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INTRODUCTION

The City of Kelowna's 2015 Community Trends Report aims to provide an engaging examination of key trends that will influence Kelowna's future. In doing so, the report offers the City, businesses, community groups, and residents the necessary information to prepare for and respond to the impacts of these trends.

The Community Trends Report examines current trends from four key areas: our people, our economy, our homes, and our environment. In each area, the report summarizes key data, providing a snapshot of how we are doing today. Then, one key trend is selected in each area for more detailed examination. The report relies mostly on data from 2014, with updated 2015 data added where available.

Wherever possible, the information provided in this document refers to the city of Kelowna. Some data, however, is only available for the Kelowna Census Metropolitan Area (CMA), which includes the entire Central Okanagan Regional District from Peachland to Lake Country.

EXECUTIVE SUMMARY

In 2014, the outlook was positive and the community was growing. Approximately 1,500 new residents called Kelowna home. Population growth was supported by a strong and expanding economy, which helped to reduce the city's unemployment rate to well below provincial and national averages. Construction and building activity were gaining steam and household incomes were rising.

In 2014, residents felt that their quality of life had improved and they felt optimistic about their futures in Kelowna. Increased civic engagement and a declining crime rate further contributed to this favourable outlook.

While 2014 provided much to celebrate, it also presented an opportunity to step back to consider the many paths that Kelowna might take in the future. There are trends at work that are already shaping Kelowna's future. Many of these trends are also being felt at a national and international level. Even so, these trends will have some very local effects.

The 2015 Community Trends Report examines five key trends that became evident in 2014:

Aging community – as the share of Kelowna's population 65 years or older continues to grow, new approaches are needed to ensure that the community supports high quality of life for residents of all ages.

Feeling congested - traffic congestion continues to be top of mind for Kelowna residents. As the city continues to grow, this issue will remain a challenge. How the community choose to address traffic congestion now will have major implications for the future of Kelowna.

Tech accelerates - what was a small part of the local economy only a few years ago is now a major contributor to growth. While this is forecast to continue, the success of the tech sector will require coordinated efforts from industry. government and educational institutions.

Growing up - recent years have seen a resurgence of multi-unit development in Kelowna. With changing demographics and a limited land supply, these forms of multi-unit housing are expected to grow more and more popular.

A changing climate - this is a global trend with real local impacts. Less snow and hotter, drier summers are only some of the impacts that a changing climate will have here. What does that mean for residents? How can Kelowna adapt to mitigate any negative impacts while taking advantage of any positive opportunities?

Understanding and responding to these trends will help position Kelowna for success. The City of Kelowna is taking action with projects like the Pedestrian and Cycling Master Plan and the Age-Friendly Strategy. But, taking action is not simply the business of the City of Kelowna. It will require the combined efforts of business, educational institutions, community groups, non-profits and residents. The recent Healthy City Partnership between UBC Okanagan, the Interior Health Authority (IHA), and the City of Kelowna is an example of a major inter-disciplinary effort to promote community health from all perspectives. Through collaboration and partnerships such as this, Kelowna can thrive - even in the face of the complex challenges to come.

