

Social Acceptability Barometer: **Canadian Mining Sector**

Summary Report - 2025



About this Summary Report

This is the summarized version of the **Social Acceptability Barometer: Canadian Mining Sector 2025**, by Transfert Environnement et Société and Voconiq.

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

Citation

Moffat, K., Fortin, M-O., Pretorius, N., Zhou, J., Cyrzon, C., & McIlroy, T. (2025). Social Acceptability Barometer: Canadian Mining Sector (2025 Report). Transfert Environnement et Société & Voconiq, Canada.

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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 analysis¹. 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.

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).

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.

Table of contents

Overview and Purpose6

 Mining and the Canadian Economy6

 Who participated?6

Key National Findings9

 Six principal findings capture national sentiment:9

Regional and Indigenous Perspectives 13

Thematic Insights 14

 Community Resilience and Agency 14

 Fair and Transparent Governance 14

 Environmental Accountability 14

 Economic Inclusion 14

 Procedural Fairness 15

Implications for Policy and Practice 15

Pathways to Social Licence 15

Conclusion..... 17



Transfert is a consulting firm specialized in **public participation** and **social acceptability**. We help **build trust** between organizations and the communities where they operate.

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

Through strategic and operational support, we help organizations **meet the increasing expectations** for stakeholder engagement and responsible project development.

At Transfert, we know that lasting **project success** depends on a deep **understanding** of social and territorial issues.

Our unique approach combines **strategic insight, cultural awareness, and hands-on experience** in the field. It enables organizations to reach their goals while fostering genuine community support. Our mission: to bridge the gap between project developers and their host communities.

Certified B Corp, we champion a win-win approach that benefits everyone: organizations, civil society, citizens and the environment.

Learn more at transfertconsult.ca



"We give voice to communities and help our customers listen."

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

The Social Acceptability Barometer: Canadian Mining Sector (2025) is a collaborative initiative between Transfert et Société and Voconiq. It offers the most comprehensive, data-driven account to date of how Canadians perceive the mining sector - its economic importance, environmental impacts, social legitimacy, and trustworthiness. This comes at a time when the country faces accelerating global demand for critical minerals and mounting expectations for sustainability.

This study aims at providing in-depth insight into Canada'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 country'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.

Mining and the Canadian Economy

Mining remains a foundational pillar of Canada's national and regional economies. In 2023, the sector contributed an estimated CAD 117 billion to GDP (4%) and supported more than 700,000 direct and indirect jobs, including significant Indigenous employment¹.

Canada's mineral wealth, spanning gold, copper, potash, uranium, lithium, and rare earth elements, positions it as a key global supplier for technologies driving the clean energy transition and supporting national interest and allied access for other purposes.

However, this role also brings scrutiny from citizens, governments, Indigenous Peoples and international partners concerned about environmental protection, fair benefit sharing, and responsible development.

Who participated?

The 2025 Barometer draws on survey responses from 4,811 Canadians representing all provinces and territories, reflecting national demographics on most dimensions².

