

Tracking the Societal Reputation of the Mining Sector

Public Opinion Insights
across 34 Markets

October 2026



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Lead the future.

GlobeScan is an insights and advisory firm specializing in trust, sustainability, and engagement.

We equip clients with insights to navigate shifting societal and stakeholder expectations, crafting evidence-based strategies that reduce risks and create value for their organizations and society.

Established in 1987, we have offices in Cape Town, Dubai, Hong Kong, Hyderabad, London, Paris, San Francisco, São Paulo, Singapore, Tokyo, and Toronto.

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Methodology Summary

- Representative online samples of approximately 1,000 adults in each of 34 markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 1,500 in China and USA) ($n=33,110$).
- Samples are representative of online population, weighted to reflect general population census data.
- Online surveying in July and August 2026.



Executive Overview



Mining's societal reputation is improving, but it still trails other sectors

- Net perceived social performance rose from -16 in 2023, to +1 in 2026 across 17 tracked markets. Mining nevertheless ranks last among 25 sectors across the 34 markets in 2026



Environmental criticism has softened, but remains a key challenge

- Among negative raters across 21 comparable markets, perceptions of environmental damage fell from 61% to 51% since 2023, excessive resource use from 37% to 30%, and climate change from 31% to 26%



Jobs and providing minerals for a greener future remain the strongest reasons for positive views of the sector

- Across 21 comparable markets, between 2023 and 2026, mentions of jobs as a benefit of mining has stayed steady, as has mentions of mining providing minerals for a greener future



Views of mining vary widely by market

- Australia's net score rose from -12 in 2024, to +21 in 2026, while every surveyed European market, Canada, and the USA remain net negative



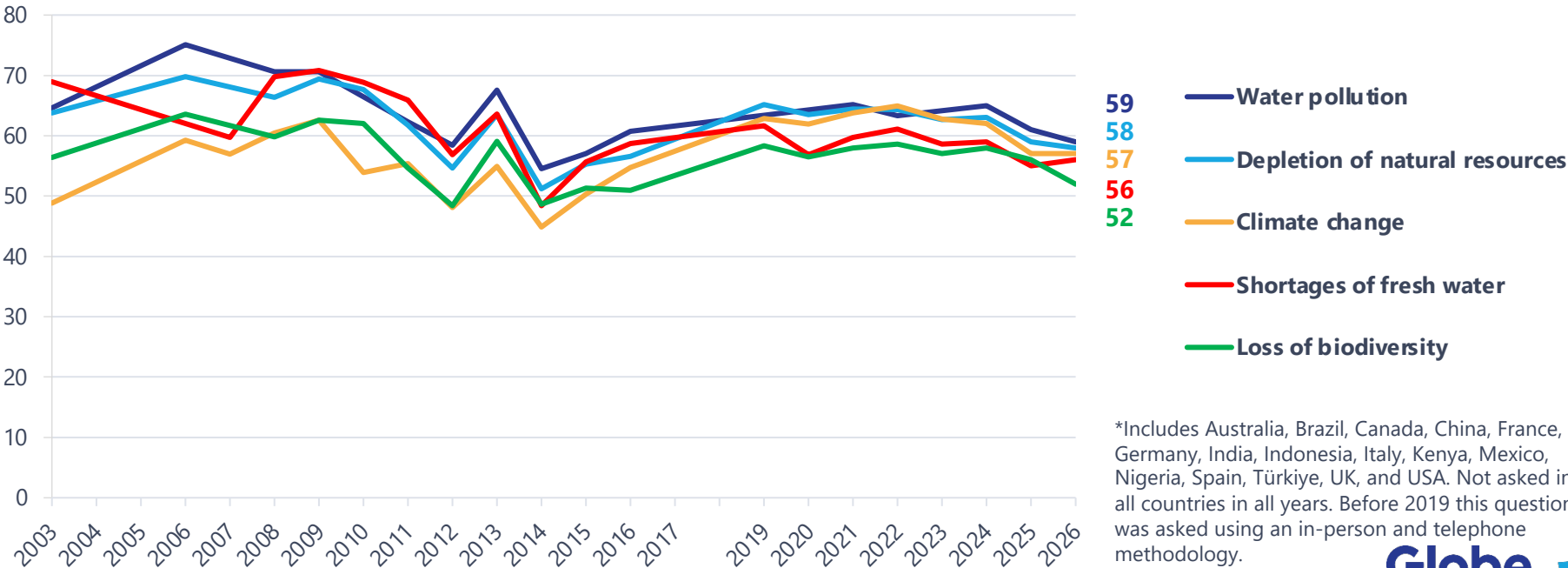
Younger generations view mining more positively

- In 2026, mining's net score ranges from +16 among Gen Z audiences to -12 among Baby Boomers+, although for all generations, mining still trails other sectors tested

Environmental concern is below 2022 levels, but majorities still say key issues are “very serious”

Perceived Seriousness of Global Problems

“Very Serious,” Average of 16 Markets,* 2003–2026

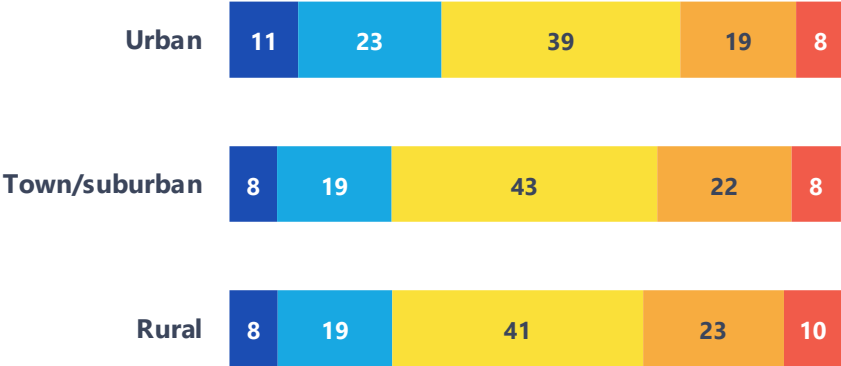
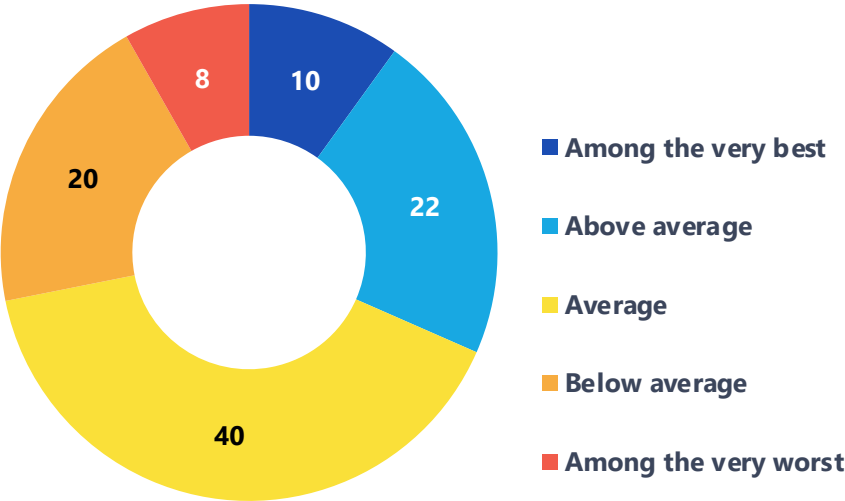


