

Shared Rides, Shared Wealth

Prosperity Report 2022
Canada





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Foreword

It's no surprise that micromobility has been growing rapidly in popularity over the last few years as cities around the world adapted to the impacts of climate change, COVID-19 and rising costs of living.

People across Canada have embraced shared e-scooters as an affordable, sustainable and physically-distanced way to travel. Micromobility operations like Neuron's have since become embedded in many local ecosystems, and cities are increasingly realizing the value that a well-run and responsibly operated e-scooter program can bring to their economies.

Since our founding in 2016, Neuron has been partnering with cities to build a more prosperous and sustainable future. During the COVID-19 pandemic, we were proud to work with local city councils to support our cities through initiatives such as offering free ride passes to essential workers and individuals heading for their vaccination appointments.

As we continue to expand globally, we see ourselves continuing to play an important role in boosting local economies to help cities get back on their feet in the wake of the pandemic.

Neuron is committed to supporting the prosperity of the cities in which we operate. We remain focused on developing new partnerships, technologies and business models to respond to the needs of our cities and improve their livability to help them thrive.



Executive Summary

In compiling this report, we analyzed responses to rider surveys conducted in September 2022 in the six Canadian cities where we operate: Airdrie, Calgary, Lethbridge, Ottawa, Red Deer and Vernon. We asked a range of questions about how our e-scooters are used and how much our riders spend during their trips to gain deeper insights into the positive economic impact our programs bring to cities. We also analyzed our riders' trip data which shows where journeys start and end, how long they last, distance covered and preferred routes.

Local business owners also gave feedback on our e-scooter programs through surveys of members of the Lethbridge Chamber of Commerce and Red Deer & District Chamber of Commerce.

Our data, which includes over 2,600 responses to our rider surveys, shows that Neuron's e-scooters in Canada have been directly responsible for growing local economies by making it easier for shoppers to reach businesses, especially those on main streets and downtown areas that might be too far to walk to but inconvenient to drive to. They also boost tourism spending by providing visitors a fun experience and a convenient way to explore cities.

With the cost of living on the rise, users are increasingly leaving their cars at home to avoid

paying higher fuel prices, and many are hopping on an e-scooter instead. This also helps reduce the number of cars on the road, especially during large-scale events, which lowers congestion and air pollution and makes the cities more attractive places to live and work.

Our e-scooters offer riders an affordable and easily accessible transport option around the clock in most of our cities, which is particularly important at night when public transport is not readily available.

Many of these trips support workers in the night-time economy such as those in the hospitality industry and healthcare workers who start and end their shifts late.

We are encouraged that an overwhelming majority of our riders believe we have made a positive impact on their cities and will work to enhance our services further to meet and exceed expectations.

9 Key Figures



12% of trips would not have happened if a Neuron e-scooter was unavailable

70% of trips result in a direct purchase from a local business

\$27 spent at local businesses by Neuron riders per e-scooter trip

\$11,300 spent at local businesses each year by Neuron riders per e-scooter deployed

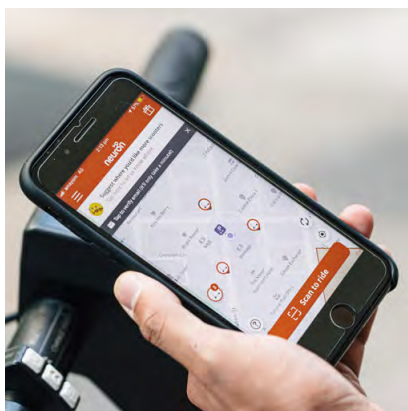
\$26 M spent at local businesses each year by Neuron riders in our six Canadian cities

\$13 M spent at local businesses each year by Neuron riders in Calgary

24% of trips support the night-time economy (10pm to 6am)

45% of trips replace a car journey

98% of users believe Neuron has created a positive impact on their city



Introduction

As cities expand and evolve, many face challenges which threaten to stifle their growth and prosperity. Main streets, the traditional lifeblood of local economies and communities in Canada, as well as downtown areas in many cities have been in decline for years in the face of fierce competition from online shopping.

Car ownership is becoming prohibitively expensive with costs of living soaring globally, including fuel prices. Experts and local authorities are also becoming increasingly aware of the detrimental economic effects of road congestion and pollution associated with private car use.