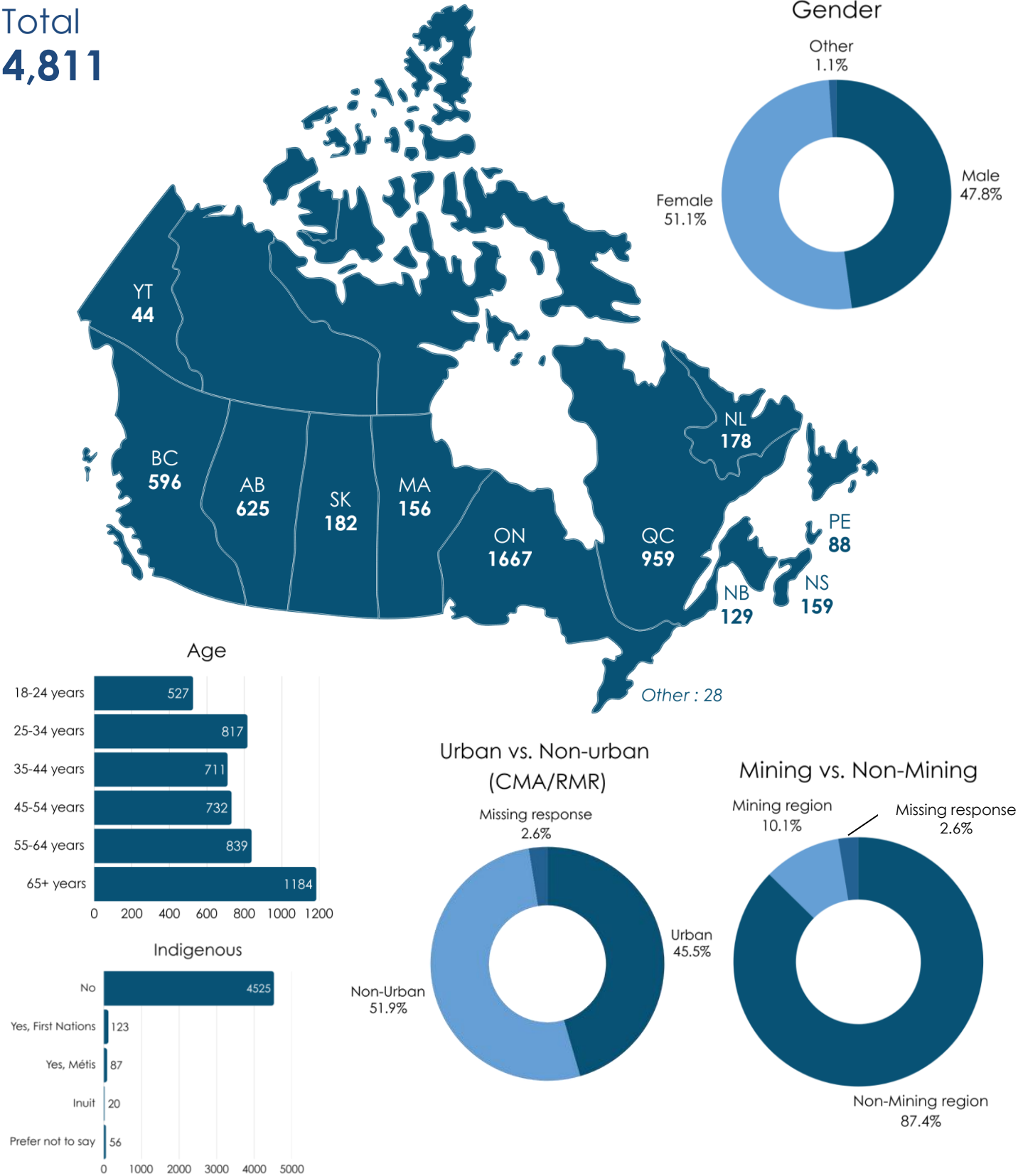
It captures public views on mining's benefits and impacts, the perceived strength of regulation, and levels of trust and acceptance across demographic and regional lines.

By identifying the social drivers of trust, the study provides actionable insights for policymakers, industry, and Indigenous partners to support a transparent and socially responsible path for Canadian mining.

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1. Natural Resources Canada. (n.d.). *Minerals economy*. Government of Canada. Retrieved October 24, 2025, from <https://natural-resources.canada.ca/minerals-mining/mining-data-statistics-analysis/minerals-economy>
 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 2025

Total
4,811



Key National Findings

The Barometer highlights an overall picture of cautious optimism. Canadians recognize the economic and technological value of mining but remain measured in their trust of the sector's social and environmental performance.

Six principal findings capture national sentiment:

1. Economic Recognition, Tempered by Caution

Mining is widely acknowledged as a cornerstone of Canada's prosperity. More than three-quarters of Canadians see it as vital for job creation, regional development, and the energy transition. Acceptance of mining is moderate (mean 3.48/5), with over 60% of respondents agreeing that the benefits of mining outweigh its costs. However, trust lags behind acceptance (mean 2.76), driven by perceptions that mining companies prioritize profit and efficiency over community wellbeing. Respondents express higher confidence in mining companies' competence ('the best at what they do') than in their integrity (act responsibly') or their humanity ('value community needs'). This trust-acceptance gap remains a defining feature of Canadian public attitudes in this work.