*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Spain, Türkiye, UK, and USA. Not asked in all countries in all years. Before 2019 this question was asked using an in-person and telephone methodology.

Most people say mining performs average or above average on fulfilling their societal responsibility; urban residents are more positive

Performance of Mining Companies in Fulfilling Their Responsibilities to Society

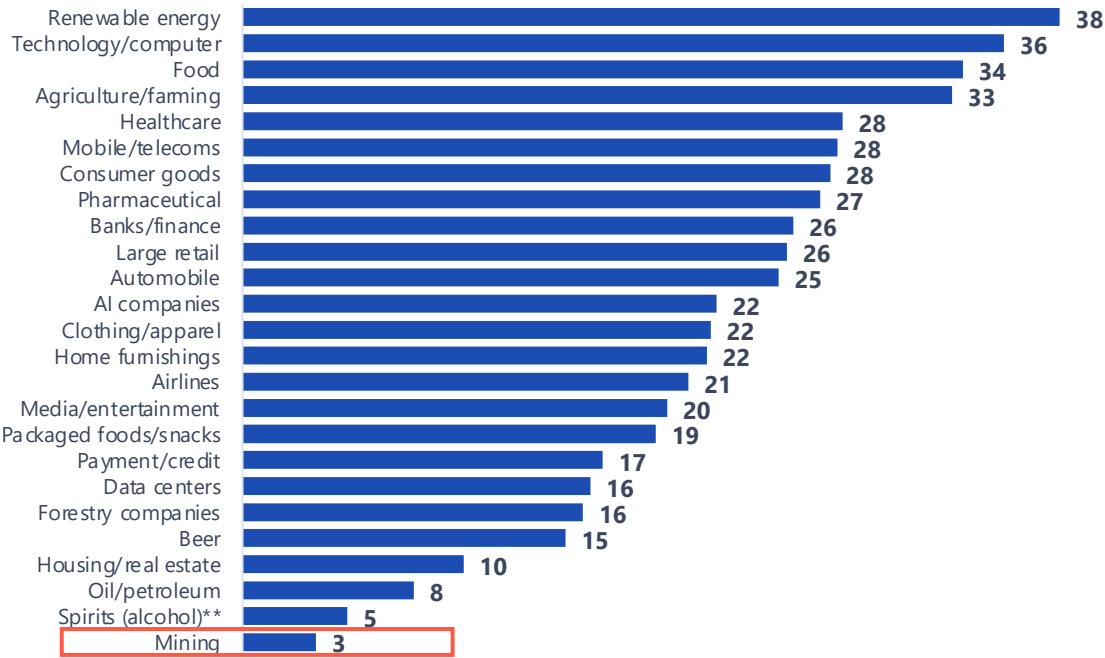
Average of 34 Markets, 2026



But mining companies rank last on societal reputation compared to other sectors

Performance of Sectors in Fulfilling Their Responsibilities to Society

Net Performance,* Average of 34 Markets, 2026



*“Among the very best” and “Above average” minus “Below average” and “Among the very worst”
**Spirits (alcohol) not asked in Indonesia and Saudi Arabia

Mining Companies rank among the bottom of 25 sectors in most markets surveyed on societal reputation

Performance of Mining Companies in Fulfilling Their Responsibilities to Society

Rank out of 25 Different Sectors by Net Performance,* by Market, 2026

ASIA-PACIFIC		EUROPE		AFRICA / MIDDLE EAST	
Australia	11th	France	25th	Egypt	22nd
China	23rd	Germany	22nd	Kenya	25th
Hong Kong	25th	Italy	24th	Nigeria	23rd
India	23rd	Netherlands	25th	Saudi Arabia	16th
Indonesia	22nd	Poland	25th	South Africa	23rd
Japan	23rd	Spain	24th	Türkiye	20th
Singapore	25th	Sweden	17th	UAE	22nd
South Korea	24th	UK	24th		
Thailand	25th	Ukraine	22nd	LATIN AMERICA	
Vietnam	25th	NORTH AMERICA		Argentina	24th
		Canada	20th	Brazil	25th
		USA	24th	Chile	11th
				Colombia	25th
				Mexico	24th
				Peru	23rd