Our data shows shared micromobility can be a part of the solution to some of these challenges. In this report, we zoom in on four areas where Neuron has helped to give urban prosperity a boost.



Accelerating the local economy



Expanding affordable transport options



Supporting sustainable urban living



Investing in future growth

Accelerating the local economy

Bringing consumers back to main streets and downtowns

Even before the pandemic, main streets were struggling with increasing consumer adoption of e-commerce and rising real estate prices and rents. These trends were worsened or accelerated by further changes to consumer behaviour as a result of COVID-19.

Activity levels in the downtown areas of major Canadian cities have also not recovered to pre-pandemic levels despite the easing of COVID-19 restrictions. A study by researchers from the University of California, Berkeley measured the levels of human traffic in the downtown areas of 10 Canadian cities from March to May 2022 and concluded that they were still significantly lower (30%-60%) than 2019 levels.

The increasing popularity of e-scooters offers a helping hand to embattled businesses in downtown areas and main streets by making it easier for residents, visitors and workers alike to get to and from these activity centres.

According to our rider survey:

70%

of e-scooter trips resulted in a direct purchase from a local business

12%

of trips wouldn't have happened at all if an e-scooter hadn't been an option

57%

of riders spent more than \$10 during their most recent trip

Where our riders spend their money*:



31%

General shopping



33%

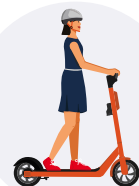
Restaurants, bars and cafes



18%

Entertainment and recreational venues

Why our riders use our e-scooters*:



35%

Commuting to work or study



15%

Connecting to public transport



26%

Running errands such as shopping



81%

Leisure and recreation

* Respondents could select more than one option

Our e-scooters have contributed:



\$27

spent at local businesses
by Neuron riders per
e-scooter trip



\$11,300

spent at local businesses
each year by Neuron riders
per e-scooter deployed



\$26 M

spent at local businesses
each year by Neuron riders
in the six Canadian cities
where we operate



