



Australia's National
Science Agency

Australian attitudes toward mining 2024 Survey

Snapshot



To understand the views of Australians regarding the mining industry, CSIRO conducted a national survey of citizen attitudes in collaboration with Voconiq. This survey is the third in a program of research, providing an update on the 2014 and 2017 national surveys. In 2024, a focus on critical and energy transition minerals was included to enable a clear understanding of community sentiment toward the role the mining industry plays in the renewable energy transition and terms of social acceptability for this activity.

Mining in Australia

The mining industry has been integral to Australia’s economy, contributing over \$2.1 trillion in export revenue over the past decade. In addition to this impact, the industry has paid \$241 billion in wages, \$132 billion in company taxes, and \$106 billion in royalties, supporting 21% of the nation’s economic growth. As the global community confronts climate change, the role of mining is expanding to provide critical minerals such as lithium, cobalt, nickel, and rare earth elements (REEs) and strategic materials like copper and manganese to construct renewable energy technologies.

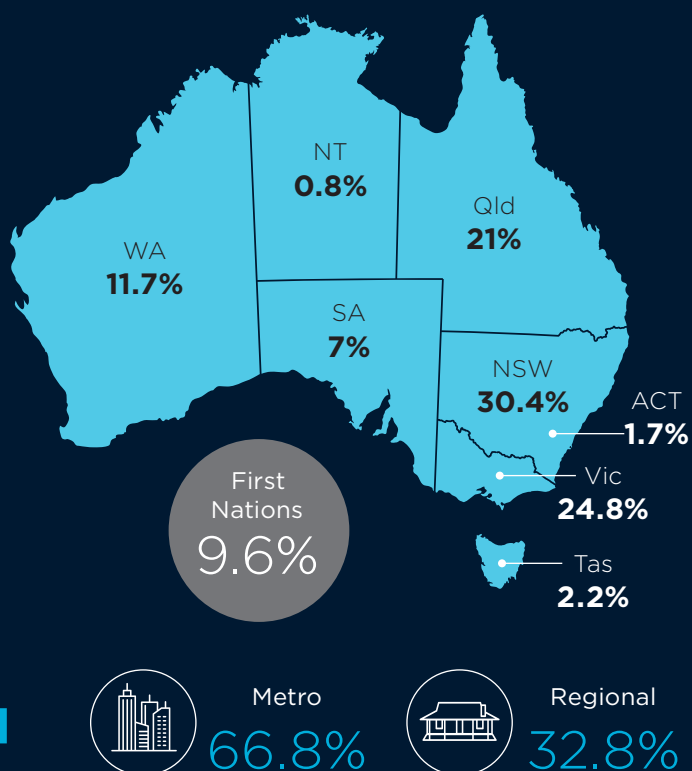
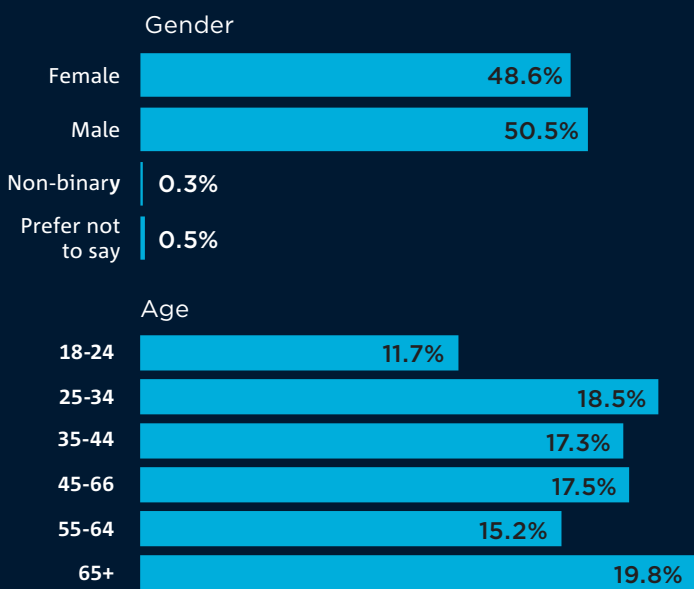
Australia’s position as a global leader in this transition is supported by over 80 major critical minerals projects in the pipeline as of December 2022, representing up to \$42 billion in investment value and the potential creation of 115,100 jobs in the Australian economy to 2040. However, this increased activity comes with heightened expectations for the mining industry to meet high environmental and social standards, ensuring that the benefits are shared equitably and that negative impacts are minimised.