- Ranked 1st – 8th
- Ranked 9th – 17th
- Ranked 18th – 25th

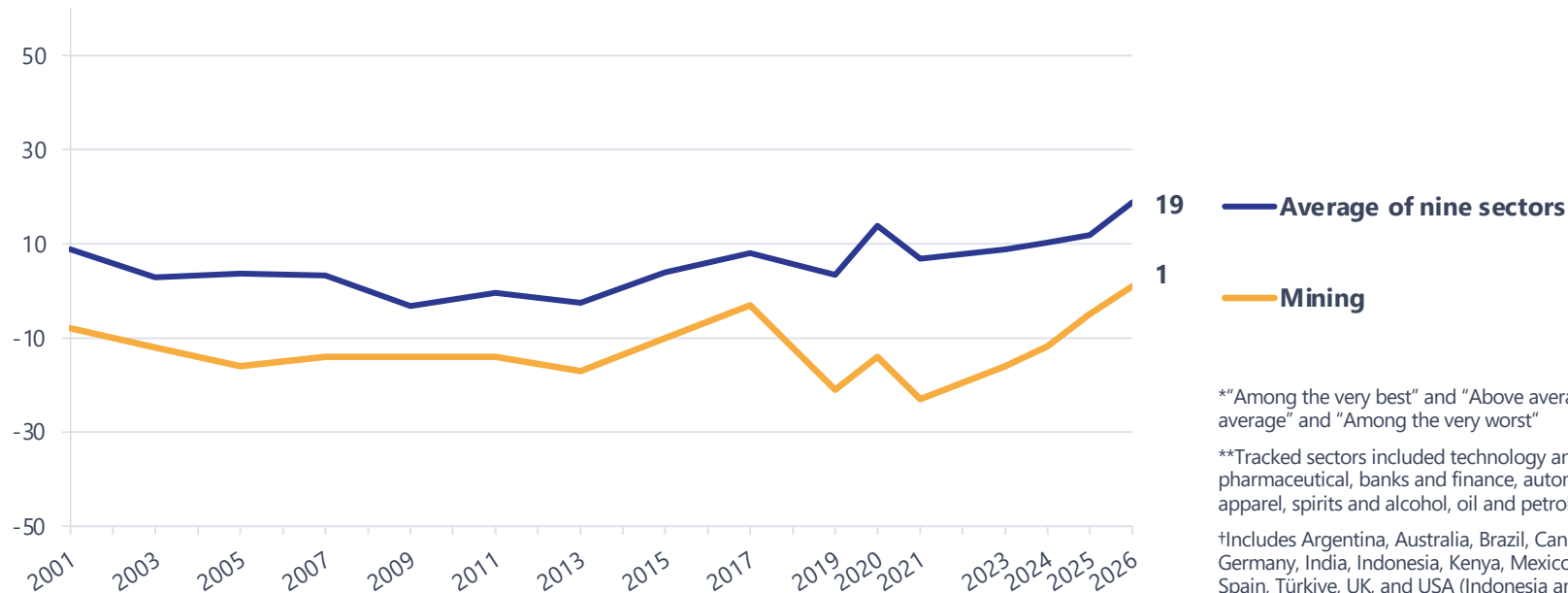
*"Among the very best" and "Above average" minus "Below average" and "Among the very worst"

T22. Please rate each of the following types of companies on how well they fulfill their responsibilities to society compared to other types of companies. – Mining Companies

When consistently tracking the same 17 markets over time, mining consistently rates below the average of tracked sectors

Performance of Sectors in Fulfilling Their Responsibilities to Society: Mining vs Average of Nine Sectors Tested

Net Performance,* Average of Nine Sectors,** Average of 17 Markets,† 2001–2026



*"Among the very best" and "Above average" minus "Below average" and "Among the very worst"

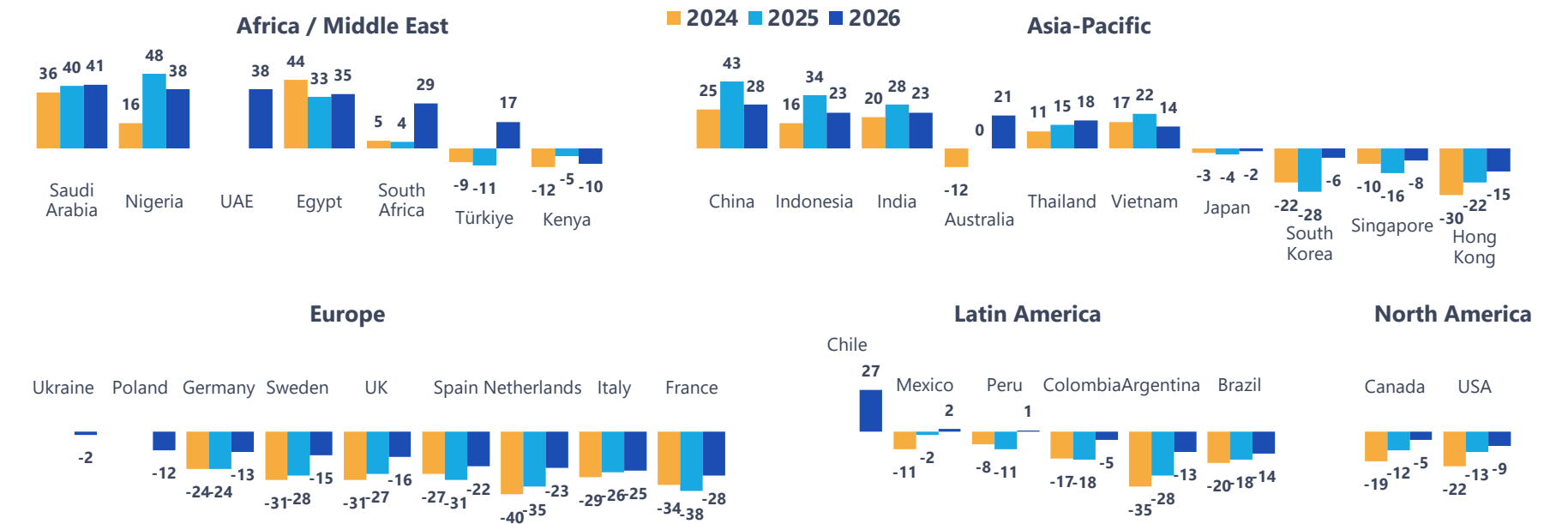
**Tracked sectors included technology and computer, food, pharmaceutical, banks and finance, automobile, clothing and apparel, spirits and alcohol, oil and petroleum, and mining.

†Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, South Korea, Spain, Türkiye, UK, and USA (Indonesia and Saudi Arabia not included in averages for Beer and Spirits). Not all countries and sectors were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

Perceptions of mining companies are negative in Europe, North America, and most of Latin America – but weak perceptions have improved in many markets

Performance of Mining Companies in Fulfilling Their Responsibilities to Society

Net Performance,* by Market and Region, 2024–2026

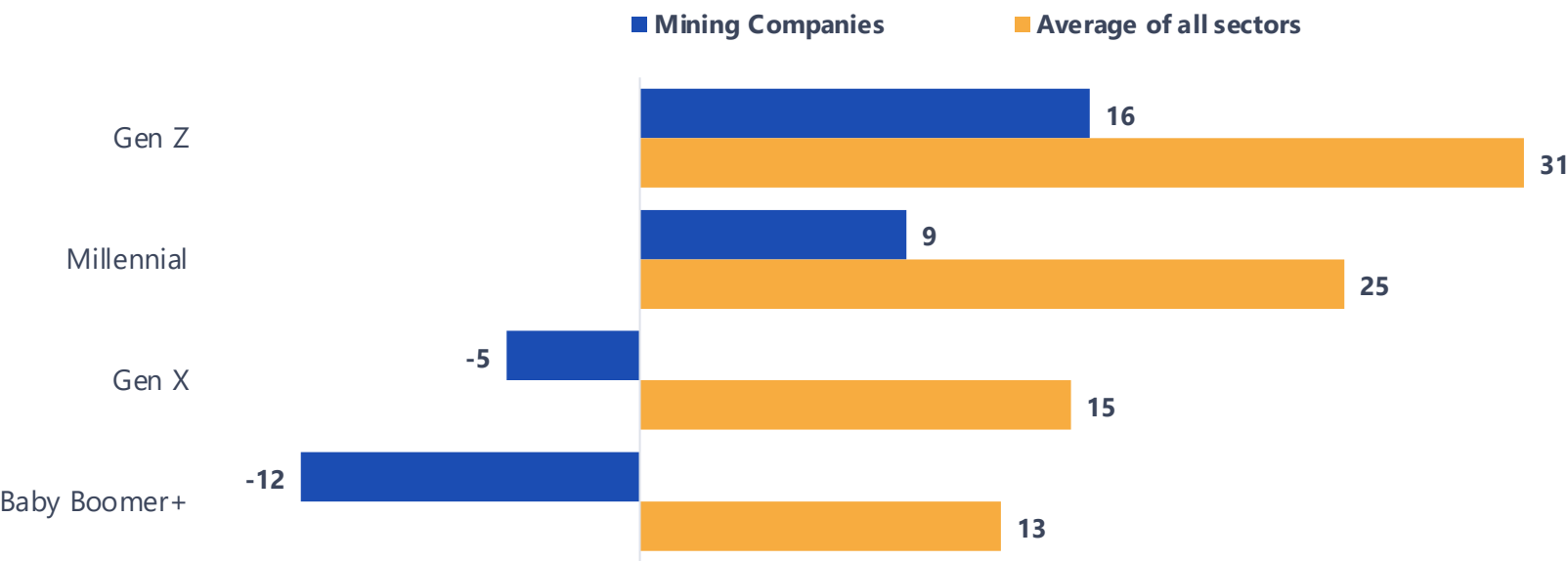


*"Among the very best" and "Above average" minus "Below average" and "Among the very worst"

Mining Companies are rated highest by Gen Z and lowest by Baby Boomers+ on how well they fulfill their responsibilities to society – same as for other sectors

Performance of Sectors in Fulfilling Their Responsibilities to Society

Net Performance,* by Generation, Average of 34 Markets, 2026



*"Among the very best" and "Above average" minus "Below average" and "Among the very worst"

Jobs, minerals for a greener future, and economic contribution drive positive perceptions of mining companies globally

Reasons for Positive Perceptions of Mining Companies

Select Three, Average of 34 Markets, 2026

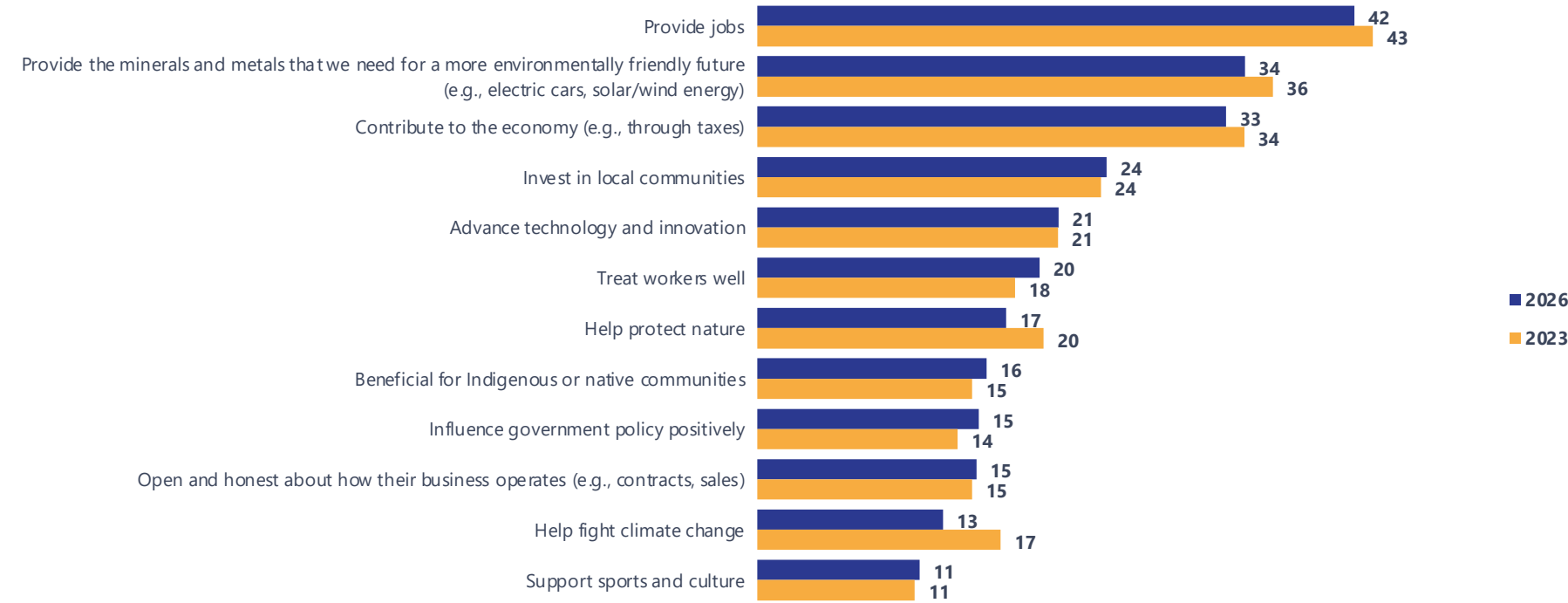


13 I1A. Why do you rate mining companies positively on fulfilling their responsibilities to society?
Please select up to three reasons that most apply.