2. Confidence in Regulation: Moderate but Uneven

Confidence in government and regulatory systems is modest, averaging below the neutral midpoint of the scale. While most Canadians acknowledge Canada's strong legal framework, fewer believe current oversight mechanisms are sufficient to ensure accountability or environmental protection. Confidence is highest in Saskatchewan, Newfoundland and Labrador, where mining is more visible and regulation may be more tangible. In contrast, Yukon and Quebec record the lowest levels, suggesting regional differences in perceived effectiveness of oversight.

Table 1. Confidence in regulation by province or region².

Measure	Overall	Alberta	British Columbia	Manitoba	New Brunswick	Newfoundland and Labrador	Nova Scotia	Ontario	Prince Edward Island	Quebec	Saskatchewan	Yukon
Legislation and regulation can be counted on to ensure mining companies do the right thing	3.03	3.01	3.09	3.11	3.16	3.15	2.92	3.11	3.14	2.80	3.34	2.25
The mining industry is regulated well enough to protect people and the environment	2.88	2.88	2.95	2.90	2.91	2.94	2.85	2.92	3.00	2.67	3.34	1.98

² **Note:** The Yukon Territory has a small sample size (n=44). This should be taken into account when analyzing data from this region. The lowest scores for provinces are shown in red and the highest scores are shown in green. The lowest absolute score is shown in **bold** if it is not a province (Yukon).

3. Procedural Fairness as a Persistent Weakness

Procedural fairness, or the extent to which communities feel listened to, respected, and able to influence decisions, scores consistently low (2.68/5). Only one in three Canadians believes they have meaningful opportunities to participate in mining-related decision-making. This perception is a critical barrier to trust, reinforcing that the social licence to operate depends as much on process quality as on project outcomes.

4. Environmental and Climate Concerns

Environmental responsibility remains central to the social acceptability of mining. Nearly half of Canadians agree that mining products contribute to climate change (45%). A majority of Canadians rated impacts on water quality and land rehabilitation as important (either “Very” or “Extremely”) factors in the acceptability of mining. Canadians support mining’s role in the renewable energy transition but expect effective effort to protect water, resources biodiversity, and ensure effective post-mining restoration.

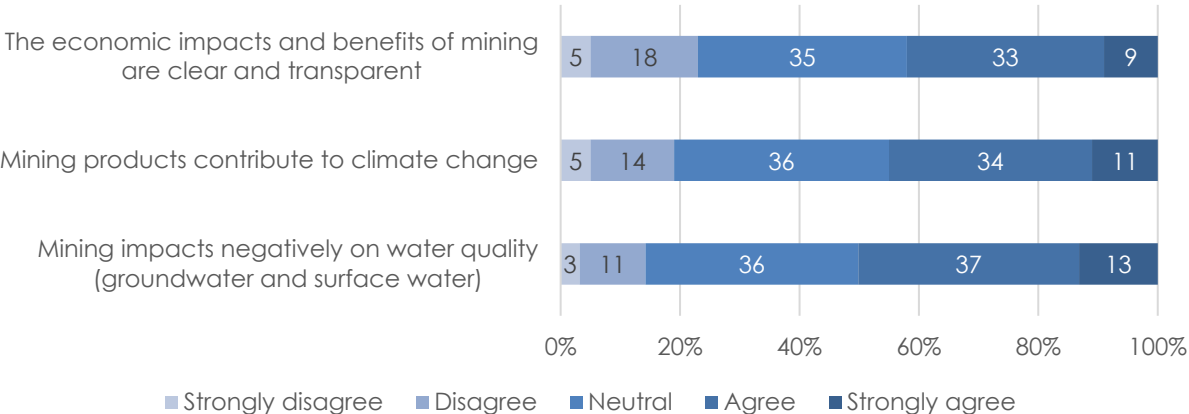


Figure 1. Distribution of participant responses (%) mining impact and benefit items