POPULATION 123,500







MEDIAN HOUSEHOLD INCOME \$62,586

AVERAGE ANNUAL UNEMPLOYMENT RATE 4.6%

AGE DISTRIBUTION

19.6% 0 - 19

60.3% 20-64

20.0% 65+



HOUSING







AVERAGE HOUSE PRICE

72.3% VOTER PARTICIPATION





TECH SECTOR **ECONOMIC IMPACT** \$1.02 BILLION



RESIDENTIAL WATER CONSUMPTION 364 LITRES/PERSON/DAY

TRANSPORTATION 82% 11.1% 1.1% 6.2%







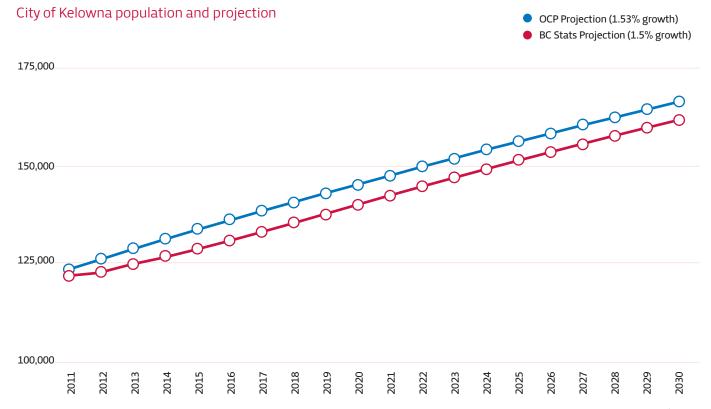


OUR PEOPLE

Modest growth

Kelowna's population is estimated at 123,500, representing an increase of approximately 1,500 residents over last year. In-migration remains the primary driver behind population growth, with intraprovincial migration representing the largest share. ii This population growth is consistent with the 2030 Official Community Plan (OCP), and growth to 2030 is still projected to be higher than the 1.14 per cent increase expected for the province.

The population of the Kelowna Census Metropolitan Area (CMA) is expected to age over the next 14 years as the percentage of working-age residents (age 20-64) shrinks and the percentage of seniors (age 65+) grows from 20.4 per cent in 2015 to a projected 24.3 per cent in 2030. This trend is expected province-wide; but, not to the same degree as in the Kelowna CMA. iii



Projected age distribution, Kelowna CMA



Source: BC Stats

Trend | Aging community

Kelowna, like much of the world, is preparing for a demographic shift towards an older population, fuelled by falling fertility rates and rising life expectancies. iv The increasing percentage of older residents will have significant impacts on communities. Companies will be more challenged to find workers, while industries such as retail, real estate and health care will need to respond to changing consumer preferences. Local governments, too, will feel the impacts of an aging population and will need to adapt both their physical environments (e.g.: parks, streets, buildings) and the services they offer (e.g.: recreation, transit) to be inclusive of older residents.

The ever-changing nature of our population presents an opportunity for the City of Kelowna to review, to evaluate and to re-imagine the services and infrastructure that are provided to citizens. Not only will people be living longer, but seniors will also be more active and physically fit and will want opportunities to participate. Understanding this shift and its impacts on the future will help communities prepare and adjust to meet future needs.

The City of Kelowna will draw from best practices as it prepares for the impacts of changing demographics. The City will be undertaking an Age-Friendly Strategy in 2016. This will include an action plan for healthier seniors, children and those who require enhanced accessibility, as most of the actions will provide cobenefits. This project will consider outdoor spaces and buildings, access to transportation, relationship to the housing spectrum, social participation, and community support and health services. In doing so, the strategy will identify areas where the City of Kelowna can adapt policies, plans and programs to respond to the evolving needs of the community.

For Kelowna, the peak of these demographic changes will be felt within the next two decades. In advance of that time, both the private and public sectors will need to re-examine every aspect of their operations to ensure a successful transition in an evolving community. The Age-Friendly Strategy will represent the beginning of this vital conversation.

Good quality of life

Kelowna residents' perception of quality of life continues to be positive, with more than 95 per cent of residents surveyed in the 2015 Citizen Survey rating quality of life as "good" or "very good." Overall, residents are optimistic about the direction of their quality of life, with more residents stating quality of life has improved (30 per cent) than worsened (18 per cent)

in the past three years. Top reasons cited for this improvement include having a nice place to live, downtown revitalization and the availability of more opportunities for recreation. Economic factors, such as rising cost of living and unemployment, were cited as reasons for a declining quality of life.

