Unlocking the Potential of E-Scooters In New Zealand:

Supporting Prosperity and Accessibility

neuron

Contents

Introduction

It's no surprise that micromobility has been growing rapidly in popularity in recent years as cities around the world have adapted to the impacts of climate change and rising costs of living. As a result, e-scooters have been more widely adopted and are now regarded as a mainstream transport option that provides a convenient, cost-effective, and environmentally friendly alternative to cars.

Neuron's micromobility programs are transforming local ecosystems and more cities are realising the economic benefits of well-run rental e-scooter schemes. The design, manufacture, and regulation of e-scooters have advanced significantly since their introduction in New Zealand. Technological innovations like geofencing automatically control e-scooter usage and speed limits, while features like integrated helmets, topple detection, and voice guidance enhance safety for riders as well as the community.

To compile this report, we analysed Neuron trip data and usage trends from our New Zealand cities*, as well as rider focus group and survey data. We posed a series of questions to understand our riders' experiences and the benefits they gain from using rental e-scooters.

The data demonstrates that Neuron's e-scooters have been directly responsible for growing local economies and boosting tourism spending by making it more convenient for visitors and locals to reach local businesses and explore cities. It is clear that rental e-scooters are providing a dependable means of transportation to a diverse range of individuals, some of whom have a disability or mobility issue.

We are heartened to learn that a resounding majority of our New Zealand riders think our e-scooters have made a positive impact in their cities, and we are determined to keep enhancing our services to surpass their expectations.

*Data included in this report is from our current and past operations in New Zealand cities Christchurch, Dunedin, Auckland and Hamilton

10 Key Figures

37% of all Neuron riders are female, with 70% being younger women, aged 18-34 years

6% of Neuron riders in New Zealand have a disability or mobility impairment

11% of trips would not have happened if a Neuron e-scooter was unavailable

52% of trips result in a direct purchase from a local business

$38.50 spent at local businesses by Neuron riders per e-scooter trip

$13,500 spent at local businesses each year by Neuron riders per e-scooter deployed

19% of trips support the night-time economy (10pm to 6am)

36% of trips replace a car journey

55% of e-scooter trips in New Zealand are used to commute to work or study

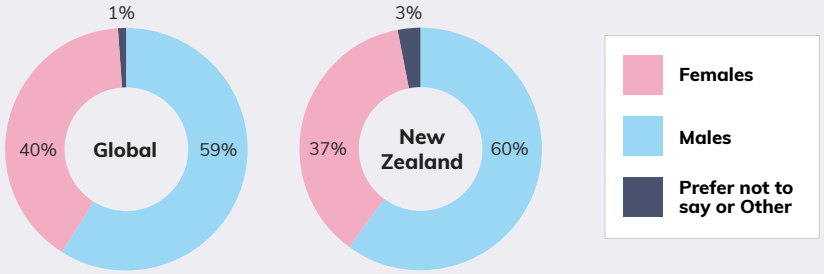
97% of users believe Neuron has created a positive impact on their city

E-scooter riders in New Zealand

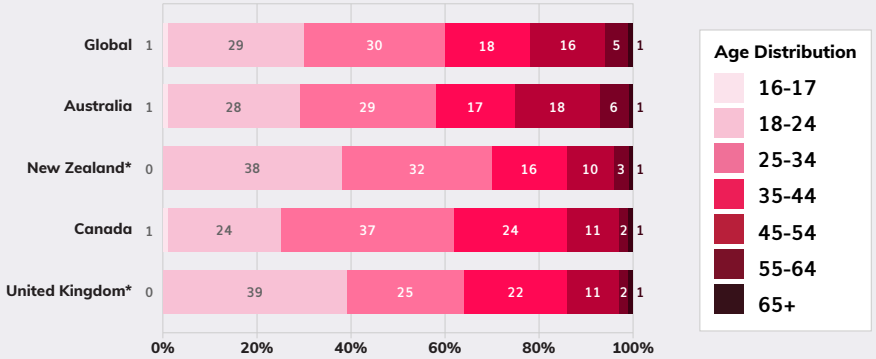
The demographic breakdown of Neuron's e-scooter riders reveals e-scooters have a large appeal to younger riders in New Zealand, with 65% aged between 18 and 34 years. Ages 35 to 54 make up 28% of riders, with 55 and older making up the remaining 7%.

New Zealand's rider demographics were 60% male and 37% female, with 3% preferring not to say. This was found to be slightly wider than Neuron's global average, which is 59% male and 40% female. The reasons why are explored further in Neuron's *Bridging the E-scooter Gender Gap, Enhancing Adoption and Safety* report.

