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ABOUT CHALLENGE FACTORY

Challenge Factory is a Future of Work research agency and consultancy. We help purpose-driven organizations and communities ignite transformative, measurable change for people and workplaces. We are policy and systems influencers, conveners, and thought leaders. As a certified B Corporation, we focus on using business as a force for good and advancing the United Nations Sustainable Development Goals.

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This company is committed to accountability, transparency, and continuous improvement.

ABOUT CERIC

CERIC is a charitable organization that advances education and research in career counselling and career development, in order to increase the economic and social well-being of people in Canada. It funds projects to develop innovative resources that build the knowledge and skills of diverse career and employment professionals. CERIC also annually hosts Cannexus, Canada's largest bilingual career development conference, publishes the country's only peer-reviewed journal, Canadian Journal of Career Development, and runs the CareerWise / OrientAction websites, providing the top career development news and views.

www.ceric.ca

ABOUT THE CANADIAN CAREER DEVELOPMENT FOUNDATION

The Canadian Career Development Foundation (CCDF) is a non-profit centre of excellence and leadership for the career development profession, committed to extending the sector's reach and impact. CCDF conducts rigorous research to strengthen the evidence-base, develops innovative career development programs and resources, creates educational/labour market policy solutions, and builds the capacity of the career development profession to offer timely, targeted, inclusive, and impactful services.

www.ccdf.ca





EXECUTIVE SUMMARY

Much of Canada's career development sector is hidden from the people it serves. It is also largely invisible to policymakers, employers, and other interest holders who influence labour markets, workforces, Canadians' career and employment pathways, and the Future of Work. The career development sector can be a critical leader in shaping employment, work, education, purpose, and community across the country. To do this successfully, the sector requires basic comprehensive data about its own size, scope, and composition.

The purpose of this project is to identify who does career development work in Canada and where. We have produced insights that can influence the future of the sector and an evidence base that can be used and advanced in future research, programming, and other initiatives. Having this valid and credible information is necessary to inform policymakers, private sector leaders, the career development sector itself, and Canadians more broadly. With it, the sector's strengths can be channeled to address the wide range of issues impacting the careers of Canadians. Without it, showcasing the socioeconomic impact of career development, fully understanding career development professionals' learning needs, and advocating for public awareness and recognition of the value of career development will be impossible.

This report presents the sector's size, scope, and composition using the following sector mapping methods:

- 1. A Sector Scoping Model that defines the sector's membership (by 10 types of organizations and 15 personas that represent types of individuals)
- A national portrait of the career development sector, including considerations about the state of Equity, Diversity, Inclusion, and Indigeneity (EDII) in the sector
- 3. Profiles of the career development ecosystems in Canada's 13 provinces and territories
- . A discussion of high-level impact metrics and recommendations

HOW BIG IS CANADA'S CAREER DEVELOPMENT SECTOR?

This research project set out to answer two key questions about the size of Canada's career development sector (Table 1). The answers to both questions use a numerical range, due to the complexities of drawing together information from many different data sources across the country and working to reconcile and/or compare them.

Table 1. Two key research questions about the size of Canada's career development sector

Research question	Answer
How many career development professionals are there in Canada?	 As low as 16,000 core professionals As high as 60,000 core professionals The answer depends on how the sector's membership is defined (i.e., who is considered part of the sector). Taking all the research findings into account, the most likely range is 40,000-60,000 core professionals.
How many organizations provide career services in Canada?	• 797-1,635 organizations Taking all the research findings into account, the higher end of the range (n=1,635) is likely the stronger answer.

In addition to answering the research questions, the findings identified significant weakness in how data related to the sector is gathered, tracked, and reported. This report discusses how the answers to these questions were reached, why we believe significant segments of the sector are not captured by these estimates, and what the difficulties in gathering data reveals about Canada's sector.

