

Bolt's annual e-scooter safety report 2023



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Making cities for people, not cars

For decades, cities have been built to accommodate private cars, rather than the people living in them. As a result, private cars have become the cause of some of the biggest issues facing urban areas today, such as congestion, pollution, and lack of space.

At Bolt, we want to help cities change course and build a better future for their residents.

This is why, for the past 10 years, we've created products that offer flexible and more affordable alternatives for almost every purpose a private car serves. This includes shared mobility options like ride-hailing and car-sharing, and light electric vehicles such as shared scooters and e-bikes.

To transform urban areas back into sustainable, people-friendly spaces, it's essential to ensure that these services are as safe as possible. That's what this report is all about. Throughout 2022, we continued building on Bolt's culture of safety by successfully introducing a range of safety initiatives for our micromobility and car-sharing products. In this report, we're proud to showcase the main safety developments over the past year.

Markus Villig
Founder & CEO of Bolt





The Bolt Scooter Safety Pledge

Ever since we launched Bolt's shared scooter service in 2018, safety has been the top priority in all aspects of our decision-making, from the design of our scooters to the development of new features within our app. We have since expanded into shared e-bikes and shared cars, but the relentless focus on safety has never changed.

In 2022, we were proud to publish <u>Bolt's Scooter Safety Pledge</u>, which outlines how we support cities' efforts in achieving Vision Zero – the elimination of all traffic fatalities and severe injuries.

We made this pledge specific to scooters because they are still a new form of transport that invite the most questions about how they are impacting road safety, but the core principles apply to our shared e-bikes and cars as well.

Developing this pledge was not a hasty exercise. To ensure that we are committing to evidence-based and impactful safety solutions, we partnered with <u>Steer</u> to help build on our existing knowledge by comprehensively reviewing the available research and data to develop a <u>report</u> identifying the most pressing scooter safety issues.

We've subsequently used this research as a key input into the development of our 9-point pledge.

Throughout the rest of this report, we are excited to highlight how Bolt is bringing these principles to life in our everyday work.

Moving forward, we will track progress toward each pledge point and will continue to report on our safety performance.

01 Deep partnership with cities

We pledge to work in mutual partnership with cities through transparent 2-way dialogue to understand the challenges and concerns related to scooter safety, share learnings and best practices, and identify and implement solutions together.

03 Safe vehicles on the road

We pledge to only put safe scooters on the road by exceeding EU-wide vehicle standards, placing responsible limits on scooter speeds, conducting inspections weekly at a minimum, and immediately removing from circulation all scooters that require maintenance.

05 Preserving public space

We pledge to work in partnership with cities to develop and implement location-specific parking rules and automated solutions to deter improper scooter parking and educate users on parking appropriately.

07 Safety data collection and transparency

We pledge to continually refine our safety data collection methods using all available tools while also improving data transparency so that cities and the public can have an evidence-based understanding of scooter safety metrics.

02 Effective rider education

We pledge to offer riders educational materials in person, through our app, website, and public campaigns, providing them with the knowledge they need to keep themselves and other road users safe.

04 Preventing intoxicated riding

We pledge to combat intoxicated scooter riding through various initiatives that provide deterrence, disincentives, and education.

06 Protecting vulnerable groups

We pledge to collaborate with organisations representing disadvantaged groups and cities to identify and implement solutions that protect vulnerable people from dangerous scooter riding and improper parking.

08 Staff and warehouse safety

We pledge to implement procedures that minimise the safety risks faced by our staff and the local communities where we operate warehouses, focusing on safely managing scooter batteries.

09 Continuous safety improvement

We pledge to prioritise the safety of our riders and other road users in all aspects of our work, continually evaluate our performance, identify areas of strength and weakness, and take action to address any gaps.

2022 in numbers

Bolt's rental vehicle services have experienced rapid growth since launching 5 years ago, with 2022 no exception.

Throughout the year, we expanded our rental services to reach over **260 cities in 25 countries** across Europe, and the total number of annual trips across our shared scooters, e-bikes, and cars **exceeded 100 million** for the first time.

Safety remained our highest focus throughout this expansion, as we implemented a range of new safety initiatives highlighted in this report. The primary goal has been to support cities in achieving Vision Zero – the elimination of traffic fatalities and major injuries.

As a result of these focused efforts, we recorded only **5.55 major injuries per 1** million km ridden on our scooters, or 8.90 major injuries per 1 million rides.

