



BRUNSWICK

THE MINE OF THE FUTURE THOUGHTS FROM THE NEXT GENERATION

A perception study of UK and South African
students about the mining industry

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THE MINE OF THE FUTURE: THOUGHTS FROM THE NEXT GENERATION

About this report

The mines and miners of tomorrow will look and operate very differently to the industry as we know it today. Technology is bringing undreamed of innovation and possibility to the field while society's expectations of miners are changing too.

While mineralisation, logistics, capital, skills, technology, and regulation are all essential ingredients for any mine; it is the people who will manage, plan, mine and refine the ore that makes the industry possible. So understanding the values, frustrations, aspirations and expectations of young people is vital if mining is to attract top talent to keep the industry innovating. It also needs to understand the values and interests of a wide range of future leaders if it is to enjoy legitimacy and societies' support.

This paper sets out the findings of a short programme of qualitative research, designed to explore perceptions of the mining industry amongst students in the UK and South Africa.

The aim of the research was to understand how students view the

mining industry, both in terms of overall perceptions, and also in terms of its 'employer brand'. We wanted to explore the positive and negative associations with the industry, and the factors that make it attractive or unattractive to potential candidates. More broadly, we wanted to understand the factors that drive career choice, and to gain insight on what the industry should do to better communicate to these important stakeholders who are the future of mining.

Summary of the findings

There were four clear themes to emerge from the research which are listed below and detailed further in this report. The overwhelming conclusion was that the mining industry appears to have neglected to communicate in such a way that resonates with students and herein lies an opportunity for the industry.

1. Negative perception

The mining industry faces a number of perception issues that impact on its 'employer brand', including views of the industry being a male-dominated, macho



environment, being stagnant and slow moving, lacking innovation, having negative health and safety issues, and a perceived poor work/life balance.

2. Lack of awareness

The primary barrier to careers in mining for many students is a lack of awareness of the opportunities available. Most students' default view is of miners in hard hats and overalls; they find it hard to visualise the corporate and professional roles.

3. Shifting views

Educating students about the range of opportunities available in the industry has a significant impact: when presented with this information, there is surprise and perceptions shift, with students realising that there might be roles for them in mining.

4. Communication is key

There is a clear need for mining companies to communicate and engage with students, and the earlier the better, as people start to narrow down their career options at an early age. Other industries have a much greater presence at universities, and mining risks missing out.

Attitudes to careers: What drives interest? What are the push and pull factors?

A clear theme emerged among students in both the UK and South Africa that the primary drivers of sector choice are the subjects they are studying, and their personal interests and passions. In many cases this means that they begin to develop preferences for a particular sector at an early age.

"For mining and petroleum, that stems off a childhood hobby of rock-collecting, it's [one of] the most lucrative careers I can think of which involve a hobby of mine, which I find interesting." [UK]

Having family and friends who work in a particular sector is also an important driver of interest.



Methodology

Two focus groups conducted with students in London and Johannesburg.

Participants were a mix of undergraduate and postgraduate students studying a range of subjects (including some who were studying mining-related subjects).

Fieldwork dates: 18th – 19th January 2017.





“The love of logistics came from the fact that it’s what I studied and it came from my dad.”
[South Africa]

When considering a potential career, there are a wide range of aspects that can attract students to a particular company or sector. These include opportunities for career progression, the ability to have an impact and make a difference, as well as factors such as earnings potential and job security. Aspects that can deter candidates include repetitive or boring tasks, low pay and sectors that are skewed to particular age or gender groups.