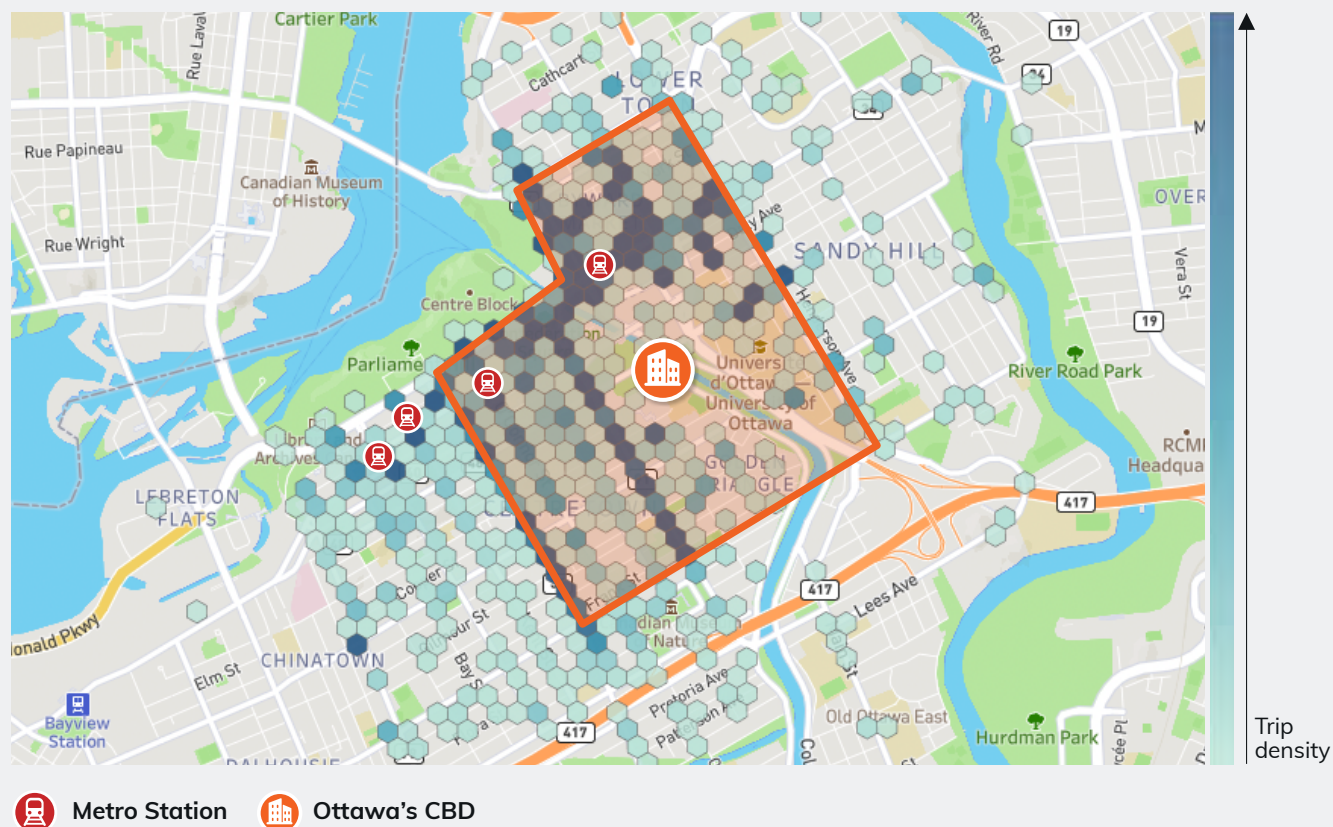
\$13 M

spent at local businesses
each year by Neuron
riders in Calgary alone

Breathing life into Ottawa's Central Business District (CBD)

- **77% of trips** started and ended within a core section of Ottawa's central shopping district, including Byward Market and Rideau Centre
- Average trip within the CBD lasts **17.5 minutes over a distance of 2km**
- **23% of trips** connected to or from public transport, including the Lyon, Parliament and Rideau train stations

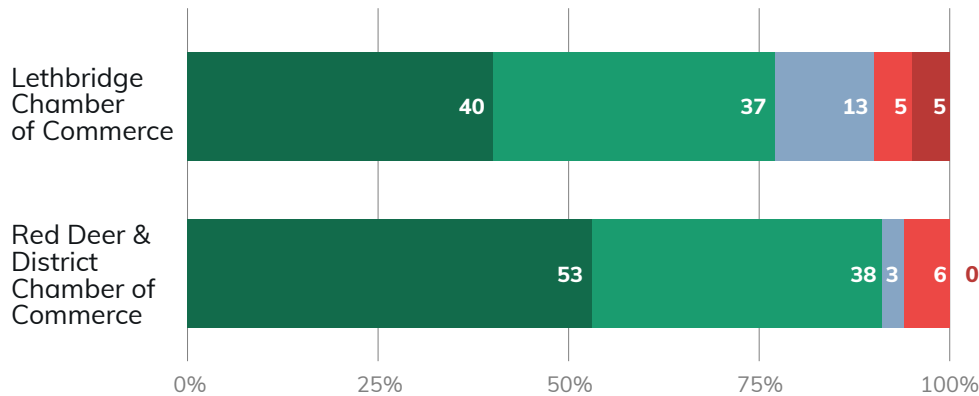
Heat map showing where trips to and from Ottawa's CBD started and ended from July to September 2022



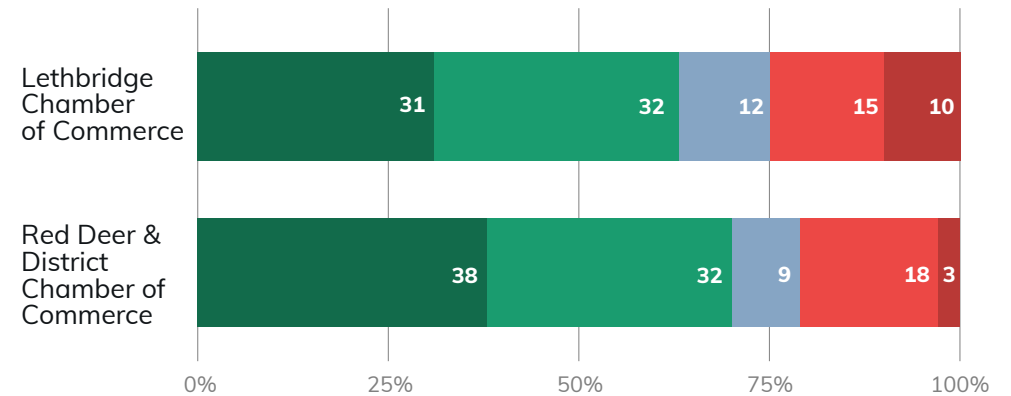
According to feedback from local chambers of commerce:



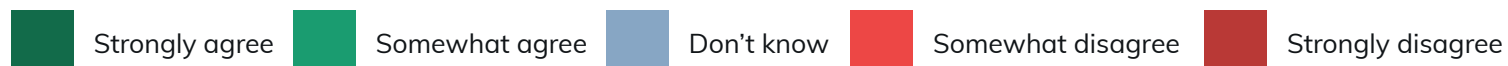
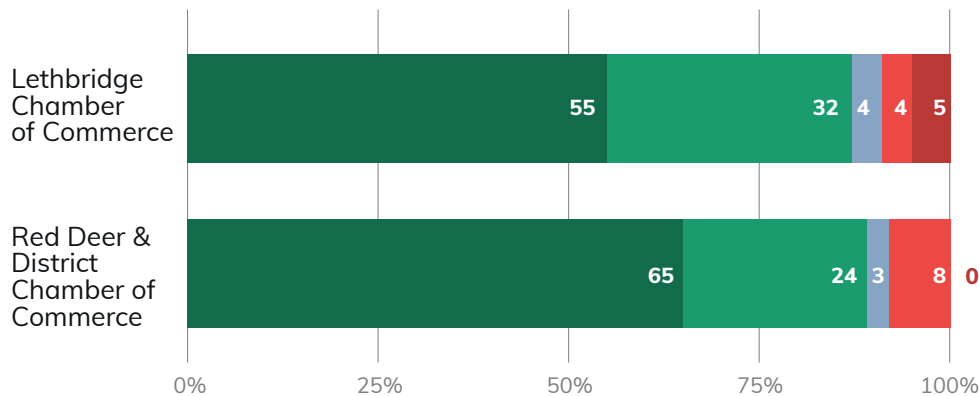
E-scooter programs have had a positive impact on the local economy



Rental e-scooters are making cities more attractive for tourists to visit



Rental e-scooters make it easier for locals and visitors to visit local businesses and activities



“Since their launch earlier this year, we have noticed the positive impact Neuron e-scooters have had on businesses in Lethbridge. We are very pleased to see those impacts quantified, supporting our impressions of Neuron’s impacts, especially after the past two and a half years of a pandemic.

Neuron has been a welcome addition to Lethbridge’s economy and we look forward to having Neuron continue to support our local business community.”

Cyndi Bester, CEO, Lethbridge Chamber of Commerce

“The results of this survey confirm that Neuron e-scooters are helping Red Deerians access and support local Red Deer businesses.

The Neuron e-scooter program introduced to Red Deer in 2021 has made a big impact on citizen mobility and we are proud they are a Chamber member making a difference for local businesses.”

Scott Robinson, CEO, Red Deer & District Chamber of Commerce

“The Greater Vernon Chamber has been advocating for businesses for over 120 years. We’re very pleased with the positive impact Neuron’s e-scooters have had on our members’ businesses.

Neuron’s e-scooters have been a welcome addition to Vernon, as they enable riders to access local businesses more easily and in a sustainable manner. We look forward to Neuron’s continued support of businesses in Vernon.”

Dan Proulx, General Manager, Greater Vernon Chamber of Commerce



Expanding affordable transport options

Helping commuters save on fuel

Car ownership and usage is becoming increasingly financially difficult for millions of Canadians, with many looking at new ways of travelling for some, or all, of their journeys.

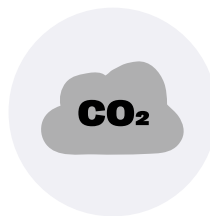
Costs of living are soaring around the globe, and Canada has not been spared. The average cost of a litre of regular unleaded gasoline has risen to unprecedented levels, more than doubling over the last two years from \$1.01 in June 2020 to \$2.07 in June 2022, according to **Statistics Canada**.