Meanwhile, on our e-bikes, we recorded **4.60 major injuries per 1 million km ridden**, or 10.11 major injuries per 1 million rides.

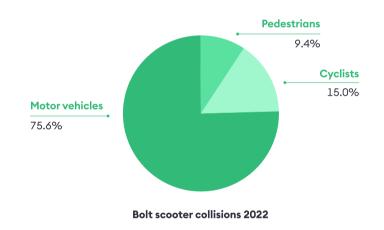
Although our primary focus is eliminating the most serious injuries, we're also conscious that every safety incident, no matter how seemingly minor, directly impacts cities and our users.

This is why we've been tracking incident rates of all severities and have consistently provided transparent updates annually. In 2022, we found that **99.997% of scooter rides and 99.995% of e-bike rides ended safely without incident.** Some more detailed data are listed in the table below.

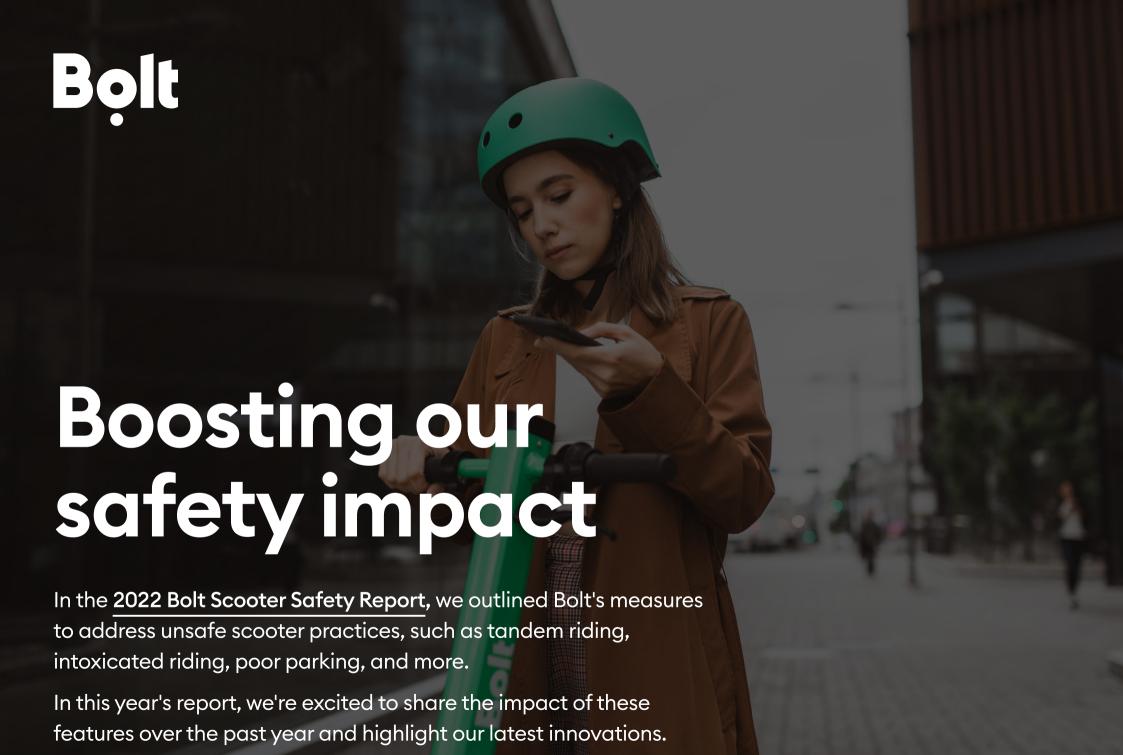
	Accidents per 1M rides	Accidents per 1M km	Injuries per 1M rides	Injuries per 1M km
Scooters	28.3	17.7	18.1	11.3
E-bikes	46.0	26.1	20.9	11.8

While these high-level numbers provide reassurance about the safety of shared micromobility, digging deeper into the data reveals a pattern that cities and shared mobility operators should keep in mind when developing new safety regulations and initiatives.

Specifically, Bolt's 2022 data across scooters and e-bikes shows that over 75% of collisions with third parties involved motor vehicles rather than pedestrians or other small vehicles like bikes, while simultaneously leading to more severe injury outcomes.



Considering external research has demonstrated that cars are involved in 80% of crashes that lead to the death of a biker or scooter rider, it's quite clear that to make city streets safer, the focus should be on reducing the risk that cars pose for micromobility users, as well as pedestrians and everybody else on the road.