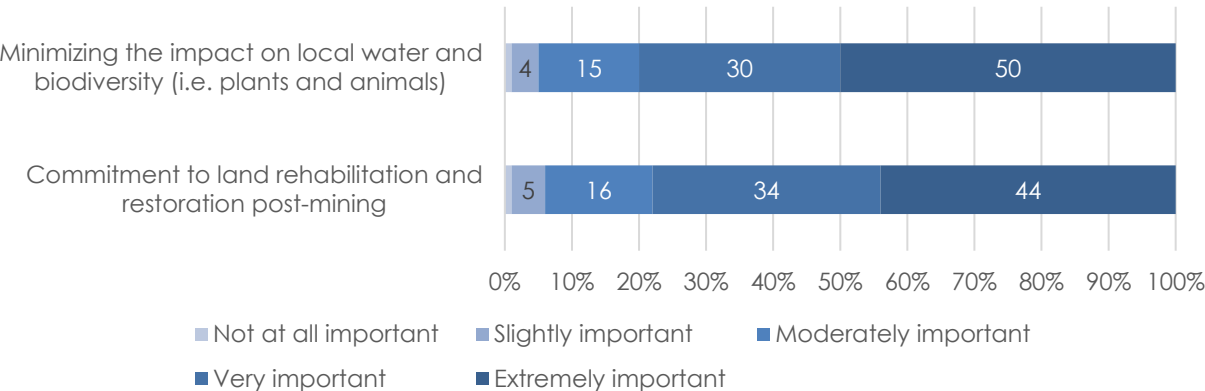


Figure 2. Distribution of participant responses (%) for importance of factors associated with increased mining to support the renewable transition

5. Conditional Support for Critical Minerals and Gold

Public sentiment strongly favours the mining of critical minerals essential for renewable energy technologies such as lithium, nickel, copper, and rare earth elements. Seven in ten respondents see these minerals as vital to Canada's energy future, and a similar share supports prioritizing domestic production over imports. Gold remains highly valued, with more than 60% agreeing it is still worth mining despite its limited role in the transition agenda; however, fewer than half would support a new gold mine in their community. This 'national yes, local maybe' pattern illustrates a nuanced public stance that balances strategic necessity with local environmental caution. Canadians are clear on the conditions for acceptability of expanded critical minerals extraction, however, with environmental management (especially reducing impacts on local water sources and biodiversity) and rehabilitation, and ensuring workers are fairly treated the most prominent.