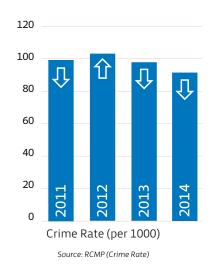


Nearly all residents (94 per cent) describe Kelowna as a safe community^v, which correlates to Kelowna's declining crime rate. Kelowna's crime rate (measured as the number of criminal code offenses reported per 1,000 residents) declined for the third straight year to 92.0 in 2014. vi This trend is consistent with the trend across Canada. Nationally, the crime rate has been decreasing such that 2014 recorded the lowest recorded crime rate in over a decade. Kelowna's decreasing crime rate can be attributed to a change in the City of Kelowna's Police Service's crime reduction model. With the addition of 23 officers between 2011 and 2015, the RCMP can direct resources to address issues that place the community most at risk for increased crime, such as targeting prolific offenders or combating the downtown drug trade.

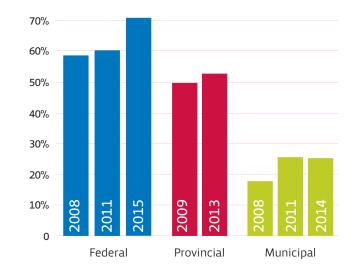
Engaging communities by empowering their citizens to play meaningful roles in discussions and in decisionmaking has been shown to improve quality of life. vii Voter turnout is one way to measure community engagement. While voter turnout has increased in Kelowna, the turnout is significantly higher for federal and provincial elections than municipal elections. The recent federal election saw voter participation increase from 60 per cent in 2011 to more than 70 per cent in 2015. It remains to be seen whether this is the beginning of a trend in citizen re-engagement.

Empowering residents to make a difference in their neighbourhoods is exactly what the City and the Central Okanagan Foundation are doing with the Neighbourhood Grants Program. Together, the organizations are offering matching grants of up to \$1,000 to support resident-led neighbourhood enhancement ideas or projects that empower neighbours to take action locally.

Crime rate



Voter participation



Source: Elections Canada, Elections BC and the City of Kelowna

Trend | Feeling congested

Transportation continues to be a leading local issue, with nearly 38 per cent of citizens stating it as the most important issue facing Kelowna - double what is mentioned for any other issue. Over the past three years, this has not changed.^V

Congestion, which is the most often cited transportation-related issue (13 per cent)^V, will likely continue to worsen as population grows, land for new roads becomes scarcer, and the road network becomes more constrained by development.

The most common reaction to increased congestion over recent decades has been to build more and wider roads. But, research consistently shows that building more and wider roads is not the cure for congestion. As long as driving on the roads remains easy and cheap, people have an almost unlimited desire to use them. It has been shown that new roads create new drivers, resulting in the intensity of traffic staying the same. Viii

| Top 5 Issues Facing Kelowna | | | | |
|--|-----------|-----------|--|--|
| Issue | 2012 Rank | 2015 Rank | | |
| Transportation | 1 | 1 | | |
| Social (housing affordability & poverty) | 2/3 | 2 | | |
| Growth/development | 2/3 | 3 | | |
| Economy | 4 | 4 | | |
| Parks/recreation/culture | 5 | 5 | | |

Policy in Kelowna's Official Community Plan states that the community will "recognize and accept a greater level of congestion [that] will result from an increase in suburban growth and a reduced road construction program." Beyond just accepting congestion as cities grow, cities can work to provide other, more sustainable ways to for residents to get around. Building compact communities with easy access to services and amenities will reduce the need for single-occupancy vehicles trips.

The Infill Challenge is an example of an initiative underway to help concentrate growth in the Urban Core and to provide Kelowna residents with easy access to amenities without the use of an automobile. Additionally, the Pedestrian and Bicycle Master Plan (currently in progress) will identify new active transportation corridors for creation over the next two decades, making travel by bicycle or foot easier, safer and more convenient.