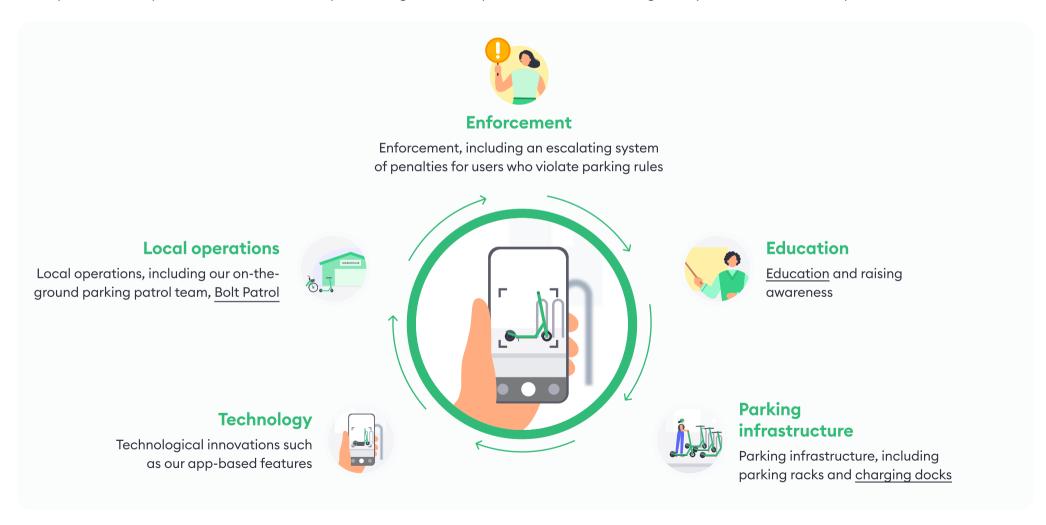


The Smart Parking 360 system

Shared scooters are becoming increasingly commonplace in many cities.

As riders have gained experience over the past few years, a recent survey conducted by Bolt in 23 European cities across 3 countries has revealed significant positive shifts in public perception of scooter parking.

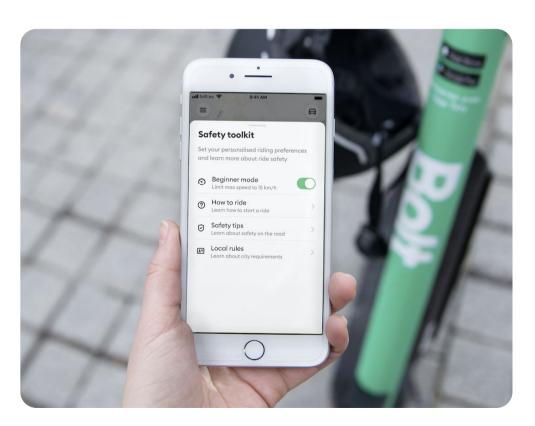
To help drive this improvement, we've been implementing Bolt's comprehensive Smart Parking 360 system, built on 5 core pillars:



Education and awareness

External studies and our internal data show that accidents are most likely among inexperienced riders. Thus, education is the key to preventing most accidents and fostering responsible scooter parking and riding habits from Day 1.

Therefore, we encourage new riders to learn the basics either <u>on the Bolt website</u> or directly in the Bolt app, and we'll soon be launching an in-app quiz to verify that users know the rules.



We also prioritise in-person training opportunities. Last year, we hosted scooter safety events in various European cities to promote safe riding practices. For example, in Germany, we <u>partnered</u> with Deutsche Verkehrswacht (DVW), a German organisation dedicated to road safety, and carried out scooter safety events with their local divisions across Germany.

Elsewhere, our latest safety training was held in Vilnius, Lithuania, where visitors participated in various educational activities, including a scooter test track.



Establishing parking infrastructure

<u>A recent Bolt survey revealed</u> that most misparking incidents occur because riders are unfamiliar with parking rules. Respondents also noted the lack of designated parking areas for micromobility vehicles as another contributing factor.

That's why we continuously collaborate with local municipalities to map noparking areas, install parking racks, and introduce <u>Bolt's industry-exclusive</u> <u>charging docks</u> where they're most needed.

