

**Regional Municipality of Waterloo**  
**Sustainability, Infrastructure, and Development Committee**  
**Addendum Agenda**



Date: Tuesday, February 11, 2025  
Regular Session: 2:00 p.m.  
Location: Council Chambers

Should you require an alternative format please contact the Regional Clerk at Tel.: 519-575-4400,  
TTY: 519-575-4605, or [regionalclerk@regionofwaterloo.ca](mailto:regionalclerk@regionofwaterloo.ca)

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**Pages**

**Start time is approximate. The Sustainability, Infrastructure, and Development Committee will start immediately following the Closed Committee.**

- 1. Call to Order**
- 2. Land Acknowledgement**
- 3. Declarations of Pecuniary Interest under the “Municipal Conflict of Interest Act”**
- 4. Motion to reconvene into Open Session**  
**Recommended Motion:**  
That the Sustainability, Infrastructure, and Development Committee reconvene into open session.
- 5. Presentations**
- 6. Delegations**
  - \*6.1 Isaac Ransom, Head of Corporate Affairs, Neuron Mobility Canada** **4**  
Re: E-scooter report - TSD-TRS-25-002
- 7. Regular Agenda**
  - 7.1 Strategic Priority - Climate Aligned Growth**
    - 7.1.1 EES-WMS-25-001, Communication and Implementation Plan for 2026 Curbside Waste Collection Change** **9**  
**Recommended Motion:**  
That the Regional Municipality of Waterloo take the following action with respect to the upcoming 2026 curbside waste collection changes as set out in report EES-WMS-25-001, dated February 11, 2025:
      - a. Amend the 2025 Waste Management Division Operating Budget to include an expenditure of \$1.25 million to prepare for the implementation of the new collection contract, to be offset from the estimated one-time 2025 revenues relating to the Blue Box Program

transition to Extended Producer Responsibility with no tax levy impact.

- b. Include expenditures of \$1.49 million in 2026 and \$452,000 in 2027 to the Waste Management Division Operating Budget, funded from the Waste Management Reserve Fund with no tax levy impact.
- c. Add 18 temporary (up to two-year) FTEs to support the successful implementation of the new waste collection contract.

7.1.2	TSD-TRS-25-003, Grand River Transit - 2025 Fare Change Proposal	26
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**Recommended Motion:**

That the Regional Municipality of Waterloo approve the Affordable Transit Program (ATP) fare changes as outlined in report TSD-TRS-25-003, dated February 11, 2025. The proposed fares will come into effect on July 1, 2025, as follows:

- Monthly Pass - ATP - \$47 (reduced from current \$48)
- Stored Value – ATP - \$1.35 (reduced from current \$1.50)
- MobilityPLUS ATP Tickets (strip of 5) - \$6.75 (reduced from \$7.50)

7.1.3	TSD-TRS-25-002, Update on Shared Micromobility Program 2024 Riding Season	29
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**Recommended Motion:**

That the Regional Municipality of Waterloo amend the licence agreement between the Region and Neuron Mobility (Canada) Limited to extend the term for the time period of April 1st to October 31st for 2026, 2027, 2028 and 2029 if all parties agree in writing by December 31, 2025, December 31, 2026, December 31, 2027, and December 31, 2028, as applicable, with the Commissioner of Transportation Services having authority to execute the amendment in a form approved by the Regional Solicitor, pursuant to Report TSD-TRS-25-002, dated February 11, 2025.

**7.2 Strategic Priority - Resilient and Future Ready Organization**

7.2.1	PDL-GDS-25-002, Region of Waterloo Workplace Count 2024 For information.	39
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**8. Information/Correspondence**

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*8.2	Letter of Support for Neuron Mobility Contract Extension from Conestoga Students Inc.	89
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9. Other Business
  10. Next Meeting - March 4, 2025
  11. Adjourn
- Recommended Motion:**  
That the meeting adjourn at xx:xx p.m.

# Neuron Mobility in Waterloo

February 2025



# Region of Waterloo Snapshot: By the Numbers



**1.87 km**

Average trip distance



**11 min 21sec**

Average trip duration



**310,000+  
km**

Total trip distance in 2024



**172,000+**

Trips taken in 2024



**4/5**

Is the average rating  
on Neuron's services



**500+**

Helmets given away at  
Scoot Safe Events

# Region of Waterloo Snapshot: By the Numbers

	2024	2023
Rides replacing car journeys:	↑ 34.5%	32.5%
Commuting to work or study:	↑ 66%	45%
Running errands:	↑ 40%	30%
Connecting to public transit:	↑ 23.5%	20%
Getting to appointments:	↑ 22.5	12%

# Adaptive Vehicle Program



Handcycle



Tricycle

Thank you.

Questions +  
Further Discussion





**Region of Waterloo**

**Engineering and Environmental Services**

**Waste Management**

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**To:** Sustainability, Infrastructure and Development Committee

**Meeting Date:** February 11, 2025

**Report Title:** 2026 Curbside Waste Collection Changes Implementation

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**1. Recommendation**

That the Regional Municipality of Waterloo take the following action with respect to the upcoming 2026 curbside waste collection changes as set out in report EES-WMS-25-001, dated February 11:

- a. Amend the 2025 Waste Management Division Operating Budget to include an expenditure of \$1.25 million to prepare for the implementation of the new collection contract, to be offset from the estimated one-time 2025 revenues relating to the Blue Box Program transition to Extended Producer Responsibility with no tax levy impact.
- b. Include expenditures of \$1.49 million in 2026 and \$452,000 in 2027 to the Waste Management Division Operating Budget, funded from the Waste Management Reserve Fund with no tax levy impact.
- c. Add 18 temporary (up to two-year) FTEs to support the successful implementation of the new waste collection contract.

**2. Purpose / Issue:**

The purpose of this report is to provide information for the implementation plan, and for approval of dedicated resources for the upcoming 2026 curbside waste collection changes.

**3. Strategic Plan:**

The curbside waste collection change meets the 2023-2027 Corporate Strategic Plan priorities to steward our natural environment and shared resources as we grow: We will work to protect the region's natural environment, biodiversity, trees, and water under Strategic Priority 2, Climate-aligned growth.

#### **4. Report Highlights:**

- An extensive communication, education and outreach campaign will be required starting in 2025 for impacted residents, businesses and property owners about the upcoming curbside waste collection changes starting March 2, 2026.
- The Waste Management Division will be working collaboratively with internal communication staff and the Creative Multimedia Services team to develop and implement communication and education materials. These tools will align with Region branding standards and support our diverse community.
- Eighteen temporary staff comprised primarily of co-op students and part-time Community Connector outreach positions, are required to ensure the successful planning and implementation of the new collection contract and levels of service. These staff will support education and outreach for the carts, the cart roll-out, the change to a four-day collection schedule, and changes to collection day to residents and downtown businesses.
- The Region will be working with Downtown Business Improvement Area Executive Directors and staff from the area municipalities to determine cart sizes, number of carts, set-out locations and collection days in the 10 designated Downtown BIAs.

#### **5. Background:**

In February 2023 (EES-WMS-23-003) Council established new service levels for the next curbside waste collection contract, specifically the use of carts and a four-day collection week. A new curbside waste collection contract is required to be in place by March 2026 to align with the end of the existing contract.