Who participated?

The 2024 Australian attitudes toward mining survey engaged 6,448 respondents between March and April 2024, comprising a nationally representative sample (by age and gender) of 5,724 participants and an additional 724 respondents through an open call via social media and direct invitation. The online survey captured a broad demographic, with nearly equal representation of men and women, and a wide age distribution from 18 to over 65 years. Geographic representation included all Australian states and territories, with a focus on both metropolitan (66.8%) and non-metropolitan (32.8%) areas. Notably, 9.6% of respondents identified as First Nations.

Total Participants in 2024

6,448



Trust and acceptance of the mining industry

The 2024 survey reveals a significant shift in public attitudes toward the mining industry in Australia over the last decade. Trust in the industry remains modest although it has improved substantively, with the mean trust score rising from 2.8 in 2014 to 3.1 in 2024.¹ Acceptance of mining has also increased, from 3.6 in 2014 and 3.5 in 2017 to 3.7 in 2024, reflecting a growing public confidence in the industry's commitment to act responsibly and perceptions that the benefits of mining outweigh its impacts.

Results show trust is closely linked to perceptions of the industry's environmental and social impacts. For instance, participants who perceive negative environmental impacts, particularly regarding water quality and climate change, report lower trust in the mining industry. The introduction of a climate dimension in the 2024 survey highlights the tension between the need for increased mining to meet climate goals and potential environmental consequences of this activity.

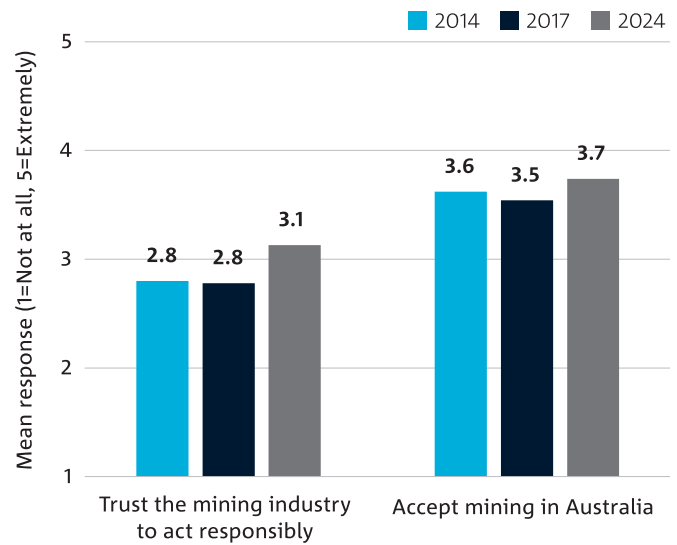


Figure 1: Trust and acceptance over time

The benefits of mining

Mining plays a significant role in discussions about Australia's economic strength and prosperity. The 2024 survey highlights several key benefits as perceived by Australians:

- **Employment:** The Australian mining industry is seen as a major contributor to employment, with the majority of Australians agreeing that it provides jobs and training opportunities for young people (78% of participants), First Nations people (66%), and for women (74%). The mean score for mining's contribution to creating jobs increased from 5.5 in 2014 to 5.7 in 2024.²
- **Personal financial benefit:** While 54% of participants feel that mining had no direct impact on their personal finances, 50% agree that the average Australian is wealthier because of the industry. The mean score for this sentiment increased from 4.0 in 2017 to 4.4 in 2024.²
- **Infrastructure in regional Australia:** Mining is credited with improving infrastructure in regional areas, including transport (70% agreement), social infrastructure (63%), and communications/IT (68%). Mean scores for these measures have consistently improved across all survey years.