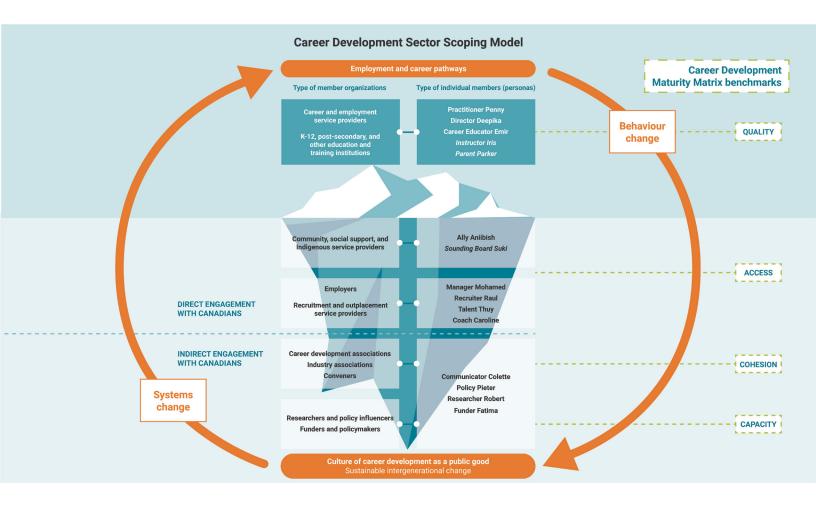
Overall, this research project demonstrates that there is no easy way to answer the questions of how many career development professionals and organizations there are in Canada. The career development sector is not regulated and organized at a national level, and there is no universal application of consistent job titles, sector member definitions, or sector data tracking systems. However, Labour Market Transfers from the federal government to each of the provincial and territorial governments do provide a pan-Canadian framework for how the majority of public funding and investment is allocated for training, upskilling, employment supports, career counselling, and job search assistance.

As a result, each province and territory has different career service providers, programs, and other supports, as well as accompanying monitoring, assessment, professional development, and reporting systems. Added to this complexity are different funding pathways for providing services and supports to specific population groups, such as newcomers and immigrants, people with disabilities, and individuals who identify as Indigenous. There are also private and independent providers of career services that are funded by the recipient of the service. These sector members do not receive funding through Labour Market Transfers, making them even more hidden because of the absence of public reporting or centralized sources of information about them.

Despite the complexities and nuances involved in determining the size of Canada's career development sector, knowing the best answer available is a fundamental prerequisite for measuring, assessing, and advancing the sector's impact.

A MODEL FOR UNDERSTANDING THE SECTOR'S SIZE, SCOPE, AND COMPOSITION

Figure 1. Sector Scoping Model iceberg diagram



Accurately mapping an entire sector and identifying its size is a complex undertaking. To accomplish this, a Sector Scoping Model was developed that meets four functional goals:

- 1. Define who is in the sector (10 types of organizations and 15 personas that represent types of individuals).
- 2. Highlight the interdependencies between sector members, between sector members and Canadians, and between sector members and the overall shared purpose of the sector.
- 3. Demonstrate how change can take place when a system of actors works together towards a preferred future.
- 4. Reflect that the system needs attention, and that the absence of attention jeopardizes a thriving economy, responsive workforce, and broader society.

For this project, the Sector Scoping Model also had two strategic goals:

- 1. Help everyone in the career development sector visualize and understand the makeup of its members and (potential) impact in the lives of Canadians, taking a "big tent" approach that encompasses anyone who engages in formal or informal career development.
- 2. Provide guardrails for the primary data collection that would take place in this project.



In developing the Sector Scoping Model, Canada's career development sector has been understood to be a "big tent." A "big tent" is an expansive and inclusive view of who does career development work across the country, and who should be part of discussions about advancing career development in Canada. It includes people who engage in unpaid career development work, don't participate in the professionalized field of practice, or don't identify as members of the sector.

The Sector Scoping Model's 15 personas (Figure 1), who represent the types of individuals who are members of the sector, are not meant to water down the sector's membership. Each persona has a distinct set of characteristics that may or may not include competencies, qualifications, scope of practice, expertise, knowledge, professional development needs, support needs, and more. This representation of the sector provides an opportunity to begin strengthening these characteristics strategically, ensuring supports are delivered to the appropriate groups across the country. It also enables considerations about a wider range of interest holders, activities, and components that contribute to or are affected by the sector. Lastly, it provides a more fulsome understanding of where Canadians get career advice and who influences their decision-making as they navigate their career and employment pathways.

In the context of this project's data collection activities, using personas was an effective method of validating whether everyone who is part of the sector had been identified. This involved an ongoing, iterative process of categorizing sector members by persona as they were encountered during data collection and interest holder engagement, determining any missing personas, and expanding, consolidating, and refining the definitions of each persona over the course of the project's duration.



Having this valid and credible information is necessary to inform policymakers, private sector leaders, the career development sector itself, and Canadians more broadly. With it, the sector's strengths can be channeled to address the wide range of issues impacting the careers of Canadians. Without it, showcasing the socioeconomic impact of career development, fully understanding career development professionals' learning needs, and advocating for public awareness and recognition of the value of career development will be impossible.