In May 2024 (COR-TRY-24-013) Council accepted the proposal of Halton Recycling Ltd. DBA. Emterra Environmental for the P2023-33 Automated Cart-Based, and Manual Waste Collection, and Supply, Initial Distribution and On-Going Maintenance of Carts Within the Region of Waterloo for a contract period of eight years starting March 2, 2026 through March 3, 2034, with the option to renew for two additional one-year periods.

In August 2024 (EES-WMS-24-003) Council approved the Region to continue to administer and fund the waste collection, processing and disposal services for Industrial, Commercial & Institutional (IC&I) properties located in designated Downtown areas.

As directed by Strategic Planning and Budget Committee as part of the 2025 Plan and Budget process, this report outlines the additional resources required to plan, implement and monitor the approved curbside waste collection changes that will start March 2026. The scope of the work is significant and cannot be undertaken successfully with the existing resourcing complement who will be continuing to administer the existing waste

collection contract.

### **Planned Work for the Successful Implementation of the March 2026 Waste Collection Contract**

The upcoming curbside waste collection changes will impact over 165,000 residential properties and 1,500 Downtown Business Improvement Area properties in the Region. Education and outreach will be required for all phases of the implementation plan, and Waste Management staff will be working collaboratively with our internal Communications and the Creative Multimedia Services teams to develop and implement communication and education materials.

Key considerations for this plan include:

- Supporting the delivery of over 330,000 garbage and organics carts to 165,000 residential properties over a four-month period to ensure collection begins on March 2, 2026;
- Engagement with over 1,500 businesses on determining cart sizes, number of carts, set-out locations and collection days in the 10 designated Downtown BIAs in the Region;
- Educating businesses in the Downtowns on the new organics Green Bin program, including how to sort their waste;
- Communicating the timeframes of when a resident can choose their garbage cart size or exchange their garbage cart after the trial period;
- Communicating collection day changes for residential properties impacted due to the residential waste collection schedule changing from five days (Monday to Friday) to four days (Tuesday to Friday) collection. This includes, supporting residents to adjust to their new collection day;
- Provision of solutions to potential changes in medical exemptions, extra garbage bag tags and assisted collection services; and
- Educating residents and businesses on sorting, storage and set out of carts alongside bulky items and Christmas trees.

A variety of traditional and digital communications tactics will be used to reach residents and business owners across the Region. Some of the tactics include information and public notices on our website and social media channels, printed brochures, flyers and calendars, videos, newspaper and radio advertisements, waste truck decals, curbside error stickers, and cart information kits. These tools will align with Region branding standards and support our diverse residential and business community. QR codes on our materials will direct residents to our website to read our information in the language of their choice.

Waste Management staff will also inform and educate impacted residents, businesses and property owners via phone, email and in-person at pop-up events (information

booths, presentations, meetings, tours, curbside street team, etc.). Staff will be available to explain the program changes and answer questions throughout all phases of the change. Event participation will be based on the ability to connect with the Region of Waterloo community who receive our waste management services.

### **Proposed Implementation Plan**

The Region consulted with a number of municipalities such as the City of Guelph, City of Edmonton, Peel Region and Simcoe County, that have transitioned their curbside waste collection service from manual bag-based to cart-based collection. Through their experience, learnings and feedback, and in addition to our own learnings from previous successful contract rollouts, this information was used to form the proposed implementation plan, including staff resources.

The proposed implementation plan and communication campaign (dates are approximate) will be completed in the following stages:

#### **Phase One – Awareness – March to June 2025**

- Share information with impacted residents, businesses and property owners about the upcoming changes to curbside waste collection. This phase will focus on who is affected, what is changing, why the change is happening and how waste will be collected in the future.
- Remind the community that Blue Box recycling is no longer a part of the Region's waste management services and is not impacted by this change.
- Educate about supporting services such as medical exemptions, extra garbage bag tags, and assisted collection services. These will be promoted to assist residents who may require help with their waste collection. Waste Management staff will also meet with the Grand River Accessibility Advisory Committee and Cambridge Accessibility Advisory Committee during this phase.
- Communications in this phase will include news releases, newsletter articles, flyers, newspaper and online advertisements, and social media campaigns.
- Pop-up events and stationary displays will be used to reach members of the community where they live.

#### **Phase Two – Preparation – June 2025 to February 2026**

- Residential properties eligible for Region waste collection will be issued a large garbage cart, and a small organics cart before March 2026. If the property owner would like a small garbage cart, they will be able to order one through the website provided by the contractor, or by contacting the Region's Service First Contact Centre from June to the end of July 2025.
- Carts will be delivered to properties between October 2025 to February 2026. We will share information with residents to not use the new carts until March 2, 2026. Switching to a cart-based collection for garbage and organics will require

education on sorting, storage, and how to set out the carts (e.g. location, spacing, avoiding obstructions, etc.) alongside other materials such as bulky items, yard waste and Christmas trees.

- Residential waste collection is changing from five days (Monday to Friday) to four days (Tuesday to Friday). Communication will be required to ensure properties know which day of the week to set out their waste as of March 2026.
- Cart sizes, number of carts, set-out locations, collection days, etc. for properties in the downtown areas are yet to be determined. The Region will be working alongside interest holders, such as the Downtown Business Improvement Area Executive Directors and staff from the area municipalities to determine these details.
- Communications in a variety of ways, supporting tools, pop-up events and stationary displays will continue during this phase.

### **Phase Three – Implementation – March to September 2026**

- Residential and business (Downtown and BIA) properties will begin using their garbage and organics carts as of March 2, 2026. Temporary staff members will provide education to residents at the curb to correct any errors and provide reminders (through conversation or education tools like stickers) on how to sort and set out their waste.
- In collaboration with the Service First Contact Centre, customer service support will be a priority to ensure the success of the cart implementation.
- Contract management of the new contractor will begin in this phase, monitoring their performance and service as per the contract requirements and service level standards.
- After six months of use, a one-time exchange for garbage carts will be available should households prefer another size. Properties will request a change on the website provided by the contractor, or through contacting the Service First Contact Centre during a specified period in 2026. On-going maintenance of the carts (repair, replacements and exchanges) will be available, but limits and restrictions may apply.
- Monitoring and review of the Downtown BIA collection frequency and service will be completed at this time. Any adjustments will follow this review process.
- Communications in a variety of ways, supporting tools, pop-up events and stationary displays will continue during this phase.

### **Phase Four – Reinforcement and Retention – Fall 2026 to Spring 2027**

- Customer service and contract management enters “day to day” on-going operations.
- Education and outreach, including pop-up events, will continue during this phase. Temporary staff members will support residents via phone, email and in-person

at pop-up events. This includes:

- Supporting the community during the first full winter season of using carts – ensuring proper placement and successful waste collection
- Reaching new residents to the community (e.g. new subdivisions/developments, off-campus housing areas), so they are aware of the Region's waste management services.
- Continued support of existing residents and businesses to ensure successful collection of their carts.
- Feedback will be collected to determine if any adjustments or changes are required for the curbside waste collection service.

### **Proposed Temporary Staff Resources**

During the four phases of the proposed plan, a staff team, comprised of four temporary contract waste coordinators, and up to ten co-op students and four part time community connector staff, will be utilized to plan, implement and monitor the program and service.