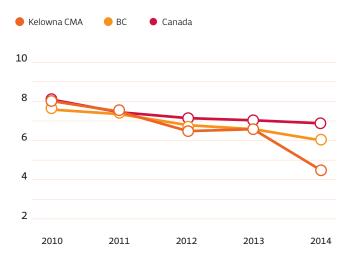
OUR ECONOMY

Consistent Improvement

In 2014 there was modest, but continued growth in Kelowna's economy. Key economic indicators, such as the unemployment rate^{ix}, were showing steady improvement. For instance, the value of building permits increased by 3.4 per cent over 2013, which exceeds the five-year average, and demonstrates a healthy construction industry. Additionally, Kelowna International Airport (YLW) - a key contributor to the local economy - continued to grow, with more than 1.6 million passengers in 2014.xi

The number of business licenses issued by the City of Kelowna increased to 9,251 in 2014^{xii}, recovering to near pre-recession levels (2007-2008). Household income also increased, and is estmated at \$62,586 for 2015. XIII Together, this data points to a local economy performing well. Early 2015 numbers suggest a continuation of this positive outlook.xiv

Unemployment rate



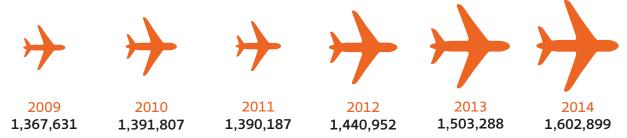
Source: Statistics Canada, Labour Force Survey Estimates, Cansim Table 282-0110

\$350,823,660

TOTAL VALUE OF BUILDING PERMITS ISSUED IN 2014

Source: City of Kelowna, Annual Development Statistics Report, 2014

Airport passengers



Source: City of Kelowna

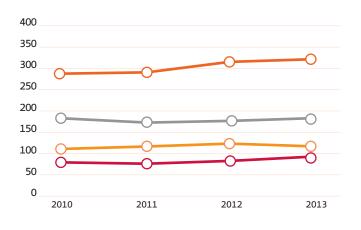
Trend | Tech accelerates

Traditional perceptions of Kelowna as a city of wineries and golf courses are being quietly challenged by a sector of the economy that has only recently come to the attention of locals. The high technology sector (tech sector) has grown to become the third largest sector of the provincial economy^{xv} and is competing with tourism in its overall impact on the local economy. XVI, xvii

What was a relatively small industry ten years ago has grown to the point where it now contributes an estimated \$1.02 billion dollars to the Okanagan economy. XVI The tech sector is a rapidly growing part of the provincial economy; however, its influence in Kelowna is growing even more quickly than provincial averages. Within the Thompson Okanagan region, Kelowna is the largest tech hub, with approximately 334 tech-related businesses in 2014 and the feeling within the sector is that it will continue to climb. XVII

Part of this success is due to the expansion of Kelowna's airport, University of British Columbia's Okanagan Campus and Okanagan College. Building on this momentum is construction of the Okanagan Centre for Innovation (slated for completion in late 2016), which will bring young tech entrepreneurs together with experienced business mentors and venture capital investors in a central facility.

Thompson/Okanagan Tech Business Growth



Source: BC Stats, Profile of the British

Edition

Columbia High Technology Sector: 2014

Central Okanagan North Okanagan

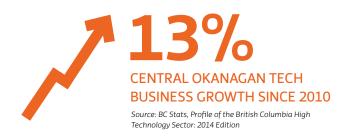
Okanagan-Similkameen

Thompson-Nicola



TOTAL ECONOMIC IMPACT OF THE OKANAGAN CHNOLOGY SECTOR

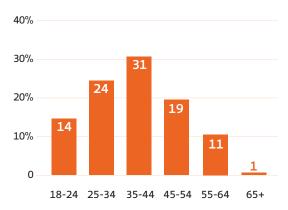
Source: Accelerate Okanagan, Economic Impact of the Okanagan Technology Sector, 2014



Unlike traditional industries that are tied to the location of specific resources, the tech industry has a far greater choice of where to locate. In this way, Kelowna is competing with the world to build a successful sector in the Okanagan. Fostering the skills needed by the local tech sector in key university and college programs will be an important step to ensuring local firms can find local talent. XV, XVI Attracting investors and giving local firms access to funds needed to grow their businesses will help take the Kelowna tech sector to the next level.