Positive perceptions of mining still rest on jobs and the minerals needed for a greener future, though fewer cite these reasons than in 2023

Reasons for Positive Perceptions of Mining Companies

Select Three, Average of 21 Markets,* 2023–2026

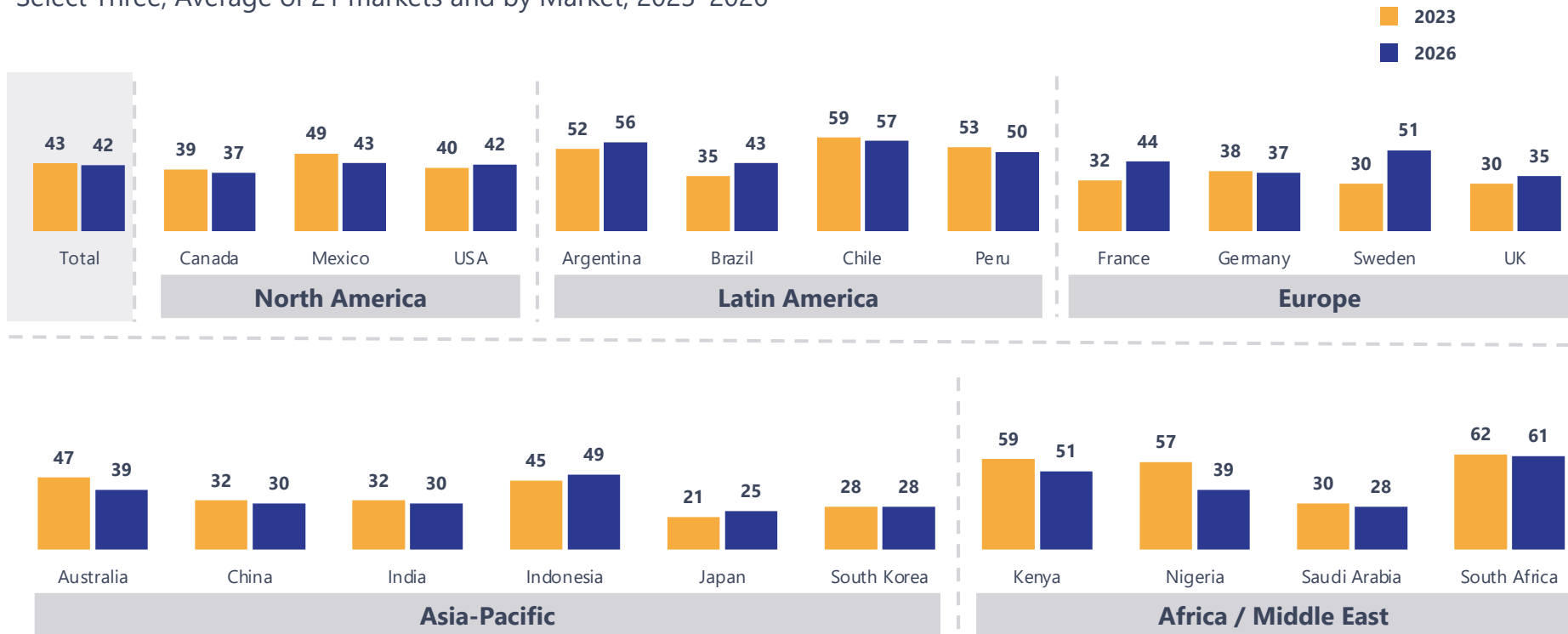


14 Same 21 markets in both years include: Argentina, Australia, Brazil, Canada, Chile, China, France, Germany, India, Indonesia, Japan, Kenya, Mexico, Nigeria, Peru, Saudi Arabia, South Africa, South Korea, Sweden, the UK and the USA
11A. Why do you rate mining companies positively on fulfilling their responsibilities to society? Please select up to three reasons that most apply.

Job creation supports positive views of the mining industry, but its importance varies widely by market

Reasons for Positive Perceptions of Mining Companies: Providing Jobs

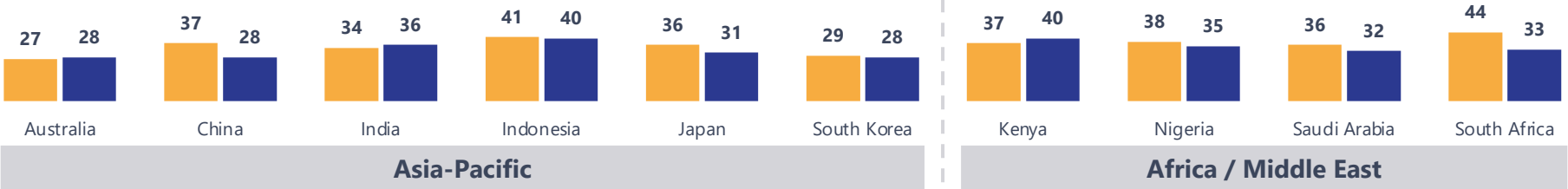
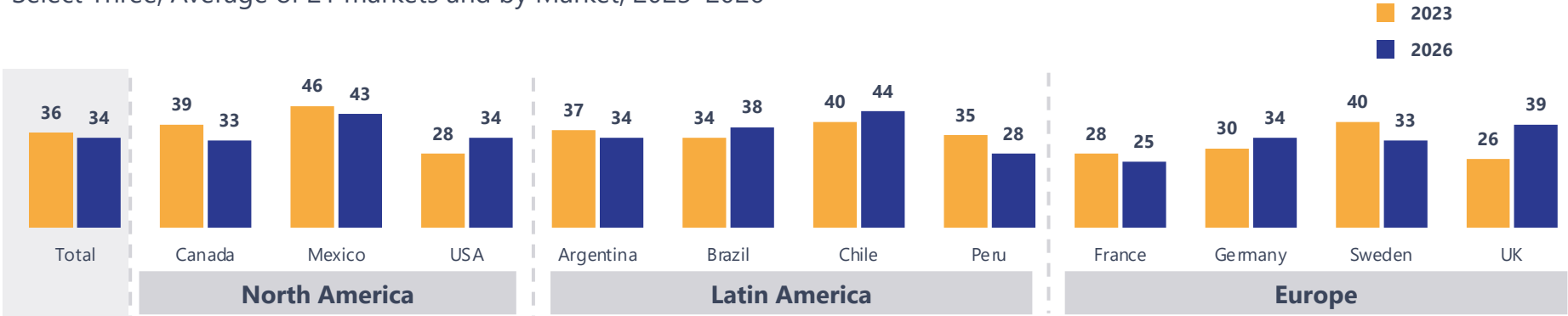
Select Three, Average of 21 markets and by Market, 2023–2026