Details of the temporary staff positions and work to be performed is provided in Attachment A.

## **6. Communication and Engagement with Area Municipalities and the Public:**

**Area Municipalities:** In Q1 2025, staff will reach out to affected local interest holders (e.g. area municipalities, Downtowns, etc.) to clarify potential impacts and how best to proceed to ensure a seamless and effective transition as possible. As mentioned above, a working group will be established for the Downtown Business Improvement Areas where BIA Executive Directors and area municipality staff will be involved in the planning and implementation of the downtown program.

**Public:** An extensive communication and public awareness campaign will be required starting in 2025 to inform and educate impacted residents, business and property owners about the upcoming curbside waste collection changes. Waste Management Division staff will connect with various interest groups such as accessibility advisory committees, post-secondary institutions, newcomer groups, seniors' groups, etc. Overview of the phases are listed in the background of this report.

## **7. Financial Implications:**

With the Region's transition of the Blue Box Program to full Extended Producer Responsibility in March 2024, the Waste Management Division entered into an agreement with Circular Materials (CM), the producer responsibility organization responsible for operating the new blue box program, to support on-going recycling education and outreach. The Waste Management Division also entered into an agreement with CM's service provider to receive and load blue box materials for transfer to offsite processing facilities from the Region's Waste Management facilities, while the

construction of a private transfer station is completed. These agreements are only in place during our transition period from March 2024 to the end of January 2025, when the new private waste transfer station is expected to become operational.

It is estimated that it will require one-time operating costs of approximately \$1.25 million in 2025, \$1.49 million in 2026 and \$452,000 in 2027 to implement the curbside waste collection changes. The 2025 revenues associated with the agreements described above to support the Blue Box Program transition will offset the 2025 operating costs of the proposed implementation plan. 2026 and 2027 costs will be funded from the Waste Management Reserve Fund. There is no tax levy impact.

Included in the above costs is education and outreach (e.g. brochures, calendars, signage, advertising, waste truck decals, etc.) and for resources including vehicle rentals, equipment and temporary staff on contracts for up to two years to support the implementation of the curbside waste collection changes.

## **8. Conclusion / Next Steps:**

Upon approval of this report, Waste Management Division staff will proceed with the phased implementation plan and prepare to hire the temporary resources to support the upcoming 2026 curbside waste collection changes.

## **9. Attachments:**

Appendix A: Roles and Responsibilities of Temporary Staff for Curbside Waste Collection Changes

Appendix B: 2026 Curbside Waste Collection Changes Implementation Presentation

**Prepared By:** Olivia Kwok, Manager, Waste Collection & Diversion

**Reviewed By:** Jon Arsenault, Director, Waste Management

**Approved By:** Jennifer Rose, Commissioner, Engineering & Environmental Services

## **Roles and Responsibilities of Temporary Staff for Curbside Waste Collection Changes**

The following positions are recommended to be hired (start in Spring 2025) to support the change.

### **Temporary (up to two-year contracts):**

- Two x Coordinator, Contracts & Service
- Two x Project Coordinator

These four positions tasks include:

- Review and coordinate cart storage and waste collection in unique residential collection areas (e.g. laneways, internal collection at multi-residential properties, schools, off-campus areas, bike lanes, iON areas, etc.).
- Coordinate and administer programs such as medical exemption, assisted collection, bag tags, etc.
- Update policies, procedures and software (e.g. Waste Management By-law, Waste Collection Guidelines/Requirements, GIS property database, Waste Whiz, construction and special event alternative collection plans, Service First Contact Centre forms, etc.).
- Administer and monitor the cart distribution, initial cart selection and size exchange periods, and cart inventory.
- Engage with area municipalities regarding impacts to snow clearing, leaf collection, parking, etc.
- Create contract management process/standards (on-street performance, street cleanliness).
- Coordinate training for Service First Contact Centre and contractor on Region guidelines and processes.
- Develop new public education and outreach; assist with communications, and update existing materials (e.g. brochures, calendars, signage, advertisements, vehicle wraps, etc.).
- Develop end of life program for existing containers (e.g. Green Bin) for current program.
- Coordinate the pop-up events and stationary displays to educate impacted members of the community.

These positions will also work alongside the Downtown BIA members to select cart sizes, number of carts, set-out locations, collection days, contractor coordination, and help businesses understand sorting and cart placement.

### **Temporary (four-to eight-month co-op contracts):**

- Ten x Student, Waste Collection & Diversion (typically undergraduate students)



These 10 positions will be supporting the planning, implementation and monitoring of the curbside waste collection changes. They will lead the delivery of pop-up events (information booths, presentations, meetings, tours, curbside street team, etc.) where they will engage with the community and will support customer service in-person at the curb, over the phone or by email during all phases of the implementation. They will also assist with the above noted tasks required to be completed.

**Temporary part-time:**

- Four x Community Connector

These four part-time positions will be dedicated to engaging with residents at community events and supporting customer service in-person at the curb on waste collection day. They will share and explain community feedback, concerns, and questions with staff.

As of March 2, 2026, all temporary staff will also assist with contract oversight. This includes monitoring contractor performance and service, as per the contract requirements and service level standards.



Region of Waterloo

# 2026 Curbside Waste Collection Changes Implementation

Sustainability, Infrastructure, and Development Committee

Presented by: Jon Arsenault  
Director, Waste Management

February 11, 2025

# Overview



Affects over 165,000 residential and 1,500 Downtown Business Improvement Area properties



Delivery of over 330,000 carts in four months to ensure residential collection begins on March 2, 2026



Engaging with over 1,500 businesses on determining cart sizes, number of carts, set-out locations and collection days in the 10 Downtown BIAs



Four temporary contract waste coordinators, and up to ten co-op students and four part time community connector staff, will be utilized to plan, implement and monitor the program and service

# Proposed Implementation Plan

## Phase One Awareness



March to June 2025

## Phase Two Preparation



June 2025 to February 2026

## Phase Three Implementation



March to September 2026

## Phase Four Reinforcement and Retention



Fall 2026 to Spring 2027

# Key Elements of Implementation

- Share information – who, what, why, how?
- Choose your garbage cart size
- Carts will be delivered between October 2025 to February 2026
- New residential collection schedule – Tuesday to Friday



# Key Elements of Implementation

- Starting March 2, 2026, education at the curb to correct errors and provide reminders on how to sort and set out waste. Customer service is a priority!
- One-time size exchange for garbage carts available
- Customer service and contract management enters "day to day" on-going operations



# Roles and Responsibilities of Temporary Staff

- Review unique collection areas, administer cart processes, coordinate exemption programs, update policies, procedures, software and the waste by-law
- Engage with accessibility advisory committees, area municipalities and Downtown BIAs, develop education and outreach and coordinate contractor and SFCC training
- Delivery of pop-up events, such as information booths, presentations, meetings, tours, and the curbside street team
- Assist with on-going education and outreach, and contract oversight

# Next Steps

- Recruitment of temporary staff resources
- Initiate meetings with interest holders (advisory committees, area municipalities, BIAs)
- Update advertising such as revised waste calendars, truck decals, website and waste whiz updates
- Outreach and engagement through community special events, pop-up events and direct curbside support



# Questions? Thank you!

**Region of Waterloo**  
**Transportation Services**  
**Transit Services**

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**To:** Sustainability, Infrastructure, and Development Committee

**Meeting Date:** February 11, 2025

**Report Title:** Grand River Transit – 2025 ATP Fare Proposal

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**1. Recommendation**

That the Regional Municipality of Waterloo approve the Affordable Transit Program (ATP) fare changes as outlined in report TSD-TRS-25-003, dated February 11, 2025. The proposed fares will come into effect on July 1, 2025, as follows:

- Monthly Pass - ATP - \$47 (reduced from current \$48)
- Stored Value – ATP - \$1.35 (reduced from current \$1.50)
- MobilityPLUS ATP Tickets (strip of 5) - \$6.75 (reduced from \$7.50)

**2. Purpose / Issue:**

This report outlines proposed changes to Affordable Transit Program (ATP) fare products. The recommendations follow changes adopted in the 2025 Regional Budget. The changes apply a consistent discount for ATP customers across all fare products.