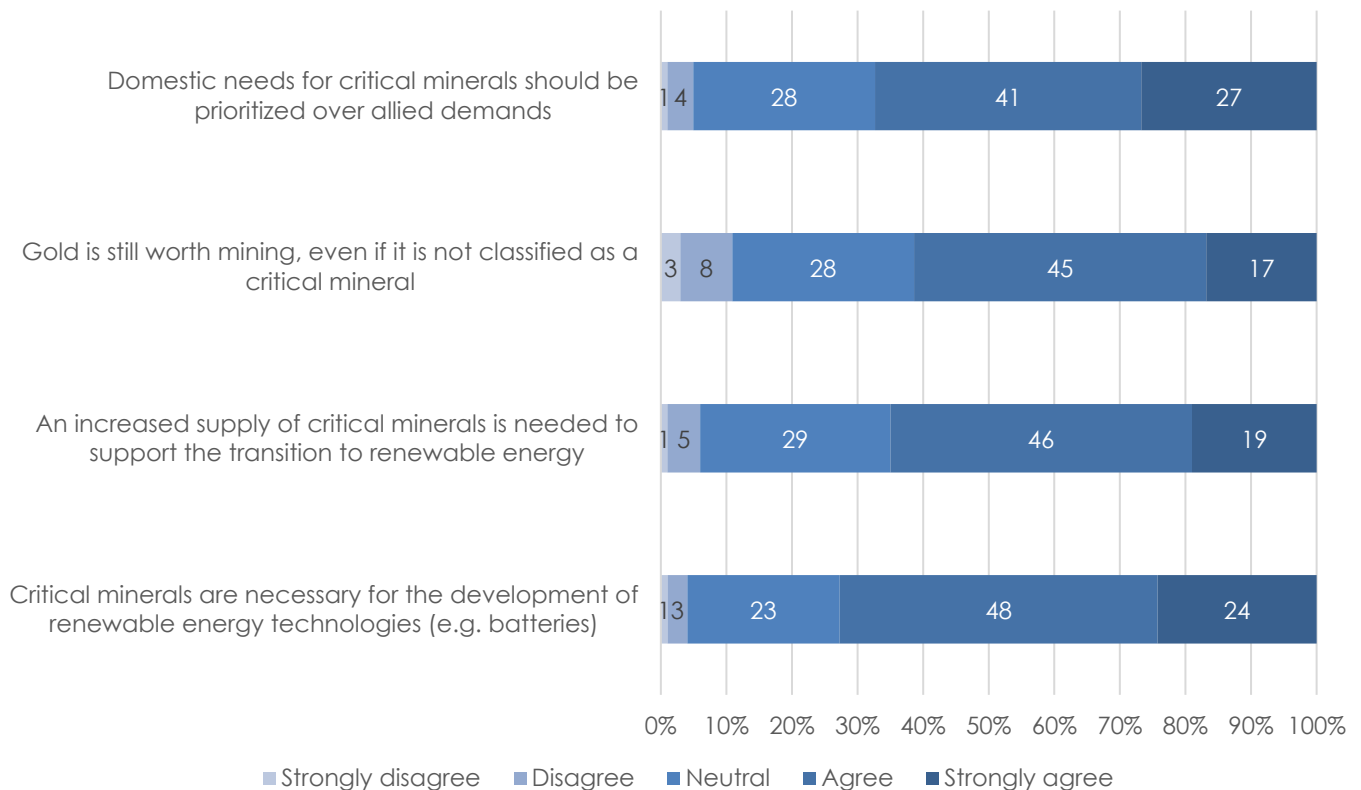


Figure 3. Distribution of participant responses (%) for critical mineral and gold mining items

6. Indigenous Perspectives: Confidence with Caution

Indigenous respondents, particularly First Nations participants, report higher trust, confidence in regulation, and overall acceptance of mining than non-Indigenous Canadians. This may reflect greater engagement and benefit-sharing through formal agreements such as Impact Benefit Agreements. However, 44% of all respondents believe Indigenous peoples still have too little influence over mining approvals, underscoring the public expectation for stronger Indigenous leadership in resource governance.