Accordingly, we've been installing charging docks in high-demand spots where users usually mispark scooters and e-bikes. Our <u>case studies</u> on charging dock usage showed that the docks promoted correct parking by clearly indicating where to park vehicles properly and had a knock-on effect – more scooters and e-bikes were parked correctly nearby. It's also clear that riders appreciate the convenience of our charging docks. For example, in 2022, more than 90,000 rides started or ended in a Bolt charging dock. Furthermore, in a recent Bolt survey, nearly 80% of respondents said that charging docks have helped to make scooter parking more orderly.



Bolt Patrol for correcting improper parking

Bolt Patrol is an on-street team dedicated to identifying and correcting improper scooter and e-bike parking. When a problematic vehicle needs to be collected or re-parked, we're notified by onboard sensors or reports sent to us via our Customer Support, through our app, or online.

We designate Bolt Patrol routes based on a city's requirements, targeting areas with a higher probability of incorrectly parked scooters, such as locations with high foot traffic and public transport stations. A real-time tracking system also monitors any possible scooter vandalism or theft attempts, automatically alerting the Bolt Patrol and other operational teams.

Our data shows that in the first 2 months of Bolt Patrol's implementation, complaints regarding poor parking decreased by 50% globally.



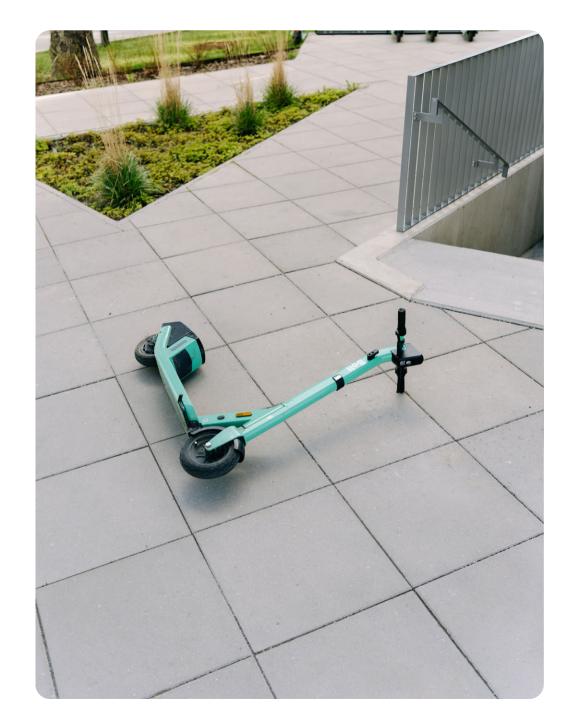
New kid on the block: ParkAssist+

Over the course of 2022, we rolled out a new feature that requires users to submit a photo of their parked scooter when ending a ride, which is then reviewed by our AI system to validate whether the scooter is parked per local rules.

We're now excited to begin implementing the updated version of the feature, ParkAssist+, which successfully validates 99.9% of end-of-ride photos and provides users with instant feedback on their parking.

In the event of poor parking, the rider receives in-app guidelines on correctly re-parking their scooter. The feature lets the rider finish the ride only after they provide a picture of a scooter parked following local regulations.

During the initial testing phase, the data shows that with the help of ParkAssist+, we reduced poor parking cases in Stockholm by 69%. On a global level, over 11 million push notifications alerting users of poor parking were sent in 2022, and we expect to see continued improvement in parking compliance as we roll out the latest version of this feature.



RECKLESS RIDER SCORE

Thanks to the growing level of experience among scooter users and the implementation of safety features, our data shows that 98% of our scooter and e-bike riders behave responsibly, and only 2% demonstrate consistently poor riding and parking practices.





Bolt has recently developed the <u>Reckless Rider Score</u> to handle these rare cases and to identify and penalise such users. The score is based on a combination of riding habits picked up by scooter sensors and poor parking.

To improve the behaviour of these users concretely, we're also implementing a 3-step penalty system to halt irresponsible behaviour:



STEP 1

A rider receives in-app educational materials explaining what riding habits they should improve.



STEP 2

If a rider doesn't improve their habits during the 5 subsequent rides after receiving educational materials, their maximum scooter speed is limited to 15 km/h.

This step may be implemented differently based on local rules and regulations



STEP 3

If riding behaviour remains unsafe for the 5 rides following step 2, we'll suspend the rider from using Bolt scooters for a week.

With an option to dispute the decision through Customer Support

This approach has proven to be effective, with the first warning leading to an immediate 26% reduction in reckless riding.