**3. Strategic Plan:**

Equitable Services and Opportunities: ATP ensures transit services are inclusive, accessible and equitable. Climate Aligned Growth (foster car-alternative options): Affordable transit fare options increase transit ridership, increase transportation choices, expand access to housing and reduce car dependency.

**4. Report Highlights:**

- As part of the 2025 Regional Budget process, the Fees & Charges By-law was amended to increase the GRT Adult and MobilityPLUS Monthly Pass price to \$104 per month as of July 1, 2025.
- The ATP monthly pass price was based on a 50% discount of the equivalent fare product. By increasing the GRT Monthly Pass, the ATP Monthly Pass also increases. Council direction to maintain the ATP Monthly Pass price at its current value of \$48 per month, effectively increased the discount on the ATP Monthly Pass fare product from 50% to 54%.

- Because stored value was not proposed to increase from the current fare, the related ATP stored value rate was not adjusted as part of the Fees and Charges By-law. There is now a disparity between ATP discounts for stored value and for monthly passes, creating inequitable fare pricing for ATP customers.
- To provide consistency for ATP customers, it is proposed that all ATP fare products be set at a 55% discount of the equivalent fare product.

## 5. Background:

The Affordable Transit Program is designed to assist lower income households with access to transit services. Eligibility is determined by an income threshold, coming from the Market Basket Measure, which is Canada's official measure of poverty based on the cost of a specific basket of goods and services.

ATP fare products were originally set using a 45% reduction of the full fare in each category. This number was adjusted to a 50% reduction in 2023. The current proposal would have a 55% reduction in all categories of ATP fares.

The proposed fares are shown in the table below.

	Fares Effective July 1, 2025	
	2025 Fares* Current as Approved	Revised 2025 Fares Proposed at 55%
Monthly Pass	\$104	\$104
Monthly Pass – ATP	\$48	\$47
Stored Value	\$3	\$3
Stored Value - ATP	\$1.50	\$1.35
MobilityPLUS Tickets (5)	\$15	\$15
MobilityPLUS Tickets (5) - ATP	\$7.50	\$6.75

## **6. Communication and Engagement with Area Municipalities and the Public**

**Area Municipalities:** N/A

**Public:** Members of the public provided input on transit fares as part of the 2025 Budget consultation sessions.

## **7. Financial Implications:**

The proposed changes would decrease fare revenue by \$30,000. Increased ridership due to lower fare prices will offset \$10,000. The remaining gap will be absorbed through GRT's customer acquisition budget.

This will result in the changes being cost neutral on 2025 fare revenues.

## **8. Conclusion / Next Steps:**

The new fares would take effect on July 1, 2025, at the same time as the other currently approved fare changes. If the approval of the proposed fares is delayed, there may not be sufficient time to have electronic fare system adjustments made in time for the July 1 fare change.

Transit Services will work with Clerks to have the appropriate changes made to the Fees and Charges By-law.

All transit fares are being evaluated as part of the new Grand River Transit Business Plan. A recommendation on the overall fare policy strategy will be part of the Business Plan report that will come before Council later this year.

## **9. Attachments:** N/A

**Prepared By:** Blair Allen, Manager Transit Development

**Reviewed By:** Neil Malcolm, Acting Director, Transit Services

**Approved By:** Doug Spooner, Acting Commissioner, Transportation Services

**Region of Waterloo**  
**Transportation Services**  
**Transit Services**

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**To:** Sustainability, Infrastructure, and Development Committee  
**Meeting Date:** February 11, 2025  
**Report Title:** Update on Shared Micromobility Program 2024 Riding Season

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**1. Recommendation**

That the Regional Municipality of Waterloo amend the licence agreement between the Region and Neuron Mobility (Canada) Limited to extend the term for the time period of April 1st to October 31st for 2026, 2027, 2028 and 2029 if all parties agree in writing by December 31, 2025, December 31, 2026, December 31, 2027, and December 31, 2028, as applicable, with the Commissioner of Transportation Services having authority to execute the amendment in a form approved by the Regional Solicitor, pursuant to Report TSD-TRS-25-002, dated February 11, 2025.

**2. Purpose / Issue:**

This report provides updates on the second season of the commercial e-bike and e-scooter share operated by Neuron Mobility. Staff have exercised the renewal option of the Council-approved licence agreement to relaunch the program for the 2025 riding season.

Staff is also requesting the ability to extend the program annually until November 2029 in response to the Ministry of Transportation's recent extension of the provincial e-scooter pilot.

**3. Strategic Plan:**

Supporting the introduction of low energy micromobility options and programs that can be integrated with the Region's transit network aligns with the Climate Aligned Growth priority of the Region's 2023-2027 Strategic Plan. This work is also a Strategic Action of the TransformWR plan (Action 1.3.1: Launch Micromobility Systems).

**4. Report Highlights:**

- The second year of operations of the program with Neuron Mobility is considered an overall success by the Shared Micromobility Project Team (Appendix A).
  - Close to 173,700 rides were taken, totalling over 288,000 kilometers

- travelled. According to the monitoring platform used by the Project Team, this year's ridership resulted in up to 9.9 tonnes in carbon dioxide savings (equivalent to approximately 396 mature trees), and up to 22 tonnes in total (equivalent to approximately 880 mature trees).
- In 2024, the size of the service area increased substantially to 64.61 km<sup>2</sup> from 39.55 km<sup>2</sup>, and the service area now connects the three Cities (see Appendix B). The Project Team will work to identify areas for future expansion over the winter.
  - The Project Team worked with Neuron to improve geofences and parking compliance, and Neuron has confirmed a low percentage of trips result in misparked vehicles. The Project Team continues to monitor parking compliance. The Project Team is sourcing parking corrals and decals for parking areas for select locations in collaboration with Neuron.
  - In response to feedback received by the community regarding the need for more education/resources on the rules of the road and rider etiquette, the Project Team retained the services of a creative agency using program improvement fees collected from Neuron. The resulting campaign targeted e-scooter riders between 18-24 years of age, with the goal of promoting safe behaviours amongst e-scooter riders and increase awareness of applicable laws and consequences. Deliverables included social media posts, ION and bus shelter posters, magnets for distribution at events, and posters (Appendix C). The key messages pertained to riding with a helmet, riding sober, not riding or parking on the sidewalk, as well as no tandem riding. These messages were also intended to address stakeholder concerns over late night issues (Appendix A).
- Region and City staff have renewed the agreement with Neuron, and Neuron plan to redeploy its fleet for an April 2025 launch (Appendix D).
    - Neuron will be introducing accessible fleet options into the Region's shared micromobility program in 2025 – a priority identified by the Project Team in response to community feedback.
    - Neuron has purchased two models of adaptive vehicles (i.e. upright tricycles (Appendix E) and handcycle tricycles specifically designed to meet a range of needs for individuals living with mobility impairments/disabilities). Program improvement fees collected from Neuron will be used to introduce and integrate the accessible fleet into the program, and the vehicles will be owned and maintained by Neuron. Neuron will be testing the service delivery model and integration, as well as collecting data on key metrics. If considered successful, Neuron may consider an expanded accessible fleet with greater system integration. This is one of the first initiatives of its kind

run by a private shared micromobility operator in Canada.