“For me it’s career progression. Quite a lot of the jobs I’ve seen my friends go into, they don’t have that, and that gets me ... I want to be able to move upwards.” [UK]

“Security. Will it be a relevant career in ten years, twenty years? If I decide to retire at the normal age, will it still be relevant?” [South Africa]

Negative perception of the mining industry

Overall perceptions of the mining industry differ somewhat between students in the UK and South Africa. In the UK, most students were neutral, primarily due to a lack of knowledge of the industry. Among those students with stronger views, these tended to be negative, driven by high profile incidents (such as the Chilean mining accident in 2010 where 33 men were trapped underground for 69 days before their rescue) and negative media coverage. In South Africa, students generally held stronger (more negative) views of the sector, driven by issues relating to national interest and the perceived exploitation of the country by foreign mining companies.

“Neutral; I haven’t really thought about it too clearly. I’ve heard a majority of bad stuff. I think the thing that happened in

Chile was terrible, [so] generally I’d say a bit more to the negative side rather than positive.” [UK]

“The way we go about mining saddens me. I’m a bit of a patriot. It wouldn’t be so bad if we were the ones destroying our own country.” [South Africa]

In both markets, students were able to identify a range of positive associations with mining. These include the creation of jobs, technological innovation and a sense that progress has been made in terms of environmental and social responsibility.

“It creates jobs. If you have a mine in one area, it’ll boost the local economy [and] that will create jobs, better healthcare. I think it can have a good social impact, definitely.” [UK]

Negative associations with the industry focus primarily on the environmental and social impact of mining. More specifically, students cited health and safety concerns for



workers, pay inequality between the top and bottom of the industry and also an excessive focus on profit at the expense of other interests.

“The industry’s really competitive, and that’s not necessarily a good thing, because companies are willing to overlook certain things to be able to stay competitive, things like health and safety.” [UK]

“I think the impact on communities is quite disproportionate to the gains that the international mining companies make.” [South Africa]

The theme of developing countries being exploited by foreign mining companies was raised in both groups, but much more strongly in South Africa, where students called for regulation to promote the national interest. South African students also raised concerns regarding the sustainability of the industry and possible over-reliance

of the economy on mining. There was a clear lack of understanding by the South African students about mining’s financial contribution to society.

“There’s a lot of money in mining. One of the best ways to fight that might be to introduce a tax. As soon as a company makes a certain percentage of profit or perhaps a certain amount of money, a percentage of that goes back into a government programme to reallocate those funds.” [South Africa]

Lack of awareness of the opportunities available

For students in both the UK and South Africa, a major barrier to working in the mining industry is a lack of familiarity with the

opportunities available. There was agreement on the lack of visibility of mining-related companies at universities (careers fairs etc.), with those people studying mining-related courses saying they do not feel well informed. The result of this is that students are left with the default view that jobs in the mining industry mean working in a mine; it is hard for them to visualise the corporate and professional roles beyond this.

“It’s probably just because I don’t know much about what other people do. There’s people who manage and decide where they’re going to dig up, but I guess it’s almost a child’s point of view [that I have:] ‘miners work underground’.” [UK]

“My degree’s in mining and we’re still not told that much about the career opportunities ahead of you.” [UK]

On balance, students were able to identify more negative associations with a career in mining than positive associations. The limited range of positive aspects include travel opportunities, working with technology and exciting work. However students in both the UK and South Africa could more readily identify negative aspects. These include:

- An assumption that jobs are dirty, dangerous and underground
- Mining being a male-dominated and macho environment – a turn-off to those who don't fit this profile
- Mining as an industry dominated by older age groups, not welcoming to young people
- Careers in the industry having a negative impact on work-life balance – particularly being required to work and live in remote locations
- Ethical objections to working for the industry

“With it being so male-dominated ... for girls, and for me because I'm gay, it's quite intimidating. When you have the people come in from the mining companies, they tend to send this big macho man in a suit, and he doesn't care about talking to students.” [UK]

“I just feel like mining gives off this impression that they don't necessarily like working with young people, like it favours people with lots of work experience, and older people that have been in the industry for ages.” [UK]

“Business ethics is an issue for me. If I was hired by a mining company as an attorney, I know the cases I would be given would involve protecting the mining companies' interests even when it's a disservice to the people working in the mine.” [South Africa]

Shifting views

Another theme, particularly in South Africa, was uncertainty as to how open the industry is to technological and digital innovation, with some describing mining as 'stagnant' and 'slow-moving'. This raises doubts regarding mining as a career option; students, particularly those in technology-related subjects, want to work in an industry that is open to innovation.

