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Methodology Summary

Atlantic Economic Panel Telephone Survey

Prepared by: Elemental Data Collection

Prepared for: Atlantic Canada Opportunities Agency (ACOA)

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Ce rapport est aussi disponible en français

Canada

Atlantic Economic Panel Telephone Survey

Prepared for: Atlantic Canada Opportunities Agency

Prepared by: Elemental Data Collection

Registration Number: POR 084-25

Ce rapport est aussi disponible en français sous le titre :

Sondage téléphonique du Panel économique du Canada atlantique

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Introduction

On November 24, 2025, the Honourable Sean Fraser, Minister of Justice and Attorney General of Canada and Minister responsible for the Atlantic Canada Opportunities Agency, announced the formation of the Atlantic Economic Panel, a business-led entity tasked with consulting businesses, communities, sectors and other groups across Atlantic Canada to identify opportunities and barriers in achieving the Atlantic region's full economic potential. The Panel will commission targeted research and analysis to inform its recommendations. This includes public opinion research to ensure that the views and opinions of Atlantic Canadians are considered in this important conversation about Atlantic Canada's future.

1.1 Background

As an initial Public Opinion Research (POR) activity to support the Panel's work, the Panel's current POR requirement is a telephone survey of Atlantic Canadians, expected to be conducted over an estimated two-week period in January/February 2026, with completion anticipated by the end of the month. ACOA is the lead on this project and will exercise oversight throughout the POR process to ensure that all mandatory procedures and standards are respected, including requirements related to design, content, and delivery. ACOA will oversee project implementation and ensure compliance throughout the process, including responsibility for the survey design and receipt of all deliverables. ACOA will then provide the deliverables to the Panel, which will analyze the data and use the findings to inform its recommendations to the Government of Canada.

1.2 Research objectives

To gather credible, region wide evidence based on the experiences and perspectives of Atlantic Canadians, to inform the Panel's recommendations and ensure they reflect the region's real economic challenges and opportunities.

Specific objectives of this research include, but are not limited to, providing ACOA with up-to-date data on:

- 1) Understand perspectives related to Atlantic Canada's economic prosperity
- 2) Identify sector specific opportunities
- 3) Identify structural, regulatory and cultural barriers

To achieve the study objectives, a quantitative survey of N=1,000 Canadians aged 18 years and older residing in the Atlantic Provinces was conducted between January 24 and February 9, 2026. Respondents were contacted using both cell phone and landline sampling methodologies, with a 70/30 split between cell phone and landline records, respectively, to ensure appropriate coverage and representation of the target population. Based on a sample of this size (n=1,000), the overall results are considered accurate to within $\pm 3.10\%$, 19 times out of 20.

1.3 Contract value

The total contract value of this research was \$25,870.60, excluding HST.

1.4 Political neutrality certification

I hereby certify as a Representative of Elemental Data Collection that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.



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February 17, 2026.

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Methodological summary

2.1 Survey methodology

The phone survey was conducted with a sample of 1,000 Atlantic Canadians, 18 years of age and older. Based on a sample of this size ($n=1,000$), the overall results are considered accurate to within $\pm 3.10\%$, 19 times out of 20. Details regarding the methodology are outlined below.

2.2 Sample design and selection

To ensure that the survey achieved the required number of completed interviews outlined in the table below, Random Digit Dialing (RDD) telephone samples were drawn proportionally. The study's sample frame was constructed using a 70/30 split between cell phone and landline records. The landline sample was compiled through ASDE, while the cell phone sample was generated using Random Digit Dialing from known cellular exchanges across the Atlantic provinces.

Strata	Completed Interviews	Margin of Error (%)
Newfoundland and Labrador	212	± 6.73
Prince Edward Island	64	± 12.25
Nova Scotia	402	± 4.89
New Brunswick	322	± 5.46
Total	1,000	± 3.10

Based on a sample of this size, the results can be considered accurate to within $\pm 3.10\%$, 19 times out of 20.