TANDEM RIDING PREVENTION

Throughout 2022, we expanded the implementation of our patent-pending <u>Tandem Riding Prevention System</u>, which uses onboard sensors to detect and deter users from riding with multiple occupants on a single scooter. Throughout the year, we sent over 180,000 push notifications globally to warn users that tandem riding poses a danger to riders and pedestrians and the fact that it may lead to further penalties based on our Reckless Rider Score feature. This warning alone led to a 28% reduction in tandem riding.

To further disincentivise tandem riding, we also began rolling out a <u>Group Rides Feature</u>, which allows users to unlock up to 5 scooters or e-bikes from 1 Bolt account and ride safely in a group. This removes 1 of the key drivers of tandem riding – when multiple people want to use our vehicles together, but not everybody has a Bolt account.

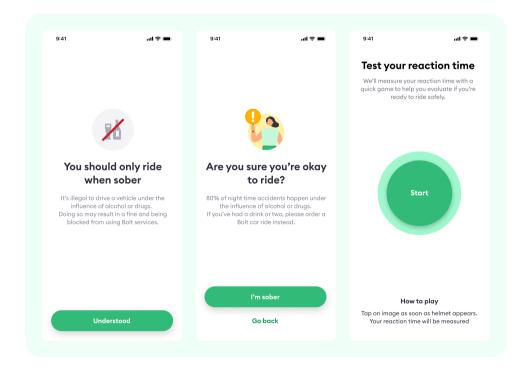
Following positive results in the testing phase, we're now scaling the feature across our markets.



INTOXICATED RIDING PREVENTION

Preventing intoxicated riding is 1 of the most important ways to keep scooter riders and pedestrians safe. That's why during the times when intoxication is most likely (such as nights and weekends), the Bolt app alerts users about the potential risks. If the user confirms that they're sober, the app displays a cognitive reaction test to verify if the user is ready to ride safely. If users fail the test, we encourage them to request a Bolt ride home instead of taking an e-scooter.

Throughout 2022, we conducted over 5.3 million tests globally, preventing over 180,000 potentially intoxicated rides.



PROTECTING VULNERABLE GROUPS WITH RTB

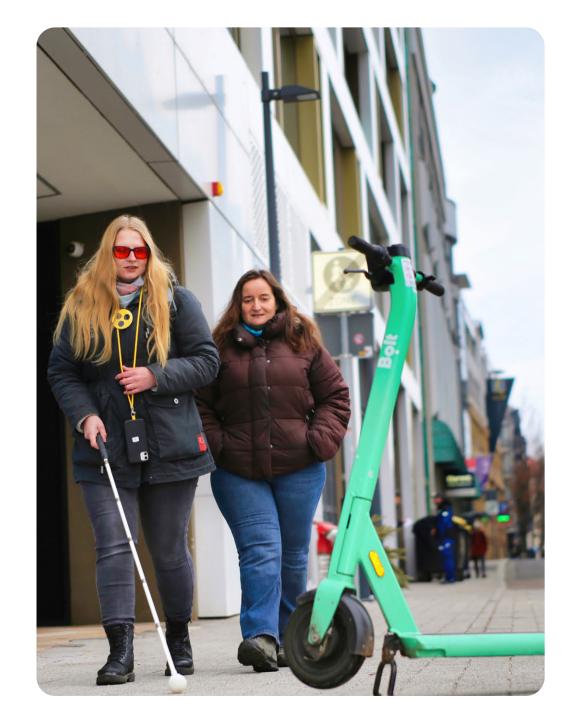
Blind and visually impaired people face daily challenges that can be exacerbated by poorly parked or knocked-over scooters, representing a tripping hazard and an additional stress factor.

This is why in 2022, we <u>teamed up</u> with <u>RTB</u>, a leading provider of acoustic technology for the visually impaired, to integrate Bolt scooters into their LOC.id app. This solution is the first in the industry and aligns closely <u>with our principles</u> of protecting vulnerable groups from dangerous scooter riding and improper scooter parking.

The LOC.id solution is a Bluetooth-based system that communicates with external objects such as traffic lights, building entrances, public transport vehicles, roadworks sites, and now Bolt scooters.

When the user approaches an object equipped with a LOC.id receiver, the object is recognised, and either the object or the user's phone emits an audible signal or starts voice-controlled guidance to ensure the user can navigate safely.