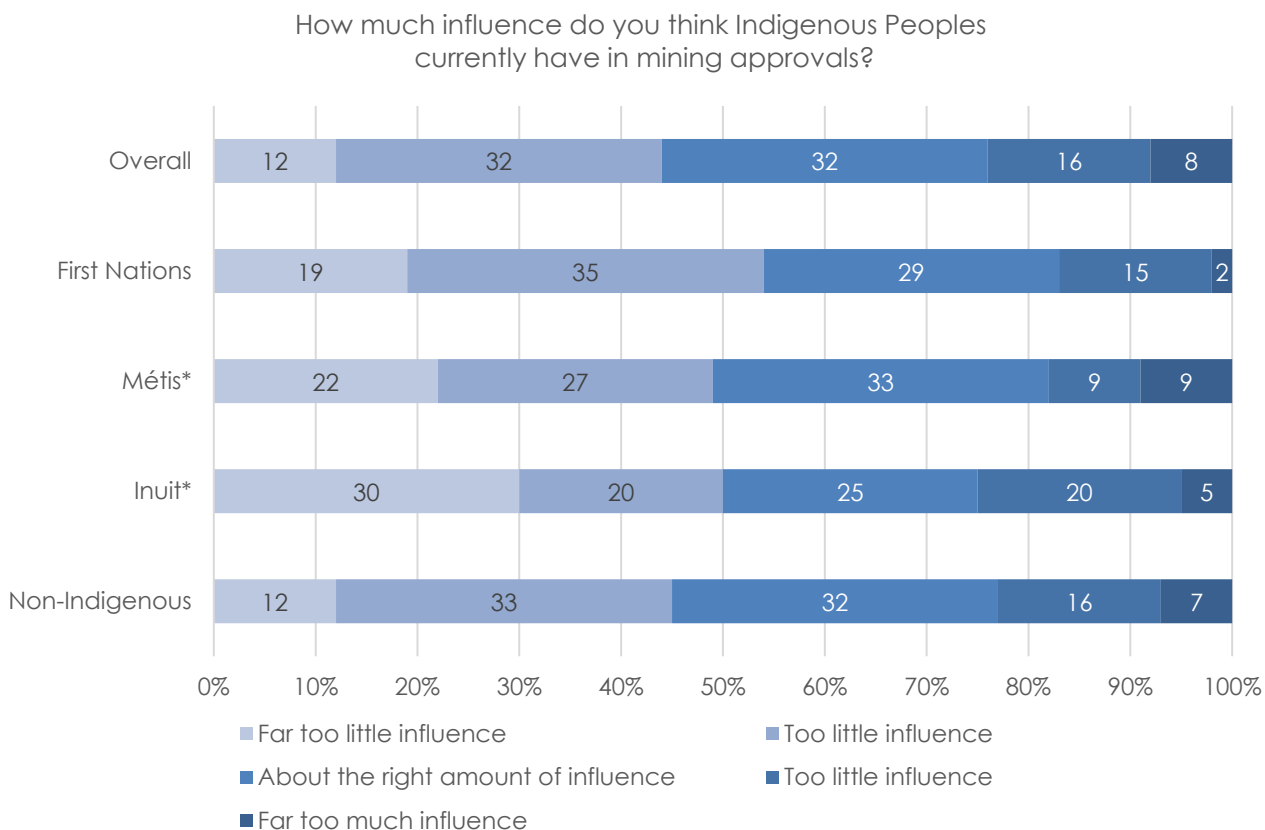


Figure 4. Distribution of participant responses (%) on Indigenous Peoples' influence, by Indigenous status and overall. *Small sample size

Regional and Indigenous Perspectives

Regional and demographic variations are pronounced. Residents in mining regions exhibit higher trust (3.17 vs 2.74), acceptance (3.73 vs 3.46), and optimism about the industry's future (3.52 vs 3.27) compared to non-mining regions. Exposure to tangible benefits such as employment, infrastructure, and training likely contributes to this pattern.

Provincially, Saskatchewan, Newfoundland and Labrador show the highest acceptance (3.78 and 3.74 respectively), while Quebec reports the lowest regulatory confidence and trust. These contrasts reveal the influence of both experience and proximity: where mining is more visible, perceptions tend to be more pragmatic and positive.

Among Indigenous respondents, trust and agency are consistently higher. First Nations participants score highest on measures of competence and responsibility (compared to Métis and Inuit), with an average trust score above 3.20, nearly half a point higher than the national mean. This finding illustrates the impact of meaningful partnership, though concerns persist about uneven influence across regions and project types.