- The Ministry of Transportation (MTO) Electric Kick-Scooter Pilot Project (O. Reg. 389/19) has been extended for an additional five years, until November 27, 2029. The MTO opted to collect more data for their analysis of the impact of the pilot which will inform future policies.
  - Staff are requesting to extend the term of current license agreement with Neuron Mobility to continue participating in the pilot in recognition of the delayed response to the pilot program due to the pandemic, and the favourable preliminary findings of the Region's shared micromobility program in achieving municipal strategic initiatives and climate action goals for sustainable transportation. City partners will also be seeking to extend their participation in the joint licence agreement with Neuron through their respective processes.

## 5. Background:

In August 2022, Region staff issued a joint request for proposals (RFP) with the Cities of Cambridge, Kitchener, and Waterloo, for a single shared system operator for bike/e-bikes and e-scooters (as described in TES-TRS-22-07).

Neuron Mobility was selected as the preferred service provider as they scored highest on the Technical Submission and met the performance expectations established through their proposal during an equipment demonstration. The program launched in Spring 2023, and first year of operations of the program was considered an overall success (as described in TSD-TRS-23-005).

## 6. Communication and Engagement with Area Municipalities and the Public

**Area Municipalities:** Transportation staff from the Region of Waterloo and Cities comprise the Project Team that are working with Neuron. This Project Team coordinated a 2019 bike share pilot, the 2020 shared micromobility study, the e-scooter Traffic and Parking By-law amendments (TES-TRS-22-06), and the shared program implementation plan (TES-TRS-22-07).

**Public:** The Region/Cities e-scooter safety campaign ran from September to October. Neuron conducted over 20 safety events in 2024. An online survey was conducted to get feedback from the community on the first year of Neuron operations. The Project Team undertook public engagement for the 2018/2019 bike share pilot with Drop Mobility (TES-TRS-18-11), 2019/2020 Micromobility Feasibility Study with Alta Planning + Design (TES-TRS-20-14), and the 2021 e-scooter bylaw update (TES-TRS-21-01).

## 7. Financial Implications:

The shared micromobility program is intended to be revenue neutral, with Neuron being charged scalable trip and vehicle fees to offset any program costs to the Region/Cities

and to fund program improvements supportive of the Region's goals for the program. In 2024, approximately \$60,000 was collected from Neuron and approximately \$60,000 spent on operating expenses and program improvements, including the rules of the road and rider etiquette campaign, and introduction of accessible fleet options.

## **8. Conclusion / Next Steps:**

The Project Team will continue to collaborate with Neuron on program development and system expansion initiatives, as well as addressing feedback received from users and non-users. Staff will report to Regional Council after the 2025 riding season.

### **Attachments:**

Appendix A: Progress on Shared Micromobility Program Goals

Appendix B: Service Area Map

Appendix C: E-Scooter Safety Campaign Deliverables

Appendix D: Letter from Neuron Confirming Interest in Returning to Waterloo Region in 2025

Appendix E: Neuron Upright Tricycle with Description of Key Features

**Prepared By:** Julie Belanger, Principal Planner, Transit Services

Kevan Marshall, Project Manager, Transit Services

Blair Allen, Manager, Transit Services

**Reviewed By:** Neil Malcolm, Acting Director, Transit Services

**Approved By:** Doug Spooner, Acting Commissioner, Transportation Services



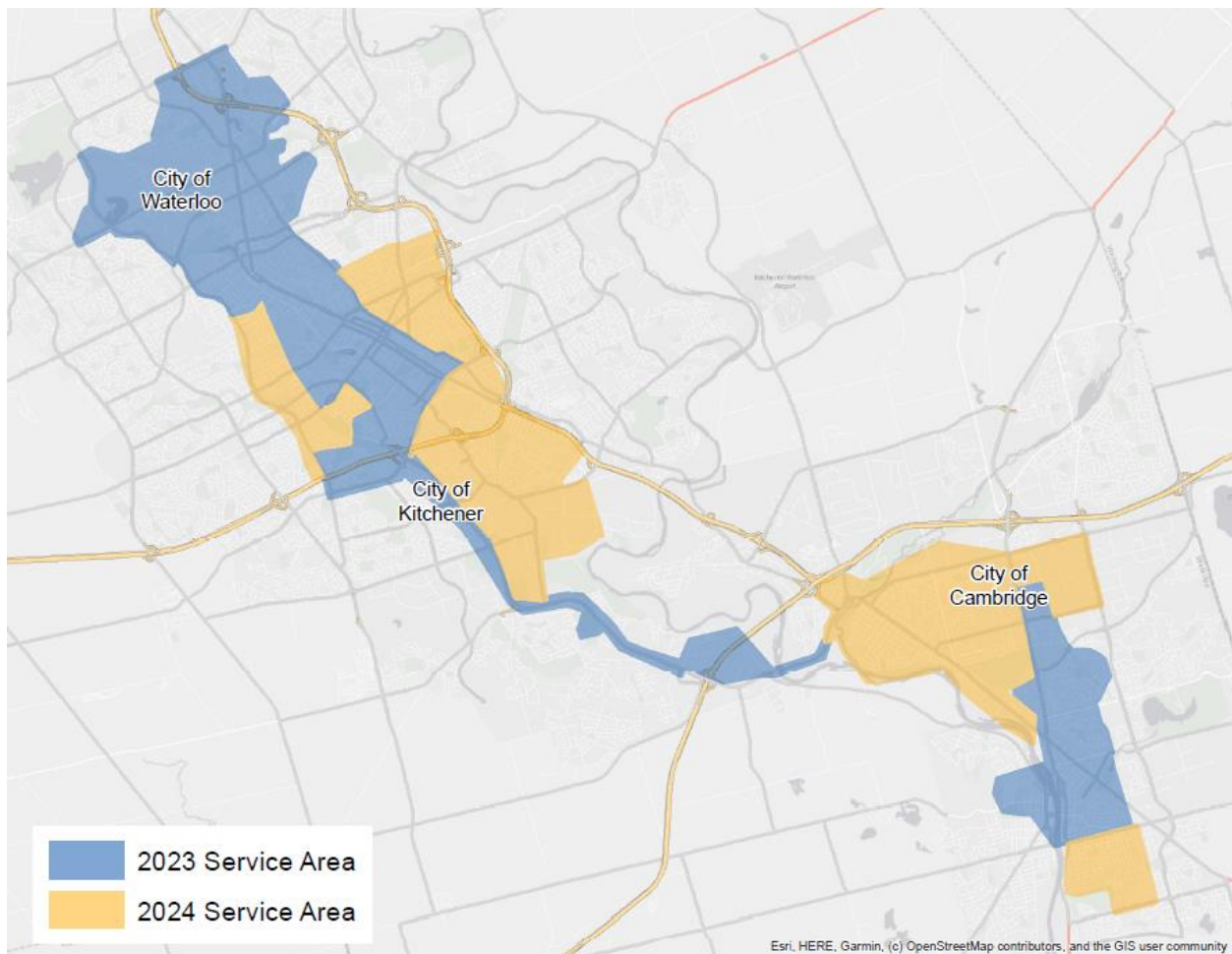
## Appendix A – Progress on Shared Micromobility Program Goals