During the testing process with members of the visually impaired community in Germany, 98% of users confirmed they would use this feature in the future, so we're excited to begin the feature roll-out soon.



PREVENTIVE MAINTENANCE

Regular, high-quality maintenance is critical to ensuring that all Bolt scooters available on the street are safe for use. Until now, we've used a variety of signals to determine when a vehicle requires maintenance, including user reports and on-street inspections by our operational teams. But we're now deploying a new system to detect potential maintenance needs before they even arise.

Using our <u>Advanced Mobility Intelligence System</u>, Bolt scooters can continuously assess how they're being used and predict potential issues such as brake and tyre wear. By flagging the scooters that are at risk for maintenance needs, we're able to address any issues before they have any impact on our users.

This not only adds another layer of safety, but also improves our efficiency and ability to maintain high vehicle availability on the street.



REDUCED NIGHT-TIME SPEED LIMITS

Research has demonstrated that high speed is 1 of the most critical factors that contributes to scooter crashes. To help address this issue, Bolt partnered with local authorities to reduce the speed limit of our scooters in Tallinn, Estonia, from 25km/h to 17km/h on Friday and Saturday nights.

The goal of the initiative was to implement a highly targeted speed limit specifically aimed at the key accident risk factors identified by the local police: speed, intoxication, and low visibility.

According to the Estonian Transport Administration, this targeted approach led to a 20% reduction in scooter crashes.

This measure removed the need for more drastic measures that could hamper electric scooter adoption and perpetuate dependence on private cars, such as completely shutting down the service at night or blanketly enacting a speed limit reduction at all hours.

Due to this success, we have expanded the night-time speed reduction to some other cities, and will continue to monitor the impact.



Vehicle hardware

THE BOLT 5 SCOOTER

Throughout 2022, we were thrilled to deploy over 20,000 of our latest scooter model, the <u>Bolt 5</u>. The new model included the latest innovations in our safety-focused vehicle development, introducing a wide range of new features.

The Bolt 5 added slightly curved handlebars and a wider floorboard, offering users better grip and easy manoeuvring, along with a 12-inch front wheel and front suspension to improve control and comfort across all types of urban environments.

Meanwhile, the addition of turn signals has enhanced visibility in all lighting conditions and made it easier to avoid incidents when changing direction.

Furthermore, the Bolt 5's enhanced durability has reduced the need for maintenance, which helps keep scooters safely available on the street while providing sustainability benefits.

Finally, the Bolt 5 added improved triple braking technology, with front and rear mechanical braking, along with electromagnetic braking, which combine to provide redundant safety systems that ensure all riders can slow down and stop safely.



Vehicle hardware

E-BIKES

In addition to the Bolt 5 scooter, we also rolled out a new e-bike model to 15 European countries. As a multimodal transport provider, this was an important step to provide users with a new transport option suited for trips that may be too long for a shared scooter or too short for ride-hailing.

The new e-bike model was designed with a clear focus on safety. Solid rear and front wheel drum brakes help control the speed efficiently, while puncture-proof pneumatic tyres improve grip and durability. Pedalling assistance is only active when the bike is travelling below 25 km/h, with the option to further restrict the speed based on local regulations and dialogue with cities.

The e-bike is also equipped with a functional dashboard providing information about speed, battery level, and speed zones, showing the user all necessary information to enjoy the ride while keeping their hands free to manoeuvre the bike.



Customer support

IMPROVING THE USER EXPERIENCE AND IMPROVING SAFETY DATA

Our customer support team is invaluable to all of Bolt's services.

Not only do the team provide our customers with fast and reliable assistance if any issue arises when using any Bolt product, but they're also a critical source of feedback to understand how we can continually work to improve our services for users and cities.

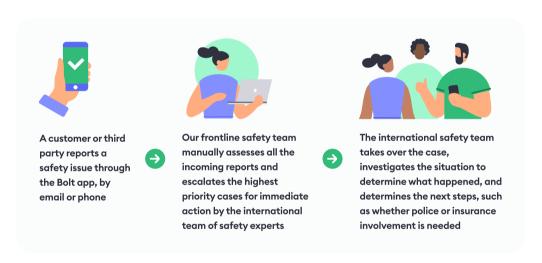
In terms of safety, this team plays an especially critical role in data-gathering. Any time there is an issue or incident related to Bolt's scooters or e-bikes – ranging from a flat tyre to collisions, poor parking, and many others – **customer support is our first point of contact for these events to be reported.** Each event is investigated according to standard Bolt procedures and the results of the investigation are logged in our safety database.

