



CANADIAN MINERAL EXPLORATION HR OUTLOOK

The mineral exploration industry consists of a myriad of different organizations that come together to discover potential areas for economic mineral resource development. Mineral exploration is the first stage of the mining process and requires collaboration between multiple stakeholders to be successful.

All mining stakeholders – employers, government, educators, associations, etc. – have a vested interest in optimizing the supply of labour, for today and tomorrow. To help provide a better understanding the Mining Industry Human Resources Council (MiHR) partnered with The Prospectors and Developers Association of Canada (PDAC) to investigate the particular experiences and perspectives of the wide variety of people working in Canada's mineral exploration sector. This research conducted through a robust industry research tool (national industry survey of individuals and organizations working in exploration) helps fill a gap in labour market information, allowing for a more refined and accurate reflection of the labour market realities and challenges facing mineral exploration in Canada.

The key observations, derived from information provided by respondents, help foster a better understanding of the exploration industry; which is often characterized by its high volatility. Some of these issues cannot be mitigated; the exploration industry will always be cyclical as it is closely tied to commodity prices and the volatility of the stock market.

The findings also provide a new perspective, from a broad and national lens, for many topics in exploration including: the role of women in exploration, work integrated learning and career awareness. These insights will support industry stakeholders in creating strategies to increase the sector's ability to engage new pools of talent in mineral exploration work.

This pilot study on the exploration industry provided valuable information about the least-understood labour market in the mining industry. This survey was the first step in a larger strategy that incorporates learning from all stakeholders in our sector – not just mining extraction – enabling us to better understand and address labour market issues related to the entire mining cycle.

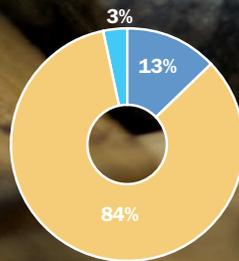


PROSPECTORS &
DEVELOPERS
ASSOCIATION
OF CANADA



KEY OBSERVATIONS

84% of 2017 graduates are looking for work



Do 2017 graduates have employment arranged?

- Yes
- No, but currently looking for work
- No, not currently looking for work

Students in exploration programs have the most negative five-year career outlook. Lack of current employment opportunities may greatly impact all students' outlook for the mineral exploration industry.



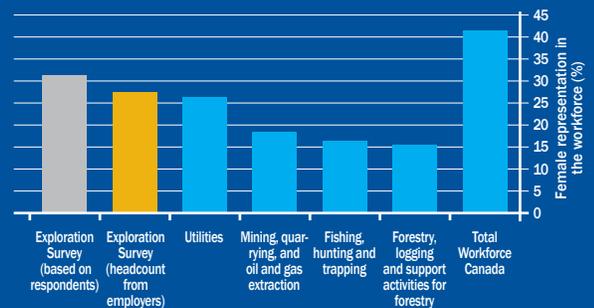
More collaboration is needed between industry and educational institutions

Educators in mineral exploration suggested that better coordination is needed between industry and educational institutions. A vast majority indicated that field courses and summer work experience were important (or very important) for students to take part in. However, they also indicated that it was difficult (or extremely difficult) to get industry to provide these opportunities for students.



30% of survey respondents were female.

Female representation appears to be much higher in mineral exploration than in the mining industry. Although lower than the total Canadian workforce, it is much higher than in other Canadian resource sectors.



Absence of a mid-career workforce

Despite the large number of respondents under the age of 35 and over 55, there is a significant lack of workers who fall within the middle career age range of 40-49. This was observed through all groups of respondents who work in exploration (affiliates, workers and consultants).

54%

did not learn about careers in exploration until post-secondary education.

An additional 11% only learned about these careers after they had left school.

Most people who work in mining and exploration were unaware of the industry's opportunities when they graduated high school. This limits the number of potential entrants to the mining industry and ultimately reduces labour supply.