1 Using a 1 (Not at all) to 5 (Extremely) response scale

2 Using a 1 (Strongly disagree) to 7 (Strongly agree) response scale

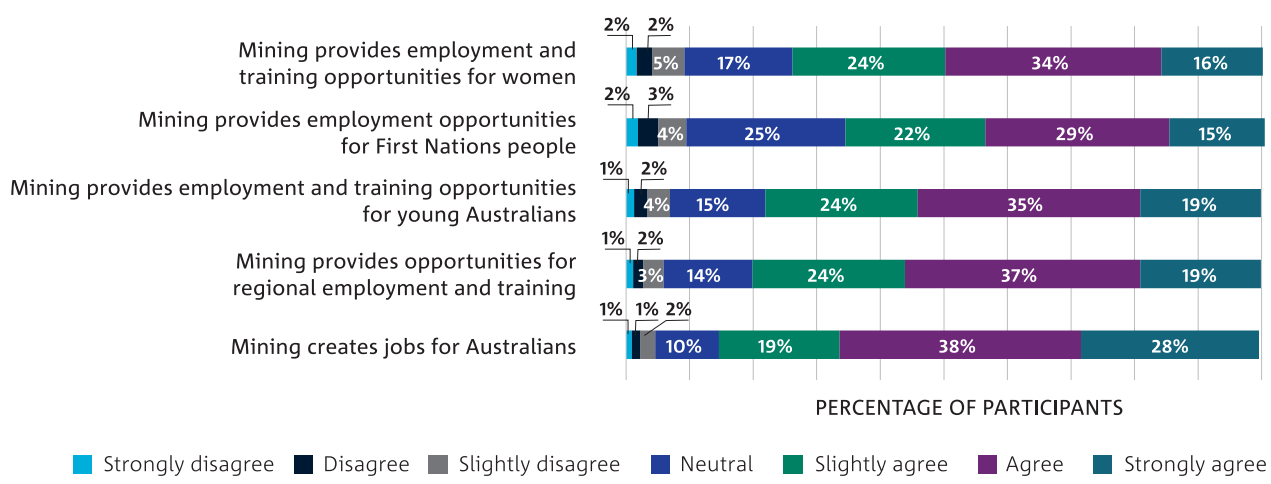


Figure 2: Employment and economic benefits

Concerns about mining

Despite the benefits, the environmental and social impacts of mining continue to raise concerns among Australians. Key findings² include:

- Environmental impacts:** A majority (61%) of participants agree that mining has negative environmental impacts, particularly on water quality, with a mean score of 4.8. This is consistent with findings from the 2014 and 2017 surveys. However, concern that mining creates impacts on water quality (groundwater and surface water) declined, from 4.8 in 2017 to 4.6 in 2024.
- Impact on other sectors:** The perceived impact of mining on other sectors, such as agriculture, remains a point of tension. While 44% agree that mining negatively impacts on the agriculture industry, this is now less so, with the mean score decreasing from 4.6 to 4.2 in 2024.
- Health impacts:** Concerns about mining’s impact on health persist, with 55% agreeing that it negatively affects mine employees’ health and 45% for affecting local communities. Mining employees themselves view these impacts as less severe ($M=4.3$ for employee health and $M=3.9$ for community health) compared to other participants ($M=4.7$ and $M=4.4$, respectively).
- Fly-in, Fly-out (FIFO) and Drive-in, Drive-out (DIDO) workforce:** Opinions are mixed on whether these workforce strategies negatively impact local communities, with 36% agreeing and 36% disagreeing. However, mining employees show stronger agreement ($M=4.4$) that these strategies are necessary compared to non-mining employees ($M=4.1$).

