

BACKGROUND

This is a summary of the latest results of a tracking study which Abacus has been conducting on behalf of the Mining Association of Canada. Many of the questions asked in this study have been tracked using the same polling methodology for 12 years. The sample size for the latest survey was 2700 adult Canadians and the field work was conducted between March 15-20, 2022. The margin of error for a comparable probability sample is 1.59%, 19 times out of 20.

MINING INDUSTRY REPUTATION

80% have a positive feeling about producers of minerals and metals in Canada, and 78% say they have a positive feeling about Canadian mining companies a strong level of public support for a sector which has a substantial environmental footprint. This year’s results are among the better level of support found for the industry.

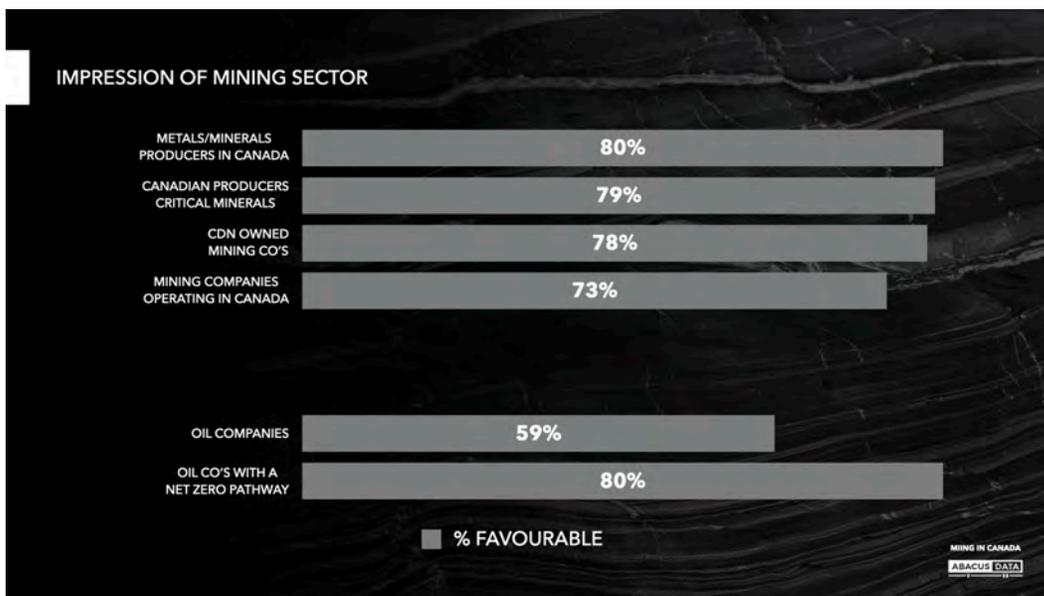
In this study we also measure feelings about oil companies in Canada – given the role in oil sands mining. An interesting finding this year is that support for oil companies is 21 points higher when they have a plan or a pathway to reach a net zero emissions.

