

Social Acceptability Barometer: **Canadian Mining Sector**

Quebec Report 2025



About the Quebec Report

This is a summarized version of the **Social Acceptability Barometer: Canadian Mining Sector 2025**, by Transfert Environnement et Société and Voconiq, **presenting data and analyses specific to Quebec**.

For more information, please visit transfertconsult.ca/en/barometer

Citation

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Method

The survey was conducted between August 27th and September 14th, 2025. In line with the aims of the Social Acceptability Barometer: Canadian Mining Industry, a sample closely matching the Canadian census data was collected from across the country. Data was collected using a specialized research panel with national coverage, and participants did not know the nature of the survey topic until they had opted in to consider their participation.

5,490 surveys were completed, with 4,811 surveys retained after data cleaning for analysis. All participants were 18 years or older. Data was collected from all Canadian provinces. Major mining provinces such as British Columbia and Quebec, samples of community members from mining regions and non-mining regions were explicitly targeted for collection to allow for meaningful comparisons within and across provinces on this dimension. Participants were also recruited from urban areas as defined in the Canadian census as Census Metropolitan Areas (CMA) and non-urban areas, in proportions that match 2021 census reporting.

The survey took approximately 15 minutes to complete. Research participants were asked questions regarding demographics and quota screened (i.e. to ensure a sample matched to key census categories) before then proceeding to the main survey content.

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Our talented team supports clients from the mining, industrial, renewable energy, waste management, and transportation sectors in strengthening their **community relations** and **social performance**.

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Voconiq is a **global data and technology company** headquartered in Australia.

Founded in 2019, Voconiq is built on more than a decade of research conducted by its founders within CSIRO, Australia's national science agency.

Voconiq created Enterprise Social Performance - a systematic approach that combines data, technology, science and community engagement **to help organizations understand community sentiment and strengthen trust-based relationships**.

Working at local, national, and global scales, Voconiq helps its customers **reduce social risk and build more productive connections** with the communities where they operate.

Trusted by many of the world's largest **mining** companies, Voconiq also delivers **insights** across sectors including **resources**, renewable and conventional energy generation, energy transmission **infrastructure**, and **agriculture**.

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Transfert's Reconciliation Plan - In response to the Truth and Reconciliation Commission of Canada's call to action, Transfert is committed to fully playing its role as an ally. Our 2024–2025 Indigenous Reconciliation Plan guides our team in fulfilling our commitment towards mutual understanding and lasting collaboration with Indigenous communities and organizations.

Overview and Purpose

Quebec occupies a distinctive position in Canada's mining landscape. With major operations in gold, iron ore, lithium, and other critical minerals, the province is both an economic engine and a policy innovator in resource governance. Despite this, public sentiment toward mining in Quebec is characterized by cautious engagement: residents acknowledge mining's contribution to employment and the energy transition but express some of the lowest levels of trust and regulatory confidence nationally.

This study aims at providing in-depth insight into Quebec's mining industry, its challenges but also its opportunities. The findings can serve not only industry stakeholders but also government bodies seeking a clearer view of the province's societal context. Ultimately, this will help communities and companies make more informed decisions. The study will become a regular benchmark, allowing readers to track how social acceptability and trust in the mining industry change over time.

Quebec's view on mining

Understanding Quebec's perspective is vital. The province's environmental movement, strong social norms around fairness and transparency, and emphasis on state-led regulation create a social environment in which mining must demonstrate not only economic utility but procedural integrity.

This report interprets the data through the Voconiq Trust Model and the community engagement experience of Transfert, **focusing on five key drivers: community resilience and agency, confidence in regulation, procedural fairness, economic inclusion, and environmental accountability.**

Who participated?

This summary report utilises data from the Social Acceptability Barometer: Canadian Mining Sector (2025 Report).

The full dataset contains 4,811 surveys retained after data cleaning¹, with the current report based on a sub-sample of 959 surveys collected from Quebec residents.

