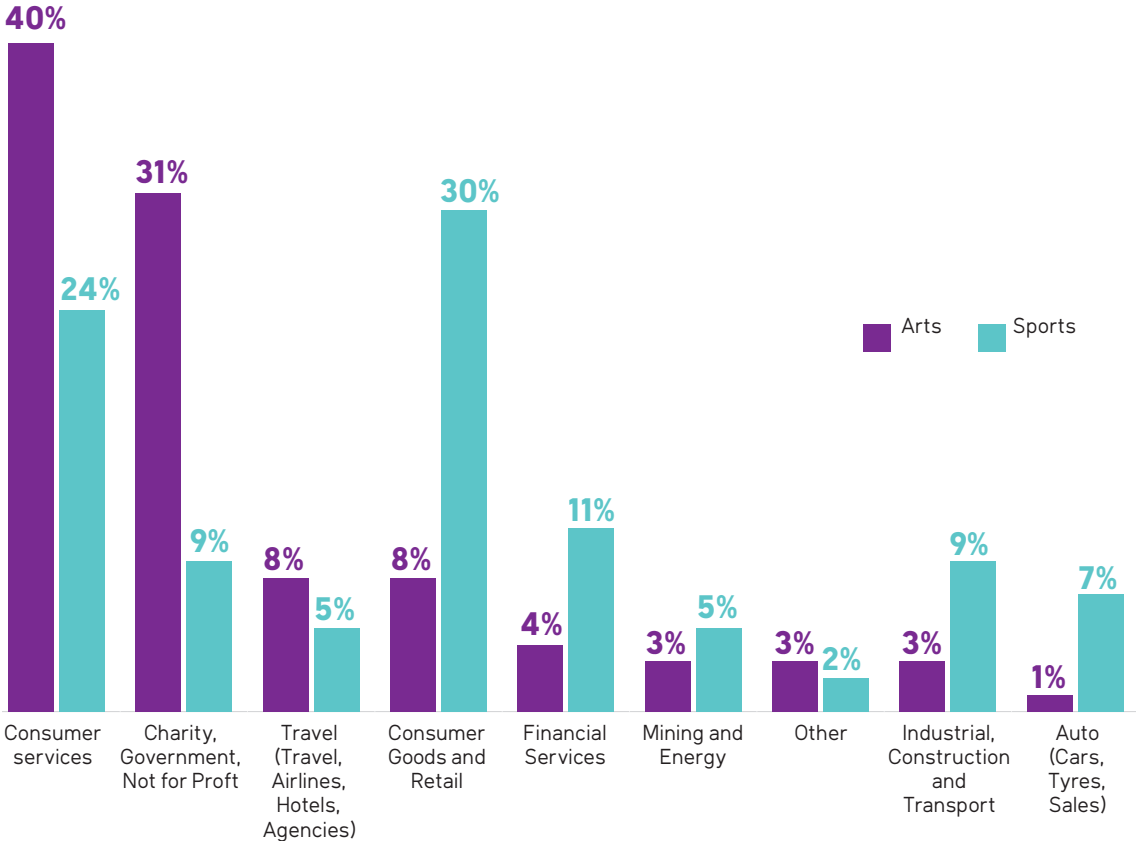


Comparisons to other industries provides further context to the results. Considering the market for wider sponsorship in Australia, sport attracts the dominant share of sponsorship. Data collected on sport sponsorship using the same process and method as this report was conducted in 2022. Results in Figure 1 show a comparison of the sectors from where arts and sports sponsorships and partnerships are drawn.

In sum, the arts sector draws more heavily on consumer services, charity, government, and not for profit organisations and sponsors or partners (71% of all arts sponsorships in the sample vs 33% for sport). Alternately, sport is more reliant on financial services; goods and retail brands; construction and transport and auto brands (58% of all sport sponsorship, but only 16% of all arts sponsorship).