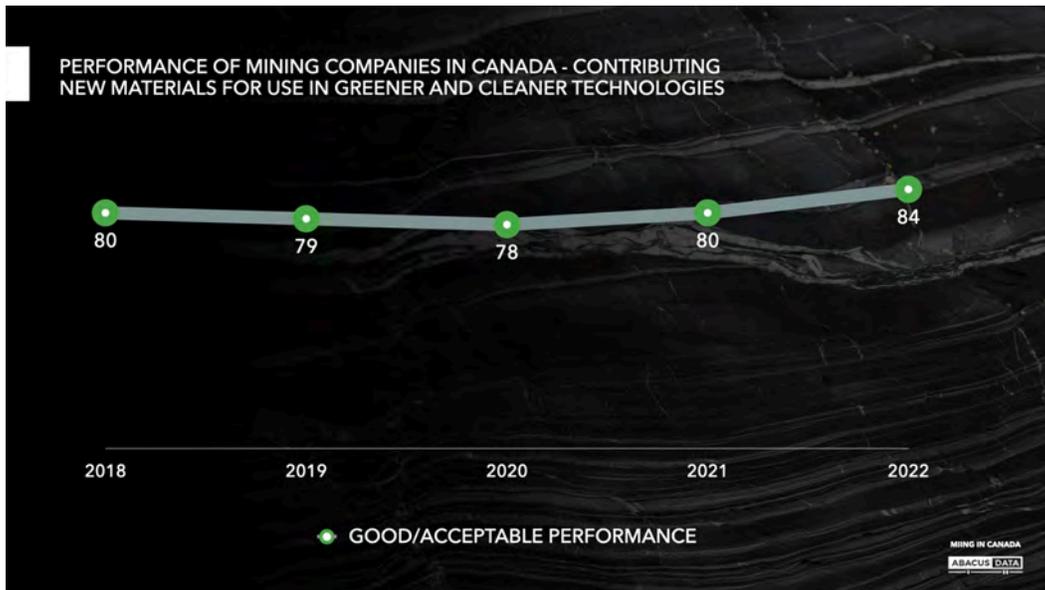
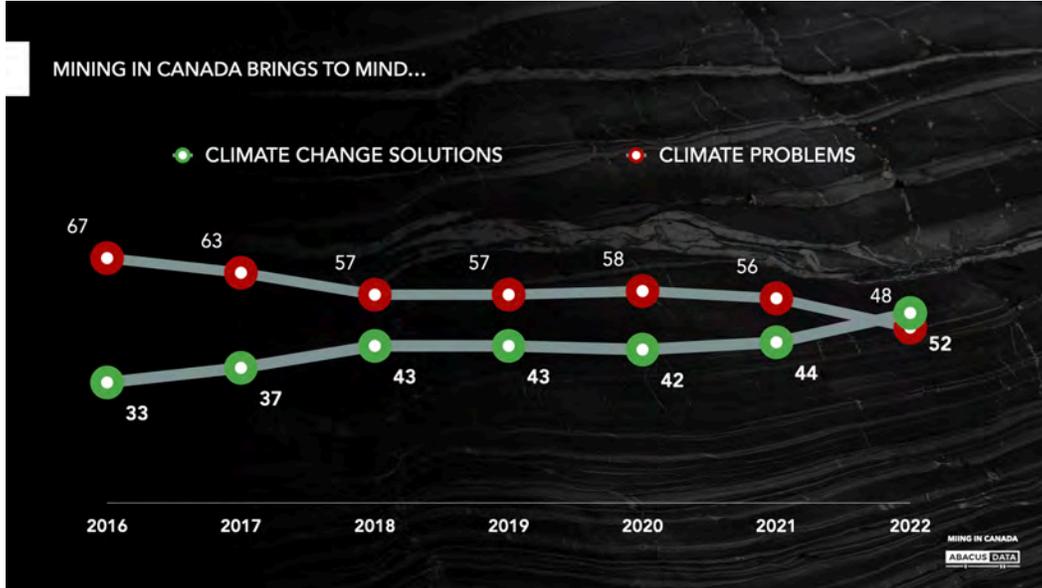


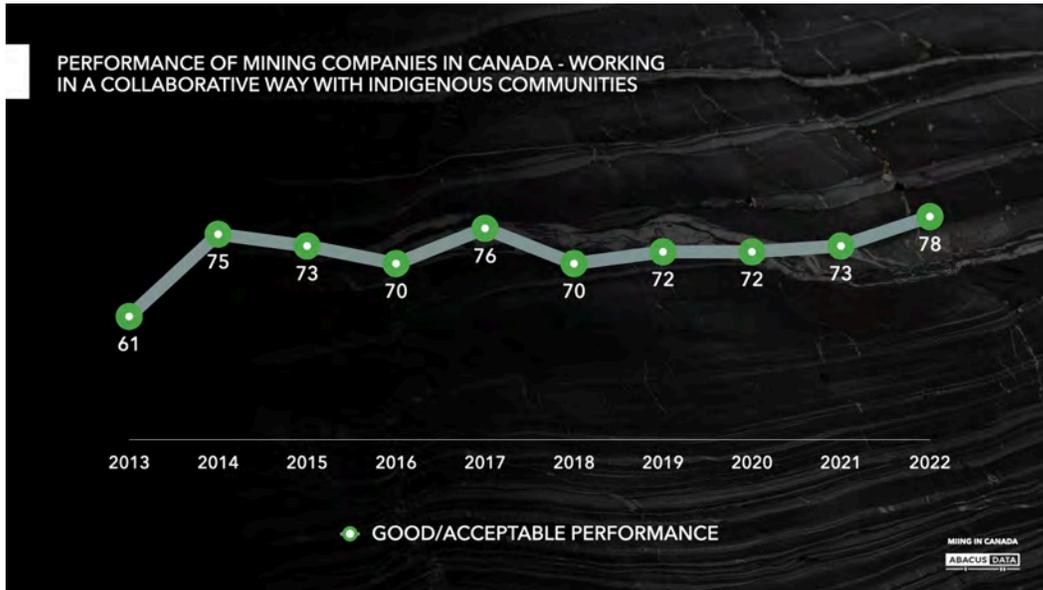
The generally positive feelings about the mining sector have a lot to do with the feeling that the industry provides economic benefits and well-paying jobs for Canadians, but also because people believe the industry has been making an effort to reduce its environmental impact. Impressions in this area have been improving over time, even as societal environmental anxiety has been on the rise as well.