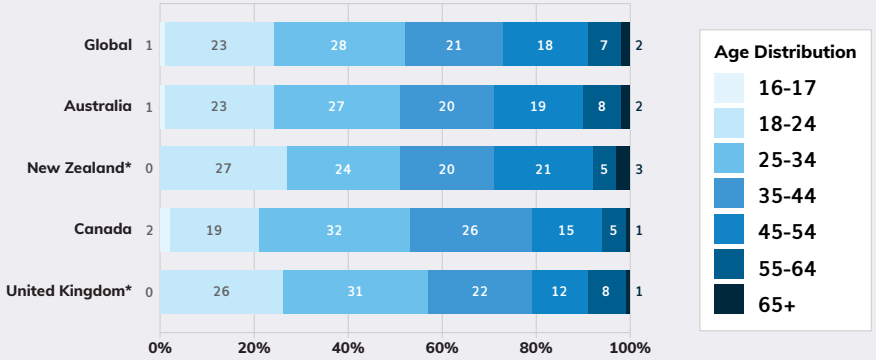
Gender breakdown of Neuron's riders



Age distribution of female riders



Age distribution of male riders



* The minimum age requirement for Neuron riders is 18 years old and above in these countries

Focus on accessibility

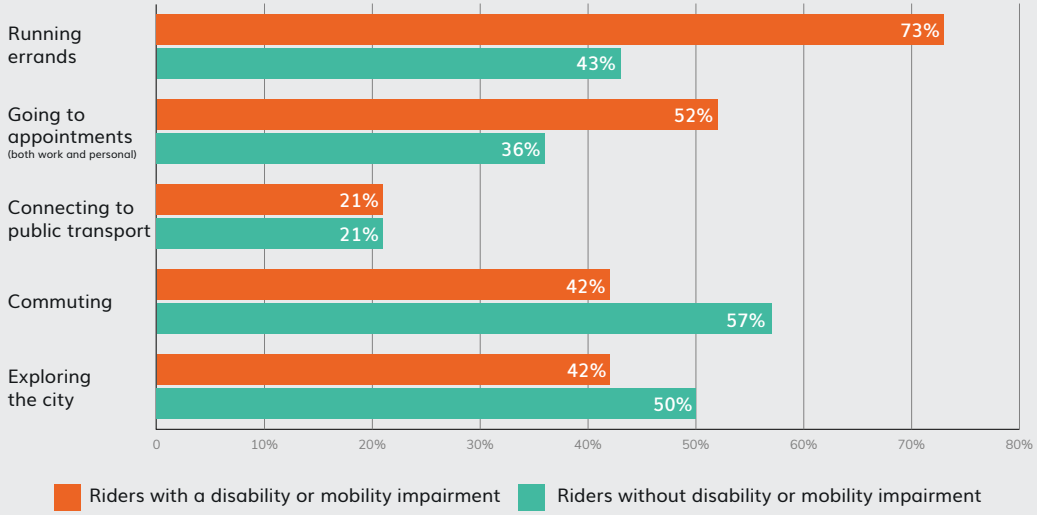
Dependable transport solutions

Neuron's e-scooters play a valuable role in providing a dependable transport option for the daily commute, particularly for the 6% of Neuron riders in New Zealand who have a disability or mobility impairment. The number may seem relatively small, but it represents a significant proportion of our users, and it underscores the importance of ensuring that rental e-scooters are accessible to all.

6%
of Neuron riders in New Zealand have a disability or mobility impairment

16%
of trips would not have happened if a Neuron e-scooter was unavailable

Riders with a disability or mobility impairment are more reliant on e-scooters for running errands, getting to appointments, and connecting to public transport.



Making streets safer for all

Safety is one of Neuron's core values and we prioritise making the streets safe for everyone, not just our riders. We continue to make significant investments in rider education and have been successful in establishing real partnerships with safety organisations as well as accessibility and community groups. We have collaborated with Brake New Zealand, and a range of other community and accessibility groups to promote safe riding and to reassure the community.

Perceptions of e-scooter safety in New Zealand

Like Neuron, our riders believe safety is vital to the success of our rental e-scooter programs. Recent research found that nine out of 10 people believe rider and pedestrian safety are extremely important when using an e-scooter.

Eight out of 10 New Zealanders believe helmets are very important when riding e-scooters, despite the fact that they are not currently required by law. Research found that the general public believes more should be done to promote helmet use.