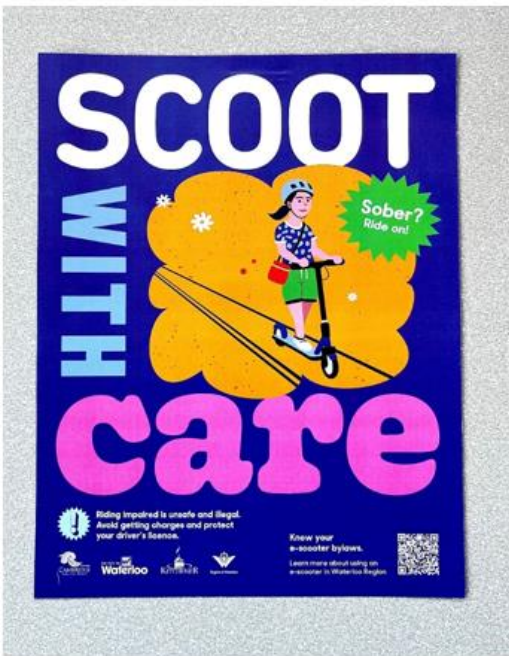
Indicators related to the overall goals of the program were monitored throughout the riding season to support staff on evaluating how the system is performing, and to identify where improvements could be made to support accomplishing the program goals.

Key indicators include:

- **Overall system use.** Close to 173,700 rides were taken, totalling over 288,000 kilometers travelled. According to the monitoring platform used by the Project Team, this year's ridership resulted in up to 9.9 tonnes in carbon dioxide savings (equivalent to approximately 396 mature trees), and up to 22 tonnes in total (equivalent to approximately 880 mature trees).
  - The number of rides is approximately 8.6% lower than in 2023. Ridership was likely higher in the first year of the program due to the novelty of e-scooters and has been observed in other communities.
  - Both the number of regular users/pass holders has increased and the percentage of user reporting using the program for commuting purposes, which is considered more important to the longer-term sustainability of the program.
- **Community impact.** Staff expect improvements in community perception as users become familiar with the service and the rules of the road, and drivers become more accustomed to a new vehicle type.
  - Staff received fewer negative emails about the program in 2024 even as the system service area grew.
  - Neuron issued fewer customer service tickets in 2024. For example, 5.64% of rides were issued a customer service ticket in May 2023 and 2.6% of rides were issued a ticket in May 2024.
  - The City of Waterloo received complaints from the Uptown Waterloo Business Improvement Area (BIA) regarding late night issues (e.g. stations overcapacity and anecdotal reports of the use of the program by intoxicated riders), and select stations were deactivated as a precautionary measure. Neuron, in collaboration with City staff are working with Neuron on a proposal to manage stations and introduce additional preventive measures that minimize the impacts on other users.
  - There is a [Shared Micromobility Program](#) page on EngageWR to provide the community with general program information and opportunities for engagement, and lists a dedicated program email address to reach the Project Team.
- **Equity.** Equity initiatives will become a greater priority as the program matures.

- Neuron is working toward adding accessible fleet options into the Region's shared micromobility program in 2025 – a priority identified by the Project Team. As a first step, Neuron will introduce upright tricycles and handcycle tricycles (Appendix E). The adaptive vehicles will be owned and maintained by Neuron. Neuron will be testing the service delivery model and integration over the 2025 riding season and collecting data on key metrics. If considered successful, Neuron may consider fuller integration.
  - Neuron developed new fare products to provide more affordable options and focused on increasing awareness of their reduced fare products.
- **Cost.** The Region collected approximately \$60,000 in fees from Neuron and had minimal operating expenses and no unanticipated maintenance costs.
  - Region/City staff time required to oversee the pilot met expectations.
  - No additional costs associated with the operation, and maintenance of roads, active transportation facilities, or the shared micromobility system were incurred.
- **Safety/Injuries.** Staff have established partnerships with Waterloo Region Police Services, as well as Public Health and Paramedic Services and have developed a strategy for ongoing monitoring/reporting to inform future years of the project.
  - For both shared and personal e-scooter users, data from Public Health's Epidemiology and Health Analytics Team shows 36 emergency department visits and 2 hospital admissions between April and June 2024, and 17 ambulance trips with transport to hospital from April to November 2024. These represent improvements from 2023 data.
  - There were no reported collisions involving shared e-scooters, and no fatalities were reported related shared e-scooters/e-bikes program.

**Appendix B – Service Area Map**

**Appendix C – E-Scooter Safety Campaign Deliverables**

## Appendix D – Letter from Neuron confirming interest in returning to Waterloo Region in 2025



**Neuron Mobility (Canada) Limited**  
Suite 1700, 777 Dunsmuir Street,  
Vancouver BC, V7Y 1K4

**September 26, 2024**

### **Regional Municipality of Waterloo**

**Re: Renewal of the Shared Micromobility Licence Agreement (the “Agreement”) between Neuron Mobility (Canada) Limited (“Neuron”) and The Regional Municipality of Waterloo, The Corporation of the City of Cambridge, The Corporation of the City of Kitchener and The Corporation of the City of Waterloo (collectively, the “Region”)**

Under section 6 of the Agreement, we write to confirm that Neuron would be happy to renew the Agreement for 2025 and continue its shared micromobility operations in the Region.

2024 was a successful season for operations in the Region and Neuron is looking forward to capturing and expanding on this momentum as it plans 2025.

Highlights of the program to date include:

- Over 660,000 kilometres travelled by riders in the Region of Waterloo
- An estimated local economic contribution of over \$16 million
- Eliminating over an estimated 30 tonnes of CO2 emissions in the Region

Neuron continues to value the partnership with the Region of Waterloo. In 2024, the program's maturity has seen the riding area expand significantly and new parking locations, which has helped to create an improved rider experience.

We look forward to continuing to work alongside the Region in 2025 and can also confirm that we have increased our non-owned automobile insurance coverage to \$10,000,000 and will have our 2025-2026 insurance in place by April 1, 2025.

DocuSigned by:  
A handwritten signature in blue ink that reads "Ankush".  
625222EA89B9441...