The more detailed and accurate this data is, the better we can introduce improvements to our service. This is why in 2022, we took significant steps to bolster our data-gathering by establishing a unit within customer support solely focused on responding to safety-related issues involving our rental vehicles.

With more people on board and with more refined processes in place, we're able to dedicate more time to our investigations of safety incidents, which in turn allows us to uncover more details with greater accuracy. This has given us an extra layer of confidence that we are responding to safety issues with dedicated 24/7 expertise, and the data we collect is more precise than ever.

These changes in methodology mean that making year-over-year safety comparisons can be more difficult, but this is outweighed by our better ability to understand the safety issues that our users face and make improvements to address them.

Here's a glimpse of how Bolt customer support can resolve even the most challenging safety-related cases as quickly and effectively as possible:



Looking ahead, we'll continue developing this team by expanding its multilingual capabilities, which will enable us to more deeply embed safety expertise into local teams and respond even more quickly to any issues that arise. This will give users a more seamless experience even during challenging moments and ensure we have the information needed to make effective safety decisions based on concrete evidence.

Bolt Drive

THE SAFER ALTERNATIVE TO PRIVATE CARS

While shared scooters and e-bikes provide users with fast and convenient ways to make short trips in urban areas, they are not ideal for longer rides like a weekend road trip out of the city. This is why we launched our car-sharing service, Bolt Drive, in 2021. Over the past 2 years, we have gradually expanded the service from Bolt's home city of Tallinn, Estonia, to reach cities in Latvia, Lithuania, and Germany, with further expansion planned throughout the rest of 2023 and beyond.

As with our shared scooters and e-bikes, we have taken concerted steps to ensure that this growth has not come at the expense of safety. To assess our performance thus far, we partnered with the Tallinn University of Technology (TalTech) to develop a joint report comparing the safety of Bolt Drive cars in Tallinn with general road safety statistics in Estonia.

The study found that Bolt Drive had zero fatal incidents in 2022 and only 0.11 accidents leading to serious injury per 1 million kilometres, as compared to the Estonia-wide average of 0.14 such accidents per 1 million kilometres. This means that Bolt Drive vehicles were involved in accidents resulting in serious injuries with 27% less frequency than privately owned vehicles.

This safety gap is no coincidence. First and foremost, safety starts with the shared cars themselves. TalTech's research found that the average age of an Estonian car is 13 years old, while Bolt Drive vehicles only remain in service until they are 2 years old, at which time they are removed from service in favour of newer vehicles. This means that our shared vehicles are generally equipped with a wider range of cutting-edge safety features, such as various accident warning systems, as compared to the average private car on the street.

Furthermore, we are able to institute centralised controls to ensure that our vehicles are only used in a safe manner. For example, we can monitor driving conditions and can detect issues like harsh acceleration, braking, speeding, and drifting. This enables us to take a wide range of measures depending on the situation, for instance by providing warnings through the Bolt app, contacting a user through our customer support team, or even blocking the engine of a vehicle in case of severe misconduct such as extreme speeding.

Such safety features also extend to our usage rules and their associated enforcement mechanisms. For example, in order to ensure that all users on the Bolt Drive platform are sufficiently experienced, we use automated identity verification technology to verify that they all meet our minimum requirement of being 20 years old, with at least 1 year of driving experience. And going 1 step further, we have coupled this initial identity verification with a requirement that users submit selfies on a periodic basis to reconfirm that only the registered driver is using our service.

Looking ahead

THE BOLT 6 SCOOTER

We have many exciting developments planned for the rest of 2023 and beyond, including the release of the Bolt 6, our latest in-house scooter model, which will be introduced in many of our cities starting later this year.

This updated model was designed with rider and pedestrian safety as the highest priority. Featuring swept handlebars and 1 of the widest floorboards in the industry, the scooter helps customers maintain a comfortable posture while riding. Meanwhile, its underfloor battery ensures a low center of gravity, which translates to greater stability and optimized weight distribution. Additionally, the Bolt 6 is equipped with suspension to help riders manage obstacles safely and comfortably.