Kelowna will need to think about how it can offer more than just access to its beautiful surroundings as it works to attract and to retain talent in a sector whose workers tend to be young and apt to move between cities and jobs. Richard Florida – a prominent urban theorist – calls these workers part of the "creative class," and suggests that building an amenity-rich, vibrant city that embraces creativity and diversity is a key part of what draws and retains them. XiX Recent transformations in Kelowna's downtown core show how quickly strategic investments can have a positive effect on the ground. Continuing to build downtown and other urban centres will be a critical factor in becoming a city that can compete at all levels to create, to attract and to retain tech business.

Tech employees by age



Source: Accelerate Okanagan, Economic Impact of the Okanagan Technology Sector, 2014

67 per cent of Central Okanagan tech companies expect to increase their workforce



Source: Accelerate Okanagan, Economic Impact of the Okanagan Technology Sector, 2014





OUR HOMES

Housing activity increases

The housing sector in 2014 demonstrated a strong recovery from lows in 2011, with Building Permits issued for 1,029 new residential units. This represents the largest total since 2008, and shows steady progress towards the City's long-term averages. The total number of housing starts was led by growth in multi-family housing, with a slight reduction in singledetached home construction. Overall, it is anticipated that there will be a steady number of total housing starts throughout 2015-2017, averaging around 1,400 households annually for the Kelowna CMA. XX

Alongside new home construction was a very strong year for the resale market, with some significant price gains in 2014. The average resale home price for Kelowna rose 7 per cent from \$398,028 to \$425,996, and the number of sales increased.xx

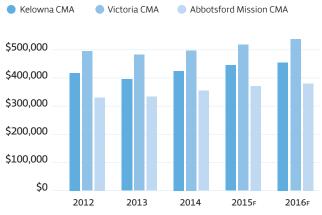
Alongside the increase in activity in the ownership market came strong demand for rental housing within the city, driven by post-secondary growth, employment growth and in-migration. The vacancy rate in October 2014 fell to 1.0 per cent, giving Kelowna one of the lowest apartment vacancy rates in Canada.XX Indications are that the private sector is responding to the demand and new rental housing projects are making their way through the development process. It is anticipated that vacancy rates will increase to 1.5 per cent in 2015 and 1.8 per cent by 2016^{XX} as new units are constructed. The upswing in rental vacancy rates will result in a steadier supply of rental housing, and will better serve the diverse needs of residents looking for rental housing.

Average rent and vacancy rate for a 2 bedroom apartment



Source: CMHC Rental Market Survey - Kelowna CMA - Fall 2014. Data represents units in $purpose-built\ private\ rental\ structures\ with\ three\ or\ more\ self-contained\ units,\ and\ may\ be$ townhouses or apartments.

Average resale home prices and forecast

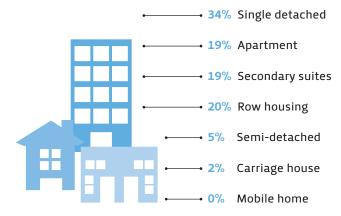


Source: CMHC Housing Market Outlook BC Highlights Fourth Quarter, 2012, 2013, 2014

Trend | Growing up

Over the next 15 years, 15,350 housing units will be needed to accommodate projected growth in Kelowna. The housing market, which has historically been dominated by single detached development, will continue to transition towards higher density options.