Mining's role in building a greener future supports positive views, with the largest increased in recognition in the UK

Reasons for Positive Perceptions of Mining Companies: Providing Minerals and Metals for a Greener Future

Select Three, Average of 21 markets and by Market, 2023–2026



Jobs, minerals for a greener future, and economic contribution are strong drivers of positive perceptions of mining companies in all regions

Reasons for Positive Perceptions of Mining Companies

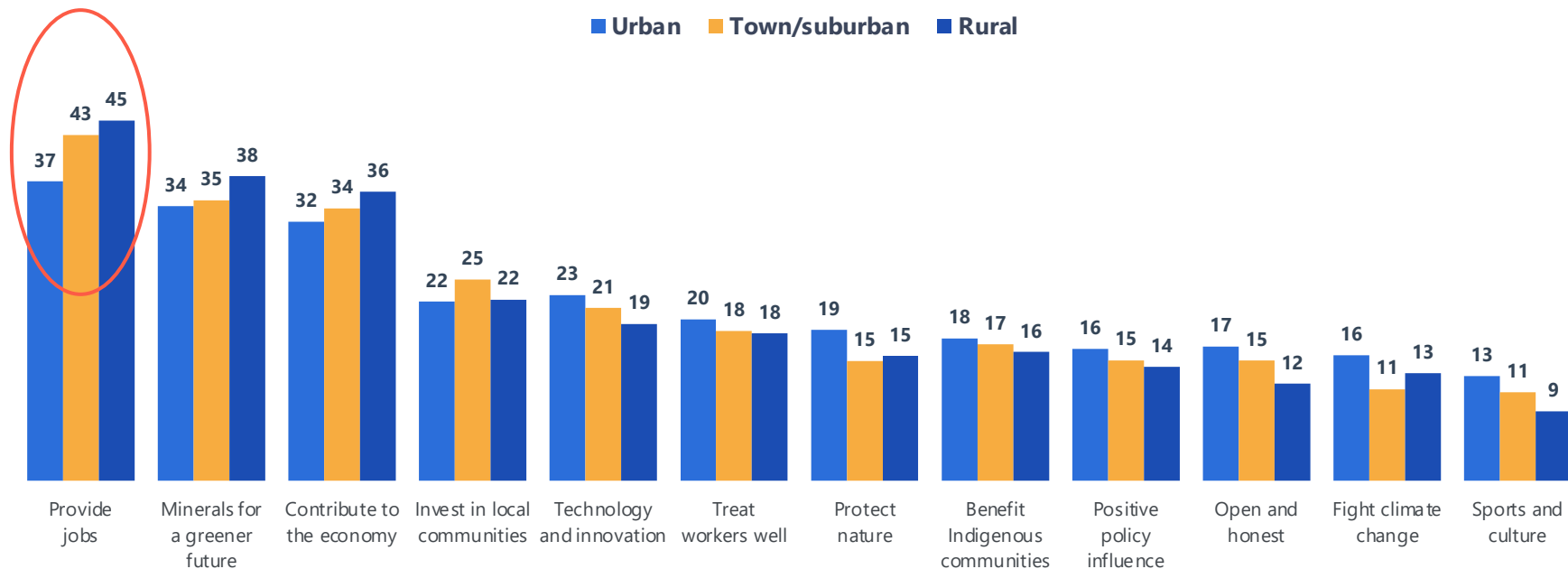
Select Three, Top Three Reasons, by Region, 2026

	Africa / Middle East	Asia-Pacific	Europe	Latin America	North America
1	Provide jobs (37%)	Minerals for a greener future (34%)	Provide jobs (41%)	Provide jobs (51%)	Provide jobs (40%)
2	Contribute to the economy (34%)	Provide jobs (34%)	Minerals for a greener future (34%)	Contribute to the economy (38%)	Minerals for a greener future (33%)
3	Minerals for a greener future (33%)	Contribute to the economy (31%)	Contribute to the economy (28%)	Minerals for a greener future (37%)	Contribute to the economy (26%)

Jobs are much more important for rural residents in driving positive perceptions of mining companies

Reasons for Positive Perceptions of Mining Companies

Select up to Three, by Settlement Type, 2026 (%)



Perceived environmental damage drives global criticism of mining, cited by half of those with a negative view of the industry