When asked the best way to increase helmet use*:

74%
believe this would be achieved by making them mandatory

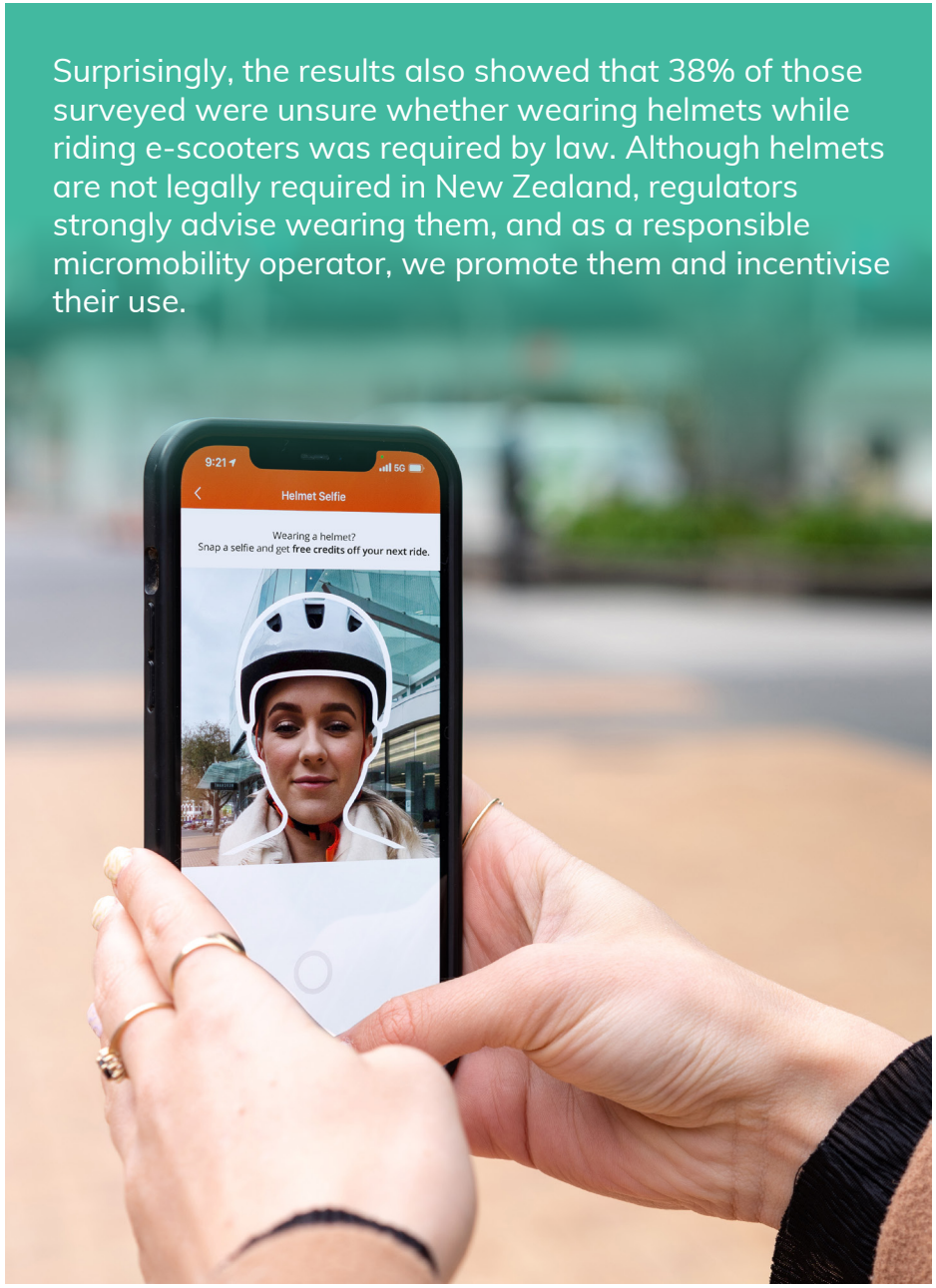
55%
believe e-scooter companies should provide helmets

55%
would like increased rider education

37%
think more incentives are required to promote their use

*The survey included over 1,000 respondents across four New Zealand cities with e-scooter programs. Respondents were able to select more than one option.

Surprisingly, the results also showed that 38% of those surveyed were unsure whether wearing helmets while riding e-scooters was required by law. Although helmets are not legally required in New Zealand, regulators strongly advise wearing them, and as a responsible micromobility operator, we promote them and incentivise their use.