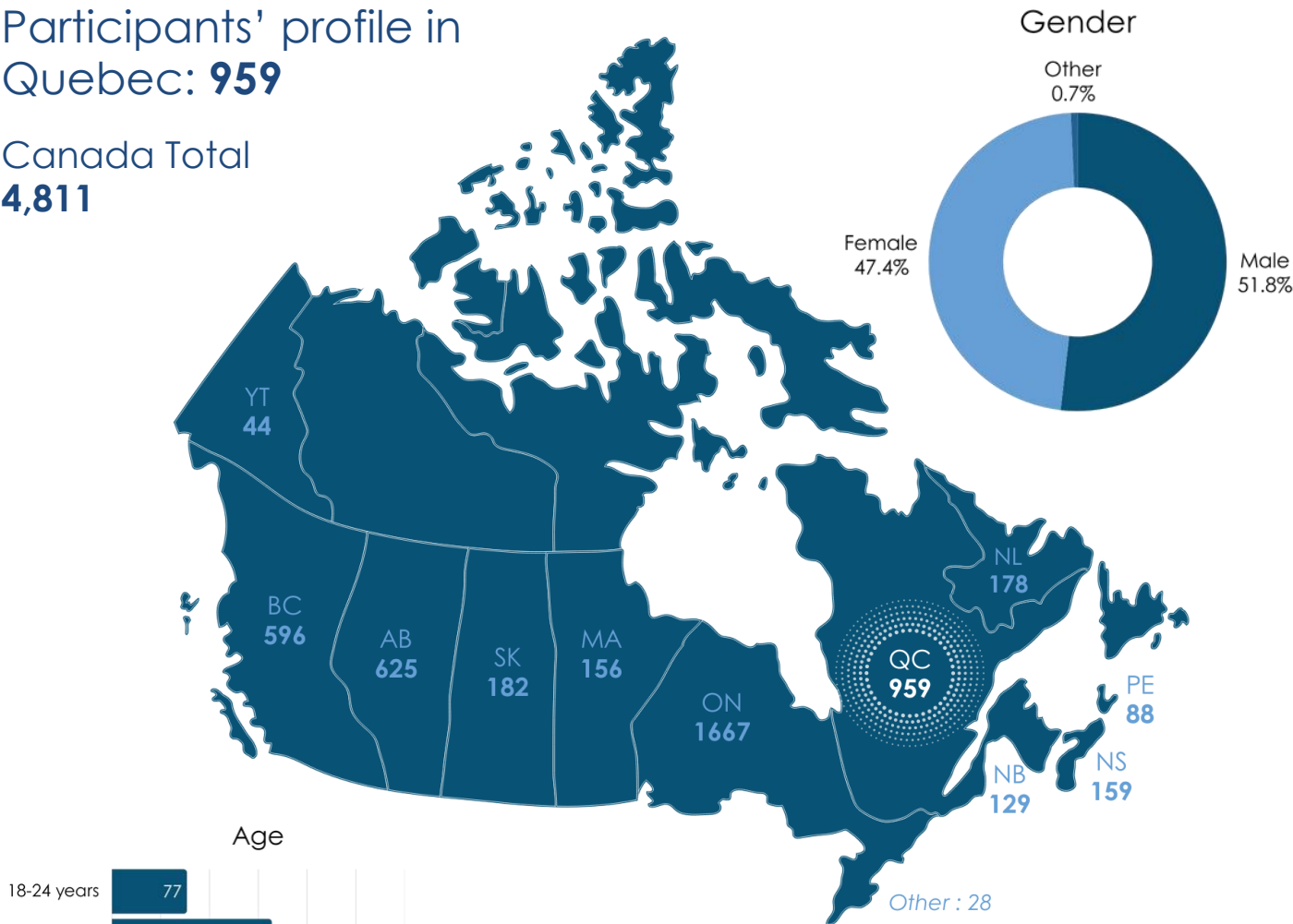
The national data and Quebec sub-sample are broadly representative of the populations at both scales². Data was collected using online research panels.

1. 'Data cleaning' is conducted in order to ensure the quality of data included in analyses is high. This involves screening and potential removal of surveys where, for example, participants answered the survey very quickly (i.e. less than 5 minutes), in ways that indicate lack of attention to the content of questions, and extreme or consistent responding on survey questions (i.e. answering '1' to all questions). For more detail on what this involves, see Meade AW and Bartholomew C. (2012) Identifying careless responses in survey design. *Psychological Methods*, 17(3), 437-455. DOI: 10.1037/a0028085.2. Data source: Statistics Canada. 2023. Census Profile. 2021 Census of Population. Catalogue no. 98-316-X2021001. Ottawa. Released November 15, 2023. <https://www12.statcan.gc.ca/census-recensement/2021/dp-pd/prof/index.cfm> (accessed October 22, 2025).

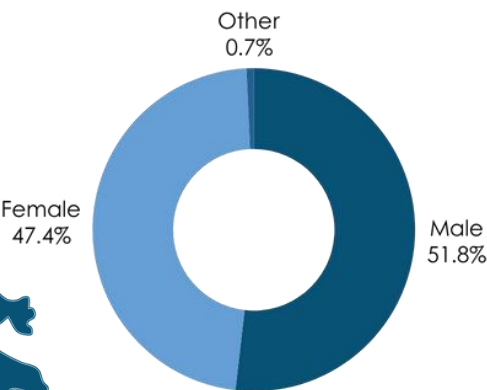
2. Data source: Statistics Canada. 2023. Census Profile. 2021 Census of Population. Catalogue no. 98-316-X2021001. Ottawa. Released November 15, 2023. <https://www12.statcan.gc.ca/census-recensement/2021/dp-pd/prof/index.cfm> (accessed October 22, 2025).