Specific to this report, mining and energy was found to represent 4.7% of sport sponsorship investment in 2022 (looking at over 1458 leading sport sponsorships and partnerships), with **1.7% of all sport partnerships attributed to coal, oil and gas miners. For the arts, the current report using the same methodology shows 2.4% of all partnerships are mapped to mining and energy, with 1.0% of all arts partnerships in the sample attributed to coal, oil and gas miners.**

**Figure 1: Arts and Sport: A Comparison of partnerships by industry of sponsor**



# Mining and energy partnerships within the Australian arts industry

The following tables provide the lists of arts organisations who (as of April 2023) have partnerships with organisations in the mining and energy sectors (in line with Australian and New Zealand Standard Industrial Classifications).

The list of partnerships where fossil fuel organisations (coal, oil and gas) and arts organisations are involved are listed in Table 4.

**Table 4:** Organisations with coal, oil and gas (fossil fuel) partners

COMPANY	PROPERTY TYPE	PROPERTY
<b>MINING (COAL, OIL AND GAS)<sup>7</sup></b>		
Australia Pacific LNG	Symphony Orchestra	Queensland Symphony Orchestra
BHP	Museum/Galleries (Arts)	Art Gallery of South Australia (AGSA)
BHP	Museum/Galleries (Arts)	John Curtin Gallery
Inpex	Festival (Major)	Darwin Festival
LandBridge	Festival (Major)	Darwin Festival
Shell	Symphony Orchestra	Canberra Symphony Orchestra
Woodside Energy	Dance Companies	West Australian Ballet
Woodside Energy	Symphony Orchestra	West Australian Symphony Orchestra
Woodside Energy	Theatre Companies	Barking Gecko Theatre Company

Table 5 provides a list of the other arts organisations involved in energy and mining related partnerships. We note here that coal, oil and gas extraction are not publically shown or identified as the primary activities of these organisations. The table shows three groups; energy suppliers or those who are retail or wholesale providers of electricity and/or gas; metals and mining organisations; and solar/hydro energy providers.

<sup>7</sup> Companies here are identified as having coal, oil and gas mining or extraction as a core component of business, or have clear and public links to subsidiary companies with these operations.

**Table 5:** Organisations with partners across other mining and energy sectors

<b>ENERGY SUPPLIERS (Electricity/Gas)</b>		
AGL	Festivals (other)	Midsumma Festival (Vic)
Energex	Dance Companies	Queensland Ballet
Ergon Energy	Theatre Companies	Queensland Theatre Company
Lumo Energy SA	Festivals (Music)	Adelaide Fringe
Power Water	Festival (Major)	Darwin Festival
SA Power Networks	Festival (Major)	Adelaide Festival
SA Power Networks	Dance Companies	Australian Dance Theatre
SA Power Networks	Festival (Film)	Adelaide Film Festival
TasNetworks	Museum/Galleries (Arts)	Tasmanian Museum and Art Gallery
<b>MINING (Metals and Resources)</b>		
FMG Fortescue	Theatre Companies	Black Swan Theatre Company
Fortescue Future Industries	Theatre Companies	Black Swan Theatre Company
Maca	Symphony Orchestra	West Australian Symphony Orchestra
Nyrstar	Museum/Galleries (Arts)	Tasmanian Museum and Art Gallery
<b>ENERGY SUPPLIERS (Solar/Hydro)</b>		
Hydro Tasmania	Festival (Major)	Ten Days on the Island



# Where is coal, oil and gas sponsorship in the arts taking place?

Tables 4 and 5 shows the distribution of mining and energy partnerships by type of arts organisations. Of the coal, oil, and gas partnerships highlighted in Table 4, nine are located across the following:

- Major Festivals
- Symphony Orchestras
- Museum/Galleries
- Dance Companies
- Theatre Companies

Clearly, the majority of sponsorship investment is with state based organisations (e.g. state ballets, festivals or galleries) with the national organisations of the same sub-sector in the sample not supported by coal, oil and gas mining partners. Western Australia and Northern Territory have the majority of reported involvement with coal, oil and gas mining. Queensland, the Australian Capital Territory and South Australia each have one active partnership.

We note that our focus on 952 partnerships and 127 organisations is not a complete representation of the overall sponsorship investment in the arts – there are many other arts events, sites and organisations that attract sponsorship.