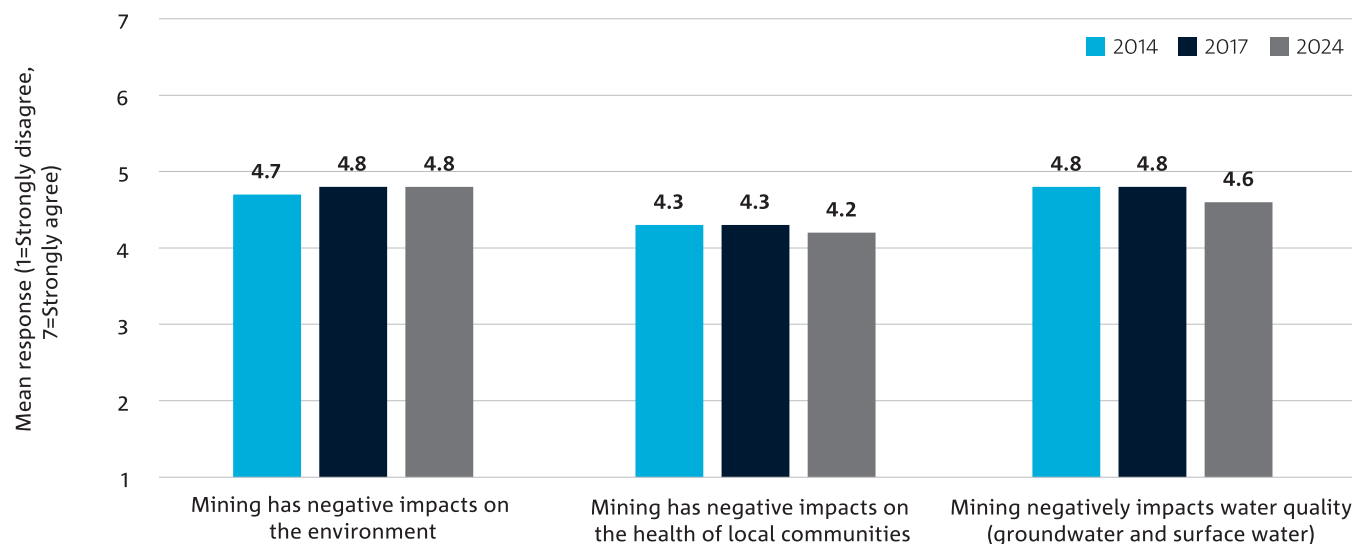


Figure 3: Environmental and community health concerns

Transition minerals and renewable energy

A central focus of the 2024 survey was on energy transition minerals, which are critical for the shift to renewable energy. The survey revealed several key insights:

- Urgency of energy transition:** 66% of participants believe it is important for Australia to urgently transition to renewable energy to combat climate change. Support is particularly strong among participants aged 25-34 years ($M=5.2$) and 35-44 years ($M=5.3$).
- Critical minerals:** There is strong agreement (79%, $M=5.6$) that critical minerals are essential for the development of renewable energy technologies.

Similarly, 72% ($M=5.3$) agree that Australia needs an increased supply of critical minerals to transition to renewable energy, and 73% ($M=5.3$) acknowledge that this will require expanded mining activity.

- Public support for mining:** 64% agree that mining is necessary to achieve a net-zero emission future, but 32% believe that Australia should reduce mining activity, even if it means taking longer to reach net-zero targets.