2.3 Fieldwork

The phone survey data was administered in the Winter of 2026. The survey data was collected using computer assisted telephone interviewing (CATI) technology and was carried out by Elemental Data Collection in Ottawa, Ontario. The survey was conducted with 1,000 respondents, from January 24 to February 9, 2026. Surveys were conducted in the respondent's official language of choice. Sample groups were set to ensure each study could be tracked via region, language and respondent gender. The average length of time required to complete an interview was 10.5 minutes.

The sponsorship of the study was revealed to all respondents during the introduction. All survey respondents were informed that participation is voluntary, and information collected is protected under the authority of privacy legislation.

2.4 Participation rate

In total, 61,418 Canadian respondents were approached. The overall participation rate for this survey was 7.1%. This is consistent with typical response rates for phone surveys with this type of residential respondent conducted over this length of field period. The table below presents detailed information.

Disposition table	
Total numbers attempted	61,418
Out-of-scope - invalid	41,896
Unresolved (U)	10,259
No answer/Answering machine	10,259
In-scope - non-responding (IS)	929
Language barrier	66
Incapable of completing (ill/deceased)	79
Callback (Respondent not available)	784
Total asked (A)	8,334
Refusal	6,943
In-scope - responding units (R)	1,391
Completed Interview	1,000
Scheduled appointments	287
Incomplete	73
Quota full	31
Refusal rate	83.3%
Participation rate	7.1%
Incidence	71.9%
Average length	10.5 Minutes
Field timeframe	January 24 - February 9, 2026

The response rates were calculated using the formula: $PR=R/(U+IS+A)$.

2.5 Data analysis

Weighting adjustments were applied to the survey data to ensure the results were representative of the Canadian population of those living in the Atlantic provinces, aged 18 and older. Specifically, the survey results were weighted by age, gender and region derived from the 2021 Census.

The following table presents a breakdown of actual and weighted completions by regional strata.

Strata	Unweighted sample size	Weighted sample size
Newfoundland and Labrador	212	213
Prince Edward Island	64	63
Nova Scotia	402	402
New Brunswick	322	322
Total	1000	1000

2.6 Non-response analysis

A non-response analysis was conducted to assess the potential for non-response bias. Non-response is the result of a unit of the sample not participating in the survey—either refusing to take part in the survey (a refusal) or not being reached during the data collection period (non-contact). Non-response results in biases in the survey sample when there are differences between respondents and non-respondents.

To undertake the analysis for this survey, the unweighted sample distribution by age, gender, employment status and education was compared to the actual population (based on 2021 Census figures from Statistics Canada).

	Population (Census 2021)	Survey Sample (Unweighted)	% diff (+/-)	Survey Sample (weighted)
18-54	58.88%	42.70%	5.72%	53.47%
55+	41.11%	57.30%	16.19%	46.53%
Male	48.76%	49.95%	1.19%	48.37%
Female	51.24%	50.05%	-1.19%	51.63%
Employed	57.10%	53.83%	-3.27%	59.53%
Unemployed	6.56%	4.03%	-2.53%	4.45%
Not In labour force	36.34%	42.14%	5.80%	36.03%
No certificate, degree or diploma	16.15%	6.45%	-9.70%	5.87%
High school certificate or equivalent	26.69%	18.35%	-8.34%	17.26%
Apprenticeship or trades certificate or diploma	8.71%	9.17%	0.46%	8.80%
College, CEGEP or other non-university certificate or diploma	18.84%	31.75%	12.91%	31.30%
University degree, certificate or diploma	29.61%	34.27%	4.66%	36.77%

As is typically found with residential surveys in Canada, the final sample over-represents those with higher levels of education. Also consistent with most surveys of the general public, age is a source of sample bias in the survey although it is much smaller in telephone surveys than with online. As the table indicates, older Canadians are slightly over-represented, and Canadians 18-54 are slightly under-represented in the survey sample. Weighting serves to reduce bias should it be present, but not to eliminate it completely. It is very unlikely that this small sampling bias introduced any meaningful bias to the survey results.