Reasons for Negative Perceptions of Mining Companies

Select Three, Average of 34 Markets, 2026

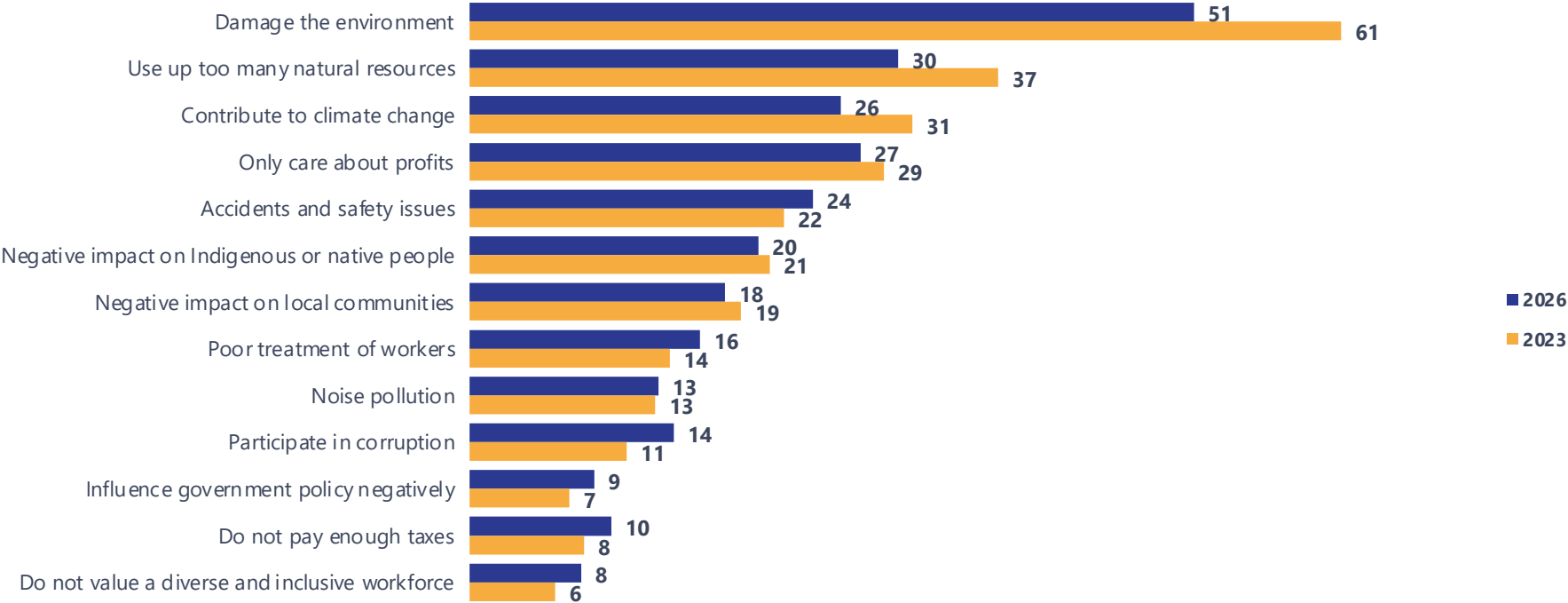


19 I1B. Why do you rate mining companies negatively on fulfilling their responsibilities to society?
Please select up to three reasons that most apply.

Environmental damage and excessive natural resource use continue to be the greatest criticism of the mining industry, but both have softened since 2023

Reasons for Negative Perceptions of Mining Companies

Select Three, Average of 21 Markets, 2023–2026



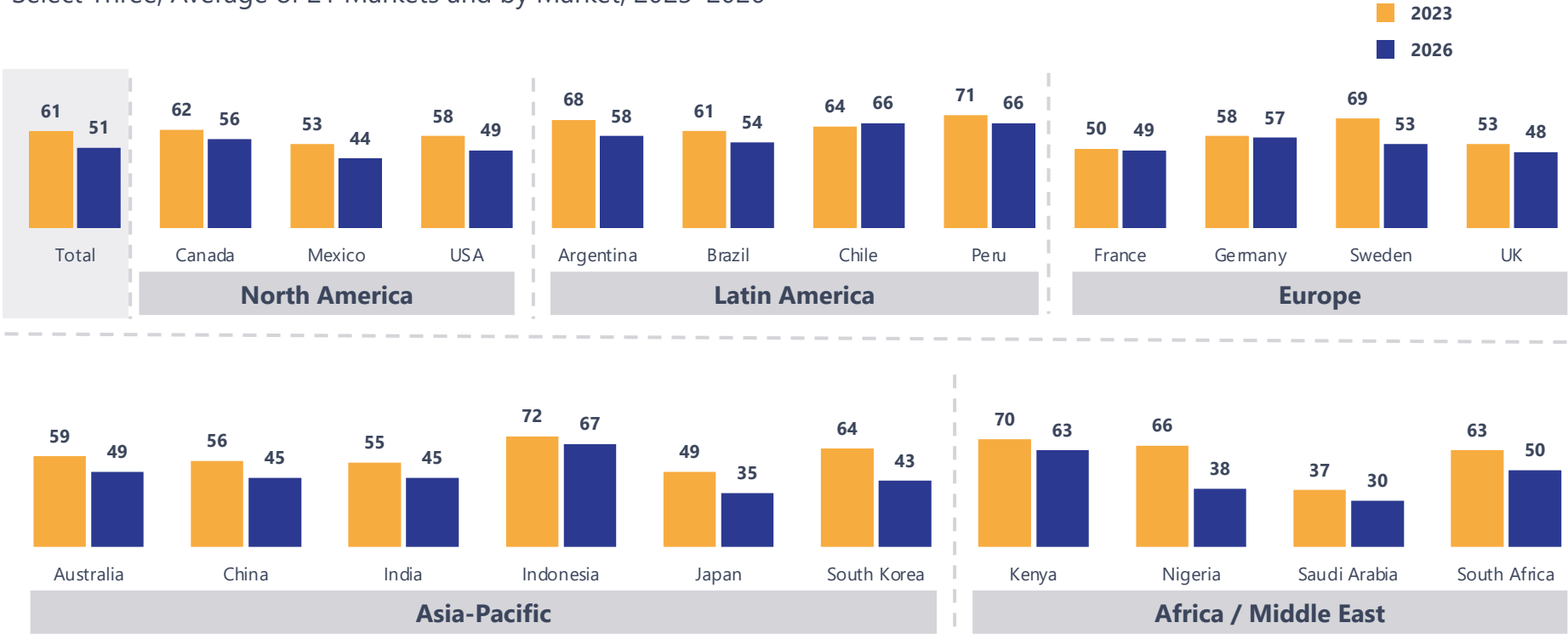
20 Same 21 markets in both years include: Argentina, Australia, Brazil, Canada, Chile, China, France, Germany, India, Indonesia, Japan, Kenya, Mexico, Nigeria, Peru, Saudi Arabia, South Africa, South Korea, Sweden, the UK and the USA

I1B. Why do you rate mining companies negatively on fulfilling their responsibilities to society? Please select up to three reasons that most apply.

Environmental damage is less widely cited as a reason for negative views of mining in 2026 than in 2023 across almost all markets