Investigation outside of the primary sample of major or state and nationally significant organisations reported here, suggest there remain additional forms of fossil fuel sponsorship or partnership investments in the arts. These examples are often specific investment in local organisations, often in those regional areas where fossil fuel extraction or production takes place. Some examples where locally based mining coal, oil and gas companies are, or have recently been, involved in local, smaller partnerships include:

- The 2022 Mackay Chamber Music Festival, Mackay Show Association, Rock'n Country, Rhythm and the Reef and Whitsunday Voices Youth Literature Festival (Whitsunday Anglican School) sponsored by the Daly Bay Coal Terminal in North Queensland
- Muswellbrook Regional Art Gallery and Muswellbrook Shire Council sponsored by the Bengalla Mining Company
- Gladstone Regional Art Gallery and Museum sponsored by Australia Pacific LNG

While smaller in scale and scope, such partnerships still provide fossil fuel companies with a range of potential benefits they access via their alignment with the reputational capital and brands built by arts organisations.

## **CASE STUDY – Woodside Sponsorship of multiple Arts organisations in WA**

***Woodside – one of Australia’s largest fossil fuel extraction companies – has been actively involved in sponsorships across Australia, with a stated purpose of supporting initiatives that improve knowledge of the environment and cultural heritage.***

### **FORM**

In 2021, the Woodside operated Pluto gas project initiated a partnership with FORM, a not-for-profit arts organisation that aims to build a cultural and creative ecology in Western Australia.

### **Optus Stadium artworks**

Another example of this sponsorship is Optus Stadium, which is surrounded by parkland and features 15 artworks. The project was funded by BHP and Chevron and aligns with the guiding principles of “Our People, Our Land, and Our Sport.” The project aims to create a space for people, gatherings, achievement, and art.

### **Perth Fringe Festival**

However, Woodside has faced criticism from artists in the Perth Fringe Festival, and the company was forced to drop its sponsorship of the festival. Woodside later diverted its funding to Artrage, the company that runs the Fringe event, rather than the festival itself.

### **Youth Symphony Orchestra**

In 2018, the West Australian Youth Symphony Orchestra (WAYS) performed at the annual general meeting (AGM) of Woodside Petroleum, one of Australia’s largest fossil fuel companies. The performance was part of a sponsorship agreement between Woodside and WAYS, which provided financial support to the orchestra in exchange for branding and promotional opportunities.

The decision to perform at the Woodside AGM was controversial, as Woodside has been involved in controversial oil and gas projects, including the proposed Browse LNG development in the Kimberley region of Western Australia, which has raised concerns about its potential impact on the environment and Indigenous communities.

Critics argued that by performing at the AGM, this endorsed Woodside’s activities and legitimises the company’s reputation. Some members of the orchestra and the wider arts community also expressed discomfort with the sponsorship agreement and called for the Youth Symphony Orchestra to refuse funding from fossil fuel companies in the future.

Woodside’s reach into arts sponsorship across Western Australia is comprehensive, including sponsorship as a lead partner for the WA Symphony Orchestra, and additionally sponsoring the WA Ballet company.

# What is the size of the problem? Can the benefits be replaced?

Estimating the Australian arts industry sponsorship market is challenging due to the lack of publicly available information on sponsorship revenue figures and other commercial benefits. The cost of investment in sponsorship rights and additional advertising and promotions to leverage associations with the arts can be included within or outside of sponsorship rights fees, making it even more difficult to assess.

However, based on a conservative estimate, the arts share of the Australian sponsorship market is suggested to be worth around \$220 – \$320m annually. The dataset includes a focus on 952 partnerships – this is not a complete list of all companies but does make up a significant portion of the Australian arts sponsorship market value, and **according to our calculations, 6.3% of arts organisations in our sample partner with companies involved in coal, oil, and gas mining or extraction – a relatively small amount which could be replaced by alternative sponsors**

While the analysis in this report identifies that only a small number of sponsorships are specific to energy and mining corporations (less than 2.4% in total), the benefits reaped by coal, oil, and gas sponsors through their relatively modest investment in sponsorship are significant and unique. They encompass both tangible and intangible gains, such as media exposure, brand positioning and enhancement of goodwill, event hospitality, as well as business and consumer sales, offering sponsors considerable value.