2.7 Data Weighting

In order to ensure that the final survey sample was proportional the current distribution of the Canadian public, the data required a weighting factor to be included. Elemental employed a process called cell weighting to ensure that we could adjust the weighting factor to accurately reflect the geographical, gender and age breakouts of the current population distribution.

2.8 Appendix

Please see accompanying documents.

Telephone Survey to support the work of the Atlantic Economic Panel Script

Introduction

Hello / Bonjour (pause), I'm calling as part of a research survey **supporting the work of the Atlantic Economic Panel on the future of Atlantic Canada's economy. Would you prefer that I continue in English or French?** Préférez-vous continuer en français ou en anglais? [Let them respond]

My name is **first name of Elemental Data Collection Inc.**, the company hired to do the survey. The survey takes about **8-10 minutes to complete**.

Should you have any questions about the survey, you can contact **EDCI email/contact information** and consult the [Canadian Research Insights Council \(CRIC\) research verification service](#).

Your participation is **voluntary** and **confidential**. Your **answers will remain anonymous**, and the information you provide will be administered according to the requirements of the Privacy Act, the Access to Information Act, and any other pertinent legislation. **Is this a safe and convenient time for you? May I continue?**

Questions

1. Have you lived in Atlantic Canada for ten years or more?
 - Yes
 - No

If yes:

2. Compared to ten years ago, how would you describe the job market in Atlantic Canada today? Would you say it is generally:
 - Much better
 - A little better
 - About the same
 - A little worse
 - Much worse
 - Don't know (Volunteered)
3. How optimistic are you personally about the future of Atlantic Canada? Are you:
 - Completely optimistic
 - Mostly optimistic
 - Not very optimistic
 - Not at all optimistic
4. Compared to other provinces and territories in Canada, do you think Atlantic Canada's income taxes are:
 - More competitive
 - Less competitive
 - About the same
 - Don't know
5. In the past five years, has a member of your family moved away from Atlantic Canada because they could not find suitable employment in the region?

- Yes
 - No
 - Don't know (Volunteered)
 - Prefer not to answer (Volunteered)
6. Thinking about recent discussion of removing inter-provincial trade barriers within Canada...Do you personally support or oppose removing trade barriers among the Atlantic provinces? Would you say you:
- Completely support
 - Mostly support
 - Mostly oppose
 - Completely oppose
 - Don't know/no opinion (Volunteered)
 - Prefer not to answer (Volunteered)

7. Thinking about the future of Atlantic Canada, and taking environmental considerations into account, I'm going to read a list of economic initiatives. For each one, please tell me whether you personally support it, oppose it, or don't have an opinion. (Read & Rotate Order)

[Interviewer reads each item]

- Expansion of the aquaculture sector
 - Development of onshore natural gas
 - Development of offshore natural gas
 - Development of offshore oil
 - Mining of critical minerals
 - Expansion of the aerospace & defence sector
 - Expansion of the forestry industry
 - Development of tidal power
 - Expansion of hydro power in Labrador
 - Expansion of nuclear power
 - Development of small modular nuclear reactors
 - Continued development of onshore wind
 - Development of offshore wind
 - Continued development of solar power
8. To what extent do you support or oppose Atlantic Canada producing more electricity than it needs and exporting this surplus electricity outside the region as a means to grow the economy? Do you:
- Completely support
 - Mostly support
 - Mostly oppose
 - Completely oppose
 - Don't know/no opinion (Volunteered)
 - Prefer not to answer (Volunteered)
9. Which of the following statements **best** represents your opinion about the future of Atlantic Canada's prosperity? Atlantic Canada will be:
- More prosperous than the rest of Canada
 - About as prosperous as the rest of Canada
 - Less prosperous than the rest of Canada
 - Much less prosperous than the rest of Canada
 - Don't know/not sure (Volunteered)