CONTENTS OF THE NATIONAL PORTRAIT

The national portrait presented in Section 3 focuses on distinctly federal and national jurisdiction elements of the sector, using federal and national information sources (with limited exceptions). It is not a complete "roll-up" of the provincial and territorial ecosystem findings presented in Section 4.

The national portrait includes the following:

- Overview of the number of core professionals in Canada's career development sector, by dataset
- Considerations about the state of EDII in the career development sector
- Information about national-level career development organizations that contributes to understanding the size, scope, and composition of the sector
- Canada's provincial career development associations that represent individual professionals
- Size of the sector according to the 2021 Census of Population
- Size of the sector according to LinkedIn
- Number of employment centres on Job Bank
- Estimated number of career development professionals working for organizations that are funded through the Indigenous Skills and Employment Training (ISET) Program
- Number of guidance counsellors in K-12 schools
- Number of individuals under the sector's "big tent" for selected personas (Recruiter Raul, Talent Thuy, Instructor Iris, Manager Mohamed, Parent Parker)

KEY FINDINGS FROM THE NATIONAL PORTRAIT

- It is not easy to find a straightforward answer about the size, scope, and composition of Canada's career development sector. A national portrait that focuses on the distinctly federal and national jurisdiction elements of the sector, using federal and national information sources (with limited exceptions), is not sufficient on its own to find this answer. Building profiles of the career development ecosystems in each of Canada's 13 provinces and territories, using provincial and territorial information sources, is also vital to finding the answer.
- A preliminary assessment of EDII-related data indicates that career development professionals who deliver career services do not always reflect the demographics of the learners and clients they serve. The sector has age-based and gender-based disparities among members. Members who do not belong to a visible minority outnumber members who do belong to a visible minority. Educational counsellors (NOC 41320) who belong to a visible minority have a lower median income than those who do not belong to a visible minority.
- The national portrait of Canada's career development sector reveals the importance of considering how much stronger career supports might be if more of the sector's members with weak ties to the formal, professionalized field became frequent referral partners.
- Millions of Canadians provide informal career advice to their family members, friends, peers, colleagues, and other people they interact with through personal or professional relationships (such as a teenager's baseball coach or a first-time homebuyer's mortgage broker). The findings in the national portrait highlight the need to prioritize a national strategy on career development so that both formal and informal support provided to Canadians reflects current labour market realities and best practices. The findings also demonstrate that the smaller but mighty core of the sector's most engaged members do not have to carry the entire burden alone. There is a constellation of other members who could be engaged.

- The counts of members categorized as part of the sector's "big tent" (Instructor Iris, Manager Mohamed, Parent Parker, Recruiter Raul, Talent Thuy) are predominantly larger than any counts of core sector members (Practitioner Penny, Career Educator Emir, Director Deepika, and, to a lesser extent, Coach Caroline). The exception to this is Recruiter Raul.
- Ally Aniibish, Policy Pieter, and Funder Fatima—
 three personas that fall under the sector's "big tent"—
 are mapped to the attendees of Cannexus, CERIC's
 national career development conference. They do not
 appear elsewhere in the national portrait and have
 not been quantified in this report. These personas are
 important and should be included in future research.
- Sounding Board Suki—also from the sector's "big tent"—is the only persona not represented at all, qualitatively or quantitatively, in the national portrait. This is an area for future research that may open uniquely creative, unexpected possibilities and opportunities that have not yet been explored.
- Communicator Colette and Researcher Robert may be represented in the Census of Population (NOC 41321), but they cannot be disaggregated for analysis. Elsewhere in the national portrait, they appear only qualitatively. These two personas are especially important for the maturity of the sector, which is discussed in Section 5.

CONTENTS OF THE ECOSYSTEM PROFILES

Section 4 profiles the career development ecosystems in all 13 provinces and territories. It begins by outlining:

- The total number of core professionals in Canada's career development sector, by province and territory
- The total number of organizations providing career services in Canada, by province and territory

Then, each provincial and territorial profile includes the following:

- Summary of what's unique about the province or territory's career development ecosystem
- List of data sources used for the profile
- Overview of the number of organizations and core professionals providing career services
- Publicly funded career service providers and estimated number of career development professionals working for them
- Estimated number of career development professionals working in the education system
- Number of people under the career development sector's "big tent," by sector member
- Ecosystem spotlights, such as featured associations, resources, programs, or other notable elements of the province or territory's career development ecosystem