Accelerating the local economy

Helping city centres and hospitality districts thrive

For both locals and visitors, rental e-scooters can make it easier to get to and from key city locations, like central business districts (CBDs), shopping centres, and hospitality precincts. This can be particularly true for destinations that are harder to reach by car, where there is limited parking, or for locations that are underserved by round-the-clock public transport. More than half of the e-scooter trips taken (55%) are to commute to work or study; this is higher than the global average, where only one third (33%) of trips are for commuting.

Around half of all our e-scooter trips started and ended within the city centre in both Christchurch (55%) and Dunedin (44%). Findings highlighted that 61% of riders believe that e-scooters are a convenient way to get around and that they allow them to cover a greater distance in less time. Almost all, 97%, reported they made a positive impact in their cities.

According to our rider survey:

11%
of trips wouldn't have happened at all if an e-scooter hadn't been an option

52%
of e-scooter trips resulted in a direct purchase from a local business

61%
of riders spent $20 or more at a local business on their most recent trip

Where our riders spend their money*:

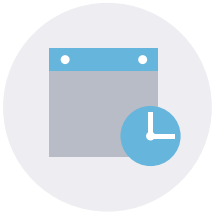
38%
General shopping

21%
Restaurants, bars and cafes

12%
Leisure and recreational venues

Why our riders use e-scooters*:

55%
Commuting to work or study



36%
Getting to appointments

46%
Running errands such as shopping

50%
Exploring the city

* Respondents were able to select more than one option

Our e-scooters have enabled*:

$38.50
spent at local businesses by Neuron riders per e-scooter trip

$13,500
spent at local businesses each year by Neuron riders per e-scooter deployed

$182 million
spent at local businesses each year by all Neuron riders in New Zealand

*These figures were calculated by applying weighted averages based on our national ridership to representative spending data collected in Christchurch and Dunedin

Expanding affordable transport options

Replacing car trips and reducing transport costs

New Zealand is not immune from the global trend of rising costs of living, and in 2023, average household costs increased by around 7%. New Zealanders are more reliant on cars than people from many other countries. This is due to a number of factors, including a dispersed population, and limited access to public transportation, even in larger cities.

The country has one of the highest car ownership rates per capita anywhere in the world. In 2023, 36% of all Neuron's e-scooter trips replaced a car journey in New Zealand, versus 46% in Australia. Despite the lower car replacement figures, many of our riders stated that renting e-scooters could be a significant way to lower the high transportation expenses associated with owning a car.

According to our rider survey:

36%
of trips replaced a car journey

230
tonnes of CO^2 avoided in New Zealand

Supporting the night-time economy and its workforce

Using public transport is an excellent way to move around the city without a car; however, most bus and train lines do not run late into the night. Neuron's e-scooters are available around the clock, providing a vital alternative.

An increasing number of councils are looking to incorporate strategies to encourage evening activities in their city centres. Businesses in the CBD are heavily dependent on the night-time economy, and employees in the hospitality and healthcare industries, along with other shift workers, are increasingly commuting to and from work on e-scooters.

In Christchurch, results from a council survey with more than 3,000 respondents demonstrated residents' desire for the city's nightlife and night-time economy to thrive. In Dunedin, the City Council and Neuron collaborated to lift a curfew that was in effect before March 2022, in part because they wished to support the city's night-time economy and its workforce.

19% of all trips happen between 10pm and 6am

57% of riders prefer e-scooters to public transport at night due to their flexibility and convenience

48% of riders felt safer riding an e-scooter than walking or travelling on public transport alone at night

Enhancing transport solutions at large-scale events

Neuron partners with events and festival organisers in every operational city to offer a valuable mode of transport for eventgoers. This mitigates the strain on public transport and alleviates traffic congestion, which usually increases when large numbers of visitors arrive in the city.

For major events, we often establish temporary no-riding, no-parking, slow zones, and preferred parking locations. Neuron's Safety Ambassadors also conduct briefings to onboard new riders, promote responsible riding, and reinforce the rules.

- In Dunedin, our busiest day on record was on 26 January, 2023 when the Red Hot Chilli Peppers performed at Forsyth Barr Stadium. Compared to an average Thursday, the number of trips increased by 70%.
- In Christchurch, major events at Hagley Park increase trips between 40% and 60% compared to a day with no events.
- 18% of trips link to public transportation; this percentage significantly rises during major events when e-scooters are frequently used in conjunction with public transport.

Bridging public transport gaps

Not everyone lives or works close to a bus stop or train station, and the operational hours of public transport are often restricted, particularly in smaller cities and quieter suburban areas. This can lead to “transport deserts," which limit opportunities and reduce economic productivity.