“I'm nervous around how open to innovation the mining industry is ... it would be quite rigid, that's something that makes me nervous.” [South Africa]

“There are certain steps that need to be taken, in particular regarding technology. I have a lot of friends that are doing the same thing as me [IT], but none of them have ever expressed any interest in the mining industry. One of the reasons for that is that it seems like such a stagnant and slow-moving industry.” [South Africa]

The general consensus was that the mining industry needs to engage with students, to raise awareness of

the opportunities available in the sector. Students in both countries called on mining companies to be more visible at universities, to promote the sector as a career option. It is key that this is done as early as possible, before students decide on other career paths. And students stressed the need to hear from a range of professionals working in the industry, to highlight the breadth of roles on offer.

“There should be more advertising for mining from when we're younger, so we're more exposed to mining jobs, and mining is not just 'going down a hole' ... I don't think I've ever seen mining, from secondary school to university. There's that big gap of students that they're missing out on because we don't know about it.” [UK]

“I think that we should actually do more earlier on. I think if we were told earlier on about the different options in the mining industry we would look at it differently. I know I do now ... We wouldn't just assume it was blue overalls.” [South Africa]

When told about the range of career opportunities that are available to them in the mining industry, there was a notable shift in views. There was surprise at the wide variety of roles available, and a sense that there might be roles for them in the industry.



“It’s got a variety of different things I wouldn’t have really thought about before. Coming from a background of no knowledge about it at all, it’s interesting to see the diversity of professions.” [UK]

“After today, I would definitely consider it as a career option. I would never have foreseen that.” [South Africa]

Communication is key

There is a clear need for mining companies to engage with students as early as possible when they are thinking about their careers in order to attract talent and the skill set needed for the ‘mine of the future’. This report hasn’t researched the ways in which students like to receive communication but it will be essential if the industry is committed to change negative perceptions of the next generation.

Mining companies often explain to their stakeholders that to create and maintain a sustainable business, it is imperative to invest through the cycles. Investing in the young leaders of tomorrow who will shape the industry and keep it innovating must also be a priority through the cycles if the mining industry is to change with the times and respond to society’s expectations.

Five ways mining can attract new talent and build wider support

Explain the business model

Students don’t know how mines are developed, the relationship between risk and investment, and even the legitimacy of revenue generated through international sales. Explaining the mining business model will combat ignorance, enhance the quality of debate and increase societies’ receptiveness to the industry’s legitimate needs.

Demonstrate mining’s contribution to the national interest

Mining’s impact and legacy is contested. Many students, particularly in South Africa, are distrustful of mining’s contribution to communities, employment, tax and the broader national interest. Compelling demonstrations of how mining supports national development would build trust, acceptance and support.

Do the research

There is little systematic understanding of society’s and particularly young people’s perceptions of the industry. Understanding the views of critical segments of society will enable mining to adapt to meet legitimate expectations, help attract top talent and receive regulatory and policy support. The industry should do more systematic research into students’ views and the ways they like to receive communication.

Combat skewed perceptions & promote the full range of mining careers

Students know too little and learn too late about the different careers in mining. The industry should promote its full range of professional careers at schools and university career fairs. It must actively combat negative perceptions of the industry so that it can influence students’ subject choices and aspirations.

Focus on innovation and technology

From mechanization to digitization and big data, the technology that is revolutionizing mining excites and stimulates students. Yet students don’t associate mining with innovation. The mining industry of the future will need to attract these relevant skill sets by highlighting mining’s digital and technological advances and deliberately challenge students and universities to develop new solutions.

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