The arts present a distinctive opportunity to achieve many of these objectives, tapping into a compelling cultural setting and generating high involvement among audiences. If coal, oil, and gas firms were to be barred or regulated out of the arts, it would be challenging for them to replicate the benefits of their sponsorship. In comparison, arts organisations could more readily replace this relatively small investment made by coal, oil, and gas sponsors – the cost of doing so may be arduous but not insurmountable.

# Action and opportunities

## Phasing out fossil fuel partnerships

In line with increasing public scrutiny and sectors moving away from problematic partnerships, there is pressure for arts and cultural institutions to cut ties with fossil fuel companies. This mirrors many other sectors, where there has been a history of transition away from certain sponsorships as a result of changing community expectations and government regulation.

The most concrete example in the history of Australian sponsorships was the banning of tobacco sponsorship. This move aligned with global action, where first tobacco advertising, and then tobacco sponsorship, was banned in many markets and industries, including the arts. Per the case study (below), this change in Australia was supported by legislative and policy approaches to supplementing or replacing lost income from sponsorship. Nationally, the Tobacco Advertising Prohibition Act was created in 1992, and resulted in national bans of tobacco sponsorship and advertising for both sport and the arts.

### **CASE STUDY: Tobacco Advertising and the Arts (Source: Tobacco in Australia online resource)**

**Nationally, in Australia the Smoking and Tobacco Products Advertisements (Prohibition) Act was passed on December 28, 1989, which resulted in bans of tobacco related advertising in all print media. Further state level legislation was required for other forms of advertising. New legislation passed in Victoria, South Australia and Western Australia between 1987 and 1990 that sought to outlaw tobacco advertising through both sport and the arts. However, sponsorship of the arts gave tobacco company executives access to politicians in an informal environment at functions associated with cultural events. With tobacco companies sponsoring major opera and ballet companies and many other arts and cultural groups, events and festivals, tobacco advertisements were ubiquitous. Sport became the major battleground for further restrictions on tobacco advertising during the early 1990s, particularly after health promotion foundations in Victoria, South Australia, Western Australia and elsewhere demonstrated that alternative sponsors were not so difficult to attract.**

Specific to fossil fuel partnerships, there is already a trend of cultural institutions reducing their sponsorship reliance on coal, oil, and gas companies. We note here that many have not publicly or expressly attributed the ending of partnerships to a specific focus on divesting from fossil fuels. However, multiple recent examples of arts organisations ending partnerships exist. As Australian examples:

- Santos and Darwin Festival partnership ended following protests from artists and Traditional Owners. Santos informed the festival board that they would not be renewing its sponsorship deal.
- Perth Festival announced their partnership with Chevron would end after years of scrutiny

Internationally, last year saw the London Tate Gallery and BP's long-standing partnership ended after 6 years of creative anti-oil interventions by art collective 'Liberate Tate'. This following several other British cultural institutions (e.g., Edinburgh International Festival, Royal Shakespeare Company, the National Portrait Gallery, Scottish Ballet, the National Theatre, Southbank Centre, the National Gallery, and The Edinburgh Science Festival) all ending fossil fuel funding.

Other worldwide examples of this ceasing of fossil fuel funding include the Canadian Museum of History, American Museum of Natural History, Van Gogh Museum in Amsterdam, Rijksmuseum in Amsterdam and Field Museum in Chicago.

## **Leading and guiding social change and storytelling**

Globally, the arts industry is in prime position to influence social change through film, live performance, music and individual artworks. Through its argument for social justice and storytelling, the arts provides a powerful voice that can shift social and institutional norms. The emergent issue of the appropriateness of fossil fuel funding, and evidence of change, allows the sector to be part of the solution to the climate crisis (NAVA, 2022).

In the arts sector, we see public calls and campaigns against problematic sponsorships, often as individual and group art activism, where artists have contributed to public visibility and support for various issues. Within the arts, this is illustrated by groups such as Art not Oil, a coalition seeking an end to oil-industry sponsorship of the arts, the many films and documentaries designed to raise awareness about climate change and extractivism, and artists bringing pieces into UN climate conferences.