Participants' profile in Quebec: 959

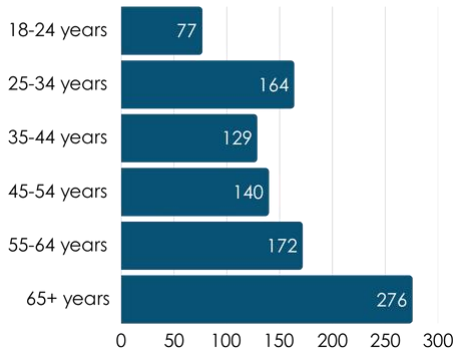
Canada Total
4,811



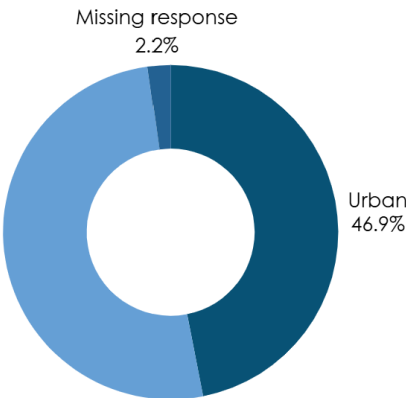
Gender



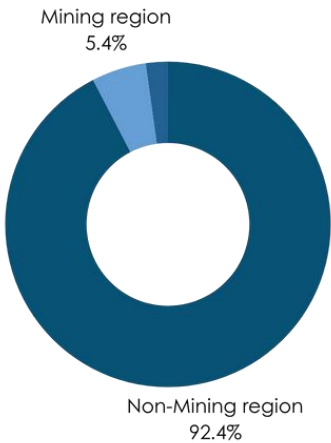
Age



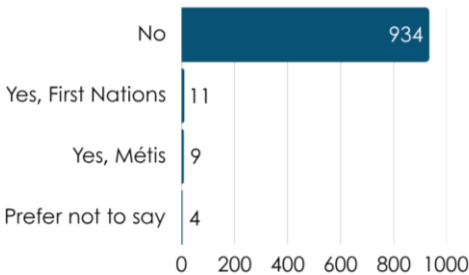
Urban (CMA/RMR) vs. Non-urban



Mining vs. Non-Mining



Indigenous



Public Sentiment and National Context

Across Canada, attitudes toward mining reveal a balance between recognition of its economic role and caution regarding its social and environmental performance. Nationally, acceptance levels are moderate (mean 3.48/5, where higher scores indicate greater acceptance), while trust remains lower (mean 2.76/5). This difference illustrates that Canadians may accept mining as necessary but do not automatically trust the sector's motives or actions.

In Quebec, these dynamics are accentuated. Average acceptance is lower at 3.28/5 while trust is 2.61/5. The province stands out for its scepticism toward both mining companies and regulatory institutions, even as residents acknowledge mining's economic value. This suggests a complex relationship: Quebecers recognise mining's necessity but maintain a critical stance toward its governance and community alignment.

When compared to resource-intensive provinces such as Saskatchewan or Newfoundland and Labrador, Quebec's attitudes are notably less trusting. Residents in those provinces demonstrate greater confidence in both company competence and governmental oversight, often driven by direct economic benefits and familiarity with mining operations. In contrast, Quebec's experience reflects urban proximity, environmental advocacy, and higher expectations for institutional performance.