Reasons for Negative Perceptions of Mining Companies: Damage the Environment

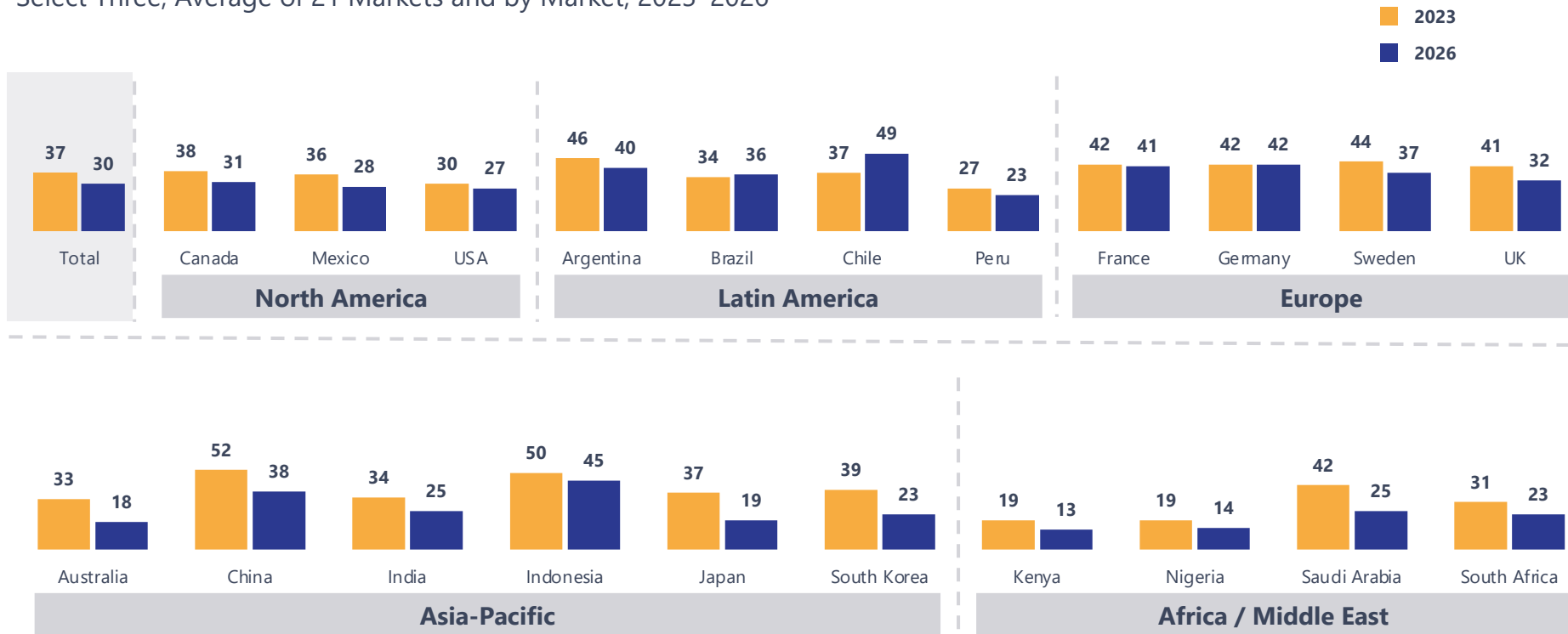
Select Three, Average of 21 Markets and by Market, 2023–2026



Concerns around mining's use of natural resources has declined in most markets since 2023, but have risen sharply in Chile

Reasons for Negative Perceptions of Mining Companies: Use up too many Natural Resources

Select Three, Average of 21 Markets and by Market, 2023–2026



Perceptions of environmental damage leads criticism of mining in all regions

Reasons for Negative Perceptions of Mining Companies

Select Three, Top Three Reasons, by Region, 2026

1

2

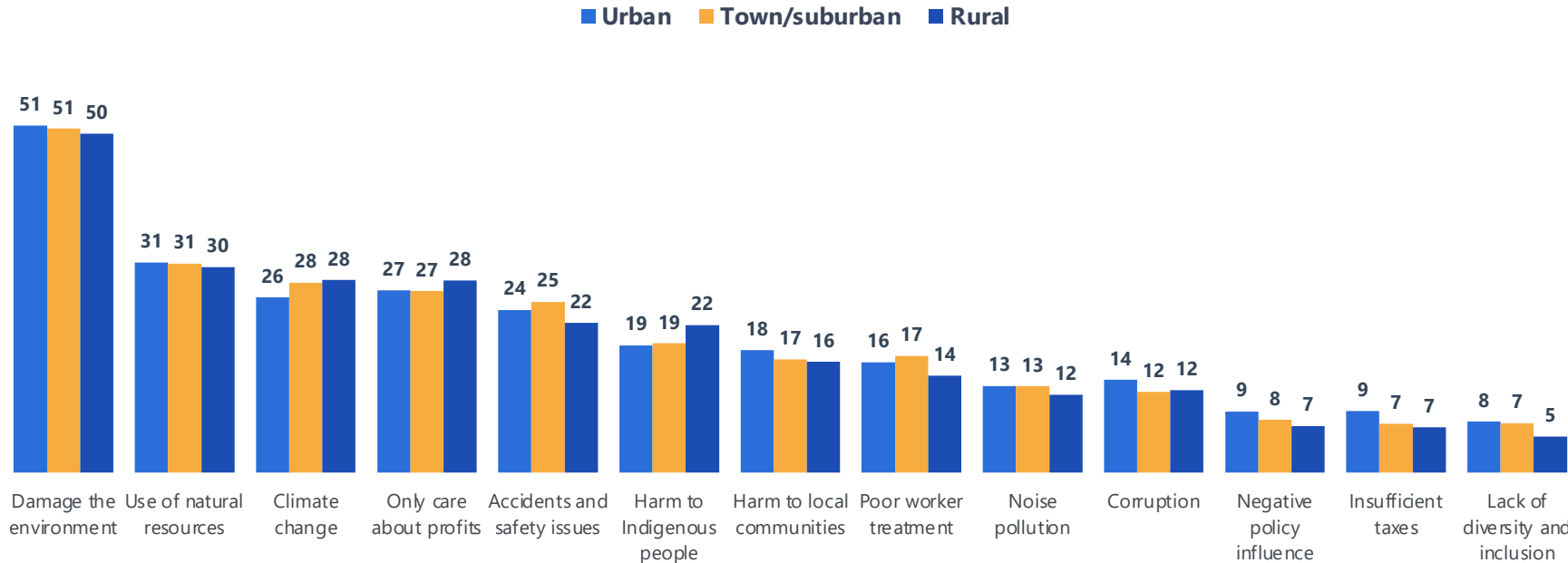
3

Africa / Middle East	Asia-Pacific	Europe	Latin America	North America
Damage the environment (44%)	Damage the environment (48%)	Damage the environment (51%)	Damage the environment (58%)	Damage the environment (52%)
Only care about profits (32%)	Use up too many natural resources (30%)	Use up too many natural resources (34%)	Use up too many natural resources (34%)	Use up too many natural resources (29%)
Accidents and safety issues (26%)	Accidents and safety issues (26%)	Contribute to climate change (31%)	Only care about profits (26%)	Contribute to climate change (29%)

People in rural areas are more likely than others to say that mining companies cause harm to Indigenous people

Reasons for Negative Perceptions of Mining Companies

Select up to Three, by Settlement Type, 2026 (%)



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