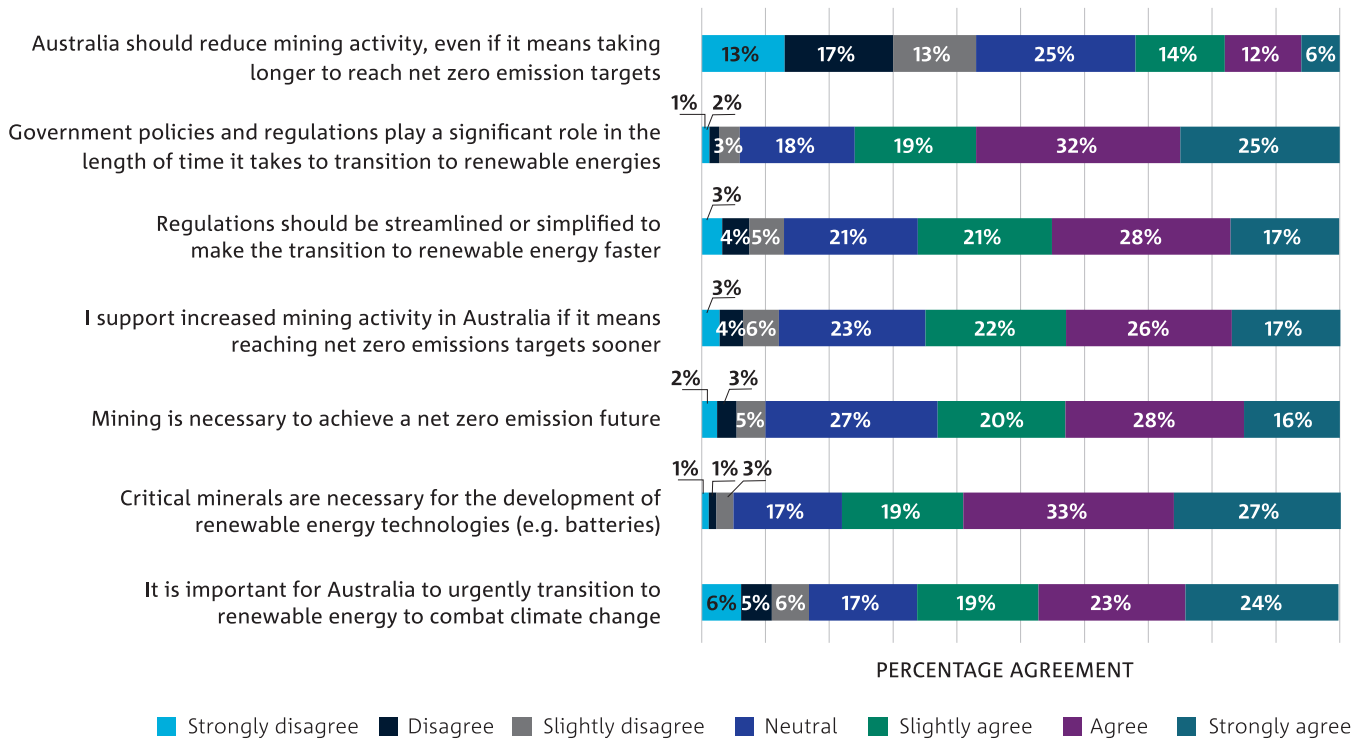


Figure 4: Energy transition minerals and public perceptions

Governance and fairness

The survey underscores the importance of governance and fairness in maintaining trust in the mining industry:

- Community confidence in governance:** Confidence in Australian and state governments to hold the mining industry accountable has increased, with the mean score rising from 2.9 in 2017 to 3.1 in 2024 for confidence in the Australian Government. Similarly, state government confidence has improved from 2.8 in 2017 to 3.0 in 2024, on a 5-point scale.
- Community agency:** The belief that communities are capable of ensuring the mining industry does the right thing by communities has also increased significantly from 4.0 in 2014 to 4.6 in 2024. This has increased across all age groups.
- Fair distribution of benefits:** Australians expect the benefits of mining to be distributed fairly. 52% agree that mining communities currently receive a fair share of benefits from mining, with the mean score on this measure increasing significantly in 2024 ($M=4.6$) from 2017 ($M=4.1$). Additionally, 51% believe that Australia receives a fair share of tax from the mining industry, with the mean score rising from 3.8 in 2017 to 4.4 in 2024, on a 7-point scale.
- Procedural fairness:** Procedural fairness, where community members feel heard and respected, has shown improvement. The mean score for how well the mining industry listens to and respects community opinions increased from 3.8 in 2017 to 4.3 in 2024, on a 1–7 -point scale. However, the perception of opportunities to participate in decision-making about mining has remained stable at a mean score of 4.1.