KEY FINDINGS FROM THE PROVINCIAL AND TERRITORIAL ECOSYSTEM PROFILES

- The size of Canada's career development sector is likely underrepresented in the profiles.
- Career services, programs, and professionals in public settings are more visible than in private settings. It is important to map who is working in public and private settings.
- Career services and programs that are delivered through government-run centres and/or communitybased organizations predominantly require clients to meet specific eligibility conditions. The sector would benefit from raising awareness about the need and benefit for "average employed Canadians" to access professional career development support.
- Canada's career development sector is principally organized and structured at the provincial or territorial level. Understanding and mapping the sector requires familiarity with provincial and territorial government departments and ministries.¹
- Publicly accessible directories that list government employees or third-party career service delivery organizations are an important tool in mapping Canada's sector. Oftentimes, however, it is not possible to know how up to date they are.
- The role that municipal governments play in delivering career services is largely invisible, except two examples (in Alberta and Ontario) where they receive funding through provincial mechanisms.
- The personas from the Sector Scoping Model that are represented in the ecosystem profiles are the following:
 - » In detail: Practitioner Penny, Career Educator Emir, Director Deepika, and, to a lesser extent, Coach Caroline
 - » From the "big tent": Recruiter Raul, Talent Thuy, Instructor Iris, Manager Mohamed, and Parent Parker
 - » Indirectly: Funder Fatima (Every provincial and territorial government department or ministry mentioned in this report has one or more Funder Fatima roles.)

- The personas from the Sector Scoping Model that are not represented in the ecosystem profiles are Ally Aniibish, Sounding Board Suki, Communicator Colette, Researcher Robert, and, with one exception (in Ontario), Policy Pieter. Communicator Colette and Researcher Robert may be represented in the Census of Population (NOC 41321), but they cannot be disaggregated for analysis. All of these personas are important and should be included in future research.
- Career services in the Northwest Territories, Yukon, and Nunavut are more integrated into the fabric of communities, with a service delivery structure less defined and administered by the territorial government.
- To the best of our knowledge, the collection, monitoring, and reporting of data by public funders about the demographics of career development professionals is limited.

CONTENTS OF THE IMPACT DISCUSSION

Section 5 discusses the impact of Canada's career development sector, including the following:

- How career development professionals' expertise connects with critical social and economic issues facing Canadians
- The Government of Canada's skills and employment investments, and what these investments reveal about funding allocation per person and percentage of the population served
- A tool that can contribute to the sector's advancement and leadership, called the Career Development Maturity MatrixTM
- Two sets of impact questions and recommendations for advancing career development in Canada, through behaviour change and systems change

KEY FINDINGS FROM THE IMPACT DISCUSSION

- Career development professionals' expertise connects to a range of critical social and economic issues facing Canadians, including job transitions, labour market participation and cycles of chronic underemployment and cyclical unemployment, labour market flexibility, mental wellness and social isolation, and social justice and equity.
- Understanding the sector is fundamental to realizing a strong ROI on current and future investments. The Government of Canada is investing billions to address skills and employment challenges. Current funding allocations indicate that no province or territory has a model that would enable a culture of basic, widespread career support—such as an annual career and labour market check-up—despite predicted widescale disruption to careers and skills. Before focusing on upskilling and reskilling, Canadians first need the tools and agency to assess their best next career move, then to select the best course of action, including training, possible internal migration, and other life or career interventions.
- The emphasis on only providing publicly funded career services to people experiencing career disruptions creates a general culture in which the average working adult believes they do not need career services. This trend does not exist in all countries. Canada's lower career services usage rate offers a significant area of opportunity. The evidence base in this report can help begin to shift the culture of career development in Canada, to align more with other countries in being proactive, ongoing, equitably accessible, and empowering. Revealing and recognizing the career development sector as a critical partner will accelerate policy priorities and foster stronger economies.
- This report provides an evidence base about the sector's size, scope, and composition and a Sector Scoping Model that defines the sector's membership. A third tool that can contribute to the sector's advancement and leadership in Canada's Future of Work is the Career Development Maturity Matrix. The Maturity Matrix identifies and measures the maturity of four sector benchmarks: quality, capacity, cohesion, and access. Each benchmark has three to five indicators. The Sector Scoping Model can be used to identify which members of the sector are best positioned to drive change in each of the Maturity Matrix's four benchmarks. Doing so can lead to more targeted and effective sector initiatives, as well as associated indicators and metrics that can be used to gauge progress.