10. I'm going to read a few statements about population growth and the workforce in Atlantic Canada. For each one, please tell me whether you completely agree, mostly agree, mostly disagree, completely disagree, or don't know (Volunteered).
- The population in Atlantic Canada needs to grow to meet the demand for workers
 - Population growth leads to job growth
 - There are growing job opportunities for young people in Atlantic Canada
 - Immigration is necessary to address current and future labour needs in the region.
 - Skills development and training are essential to meet future labour market needs.
11. Looking ahead, how confident are you that Atlantic Canada can grow its economy and rely less on equalization payments in the future? Are you:
- Completely confident
 - Mostly confident
 - Not very confident
 - Not at all confident

Demographics:

12. What is your gender? (By Observation)
- Female
 - Male
 - Undetermined
13. What year were you born? [Record year: YYYY]
[If respondent prefers not to provide a precise birth year, ask:]
Would you be willing to tell me in which of the following age categories you belong?
- 18 to 24
 - 25-34
 - 35-44
 - 45-54
 - 55-64
 - 65 or older
14. Which of the following categories best describes your current employment status?
[Accept only one answer]
- Working full-time, that is, 30 or more hours per week
 - Working part-time, that is, less than 30 hours per week
 - Self-employed or doing unpaid work for a family member's business or farm
 - Unemployed, that is, looking for work, temporarily laid off, or starting a new job within a month
 - Not in the workforce, that is, not available or not able to do paid work due to school, family responsibilities, disability or retirement, for example
 - Prefer not to answer (Volunteered)
15. What is the highest level of formal education that you have completed? [Read list]
- Less than a High School diploma or equivalent
 - High School diploma or equivalent
 - Registered Apprenticeship or other trades certificate or diploma

- College, CEGEP or other non-university certificate or diploma
- University certificate or diploma below bachelor's level
- Bachelor's degree
- Post graduate degree above bachelor's level
- Prefer not to answer(Volunteered)

16. Which of the following best describes your total household income last year, before taxes, from all sources for all household members? [Read list and accept one answer only]

- Under \$50,000
- At least \$50,000, but less than \$100,000
- At least 100,000 but less than \$150,000
- At least \$150,000 but less than \$200,000
- \$200,000 or more
- Prefer not to answer (Volunteered)

Conclusion

That concludes the survey. Thank you for your time and participation. Your feedback will help inform the Atlantic Economic Panel as it gathers insights from across Atlantic Canada and develops practical recommendations for the Government of Canada on how to support economic growth, job creation, productivity, and long-term prosperity in the region. The results of this survey will be made public once they are available.

Sondage téléphonique appuyant le travail du Panel économique du Canada atlantique Script

Introduction

Hello / Bonjour (pause), je vous appelle dans le cadre d'un sondage de recherche **appuyant le travail du Panel économique du Canada atlantique** quant à **l'avenir de l'économie du Canada atlantique. Préférez-vous continuer en français ou en anglais?** Would you prefer that I continue in English or French? [Laissez la personne répondre.]

Je m'appelle **prénom** et je travaille chez **Elemental Data Collection Inc.**, l'entreprise embauchée pour faire le sondage, lequel prendra de **8 à 10 minutes à remplir**.

Si vous avez des questions sur le sondage, vous pouvez communiquer avec **courriel/coordonnées d'EDCI** et consulter le [service de vérification des recherches du Conseil de recherche et d'intelligence marketing canadien \(CRIC\)](#).

Votre participation est **volontaire** et **confidentielle**. Vos **réponses resteront anonymes**, et l'information que vous donnez sera administrée conformément aux exigences de la *Loi sur la protection des renseignements personnels*, de la *Loi sur l'accès à l'information* et de toute autre loi pertinente. **Est-ce un moment sûr et opportun pour vous? Puis-je continuer?**

Questions

1. Habitez-vous au Canada atlantique depuis dix ans ou plus?

- Oui
- Non

Dans l'affirmative :

2. Comparativement à il y a dix ans, comment décririez-vous le marché de l'emploi au Canada atlantique aujourd'hui? Diriez-vous qu'il est, en général :

- Beaucoup mieux
- Un peu mieux
- À peu près pareil
- Légèrement pire
- Nettement pire
- Je ne sais pas (réponse spontanée).