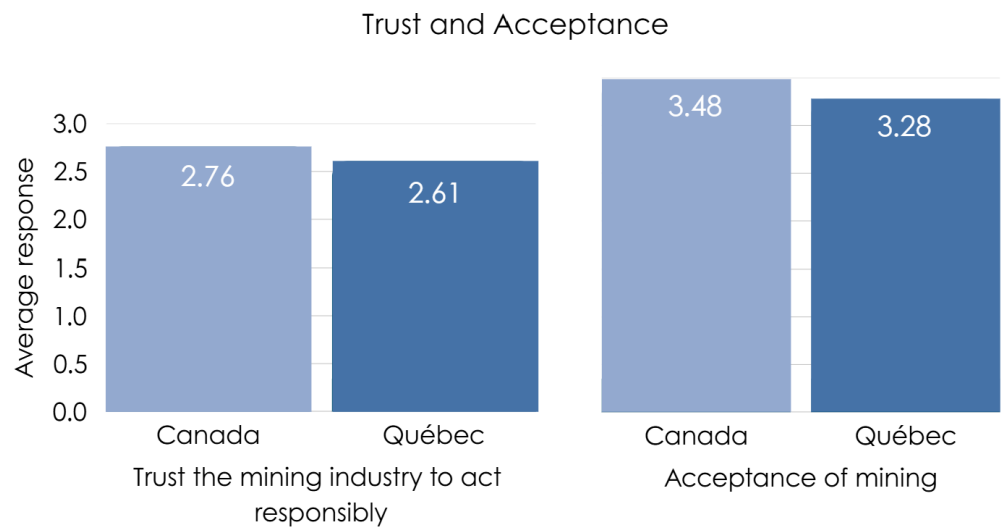


Figure 2. Mean ratings of trust and acceptance, Canada vs Quebec

Community Resilience and Agency

Community resilience and agency refer to the perceived capacity of citizens and local groups to influence mining decisions and hold industry accountable. Across Canada, this dimension strongly predicts trust. Communities that feel empowered to shape mining outcomes are more likely to view companies and governments as legitimate actors.

In Quebec, perceptions of community influence are lower than the national average. Only around one-third of respondents believe that communities can affect mining-related policy decisions. On key indicators, such as whether “*mining communities are capable of ensuring the mining industry do the right things for local communities*”, Quebec’s average score (2.95) falls below the national mean (3.10). This points to a general sense of limited agency in this province.

Qualitative commentary from open-ended survey responses reinforces this trend: respondents frequently cited a lack of transparency in consultation processes and a perception that industry decisions are predetermined. This perception constrains trust even when economic benefits are acknowledged.

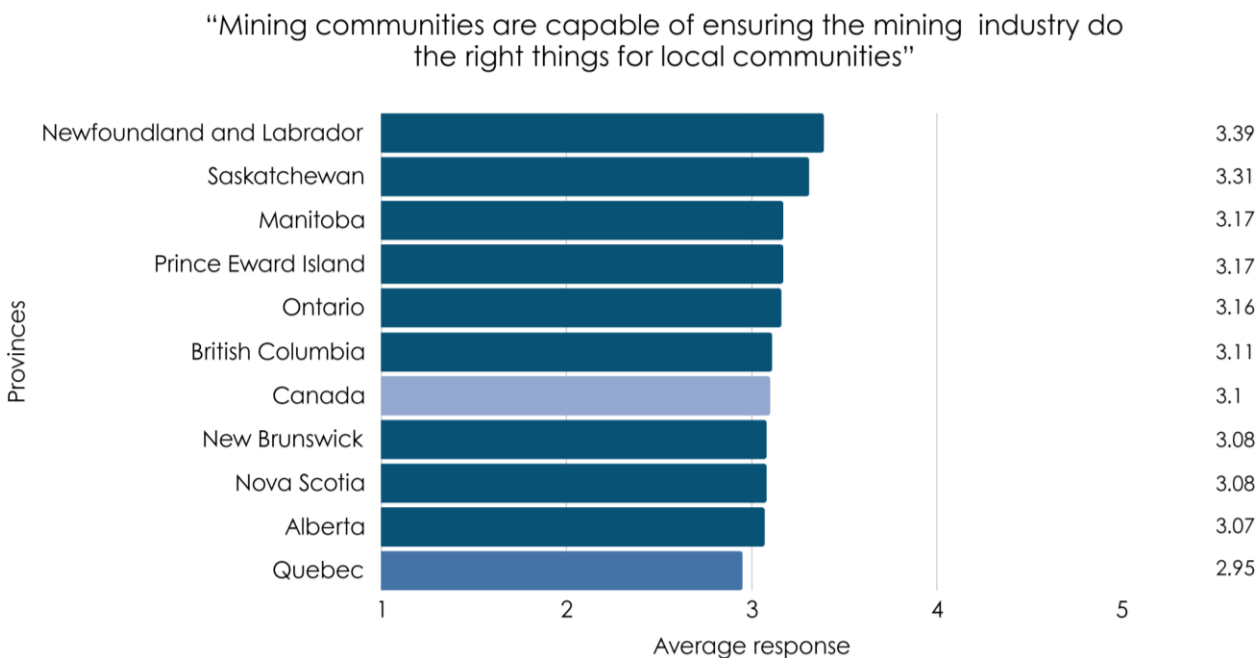


Figure 3. Mean ratings of mining community agency by province

Confidence in Regulation

Confidence in regulation captures public belief that governments and regulatory institutions effectively enforce environmental and social standards. It is a cornerstone of social licence because it signals whether citizens trust that public authorities can manage risks, community vulnerability and ensure fairness.