For the first time since we began tracking, more people see mining as contributing to climate change solutions, rather than having a more negative effect on the issue. In part this is because of a growing awareness of how minerals and metals are contributing to new technologies that help reduce harmful emissions, such as e-vehicles, as well as how many mining companies are making steps to reduce their CO2 emissions.

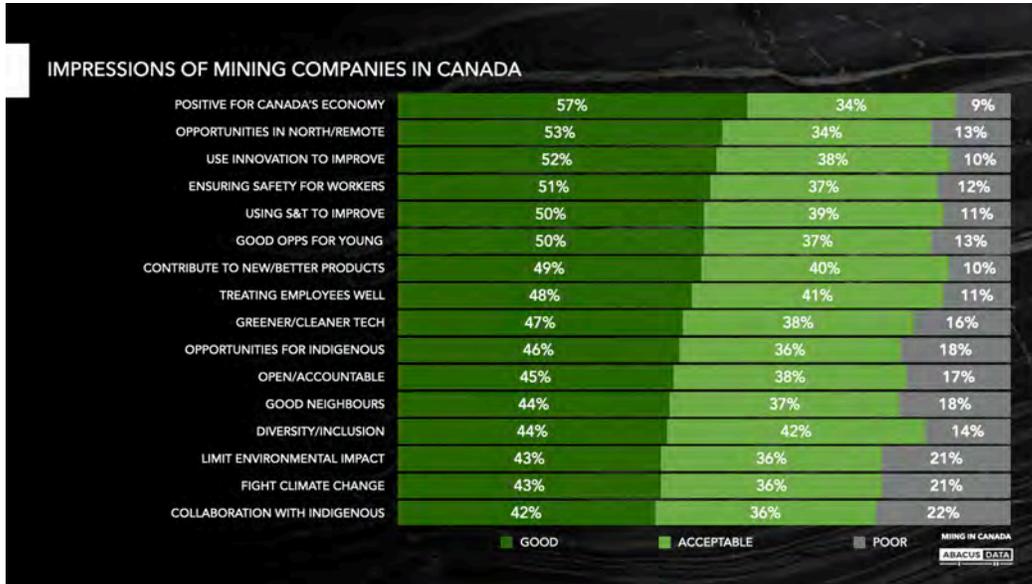
Feelings about the industry’s effort to collaborate with Indigenous communities have also been improving over time.







The overall reputation picture of the mining sector in Canada has the large majority seeing good or acceptable performance on all items that we measure. There is no item where more than 22% offer a negative point of view.