# Funding support and transitioning away from coal, oil, and gas sponsorship

The challenge of transitioning away from coal, oil and gas sponsorship for the arts sector does not appear insurmountable. This report identifies that the current financial support provided by coal, oil, and gas companies into the arts sector is largely limited to state level companies or organisations, rather than large national organisations. This focus is also predominantly concentrated in states or regions with local mining industries.

While there is already evidence of movement away from fossil fuel funding, ending such partnerships will impact short term revenue for arts organisations. In sum, there is a paradox where sponsorship support from certain industries (or its future removal) may challenge art institutions in reaching financial, artistic, and community outcomes. Sponsorship provides a valuable component of overall revenue which the arts industry, among other things, uses to pay artists, reach broader audiences and fund the creation of new work.

The introduction of REVIVE has boosted funding and financial support for the arts sector, after previous years of funding cuts (Australian Government, 2023). Whether the arts are adequately supported is always a contended question. However, there is considerable investment from various levels of government, federal, state, and local funding, as well as many philanthropic and private donations. This demonstrates the perceived value of arts by these funders. As arts organisations seek to divest from coal, oil, and gas sponsorships, further targeted support may be required to support this transition.


Any transition away from coal, oil and gas sponsorship will need to consider how institutions can shift in a responsible and sustainable way. It must also note the potential need for a medium to longer-term timeframe. The road to a transition away from coal, oil, and gas mining sponsorship, as well as wider environmental approaches can be either direct or indirect.

Directly, organisations or brands can remove or reject coal, oil, and gas sponsorships, or actively advocate or illustrate the arts' role in a more sustainable future. Some examples to assist this transitions may include:

- Use creative talents and platforms to raise awareness about the urgency of climate change
- Variation of art forms that can engage diverse audiences in discussions and actions related to climate change
- Encourage arts stakeholders to be advocates for change – lobbying for legislative and social change – use public voice for government, community and individual action
- Follow principles to encourage the adoption of sustainable practices – including those that reduce carbon footprints

Here, the importance of intent for change, versus actions should be monitored. In these instances, the commitments to having environmental policies such as sustainability statements or an organisational climate strategy in place represent an initial step. However, although demonstrating positive steps forward, mere intent for change, as opposed to actions, can be viewed as greenwashing. This is particularly the case where organisations continue to have strong and visible financial ties to the coal, gas, and oil industries through sponsorship agreements.

Actions speaker louder than words. Organisations who want to be part of the solution to climate change must align their financial interests with the need to sever ties from the corporations who are causing the crisis.



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# Conclusion

***As nations aim to rapidly reduce carbon emissions and limit global warming, there is mounting societal and intergovernmental pressure for sectors and industries to move away from fossil fuels such as coal, gas, and oil. The arts industry is not immune to these demands and nor should it be.***

This research has identified that despite evidence of some change, approximately 16.5% of arts organisation in our Australian sample still have partnerships with coal, oil and gas mining companies and providers of gas and electricity, with 6.3% having a direct partnership with coal, oil and gas companies. Coal, oil, and gas companies continue to utilise the arts as a platform as a means of improving or repairing their reputation, and maintaining their social license to operate. They take advantage of the arts' popularity and visibility to implement initiatives and benefit to their brands from the unique context and scale of the industry.

Although this investment is significant, especially in WA and NT, it is clear that with the right supports in place, the Australian arts industry would be able to reorientate revenue models in the absence of coal, oil, and gas sponsorship. Some change and activity via the reduction of partnerships, as well as artist and sector level activity is already apparent.

In the short to medium term, the challenge for the arts is to supplement the financial contribution of the coal, oil, and gas industry with new, positive, and more sustainable sources of revenue, with financial support from governments to support this transition.

Examples in this report display an intensification of pressure on the arts sector to face the ethical dilemma of coal, oil, and gas sponsorship. However, sponsorship and partnerships do represent only one issue of a broader discussion around climate impact and action. Like in many sectors, transforming arts organisations to be more sustainable is a conversation that needs be had more widely.

Art and cultural institutions can educate and provide motivation to act on climate change, advocate for an all-hands-on deck response, and bring about changes in social norms (Hollo, 2018). For arts organisations, opportunities also exist to leverage the attitudes and support of their audiences and communities and the values they expect from the events and institutions they love. Art and cultural institutions should publicly withdraw from partnerships with fossil fuel companies and instead engage in partnerships that promote the type of world that we want to hand over to future generations.