Many commuters are opting to leave their cars at home to avoid paying inflated prices for fuel in favour of affordable alternatives like public transport or e-scooters.

According to our rider survey:



45%
of trips replaced
a car journey



221
tonnes of
CO² avoided



Getting night-time economy workers around the city

Public transportation is a great way to get around the city without a car, but most bus and train routes don't run late into the night. In cities where Neuron's e-scooters are available around the clock, they have been providing a vital alternative.

Night-time economy workers, including those in the hospitality and healthcare sectors, are increasingly using e-scooters to get to and from their places of work instead of relying on their own cars or taxis.

Our data shows:



24%

of trips happen between 10pm and 6am to support the night-time economy



In Red Deer:

26%

of trips that start and end at Red Deer Regional Hospital occur at night, supporting healthcare workers on their commute to and from work

Bridging the first- and last-mile gaps

Even while public transportation is in operation, not everyone lives near a bus stop or train station. Those who live in "transportation deserts" may have limited opportunities and a reduced level of economic productivity due to poor access to public transportation.

Our data allows us to detect and respond to higher demand by deploying more e-scooters where they are needed most, and can help make existing public transportation networks easier to access.

Our data shows:



11%

of trips were combined with public transportation



50%

of trips were for commuting or connecting to public transportation

Supporting sustainable urban living

Reducing congestion and pollution, especially for large events

As a city grows, higher demand for transportation could lead to congestion and air pollution if managed poorly, which could reduce its livability, accessibility and overall success.

A [2019 article in The Financial Post](#) said that congestion costs the Canadian economy billions of dollars annually in lost time, wasted fuel and delayed deliveries. Outdoor air pollution also causes numerous negative health effects, which increase the burden on the healthcare system.

Local governments have recognized the cost of congestion and pollution, with many taking steps to counteract the effects. In Vancouver, an [independent commission](#) was set up to study how mobility pricing measures such as decongestion charging can help mitigate the problem.

Even with such measures, public transportation networks may still be strained by periodic spikes in demand, particularly during large-scale events when valuable visitors enter the city.

E-scooter programs are another way cities can spread out the load and prevent sudden influxes of traffic on the roads, making a city more attractive to investors and event organizers while ensuring it remains comfortable and convenient for those who live and work there.

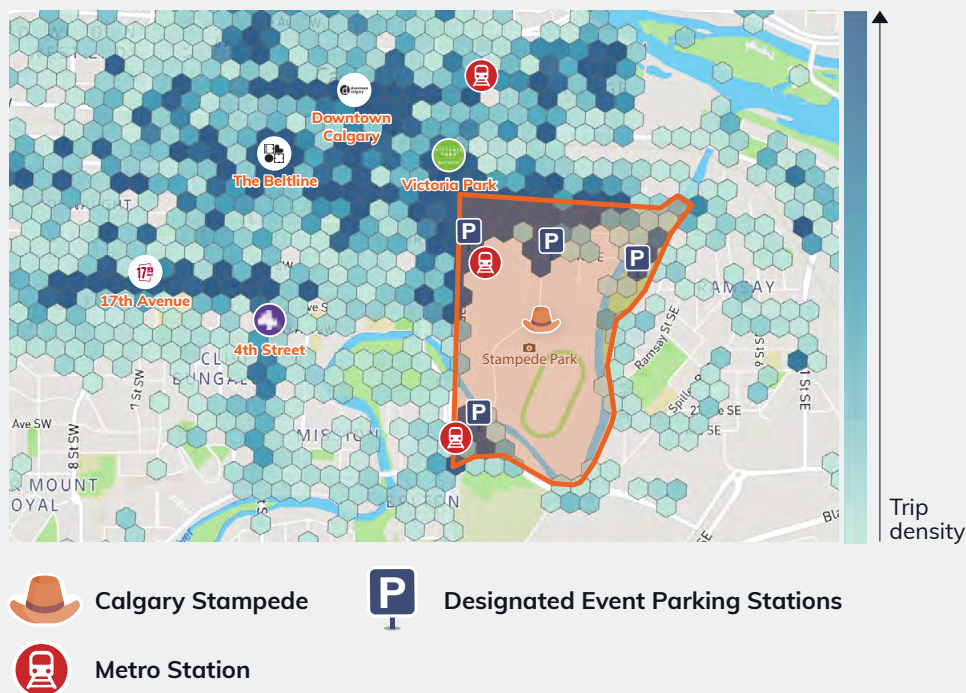


The Calgary Stampede

As cities bounce back from the pandemic, Neuron partners with major event organizers to make it easier for visitors to get to and from event sites without a car.