3. À quel point êtes-vous optimiste personnellement quant à l'avenir du Canada atlantique? Êtes-vous :

- Tout à fait optimiste
- Plutôt optimiste
- Peu optimiste
- Pas du tout optimiste

4. Comparativement aux autres provinces et territoires du Canada, pensez-vous que les impôts au Canada atlantique sont :

- Plus concurrentiels
- Moins concurrentiels
- À peu près pareils
- Je ne sais pas.

5. Au cours des cinq dernières années, est-ce qu'un(e) membre de votre famille a quitté le Canada atlantique parce qu'il (elle) ne pouvait trouver un emploi convenable dans la région?

- Oui
- Non
- Je ne sais pas (réponse spontanée).
- Je préfère ne pas répondre (réponse spontanée).

6. En ce qui concerne les récentes discussions visant le retrait des obstacles commerciaux provinciaux au Canada... Appuyez-vous personnellement le retrait des obstacles commerciaux entre les provinces de l'Atlantique, ou vous y opposez-vous? Diriez-vous que vous :

- Soutenez entièrement
- Soutenez en majeure partie
- Vous opposez en majeure partie
- Vous opposez entièrement
- Je ne sais pas/je n'ai pas d'opinion (réponse spontanée).
- Je préfère ne pas répondre (réponse spontanée).

7. En ce qui concerne l'avenir du Canada atlantique, tout en tenant compte des considérations environnementales, je vais vous lire une liste d'initiatives économiques. Pour chacune, veuillez me dire si vous l'appuyez personnellement, vous vous y opposez ou vous n'avez pas d'opinion (lecture en rotation).

[L'intervieweur(se) lit chaque élément.]

- Expansion du secteur de l'aquaculture
- Développement du gaz naturel à l'intérieur des terres
- Développement du gaz naturel extracôtier
- Développement du pétrole extracôtier
- Exploitation des minéraux critiques
- Expansion du secteur de l'aérospatiale et de la défense

- Expansion de l'industrie forestière
 - Développement de l'énergie marémotrice
 - Expansion de l'énergie hydroélectrique au Labrador
 - Expansion de l'énergie nucléaire
 - Développement des petits réacteurs nucléaires modulaires
 - Poursuite du développement de l'énergie éolienne côtière
 - Développement de l'énergie éolienne extracôtière
 - Poursuite du développement de l'énergie solaire
8. Dans quelle mesure appuyez-vous le fait que le Canada atlantique produirait plus d'électricité qu'il n'en a besoin et qu'il exporte cet excédent à l'extérieur de la région afin de faire croître l'économie, ou êtes-vous opposé à cette réalité? Est-ce que vous :
- Soutenez entièrement
 - Soutenez en majeure partie
 - Vous opposez en majeure partie
 - Vous opposez entièrement
 - Je ne sais pas/je n'ai pas d'opinion (réponse spontanée).
 - Je préfère ne pas répondre (réponse spontanée).
9. Lequel des énoncés suivants représente **le mieux** votre opinion concernant la prospérité du Canada atlantique dans l'avenir? Le Canada atlantique sera :
- Beaucoup plus prospère que le reste du Canada
 - Plus prospère que le reste du Canada
 - À peu près aussi prospère que le reste du Canada
 - Moins prospère que le reste du Canada
 - Beaucoup moins prospère que le reste du Canada
 - Je ne sais pas/je ne suis pas certain(e) (réponse spontanée).
10. Je vais vous lire quelques énoncés à l'égard de la croissance démographique et de la main-d'œuvre au Canada atlantique. Pour chacun d'entre eux, veuillez m'indiquer si vous êtes tout à fait d'accord, plutôt d'accord, plutôt en désaccord, tout à fait en désaccord ou si vous ne savez pas (réponse spontanée).
- La population du Canada atlantique doit augmenter pour répondre à la demande en main-d'œuvre.
 - La croissance démographique entraîne une croissance de l'emploi.
 - Il y a de plus en plus de possibilités d'emploi pour les jeunes au Canada atlantique.
 - L'immigration est nécessaire pour répondre aux besoins en main-d'œuvre actuels et futurs de la région.
 - Le développement des compétences et la formation sont essentiels pour répondre aux besoins futurs du marché du travail.