2014 Kelowna development by unit type

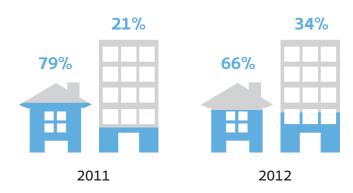


Source: City of Kelowna Annual Developments Stats Report

An increasing demand for smaller forms of housing, combined with a limited supply of land for single detached development, will influence the market for multi-unit housing (i.e. apartments and townhomes). Kelowna is already starting to see an increase in the share of multi-unit residential buildings. And, 2015 is projected to be the first year since 2008 in which multi-unit housing construction exceeds single detached construction.X The continued trend is expected to be fuelled by a confluence of the need of millenials (ages 18-34) for affordable housing and the need of baby boomers (ages 51-69) for downsized housing.

New multi-unit housing forms are also being tested in Kelowna. Notably, interest in micro-suites, an innovative niche form of housing, has increased. With a unit size of less than 312 ft², micro-suites have the potential to serve people wanting to enter Kelowna's housing market. As of 2015, 315 units were approved, which positions micro-suites as an important element of Kelowna's housing mix in the coming years.

Building permit issuances by type





Source: City of Kelowna Annual Development Stats Report

The Official Community Plan (OCP) anticipates an increase in the demand for multi-unit housing in the long term and directs this growth to the city's five urban centres. These urban centres are the keys to building a city that not only survives demographic change, but thrives because of it. Successful urban centres will be the driving force behind innovation, creativity and growth.

As the housing balance shifts towards multi-unit development, and more residents move to Kelowna's urban centres, the City needs to be ready to create urban centres that foster and reinforce a high quality of life. But, how are great urban centres built? What are their key characteristics? How can they be achieved in Kelowna? Those are some of the key questions being

answered by the *Urban Centres Roadmap*. The project will use key principles and performance targets to guide future detailed planning for each of the five urban centres. These detailed plans will outline a clear path forward towards building urban environments that will improve the health, well-being and quality of life for future residents.

Kelowna's five urban centres include City Centre, Rutland, South Pandosy, Midtown and Capri-Landmark. Together, they are expected to receive **11,515** new residential units by 2030.





OUR ENVIRONMENT

Trend | A changing climate

The Intergovernmental Panel on Climate Change (IPCC) is in agreement that "human influence on the climate system is clear and warming of the climate is unequivocal." Scientists agree that globally "surface temperatures will rise over the 21st century and that heat waves will occur more often and last longer, and that extreme precipitation events will become more intense and frequent in many regions."XXI

Looking closer to home, 2015 has seen some extreme weather conditions this year, including record snowfall in early January, a level four drought in late summer and new record high temperatures set throughout the year.

Researchers at the Pacific Climate Impacts Consortium have modelled anticipated climate trends for the Central Okanagan region. Annual average temperature is expected to rise consistently over the coming decades. XXII Precipitation trends will also vary significantly from historical levels with drier summers and wetter winters becoming the norm. One of the most notable climate changes will be spring snowfall, which could decrease by up to 77 per cent by 2080. These changes will have significant impacts on Kelowna residents.

| Predicted future climate (Central Okanagan) | | | | | | |
|---|----------------------------|-------------------|--------------------|---------------------|--|--|
| | | 2020 | 2050 | 2080 | | |
| Annual Average Temp. | | +1C | +1.9C | +2.9C | | |
| Precipitation | Annual Summer Winter | +5% -5% +3% | +7% -11% +7% | +8% -12% +11% | | |
| Snowfall | Winter Spring | -7% -33% | -14% -57% | -22% -77% | | |

Source: Pacific Climate Impacts Consortium, plan2adapt.ca

Water conservation will be crucial for Kelowna. Water consumption varies significantly throughout the year and peak summertime use can be more than three times the consumption during off-peak times.