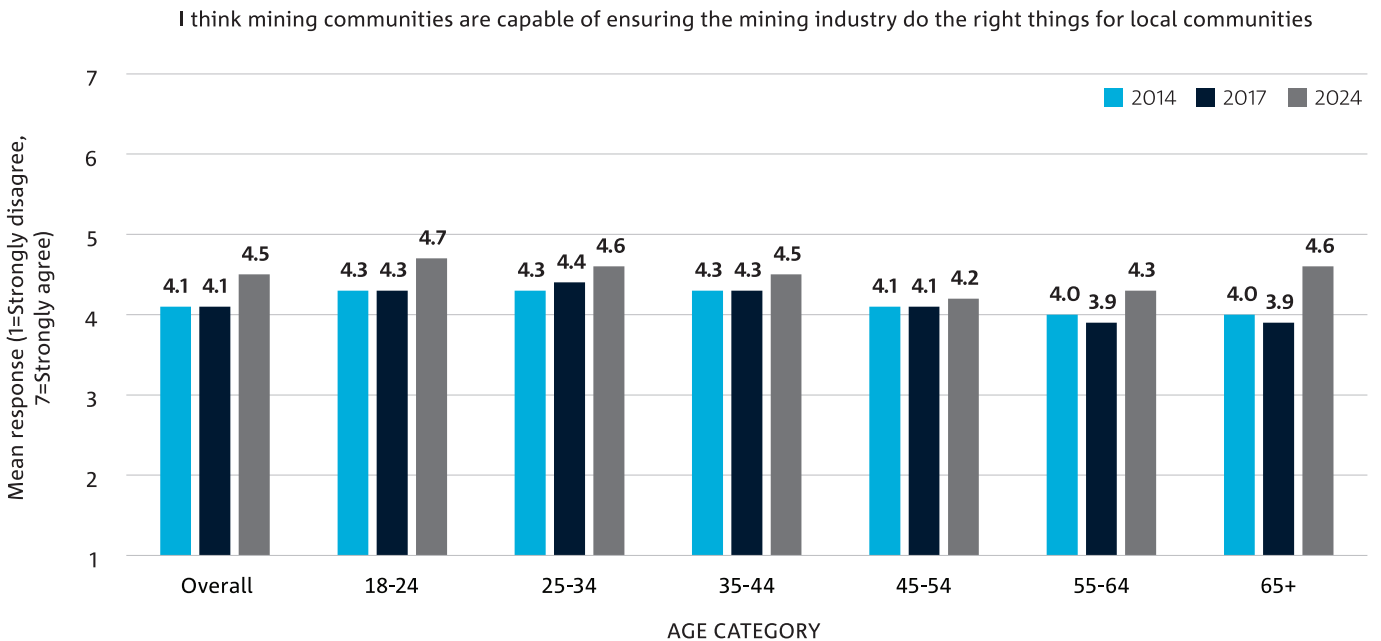


Figure 5: Community agency

Social licence to operate

The 2024 path analysis reveals that **trust** is a key driver of social acceptance for the mining industry in Australia, also known as its social licence to operate. Key factors influencing trust include **fairness, confidence in governance, and environmental impacts**.

Procedural fairness—where communities feel heard and respected—remains the strongest driver of trust. Confidence in the ability of governments to regulate the industry has improved, contributing positively to trust. Additionally, for the first time, local community agency emerged as a significant factor, highlighting the growing importance of community influence on industry practices;

the more confident Australians are that local communities can influence mining companies the more they trust the mining industry.

Negative environmental perceptions, particularly related to climate change, continue to impact trust negatively, underscoring the need for responsible industry practices.