Quebec consistently reports among the lowest confidence levels in the country. On the statement, “Mining is regulated well enough to protect people and the environment,” Quebec’s average score (2.67) is notably lower than the national mean (2.88). Similarly, confidence that legislation ensures company accountability averages 2.80 in Quebec versus 3.03 nationally. This indicates that while respondents acknowledge the existence of strong regulatory frameworks, they question the consistency and enforcement of those frameworks in practice.

By comparison, provinces such as Saskatchewan and Manitoba report stronger confidence levels, suggesting that direct exposure to visible regulatory processes and established oversight mechanisms improves public perceptions of accountability.

It is important to emphasize that low confidence in regulation does not imply a need for more stringent framework. In fact, Quebec already has one of the most rigorous regulatory environments in the country. The concern lies primarily in the perception of how these regulations are applied and enforced. Strengthening transparency and reporting on compliance would help address this gap without adding unnecessary regulatory burden.

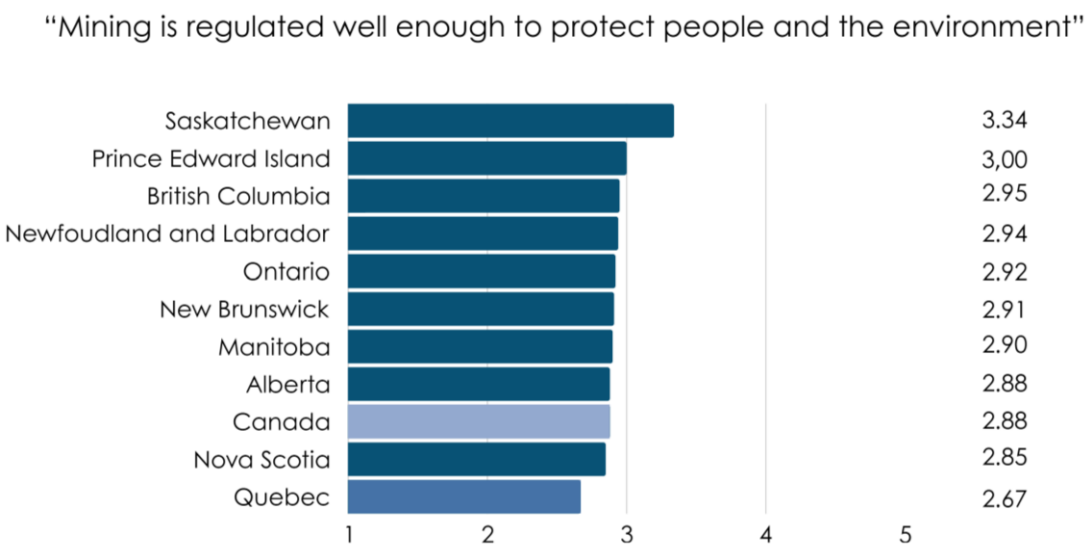


Figure 4. Confidence in regulation scores by province

Procedural Fairness

Procedural fairness measures how fairly and transparently people believe mining decisions are made. It encompasses perceptions of listening, respect, and responsiveness during consultation and engagement.

In Quebec, procedural fairness scores are below the national average. Only one in three respondents agrees that the mining industry listens to and respects community opinions. Likewise, only about a quarter feel that they have adequate opportunities to participate in decisions affecting mining projects. These low scores (2.52 compared to 2.68 nationally) reflect both limited direct engagement and a culture of expectation that public decision-making should be open and deliberative.

Procedural fairness is particularly influential in Quebec, where democratic participation and government transparency are deeply valued. The data suggest that public reluctance is less about mining's physical impacts and more about perceptions that the process itself lacks openness.