But, the effects of climate change are not just limited to water concerns. Hotter, drier summer conditions are also conducive to higher forest fire risks due to dry forest conditions. Potentially becoming the hottest year on record, XXIV 2015 saw significant forest fire activity in the region with more than 100 fires and 7.386 hectares burned. While these fires weren't in Kelowna. the impacts were still felt by residents with air quality particulate matter reaching the highest concentrations on record.xxv

Monthly household water consumption for the City water utility (cubic metres)



Source: City of Kelowna Water Utility, Population and household data from Environics Analytics

Note: data for March is not representative of actual water consumption, and is an anomaly resulting from billing cycle changes

2014

¹ Kelowna is within Penticton Fire Zone which covers an area from Osovoos to Lake Country

There are two primary approaches to addressing climate change: prevention and adaptation. Prevention includes efforts to reduce or to eliminate the factors that lead to climate change, namely the production of greenhouse gas. The IPCC advises that "limiting climate" change would require substantial and sustained reductions in greenhouse gas emissions which, together with adaptation, can limit climate change risks."XXI On this front, Kelowna is making progress.

Sixty five per cent of Kelowna's community greenhouse gas emissions come from road transportation, with more than 75 per cent of these emissions due to personal vehicle use. XXVI Making more sustainable transportation choices is the main opportunity for reducing transportation emissions and residents are starting to move in this direction. Between 2007 and 2013, more than 3,000 (3 per cent) residents switched their transportation modes from the automobile to alternatives such as transit, cycling and walking.

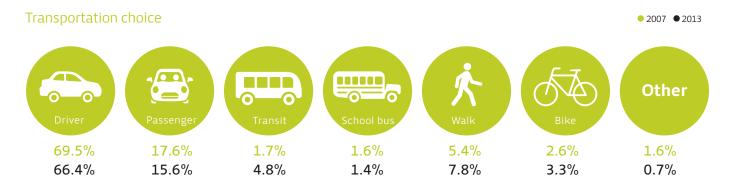
The City is investing in infrastructure to promote walking, cycling and transit. Work is currently underway on multi-use paths on Lakeshore Road and on Ethel Street, both of which will connect to the City's existing walking and cycling infrastructure. These represent small steps towards creating a transportation network that makes other modes of transportation more

accessible and attractive to residents, and helps Kelowna to reduce its greenhouse gas emissions.

Initiatives are also underway to adapt to the effects of climate change. Kelowna is working actively to reduce residential water consumption in preparation for a more constrained water supply. Recent data from the City of Kelowna Water Utility shows that residential water use dropped more than 2.8 per cent in 2014. And, preliminary data from 2015 shows that Kelowna citizens responded positively to restrictions during the extreme August drought. xxiii

Kelowna will look to implement new watering restriction programs in 2016, supplementing existing universal water metering and user-pay water rates, which have been effective in encouraging water conservation.

Further adaptation efforts are continuing in forested areas near existing homes, where the City continues to invest in wildfire mitigation. These efforts, coupled with similar efforts for new development and by individual home owners, will help mitigate this risk in the future. Investing in fire mitigation near existing homes and directing development away from forested areas will help mitigate this risk in the future.



Source: 2007 and 2013 Central Okanagan Household Travel Survey

Notes

- Based on the BC Stats growth rate applied to the 2011 Census population.
- Statistics Canada, Demographic factors of growth by census metropolitan area, Canada, from July 2012 to June 2013 — Population estimates and factors of growth, Table 1.3-1.
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- xxii Pacific Climate Impacts Consortium Plan2Adapt, http://www.plan2adapt.ca
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- xxiv Scientific American, August 20, 2015. 2015 May Just Be Hottest Year on Record, http://www.scientificamerican.com/article/2015-may-just-be-hottest-year-on-record/
- xxv British Columbia Ministry of Environment. BC Air Data Archive Website, http://envistaweb.env.gov.bc.ca/
- xxvi Province of British Columbia, Community Energy and Emissions Inventory for Kelowna, http://www2.gov.bc.ca/gov/content/environment/climate-change/reports-data/community-energy-emissions-inventory#toc