The other key driver of trust in the modelling was the overall balance of positive benefits versus negative impacts from mining in Australia as perceived by community members. On this 1-7-point scale, benefits outweigh impacts, with the mean score increasing in 2024 to 5.3, compared to 5.0 in 2014 and 2017.

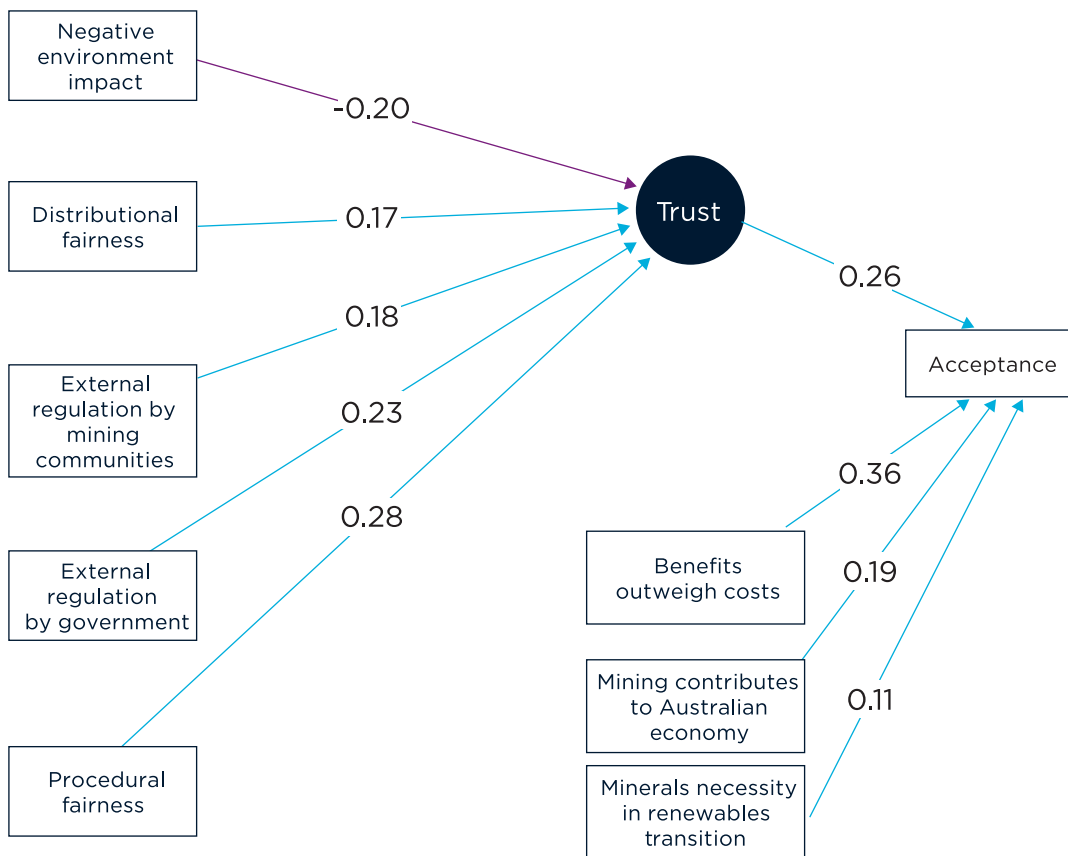


Figure 6: Path model summary diagram

Conclusion: Pathways to a sustainable future

The 2024 survey results highlight the evolving relationship between the Australian public and the mining industry. Trust and acceptance have improved over time, though the industry’s ability to manage environmental and social impacts will be crucial for maintaining this momentum. As the mining sector takes on a key role in the global energy transition, engaging with communities, ensuring the

fair distribution of benefits, and maintaining transparency will also be vital.

By meeting these conditions, the mining industry can secure ongoing public support and play a pivotal role in Australia’s journey toward a sustainable, net-zero future.

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