Ankush Karwal, ankush.karwal@neuron.sg  
General Manager, Canada  
Neuron Mobility (Canada) Limited



**Appendix E – Neuron Upright Tricycle with Description of Key Features**

## Region of Waterloo

### Planning, Development, and Legislative Services

### Growth, Development, and Sustainability

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**To:** Sustainability, Infrastructure, and Development Committee

**Meeting Date:** February 11, 2025

**Report Title:** Region of Waterloo Workplace Count 2024

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#### 1. Recommendation

For information.

#### 2. Purpose / Issue:

The Workplace Count, a collaboration with Area Municipalities and the Waterloo Economic Development Corporation (WaterlooEDC), is a region-wide survey of local businesses, conducted every two to three years. The survey took place between May and September 2024, and gathered essential data from diverse workplaces spanning cities, rural areas, and employment hubs across Waterloo Region. The data collected through the 2024 Workplace Count enhances the Regions and Area Municipalities analytical capacity, by providing granular insights into the local economy and is not available from any other source

#### 3. Strategic Plan:

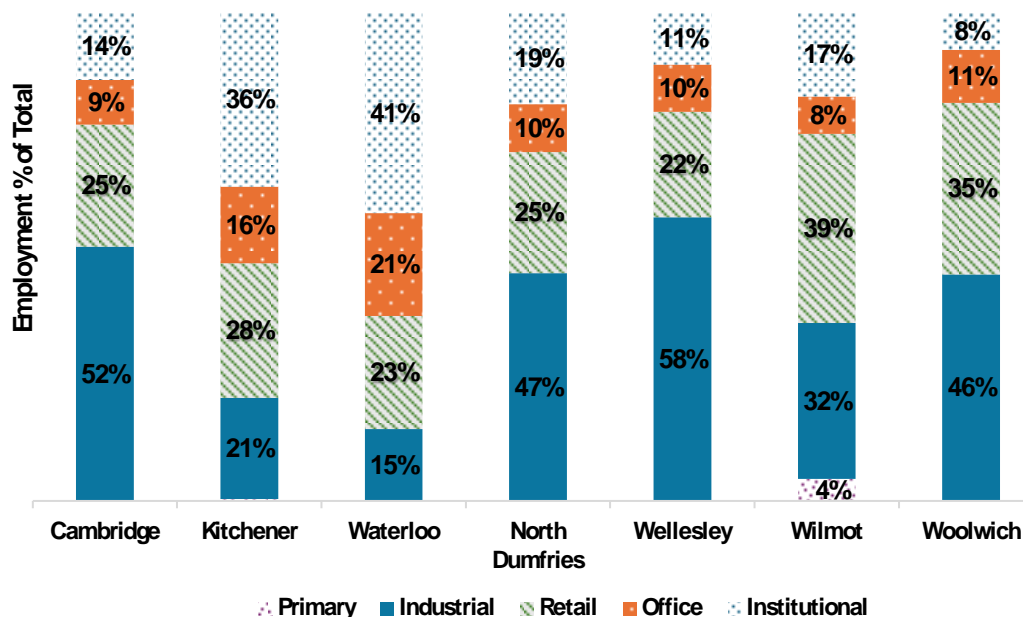
The tracking and monitoring of employment data contributes to the development of programs and services aligned with the Equitable Services and Opportunities, and Resilient and Future Ready Organization objectives.

#### 4. Report Highlights:

- The 2024 Workplace Count visited over 11,000 establishments, of which, 8,300 successfully completed the survey. This represents a completion rate of 74%. Of the completed survey, over 178,000 employees were identified.
- In partnership with Waterloo EDC, in 2024 the Workplace Count was extended to rural businesses located on farm properties (known as on-farm diversified uses). Some examples of the rural businesses surveyed include furniture manufacturers, sheet metal fabricators, or carpentry shops.
- Region-wide, the Industrial, Institutional and, Retail sectors employed a similar amount of jobs, accounting for 29 per cent, 29 per cent and 26 per cent of total

employment, respectively.

### Employment by Sector and Municipality



- Key findings of the survey include:

- The majority (62%) of workplaces in the Region employed 1-9 employees. Workplaces with 1-9 employees accounted for 12 per cent of employment.
- Businesses with 500+ employees accounted for less than half a per cent of workplaces, but 28 per cent of employment in the Region.
- Across all sectors, 73 per cent of employment in the Region was full-time, while 27 per cent of employment was part-time.
- The manufacturing sector had the highest proportion of full-time employees, with 96% of jobs being full-time.
- The arts, entertainment, and recreation sector had the highest proportion of part-time jobs at 71%.
- Of the Rural businesses surveyed, manufacturing was the top sector, representing 44% of surveyed businesses.

- A comprehensive 2024 Workplace Count bulletin is attached to this report

## 5. Background:

The Region's fifth Workplace Count was undertaken from May to September of 2024 to



collect data on places of employment throughout Waterloo Region. The survey did not collect information on workplaces in homes, or agricultural establishments engaged in growing crops or raising animals. The survey was voluntary, and businesses could refuse to participate or choose to only answer some of the survey questions. The data collected provides the most comprehensive, detailed and current employment data in Waterloo Region and helps the Region of Waterloo and Area Municipalities plan for and meet ongoing needs for services and infrastructure. The data supports the Regions and Area Municipalities ability to identify trends, measure sectoral growth and anticipate future needs across the community. The ability to track employment across various sectors, municipalities, and business sizes provides a solid foundation for evidence-based decision-making, enabling the Region and Area Municipalities to more effectively plan for infrastructure, services, and economic development initiatives. Moreover, by incorporating the data into various strategic planning and forecasting models, the Region is better equipped to respond to emerging opportunities and challenges, ensuring a resilient, future-ready economy. The Workplace Count is also an important tool in supporting a number of economic development priorities across Waterloo Region. Some of the priorities that the data supports include the following:

- Producing a variety of infographic, mapping, and other products that illustrate the diversity and composition of the Region's economy;
- Providing input for planning studies;
- Informing square footage per employee assumptions for Development Charges Background studies;
- Assisting with business retention and attraction, and populating databases such as client relationship management (CRM) and business directories;
- Responding to requests for information about Waterloo Region's economy;
- Creating employment estimates and growth forecasts for infrastructure planning purposes;
- Informing Regional and Area Municipal strategic and operational projects such as two-way all-day GO service, monitoring change in the Central Transit Corridor, Stage 2 ION, and transit planning;
- Assessing labour force needs in key employment areas, including childcare and infrastructure requirements; and
- Informing investment attraction efforts by providing insights on industry supply chains and employment demand.

An important distinction in this year's survey is the collection of data in rural areas. Historically, the Workplace Count focused on collecting data from the cities, and urbanized areas in the townships such as New Hamburg, Elmira, and St. Clements. While data was still collected in these geographies, the 2024 survey was expanded to collect information from businesses located in rural areas, outside of the aforementioned settlement areas. Agriculture data from the census is available for businesses that solely participate in agricultural activities, but does not include

information on rural businesses that have distinct operations unrelated to agriculture. The Rural Survey targeted businesses not primarily engaged in agricultural activities such as growing crops or raising animals. Some examples of the rural businesses surveyed include furniture manufacturers, sheet metal fabricators, or carpentry shops. Many of these businesses exist as ancillary uses on farm properties, often referred to as on-farm diversified uses. Information specific to the rural survey has been summarized as a separate appendix. This data is not available from any other source. Statistics Canada Labour Force Survey data is not comparable, as it provides information focused on employed people who live in the region, as opposed to the workplaces and jobs that are located in the region.