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## Appendix A: Condensed list of all organisations

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### Dance Companies

Australian Dance Theatre	Melbourne City Ballet	Tasdance
Ballet Theatre of Queensland	NT Dance Company	The Australian Ballet
Bangarra Dance Theatre	Queensland Ballet	West Australian Ballet
Dance Works	Sydney Dance Company	

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### Festival (Film)

Adelaide Film Festival	Festival	Melbourne Short Film Festival
Australian International Documentary Conference	Fantastic Film Festival	Perth International Film Festival
Brisbane International Film Festival	Flickerfest and Tour	Revelation Perth International Film Festival
Canberra Short Film Festival	Gold Coast Film Festival	St Kilda Film Festival
Darwin International Film	Melbourne International Film Festival	Sydney Film Festival

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### Festival (Literary/Writing)

Adelaide Writers' Week	Festival	National Young Writers Festival
Australian Book Industry Awards (ABIA)	Book Week	Oz Comic-Con
Australian Playwrights' Festival	Brisbane Writers Festival	Supanova
Australian Short Story Festival	Canberra Writers Festival	Sydney Writers Festival
BAD: Sydney Crime Writers	Indigenous Literacy Day	
	Melbourne Fringe	
	Melbourne Writers Festival	

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### Festival (Major)

Adelaide Festival	Perth Festival	Ten Days on the Island
Brisbane Festival	Rising Festival	
Darwin Festival	Sydney Festival	

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### Festivals (Music)

Adelaide Fringe	Melbourne International Comedy Festival	Tamworth Country Festival
Falls Festival	Sydney Comedy Festival	Womadelaide
Jammin Australia		

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### Festivals (other)

Bluesfest 2023	Darwin Fringe Festival (NT)	South by Southwest (NSW)
Brisbane Comedy Festival (Qld)	Midsumma Festival (Vic)	Sydney Fringe (NSW)
Canberra International Music Festival	Mona Foma	Vivid Sydney
Dark Mofo (Tas)	Sculpture by the Sea (Bondi)	
	Sculpture by the Sea (Cottesloe)	

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## Libraries (State)

Libraries ACT	State Library of New South Wales	State Library of Tasmania
Libraries Tasmania		State Library of Western Australia
Library and Archives NT	State Library of Queensland	
National Library of Australia	State Library of South Australia	State Library Victoria

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## Museum/Galleries (Arts)

Art Gallery of New South Wales (AGNSW)	Institute of Modern Art John Curtin Gallery	National Portrait Gallery (Australia)
Art Gallery of South Australia (AGSA)	Museum and Art Gallery of the Northern Territory	Perth Institute of Contemporary Arts (PICA)
Art Gallery of Western Australia (AGWA)	Museum of Contemporary Art Australia	Queensland Art Gallery Queensland Gallery of Modern Art
Australian Centre for Contemporary Art	Museum of Contemporary Art, Brisbane	Tasmanian Museum and Art Gallery
Australian Centre for Photography	Museum of Old and New Art	Western Australian Museum
Heide Museum of Modern Art Ian Potter Centre	National Gallery of Australia National Gallery of Victoria	

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## Symphony Orchestra

Adelaide Symphony Orchestra	Darwin Symphony Orchestra	Queensland Symphony Orchestra
Australian World Orchestra	Melbourne Symphony Orchestra	Sydney Symphony Orchestra
Brisbane Philharmonic Orchestra	Opera Australia Orchestra	Tasmanian Symphony Orchestra
Canberra Symphony Orchestra	Orchestra Victoria	West Australian Symphony Orchestra
	Perth Symphony Orchestra	

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## Theatre Companies

Barking Gecko Theatre Company	Melbourne Theatre Company
Bell Shakespeare Company	Perth Theatre Company
Belvoir St Theatre	Queensland Theatre Company
Black Swan Theatre Company	State Theatre Company of South Australia
Ensemble Theatre	Sydney Theatre Company
Griffin Theatre Company	Tasmanian Theatre Company
La Boite Theatre Company	Windmill Theatre Company
La Mama Theatre Company	
Malthouse Theatre Company	

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