- Canada needs a national careers strategy. There is a
 growing body of evidence and widespread consensus
 that the professionalized field of career development
 is essential to strengthening local and national
 workforces, labour markets, and employment
 transitions. Calls for national careers strategies have
 been made by a variety of actors in Canada and other
 countries.
- The 20 impact questions and 62 recommendations presented in this discussion identify specific actions that members of the sector can take to begin the work of affecting behaviour and systems change.
 They highlight where there's work to be done based on what we now know from the evidence base. They touch on a wide range of topics, including:
 - » Application of a career development lens during policymaking and funding decisions
 - » Benefits of different types of collaboration
 - » Canada's "fail-first" approach to career development
 - » Career literacy of all Canadians
 - » Equity, Diversity, Inclusion, and Indigeneity (EDII)
 - » Impact measurement across jurisdictions and areas of responsibility
 - » Importance of sector associations
 - » Role of certification and formal career development training
 - » The career development sector's "big tent"
- Many new future areas of exploration emerged as a result of this research project. These areas can be organized into four themes:
 - 1. Use the evidence base, Sector Scoping Model, and Career Development Maturity Matrix as the foundation for a new national careers strategy.
 - Conduct additional mapping activities to better scope career service delivery that takes place in private settings (such as private education, career management/transition firms, independent career practitioners, and within private sector and corporate workplaces).
 - Explore identified provincial and territorial data gaps and findings with a focus on learning from other jurisdictions and prioritizing key actions.
 - 4. Track additional assumptions and observations to consider in future research.



PROJECT METHODOLOGY

The project's methodological approach consisted of the following:

- Consolidating what was already known about Canada's career development sector to avoid duplicating work that has already been done
- Developing and testing a Sector Scoping Model of the sector's membership and structure
- Using and refining the Sector Scoping Model when identifying who does career development work across the country
- Providing a series of insights and recommendations based on the findings
- Relying on subject matter expertise of, and collaboration with, sector leaders

The following key phases of work were conducted:

- 1. Creation of the project's Career Development Steering Committee
- Environmental scan of the existing market research about Canada's career development sector
- 3. Top-down and bottom-up data collection
- 4. Data collation, analysis, and validation
- 5. Report drafting, revision, and finalizing
- 6. Knowledge mobilization

To map Canada's career development sector, we collected information about career services, programs, and providers from each province and territory. Most of this research focused on publicly funded career services because they have more accessible sector data tracking systems.

Top-down data collection involved conducting outreach to members of the Forum of Labour Market Ministers (FLMM) and provincial and territorial labour department representatives to gain access to as many sector data tracking systems as possible. It also involved submitting two Freedom of Information (FOI) requests in Ontario and British Columbia, and engaging with the Job Bank Data Team at Employment and Social Development Canada to access their national database of employment centres across Canada.

Bottom-up data collection involved conducting outreach to members of Canada's national and provincial career development associations to access information about their memberships and request targeted information about the career development ecosystems in their jurisdictions. It also involved conducting an online survey about the state of EDII among sector members and whether those providing career services reflect the learners and clients they serve. Lastly, it involved collecting data from publicly available websites, including directories of government staff and third-party career service providers, post-secondary institutions, and LinkedIn Sales Navigator.

Research challenges, solutions, and lessons learned concerned overcoming sector data shortcomings, addressing significant jurisdictional differences, why FOI requests are not sufficient alone to map the sector, and how to collect EDII data about the sector.

KEY TERMS AND DEFINITIONS

"Big tent"

A broad, inclusive understanding of, and approach to, the career development sector's membership. See Section 1.1. to learn more about the use of a "big tent" approach to develop a useable Sector Scoping Model.

Career development professional

A professional who provides supports and services to help individuals or organizations navigate career exploration, transitions, and pathways. In this report, the definition of career development professional is broader than career (development) practitioner, representing a wider array of job titles and professional activities. Not everyone represented in this report identifies as a career development professional.

Career development work

The act of advising, educating, or coaching another person or entity about their career during the lifelong process of blending and managing the paid and unpaid activities of learning (education), work (employment, entrepreneurship), volunteerism, and leisure time. See Section 1.1. to learn more about the use of this definition in this project.

Career services

In this report, career services refers to both career and employment services that are delivered to clients or learners.

Career service provider

In this report, career service provider refers to organizations, not individual professionals, who deliver career and/or employment services and supports.

Community-based organizations

In this report, community-based organizations are publicly funded career service providers that are operated by the staff of the organization, not the employees of a provincial or territorial government. Depending on the province or territory and funding/reporting source, community-based organizations may include non-profits, private for-profits, school boards, colleges, and First Nations. Not all of these are captured consistently across every provincial and territorial ecosystem profile.