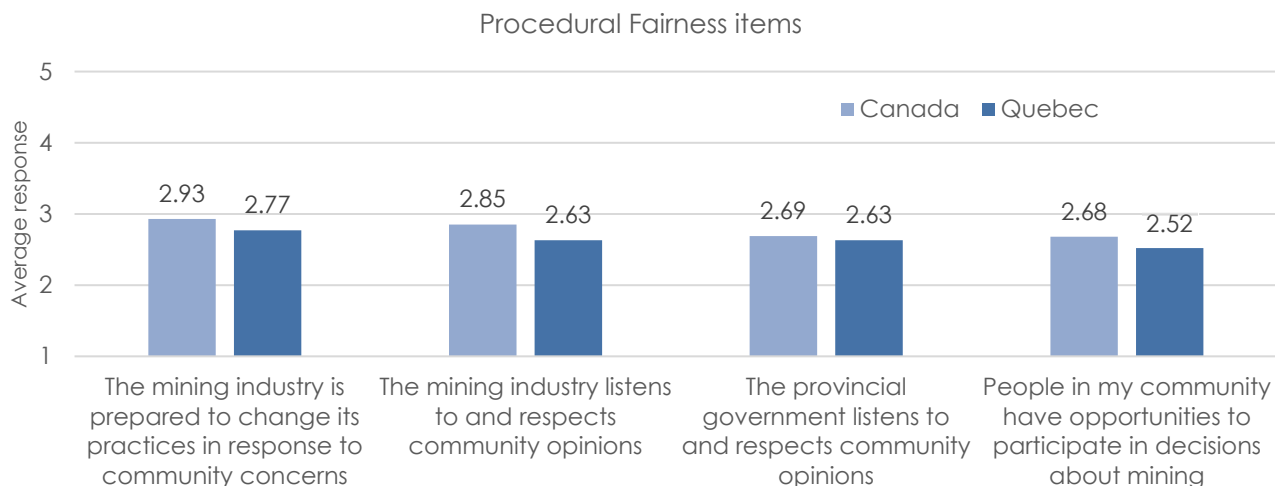


Figure 5. Mean ratings of procedural fairness items, Canada vs Quebec

Economic Costs and Benefits

Perceptions of economic benefit are a key determinant of mining acceptance. Canadians generally recognise mining's contribution to employment, regional infrastructure, and technological innovation. However, acceptance is conditional: the public expects benefits to be distributed transparently and equitably.

In Quebec, recognition of mining's economic contribution is solid but cautious. Respondents agree that mining is worthwhile to pursue (mean 3.70) but express doubts about whether its benefits are fairly shared or transparent. Quebecers tend to question who benefits most from mining activity (industry, government, or local communities) and whether long-term economic gains offset environmental costs.

This scepticism coexists with awareness of the province's leadership in critical minerals. The emerging lithium and battery industries are seen as strategically important, but the public still demands that new projects meet high environmental and social standards.

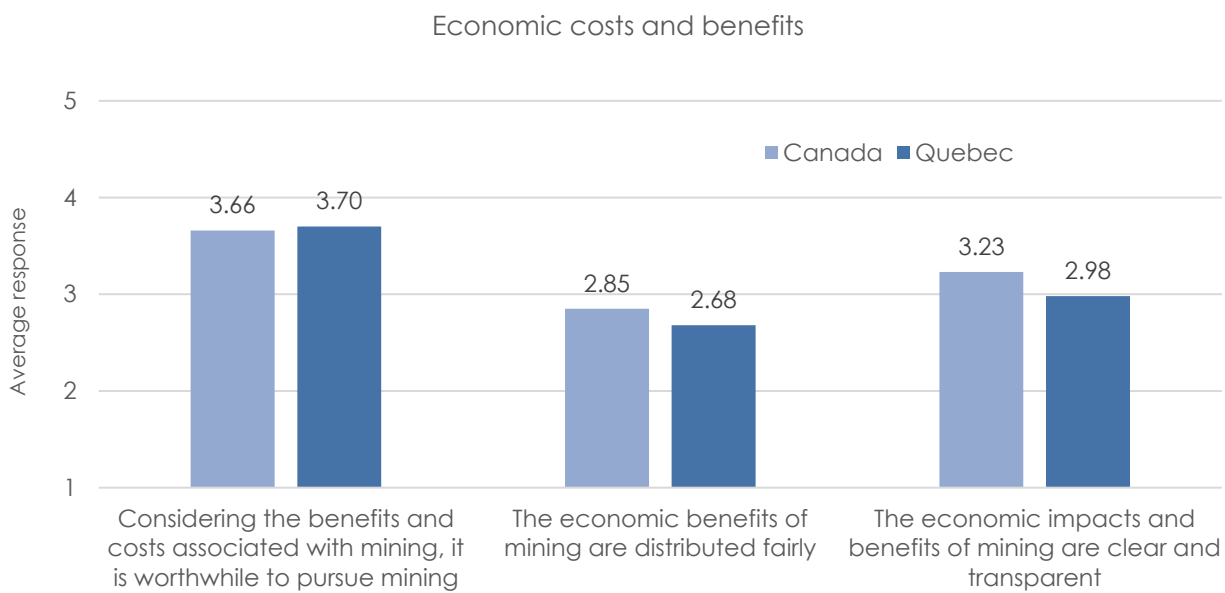


Figure 6. Mean ratings of economic costs and benefits of mining, Canada vs Quebec

Indigenous Perspectives in Quebec

Indigenous perspectives carry deep importance in conversations about social acceptability in Canadian mining. Nationally, Indigenous respondents, especially First Nations, report higher trust and acceptance where engagement and benefit-sharing are genuine.

In Quebec, Indigenous and non-Indigenous perceptions diverge. While Indigenous participants express higher trust when engaged through formal agreements, the general public continues to believe that Indigenous communities have too little influence over mining decisions. This dual perception (trust among those directly involved but concern among the broader population) signals a gap between engagement practice and public understanding.