Supported by Bolt's Advanced Mobility Intelligence System (AMIS), the Bolt 6 is fully compatible with all of our existing safety features, meaning that it is capable of detecting unsafe riding behaviours such as tandem riding, skidding, and abrupt braking, as well as identifying collisions in real time. Furthermore, the new scooter also supports parking solutions such as our AI parking system, which verifies photos of a parked scooter in a fast and efficient manner, as well as tilt detection, which can prompt a user to repark a scooter if it lest if in a tilted position.

Combined with enhanced sustainability features such as its 70% recycled aluminum frame and 8-year lifespan, the Bolt 6 will set a new standard for shared e-scooters that delivers a top-notch user experience while also helping cities achieve their transport and sustainability goals.



Looking ahead

THE BOLT 6 SCOOTER

As the Bolt 6 is gradually rolled out, we will continue to build on the safety features we have already introduced, while also developing new ones that make the most of our rapidly advancing vehicle technologies.

We are excited to keep pushing boundaries as we pursue our mission of building cities for people, not cars.

Our new Bolt 6 scooter was created by our team of engineers to address the needs of cities and riders.

Designing a scooter in-house gives us full control of software and hardware, enabling us to continuously upgrade the safety features that we provide to riders and pedestrians.

Owning the full process of scooter development and production also means stricter quality control and higher safety standards. At the same time, we don't overpay for supplier and manufacturer margins. This allows us to forward the cost savings to our customers through more affordable scooter rides.



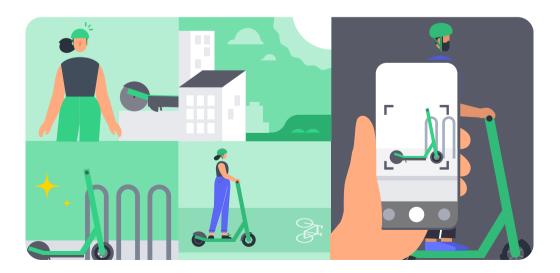
Dmitri PivovarovVice President of Rentals at **Bolt**

BOLT RENTALS SAFETY ADVISORY COMMITTEE

To drive a continuous safety improvement process, it is critical for Bolt to receive feedback on a consistent basis. This is why later in 2023 we will launch our Rentals Safety Advisory Committee to provide us with ongoing feedback on our safety initiatives, highlighting both our areas of strength as well as areas for continued improvement.

The committee will comprise an international group of traffic safety experts representing diverse professional backgrounds, ranging from researchers to former government officials. Furthermore, the group will include representatives from various regions across Europe to ensure that we have a broad view of the safety issues across the dozens of countries where we operate our shared vehicles.

By bringing in a team of external experts, we will continue to build upon our existing knowledge on the safety of shared mobility through the exchange of knowledge, best practices, and recommendations.



Looking ahead

ONGOING PARTNERSHIP WITH CITIES

At Bolt, we believe that collaboration with cities is critical to driving continuous safety improvement, which is why this is the first point of our Scooter Safety Pledge. Through mutual dialogue, we can best identify the ways in which Bolt and cities can each take meaningful actions that improve safety for all.

We welcome feedback from cities on Bolt's performance, and at the same time, we think it's important to provide input on what cities can do to ensure the safety of their residents.

Based on our experiences across Europe, we believe there are 2 critical steps that cities should take to address this issue in both the short term and the long term.

First, in the short term, cities should consider reducing speed limits for motor vehicles in urban areas, as a wealth of research demonstrates that this simple step is a lifesaver.

<u>For example</u>, evidence shows that reducing car speeds from 50km/h to 30km/h can lead to a 75% reduction in fatality risk for pedestrians and micromobility users in case of a collision.

Looking across the entire EU, the European Transport Safety Council has <u>estimated</u> that reducing the average speed of motor vehicles by just 1km/h would save over 2000 lives per year.

Implementing reduced motor vehicle speed limits in cities is, therefore, a simple and low-cost way for cities to minimise the risk for all vulnerable road users and achieve significant gains in road safety.

Second, in the longer term, cities should invest in safe road infrastructure for micromobility. A study conducted in 93 cities across 6 European countries found that introducing shared scooters in cities with a high density of bike lanes didn't lead to an increase in traffic accidents.

In other words, adopting shared scooters was shown to have zero negative impact on overall road safety in cities already committed to providing safe infrastructure for micromobility.

While it's true that building such infrastructure can be costly, there's abundant <u>evidence</u> demonstrating how establishing protected micromobility lanes can boost local economies.

Cities should, therefore, view these expenditures as a long-term investment toward building a more vibrant and prosperous future for their residents.



Bolt