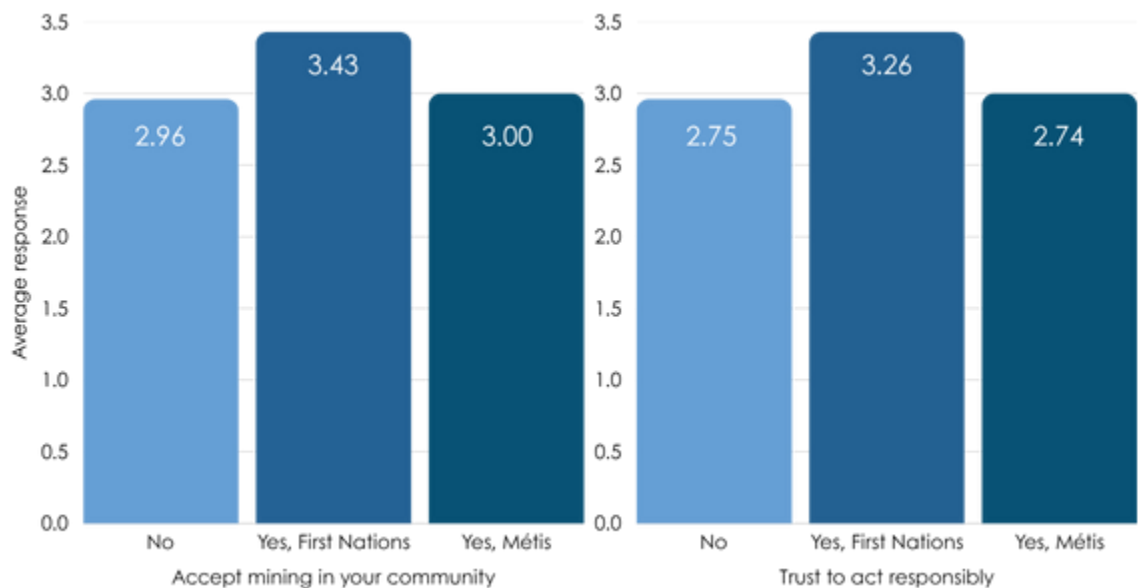


Figure 5. Average ratings of trust and acceptance by Indigenous status

Thematic Insights

Community Resilience and Agency

Communities that perceive agency in shaping mining outcomes report significantly higher trust and optimism. Empowerment derives not only from consultation opportunities but from credible evidence that input influences decision-making. Strengthening community voice in approvals and oversight is a clear avenue for building durable trust and reducing social risk.



"You are discussing an industry that needs EVERYONE on board to create regulations, transparency and responsible execution for the positive benefit and future of this country."

Fair and Transparent Governance

Confidence in regulation remains a decisive factor in determining social acceptability. Canadians expect both industry and government to uphold high standards of accountability and environmental stewardship. Policy transparency, such as open disclosure of compliance results and rehabilitation progress, can help restore public faith in regulatory systems.



"The past has shown that mining companies have not kept their commitments, particularly when it comes to restoring the land to a suitable condition and in relation to their impact on water quality. Moreover, governments have stood by and failed to intervene to make sure companies obey the law."

Environmental Accountability

Environmental responsibility represents both a moral and practical threshold for public acceptance. Respondents repeatedly emphasize water protection, climate mitigation, and mine rehabilitation as defining measures of legitimacy. Failure to meet these expectations risks eroding trust, even when economic contributions are strong.



"I believe mining of critical minerals for domestic and allied uses could be a massive benefit to the Canadian economy, but it can't be at the expense of our beautiful country and its people."

Economic Inclusion

Canadians value mining's economic role but want to see clearer, more localised benefit distribution. Public acceptance grows when communities observe direct investment in jobs, education, and infrastructure. Transparent reporting on benefit-sharing and local content can reduce skepticism and build perceived fairness.



"Mining is the backbone of our economy. It needs to be expanded to extract valuable minerals for the globe."

Procedural Fairness

Perceptions of fairness underpin every other dimension of social licence. Improving two-way communication, providing clear feedback on community input, and demonstrating change in response to concerns are essential steps at local, provincial and national levels. Fair process is repeatedly identified as one of the most powerful predictors of long-term trust in the work of Voconiq and Transfert Environnement et Société.



“Mining is the business of all members of a community”

Implications for Policy and Practice

The Barometer's findings suggest practical directions for policymakers, industry leaders, and communities seeking to strengthen mining's social licence:

- **Government** – Enhance transparency in environmental monitoring and enforcement. Reinforce public confidence by reporting on inspection outcomes and integrating Indigenous and community representatives into regulatory decision-making.
- **Industry** – Embed procedural fairness in engagement processes. Adopt early, continuous consultation and communicate how public and Indigenous feedback shapes operational practices.
- **Indigenous Nations** – Use these results to support negotiations for ownership stakes and shared governance frameworks. The strong correlation between participation and trust underscores the value of equitable involvement.
- **Civil Society and Researchers** – Continue longitudinal monitoring of trust and acceptance metrics to track the evolution of public sentiment as Canada advances its critical minerals strategy.

Pathways to Social Licence

Voconiq's Trust Model, applied through path analysis, identifies the interconnected variables shaping public trust and acceptance of mining. Five primary drivers underpin social licence outcomes across Canada:

- **Community Resilience and Agency** – Communities that believe they can influence mining-related decisions show significantly higher trust (coefficient 0.22).
- **Confidence in Regulation** – Strong perceptions of oversight and accountability correlate closely with trust (0.21).
- **Procedural Fairness** – Transparent, inclusive processes increase perceived legitimacy (0.19).
- **Economic Costs and Benefits** – Visible, equitable benefit-sharing strengthens community support (0.17).
- **Perceived Impacts of Mining** – Environmental and health impacts weaken trust (–0.12).