In Calgary, we supported the **Calgary Stampede**, the world's largest rodeo, for the second year running in 2022. The 10-day event attracts over a million visitors each year and e-scooters provide a new travel option for attendees, easing public transport demands and traffic congestion.

Heat map of trips taken to and from the Calgary Stampede event area from 8 to 17 July 2022



During the event:

- **26% of trips in Calgary** started or ended around the Stampede grounds, going to and from nearby business and retail districts
- **24% of trips** connected to or from public transport, including the City Hall, Victoria Park/Stampede and Erlton/Stampede stations
- There were **twice as many e-scooter trips** during the **two hours after the event**, compared with the same hours in the 10 days prior

We also worked with the organizer to implement temporary no-riding, no-parking and slow zones as well as preferred parking locations to ensure participants' safety. This kept the average e-scooter trip distance and duration consistent despite the increased demand and helped minimize disruption to the community. Safety Ambassadors were also on the ground carrying out safety briefings to promote responsible riding behaviour.



Investing in future growth

Creating jobs and training opportunities

In an age of increasing digitalization, there is great demand for talent with skills in areas like data science and programming as well as familiarity with emerging technologies and innovations.

As a responsible micromobility operator, we are focused on delivering long-term benefits for our cities and their people. Part of this effort includes building a strong, highly skilled workforce across the country.

Our operations have created hundreds of high-quality job opportunities to date, which have allowed local residents to gain new skills in emerging fields and future-proof themselves for the digital economy. For instance, some of our staff with previous experience as drivers and mechanics have upgraded their skills and taken on roles like electric vehicle maintenance and data analysis.

We are a certified Living Wage Employer in Alberta, Ontario and British Columbia, as we believe offering a living wage is an important part of ensuring our employees' well-being. We are also an equal opportunity employer committed to creating employment pathways for people from a diverse range of backgrounds.

Tim Daigle

At Neuron, we believe in recognizing talent and rewarding effort. Tim Daigle, our Operations Supervisor in Calgary, started in an entry-level position in May 2021. Keen to take on more responsibilities and learn new skills, he was promoted to his current role after only a month and a half.

“It’s been a great time learning about how to place e-scooters to best meet customer demand and to work with such a great crew. We’re constantly educating each other on placement, locations, staging and troubleshooting, and we’ve developed systems for working in the field that have made us much more efficient,” he said.

The 2022 Calgary Stampede was a memorable experience for Tim as it was the busiest time of the year, but his team rose to the occasion.

He added: “It was challenging to meet the demand but, as it was our second Stampede, it went really smoothly. We banded together and came up with a new way to group batteries to ensure optimal charging. It was a spectacular display of teamwork.”



Conclusion:

Partnering with cities to create a prosperous future

We've received tremendously positive feedback from local businesses, riders and our city council partners. We're proud of the impact we've made in Canada since we launched in May 2021, but there's so much more we still want to do.

As we continue to expand, we plan to:



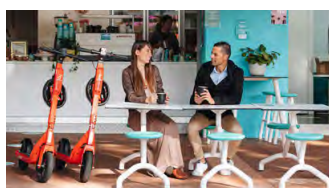
Bring more customers to local businesses by setting up designated parking stations nearby, collaborating on promotions and more



Bolster local transport networks by tailoring our services to better serve the needs and movement habits of local workers and residents



Help ensure large events go smoothly by working with organizers to anticipate and cater to increased demand and traffic from participants and visitors



Promote tourism in our cities by working with more local destinations so visitors and tourists can do more, and spend more, at key attractions, businesses and economic zones



Give more locals the opportunity to level up by expanding our training and skills upgrading programs



We are driven to help the world
build a more prosperous and
sustainable future through new
ways of moving and connecting.

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