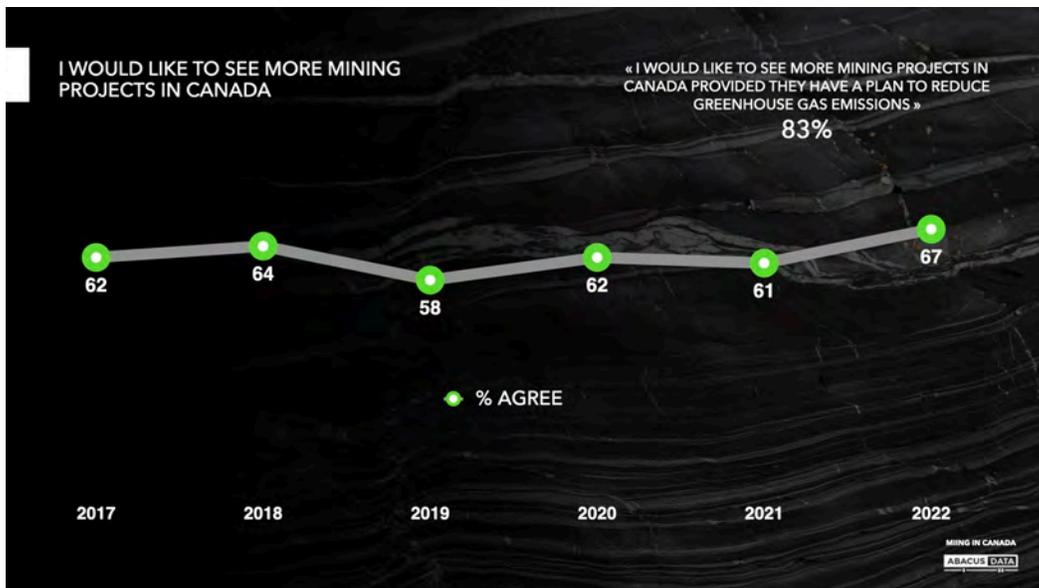


MINING AND ECONOMIC OPPORTUNITY

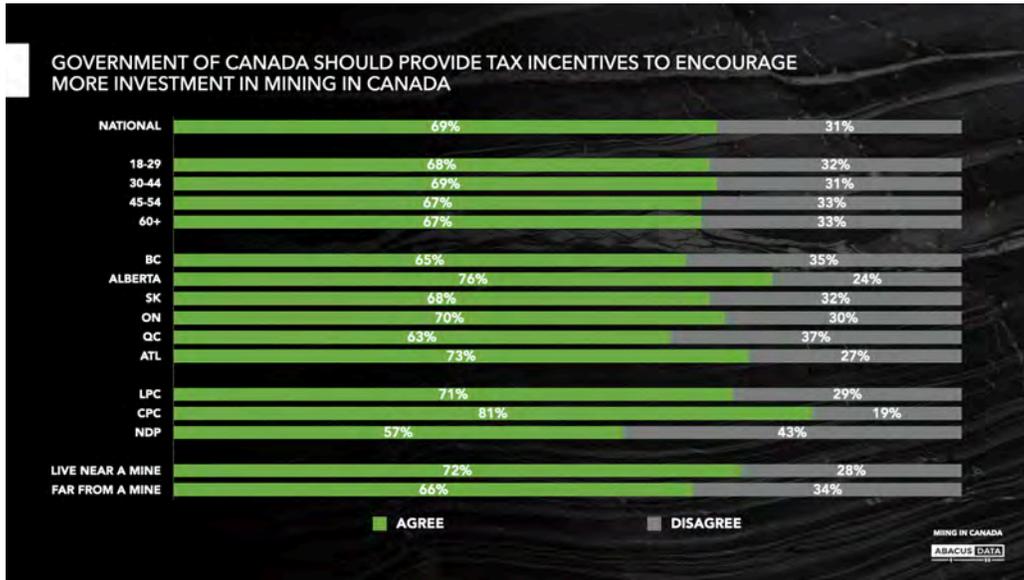
In this year’s survey, 80% of those interviewed feel that “we need a strong mining sector for Canada’s economy to be healthy over the long term” – the highest level of agreement we have seen with this statement.

As people have seen mining in a more positive environmental light over time, we are seeing an increase in a desire for more mining projects in Canada. This year’s result is the most positive in years – rising 6 points from last year, to 67%. Worth noting is that support for more mining projects reaches 83% when mining projects are understood to have a plan to reduce greenhouse gas emissions.

This underscores the potential for extractive sector companies to achieve even stronger levels of social license as more align with net zero targets of governments, customers and investors.