Trust, in turn, is the key bridge to acceptance, explaining much of why Canadians may accept mining despite limited confidence in its fairness. This model underscores that social licence is not a static permission but a dynamic relationship, sustained through continuous responsiveness and accountability.

The model also demonstrates that social licence to operate is not only the work of mining companies or the mining industry, but dependent on the implementation and enforcement of strong regulatory frameworks (i.e. Confidence in Regulation).

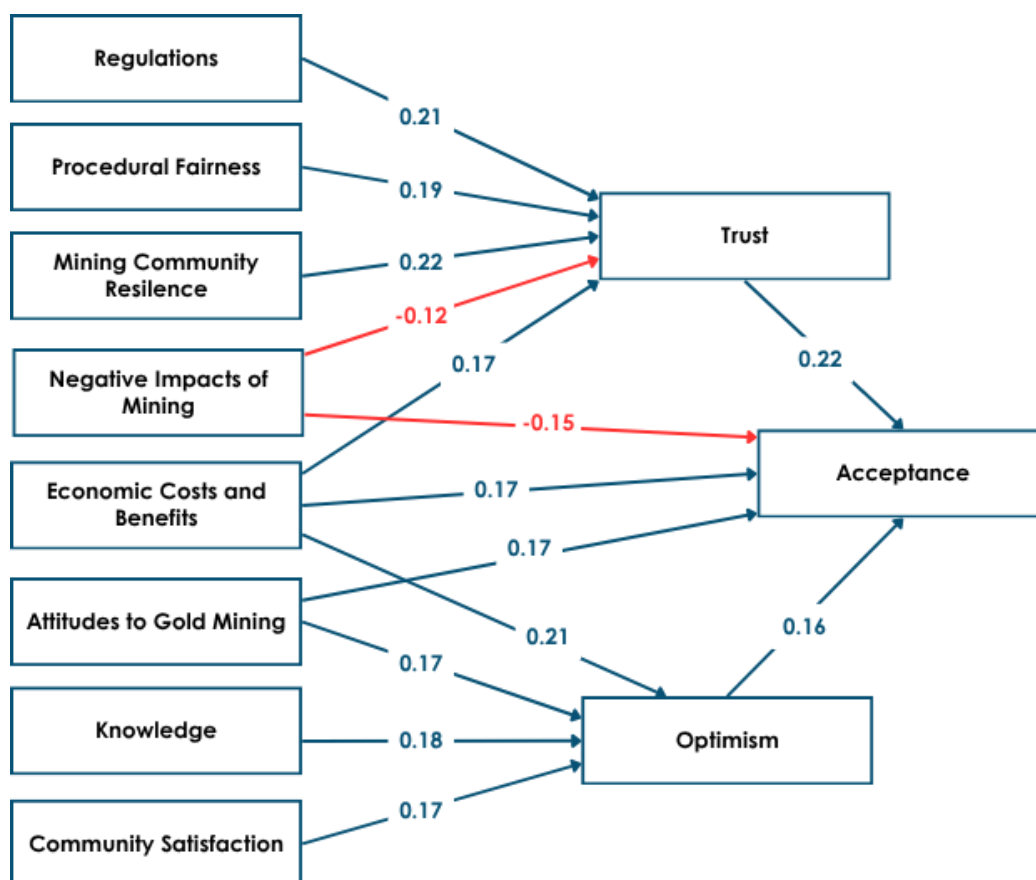


Figure 6. Canadian citizen trust path model

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. negative mining impacts lead to lower levels of trust). The model is generated by a statistical analysis using the survey data.

Conclusion

Canadians view mining as both indispensable and conditional: vital to national prosperity and the renewable energy transition, but legitimate only when conducted fairly, transparently, and inclusively.

The 2025 Social Acceptability Barometer: Canadian Mining Sector demonstrates that trust cannot be presumed, it must be continually earned through credible governance, authentic engagement, and respect for community and Indigenous voices.

As the sector moves into an era defined by the global race for critical minerals, maintaining public support will depend on whether Canada can pair its technical leadership with social leadership.

Trust, fairness, and partnership are not secondary to production. They are the conditions that make it possible.



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