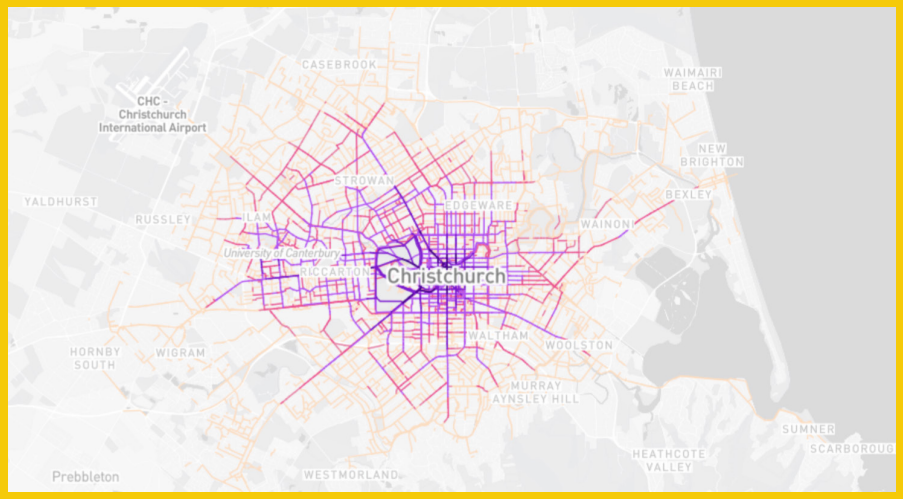
Our data enables us to identify gaps in public transport as well as predict areas and times of high demand. Neuron’s e-scooters are then frequently moved to areas where the community most needs them. This enables us to provide a more convenient and affordable car-free transportation option for more people.

Over the past two years, there has been a significant increase in e-scooter trips in outer suburbs in larger cities like Christchurch, indicating more people are willing to use e-scooters as part of their daily commute.

“I live outside of Christchurch Central and have found e-scooters to be invaluable for travelling in and out of the city. I also use them to travel to my closest bus stop, as I don’t always have enough time to walk.”

“Having access to e-scooters has meant my partner and I only need to have one car between us, which is a huge cost saving.”

Samuel Field
Christchurch e-scooter rider



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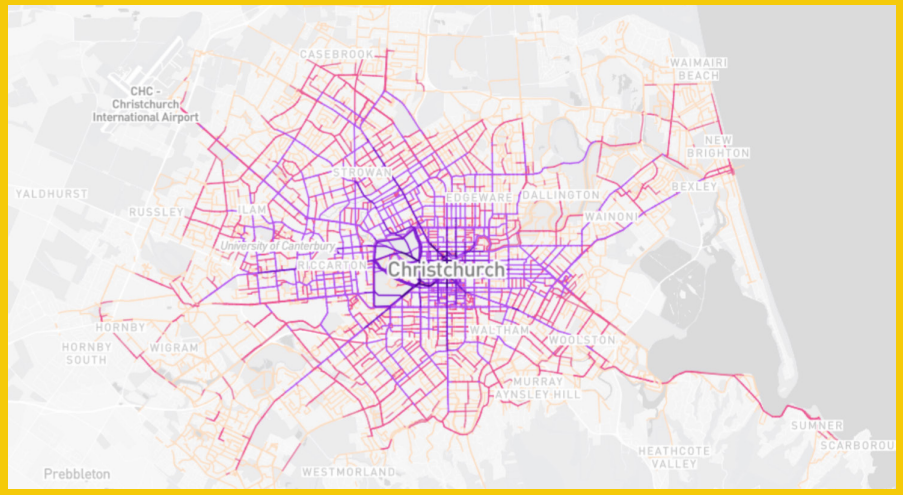


Q4 2024

Conclusion

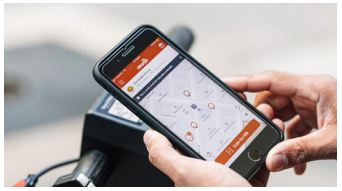
Partnering with cities to create a prosperous future

We have received tremendously positive feedback from local businesses, riders, and our council partners. We are proud of the impact we've made in New Zealand since we launched in January 2020, but there is so much more we want to do.

As we continue to expand, we plan to:

Continue to focus on safety and accessibility by working with national safety organisations, rider focus groups, and disability advocacy groups to make our service as safe and accessible as possible for everyone in the community.

Drive more customers to local businesses by setting up virtual parking stations nearby, collaborating on promotions and expanding our Neighbourhood Connect program



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

Support the smooth operation of large events by working with organisers to anticipate and cater to increased demand and traffic from participants and visitors.

Boost 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.

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

www.rideneuron.com