Continued transparency about Indigenous participation, ownership arrangements, and environmental monitoring will be essential to build confidence across all groups.

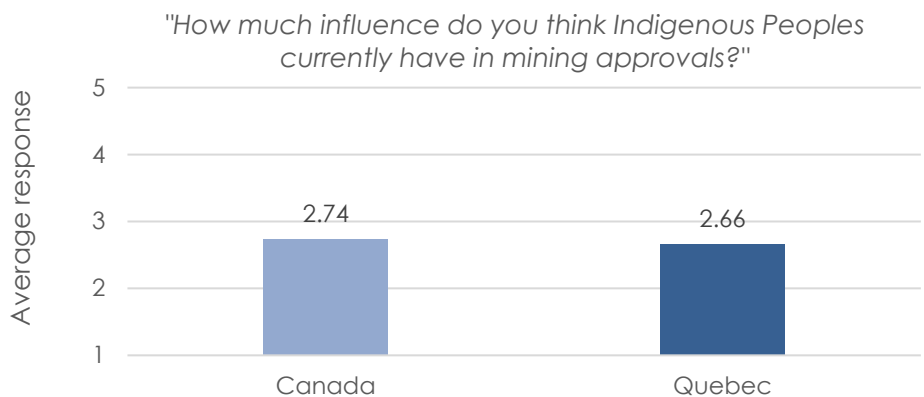


Figure 7. Mean ratings of Indigenous Peoples' influence in mining approvals, Canada vs Quebec (1=Far too little influence, 5=Far too much influence)

Modelling the Drivers of Trust, Optimism, and Acceptance in Quebec

The Quebec structural path model was derived from the Social Acceptability Barometer survey dataset (n = 4,811; Quebec subsample n = 959). To better understand the relationships between perceptions, trust, and acceptance, a path model was developed for Quebec within the Voconiq Trust Model framework. This model illustrates how trust and optimism mediate the links between key social and economic factors and overall mining acceptance (Figure below).