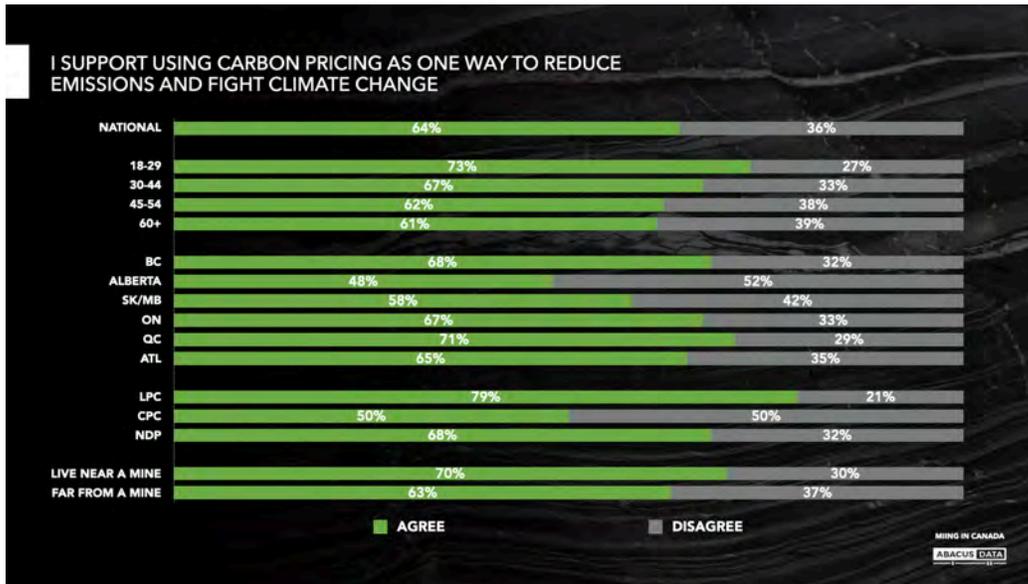
Today a little over two out of three approve of government incentives to encourage more investment in mining in Canada – including a majority in every region, every generation, and across supporters of all major parties at the federal level.



CLIMATE AND CARBON PRICING

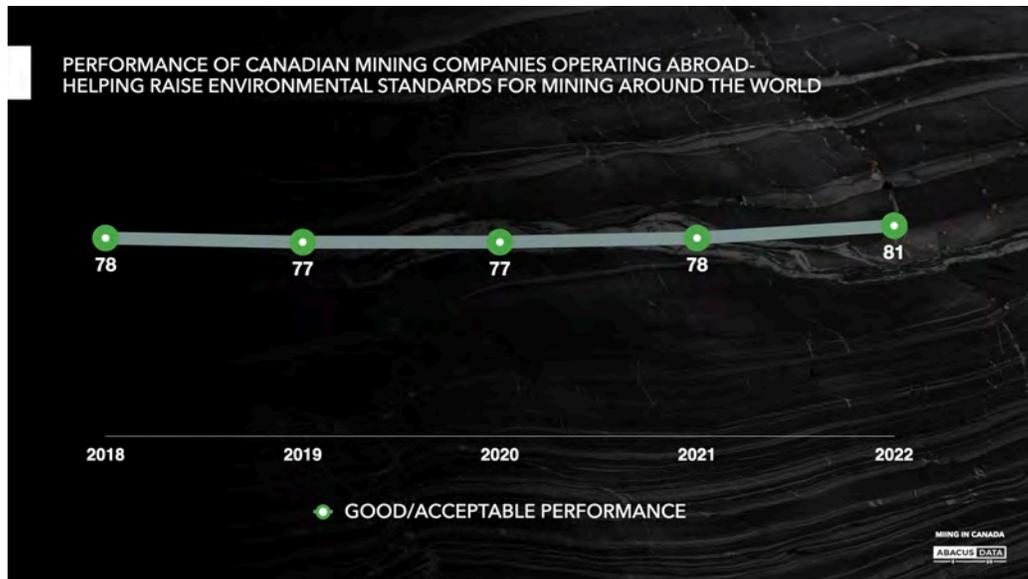
A consistent 81% believe climate change is a crisis that demands urgent action, and 65% support the use of carbon pricing as one way to reduce emissions and fight climate change.