11. En regardant vers l'avenir, dans quelle mesure êtes-vous confiant(e) que le Canada atlantique peut développer son économie et dépendre moins des paiements de péréquation? Êtes-vous :

- Tout à fait confiant(e)
- Plutôt confiant(e)
- Peu confiant(e)
- Pas du tout confiant(e)

Données démographiques

12. Quel est votre sexe? (Par observation)

- Femme
- Homme
- Non déterminé

13. En quelle année êtes-vous né(e)? (Notez l'année comme suit : AAAA)

[Si le répondant ou la répondante préfère ne pas fournir son année de naissance exacte, demandez-lui :]

Pourriez-vous m'indiquer à quelle catégorie d'âge parmi les suivantes vous appartenez?

- De 18 à 24 ans
- De 25 à 34 ans
- De 35 à 44 ans
- De 45 à 54 ans
- De 55 à 64 ans
- 65 ans ou plus

14. Laquelle des catégories suivantes décrit le mieux votre situation professionnelle actuelle?

[Accepter une seule réponse.]

- Je travaille à temps plein, c'est-à-dire 30 heures ou plus par semaine.
- Je travaille à temps partiel, c'est-à-dire moins de 30 heures par semaine.
- Je suis travailleur ou travailleuse autonome ou je fais du travail non rémunéré pour l'entreprise ou la ferme d'un membre de la famille.
- Je ne travaille pas, c'est-à-dire que je suis à la recherche d'un emploi, temporairement mis(e) à pied ou je commence un nouvel emploi au cours du prochain mois.
- Je ne suis pas sur le marché du travail, c'est-à-dire que je ne suis pas disponible ou que je suis incapable d'exercer un emploi rémunéré en raison, par exemple, d'études, de responsabilités familiales, d'un handicap ou de la retraite.
- Je préfère ne pas répondre (réponse spontanée).

15. Quel est le niveau d'études le plus élevé que vous ayez terminé? [Lire la liste.]

- Moins qu'un diplôme d'études secondaires ou équivalent
- Diplôme d'études secondaires ou équivalent
- Apprentissage enregistré ou autre certificat ou diplôme d'une école de métiers
- Collège, cégep ou autre certificat ou diplôme non universitaire
- Certificat ou diplôme universitaire inférieur au niveau du baccalauréat
- Baccalauréat
- Diplôme d'études supérieures au-delà du niveau du baccalauréat
- Je préfère ne pas répondre (réponse spontanée).

16. Laquelle des réponses suivantes décrit le mieux le revenu total de votre ménage l'année dernière, avant impôts, provenant de toutes les sources pour tous les membres du ménage? [Lire la liste et accepter une seule réponse.]

- Moins de 50 000 \$
- Au moins 50 000 \$, mais moins de 100 000 \$
- Au moins 100 000 \$, mais moins de 150 000 \$
- Au moins 150 000 \$, mais moins de 200 000 \$
- 200 000 \$ ou plus
- Je préfère ne pas répondre (réponse spontanée).

Conclusion

Le sondage est maintenant terminé. Merci de votre temps et de votre participation. Vos commentaires aideront le Panel économique du Canada atlantique à recueillir l'opinion des habitants du Canada atlantique et à formuler des recommandations pratiques à l'intention du gouvernement du Canada sur les moyens de soutenir la croissance économique, la création d'emplois, la productivité et la prospérité à long terme dans la région. Les résultats de ce sondage seront rendus publics dès qu'ils seront disponibles.