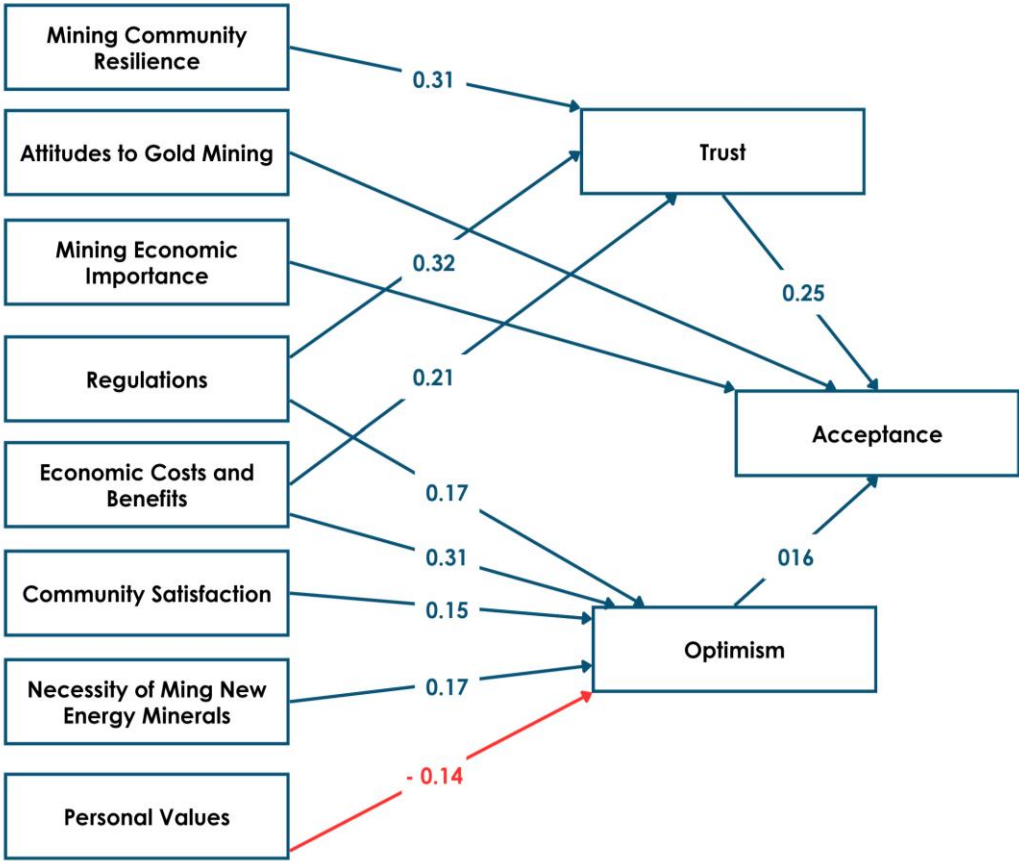


Figure 8. Quebec attitudes path model 2025

How to read this path model

When reading this path model, follow the arrows from left to right. The direction of the arrow indicates the direction of the relationship (e.g. trust leads to acceptance). The numbers on the arrows denote their importance in predicting the measure they point at; higher numbers represent stronger relationships. Blue arrows represent positive relationships between measures (e.g. greater mining community resilience leads to higher trust in the mining industry) and red arrows represent negative relationships between measures (e.g. personal values lead to lower levels of optimism). The model is generated by a statistical analysis using the survey data.

Key Findings from the Model

- **Trust as a Central Pathway:** Trust exerts the strongest direct influence on acceptance (coefficient = 0.25), confirming its role as the primary determinant of social licence.
- **Optimism as a Mediator:** Optimism mediates several relationships between perceived benefits and acceptance (path = 0.16). Community satisfaction (0.31) and perceived necessity of mining new energy minerals (0.17) positively influence optimism, which in turn enhances acceptance.
- **Community Resilience and Confidence in regulation:** These factors are the strongest positive predictors of trust (0.31 and 0.32 respectively). Communities that feel capable and confident in how mining is regulated are more likely to trust the industry.
- **Economic benefit (over costs):** When community feel the benefits of mining outweigh the costs, they have greater trust in mining (0.21).
- **Personal Values:** A small but negative effect (-0.14) on optimism reflects the influence of moral and environmental reservations that temper enthusiasm for mining.

Interpretation

The Quebec model reveals that optimism and trust play a pronounced role in predicting acceptance of mining, as they do at the national level in Canada. This suggests that Quebecers' attitudes toward mining are strongly informed by those factors that influence their confidence in mining's capacity to act responsibly. Optimism reflects hope for balance between development and sustainability, rather than uncritical support.

Compared with the national model, the Quebec results indicate that while similar factors are at play, drivers of trust and optimism that emphasize community resources and agency, strongly enforced and transparent regulatory frameworks and a net positive balance between the economic benefits derived from mining relative to the impacts of this industry (e.g. environmental impacts). This pattern aligns with Quebec's socio-political culture, where environmental responsibility and collective wellbeing are central public values.

Discussion: Quebec's Distinctive Profile

Taken together, Quebec's results portray a population that is economically pragmatic but institutionally cautious. Public support for mining rests on the condition that companies and governments act transparently and respond to citizen concerns.

Quebecers expect visible regulatory enforcement, demonstrable fairness in decision-making, and inclusive consultation processes. Lower trust in institutions does not necessarily indicate opposition to mining; rather, it reflects a higher threshold for legitimacy. This aligns with Quebec's broader social culture, where public accountability and participatory governance are central to societal trust.

Compared with provinces like Saskatchewan or Newfoundland and Labrador, where local economic dependence fosters pragmatic acceptance, Quebec's attitude is shaped more by civic norms than by direct economic experience. In this context, strengthening mining community opportunities to influence mining activity, building confidence in formal regulatory mechanism and a positively balanced value proposition represents the most direct pathway to improving social licence.

In the national model, procedural fairness plays a clear role in predicting trust, reflecting the importance Canadians place on being heard and treated equitably in decision-making processes. In contrast, procedural fairness does not emerge as a significant predictor of trust in Quebec's model.

This absence does not imply that fairness is unimportant, but rather that it may function as a baseline expectation within Quebec's civic culture. Public trust in the province appears to depend more on perceptions of regulatory competence, community empowerment, and alignment with shared social values than on variations in perceived fairness.

In practical terms, this suggests that while procedural integrity remains essential, Quebecers evaluate mining legitimacy primarily through institutional performance and demonstrable accountability rather than through engagement process quality alone.

Implications and Conclusion

The Quebec findings underline that social acceptability depends not only on mining's economic or technical performance but also on how equitably and transparently it is governed. Efforts to strengthen social licence should therefore prioritise fairness, participation, and accountability.

For policymakers, this means increasing public visibility of regulatory enforcement and inviting broader participation in project oversight. For industry, it requires a deeper commitment to early engagement, transparent communication, and collaboration with Indigenous and local communities. For communities and Indigenous partners, it highlights the potential to build trust through shared decision-making and evidence-based monitoring.

In sum, Quebec's mining sector operates in a demanding social environment; one that rewards transparency, inclusion, and integrity. By meeting these expectations, the province can continue to develop its mineral potential while maintaining public confidence.



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