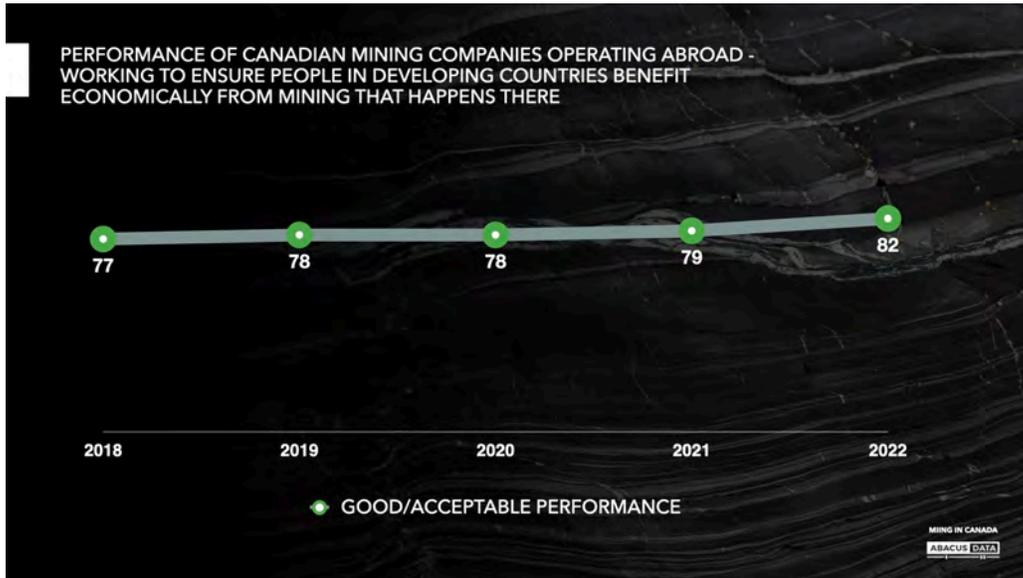




CANADIAN MINING INTERNATIONALLY

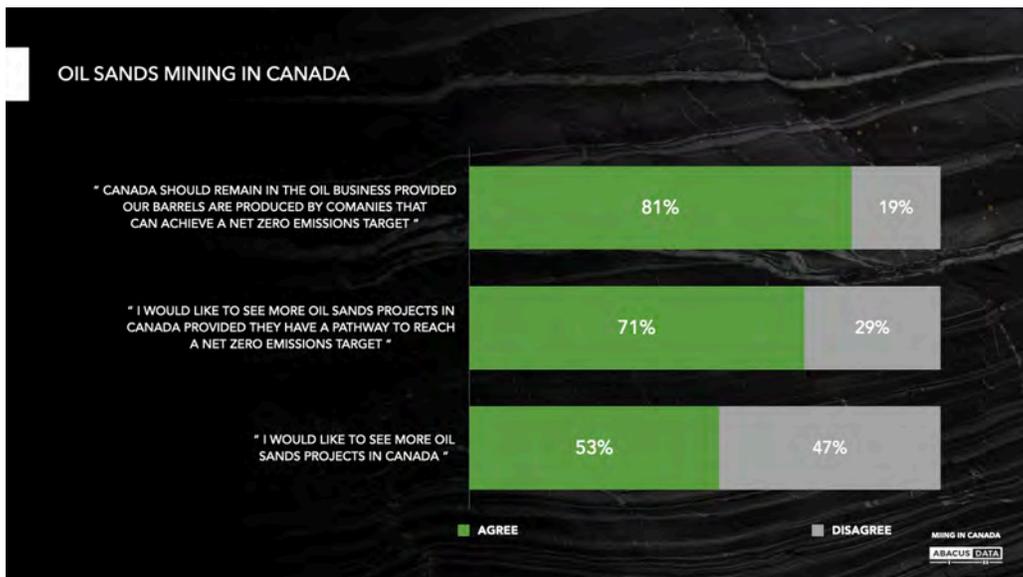
Roughly 80% of Canadians give Canadian mining companies good or acceptable ratings when it comes to the way they operate in other jurisdictions. This includes measures of how these companies help raise environmental standards and ensure that local communities benefit economically from their mining activities.