Government-run centres

In this report, government-run centres are publicly funded career service providers that are staffed directly by the employees of a provincial or territorial government.

Guidance counsellor

Professionals who offer academic, social, career, and/or post-secondary advice and guidance to children in grades K-12. A guidance counsellor is employed by a school board, elementary school, or secondary

school. Key activities include providing guidance to students on personal- and learning-related issues. A major emphasis is post-secondary education and training choices with a minor emphasis on school-to-work related issues.

In Quebec, guidance counsellors (*Conseillers/conseillères d'orientation*) belong to a regulated profession and must be registered with the *Ordre des conseillers et conseillères d'orientation du Québec (OCCOQ)*. See Section 4.11. to learn more about the Quebec definition of guidance counsellor.

Interest holder

Any individual, group, or entity that holds a specific interest or concern in a particular matter or project, often in the context of business, law, or governance, and can influence or be influenced by its outcomes.

One step we can take towards reconciliation with the Indigenous peoples who were here before us, living on and caring for the lands on which we are grateful to live and work, is to educate ourselves about the colonial legacies, applications, or implications of certain words. At Challenge Factory, we strive to use the term "interest holder" instead of "stakeholder."

The following terms found in this report have been used verbatim from their original sources (such as provincial, territorial, or federal government sources):

- · Aboriginal-controlled institute
- Band Council
- · First Nations
- · Indian Band
- Inuit
- Métis
- Tribal Council

Names of provincial and territorial ministries and departments

The names of provincial and territorial ministries and departments are used throughout the profiles of the career development ecosystems presented for each of Canada's 13 provinces and territories (Section 4 of this report). These names are subject to frequent change as government administrations shift organizational priorities, mandates, and structures. As such, at the time of reading, references to ministries or departments may differ from their current name.

Notable acronyms

- EDII (Equity, Diversity, Inclusion, and Indigeneity)
- ISET (Indigenous Skills and Employment Training) Program
- NOC (National Occupational Classification)
- P/T (Provincial/Territorial)

² Here are two information sources where you can learn more about the term "stakeholder": Province of British Columbia, "Terminology in Indigenous Content: Stakeholders," <a href="https://www2.gov.bc.ca/gov/content/governments/service-experience-digital-delivery/web-content-development-guides/web-style-guide/writing-guide-for-indigenous-content/terminology#:~:text='Stakeholder', accessed October 31, 2023; Research Impact Canada, "Switching From Stakeholder," https://researchimpact.ca/featured/switching-from-stakeholder/, accessed October 31, 2023.

HOW TO NAVIGATE THE REPORT

This report presents a significant amount of information about Canada's career development sector. Much of it is data focused. The report was developed with two expectations in mind:

- 1. Multiple audiences have an interest in the report's findings and learnings.
- 2. Many readers may not explore the report from beginning to end.

Some readers will explore this report because they are part of the sector and want to see themselves reflected in it. Other readers will explore it because they set careers-related policy or deliver career services or programs. Still others will explore it as interest holders from outside Canada who want an international sector comparison.

You can pick and choose which parts of the evidence base are of interest to you, such as the career development ecosystem profile of a specific province or territory. Understanding the full context may require further reading in another part of the report.

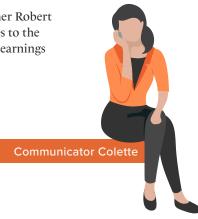
- **Sections 1-2** set the scene and provide the context you need to understand the data findings, knowledge sharing, and learning that come in Sections 3-5.
- Section 3 is a national portrait of the sector. It focuses on distinctly federal and national jurisdiction elements of the sector, using federal and national information sources, with limited exceptions. It is not a complete "roll-up" of the provincial and territorial findings presented in Section 4.
- Section 4 contains profiles of the career development ecosystems in each of Canada's 13 provinces and territories.
- **Section 5** provides a high-level discussion of the career development sector's impact in Canada, drawing on findings from Sections 1-4.



YOUR GUIDES TO THE SECTOR MAP



As you read, you'll encounter avatars of Researcher Robert and Communicator Colette. They are your guides to the report's findings, drawing your attention to key learnings and notable sector spotlights.



AREAS FOR FUTURE EXPLORATION

Throughout the report, you'll also encounter flags that identify areas for future exploration that fell outside the scope of this project. They are compiled by theme in Appendix D.