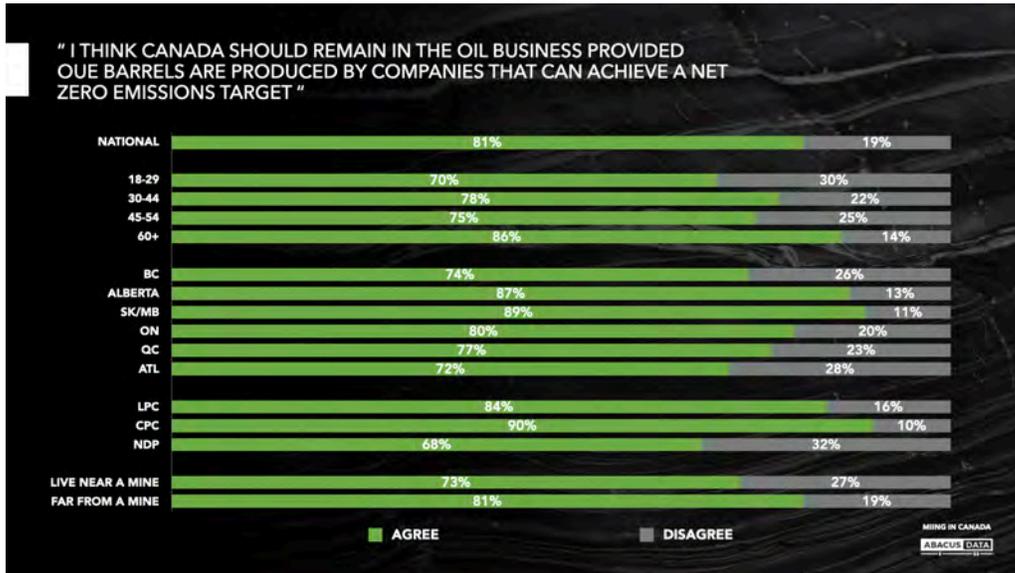




OIL SANDS MINING AND EMISSIONS

This year’s survey included a bit more probing on the way in which people see oil production in Canada. A bare majority would like to see more oil sands projects in Canada (53%), but this number rises to 71% when the proviso “provided they have a pathway to reach a net zero emissions target” and 81% say Canada should remain in the oil business provided “our barrels are produced by companies that achieve a net zero emissions target”. This is the majority view in every region, generation and across major party lines.





TOWARDS SUSTAINABLE MINING

This year’s survey provided respondents with some information about the initiative taken by the Mining Association of Canada to develop a set of protocols under the brand Towards Sustainable Mining (TSM). TSM is now being adopted as a standard by mining chambers in several other countries.

We found that 88% said learning this fact improved their perception of mining companies in Canada and large majorities believe it is a good idea for government to support Canadian companies that adhere to such standards in their efforts to win in export markets and to attract investment to Canada.

"TOWARDS SUSTAINABLE MINING" INITIATIVE OF MINING ASSOCIATION OF CANADA

CANADA IS THE FIRST COUNTRY IN THE WORLD WHERE THE MINING INDUSTRY CREATED PROGRAMS OF ENVIRONMENTAL BEST PRACTICES, KNOWN AS TOWARDS SUSTAINABLE MINING (TSM)

THE PROGRAM INCLUDES PRACTICES THAT COMPANIES MUST ADHERE TO, REPORT ON PUBLICLY, AND HAVE INDEPENDENTLY VERIFIED.

THE PROGRAM IS NOW BEING EMBRACED IN AUSTRALIA AND SEVERAL OTHER MINING COUNTRIES IN AFRICA, ASIA, EUROPE AND SOUTH AFRICA.

DOES KNOWING THIS IMPROVE YOUR PERCEPTION OF HOW CANADIAN MINING COMPANIES OPERATE?

IMPROVES MY PERCEPTION
88%

Mining in Canada
Abacus Data



CONCLUSIONS

This year's results indicate that the mining industry's reputation has been strengthening, as more people become aware of the role of minerals and metals in the world, especially as they are used in a wide range of modern and clean technologies. As more people also see mining companies making commitments and taking steps to reduce CO2 emissions, this too is helping people see the industry as having a promising future in a global economy that is looking to decarbonize.

Canadian mining companies are broadly seen to be good performers in Canada and when they mine abroad as well. A variety of indicators of public perception are stronger today than at any time we have measured in the past, including for having a collaborative relationship with Indigenous people and working to lessen the industry's environmental impact. More people today than in the last several years say they would like to see more mining projects in Canada.

Many people are likely unaware of Canada's leadership role in developing the *Towards Sustainable Mining* standard protocols, and the fact that these are becoming used in other jurisdictions as well. Upon learning about this aspect of mining by Canada's mining sector, there is even more enthusiasm for public policy that promotes Canada as a destination for mining investors and as a preferred supplier for discerning product customers.