## **6. Communication and Engagement with Area Municipalities and the Public**

### **Area Municipalities:**

A Municipal Advisory Group comprised of both Planning and Economic Development staff from the Area Municipalities provided advice and support throughout the Workplace Count project. This group was effective in spreading the news about the survey within their respective communities and also collected data from large employers to contribute to the survey. Information from the project is shared with the Area Municipalities.

A sincere thanks is extended to all Area Municipal staff, Regional ITS/GIS and the Waterloo Region business community who helped to make this project a success.

### **Public:**

Communication with the public has been consistent throughout the Workplace Count project. Final data will be summarized and shared through the Region of Waterloo website.

## **7. Financial Implications:**

This information directly supports strategic initiatives like infrastructure planning, workforce development, and economic forecasting, ensuring that investments are aligned with regional growth trends and is essential for optimizing resource allocation and supporting targeted investment.

## **8. Conclusion / Next Steps:**

Workplace Count data is being shared with Area Municipalities for their use. The Region of Waterloo will continue to monitor the region's businesses, with another workplace count project anticipated in 2026.

## **9. Attachments:**

Appendix A: 2024 Urban Workplace Count Appendix

Appendix B: 2024 Rural Workplace Count Appendix

**Prepared By:** Bobby Soosaar, Planning Information Specialist

Ryan Pogrzeba, Manager, Growth Management and Analytic Services

**Reviewed By:** Danielle De Fields, Director, Regional Growth, Development, and Sustainability Services

**Approved By:** Rod Regier, Commissioner, Planning, Development, and Legislative Services



**Date:**              **February 11, 2025**

**Subject:**        **2024 Workplace Count**

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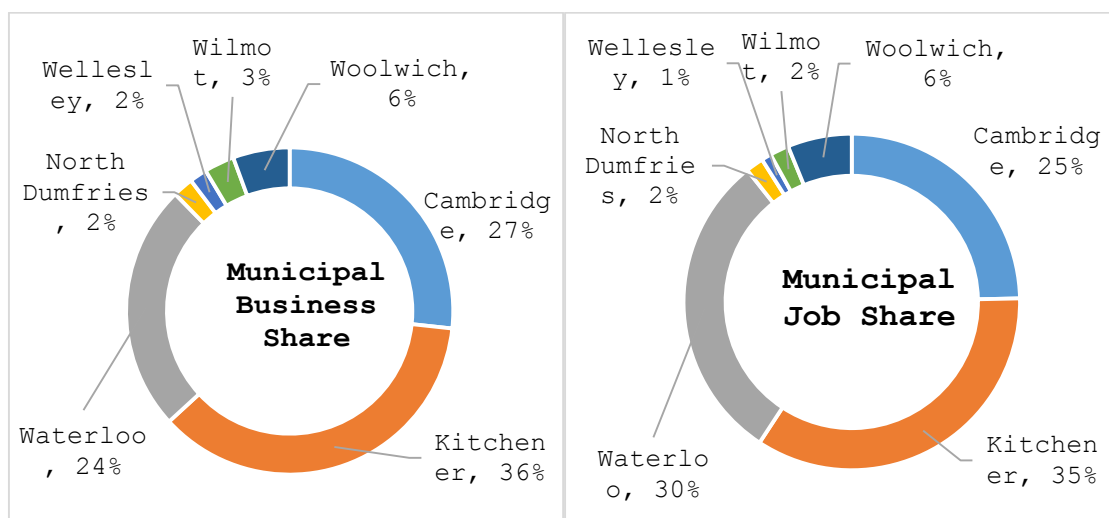
This bulletin provides details from the 2024 Workplace Count survey. The Workplace Count surveys places of employment to provide a comprehensive understanding of the characteristics of businesses throughout the Region. The project targets businesses that have a physical location in Waterloo Region. The survey is voluntary, and businesses could refuse to participate or choose to only answer some of the survey questions. The results presented in the report are based on survey responses received. The Workplace Count project visited over 11,000 establishments, of which, 8,300 successfully completed the survey. The survey did not collect information on workplaces in homes, or agricultural establishments engaged in growing crops or raising animals. Therefore, the data does not represent total employment in Waterloo Region.

The results presented in this bulletin represent businesses located throughout the Regions cities, township urban areas, and settlement areas. A survey of rural businesses was conducted in 2024, the results can be found in Appendix B – 2024 Rural Survey of report PDL-GDS-25-002. The Rural Survey targeted businesses located outside of settlements, in the Region's rural areas, that are not engaged in agricultural activities.

**Survey Highlights:**

The majority of businesses (87%) are located within Cambridge, Kitchener, and Waterloo, with the remaining 13% located in the townships. A higher proportion of jobs are located in the cities (90%) with 10% of jobs located in the townships.

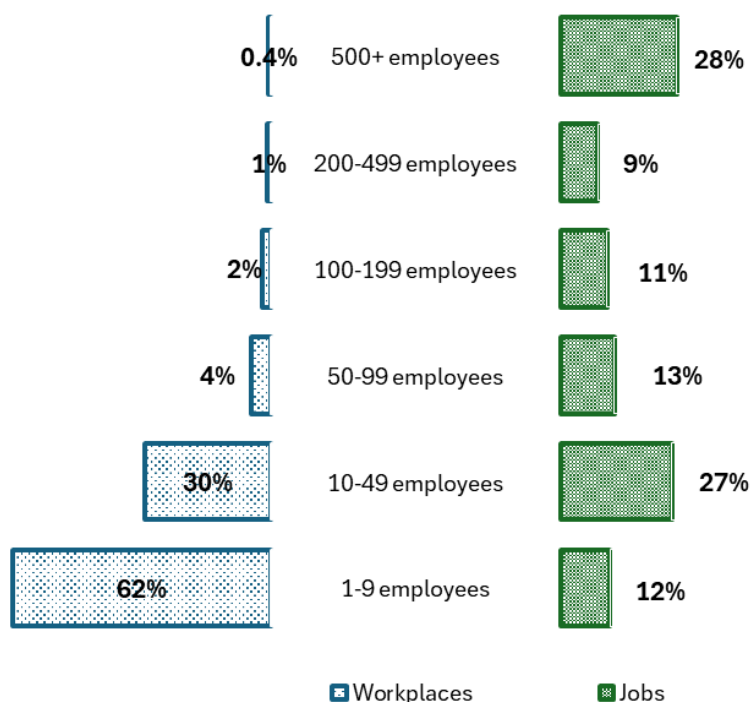
**Figure 1: Municipal Business and Job Share**



### Size of Workplace

The majority of businesses have fewer than 10 employees, representing 62% of all business establishments in the Region. Although representing the majority of businesses in the Region, small businesses accounted for 12% of employment. Medium sized businesses with 10-49 employees, accounted for 30% of businesses and 27% of all employment in the Region. Large employers, those with more than 500 employees represented less than half a per cent of all regional businesses, though employed 28% of jobs in the Region.

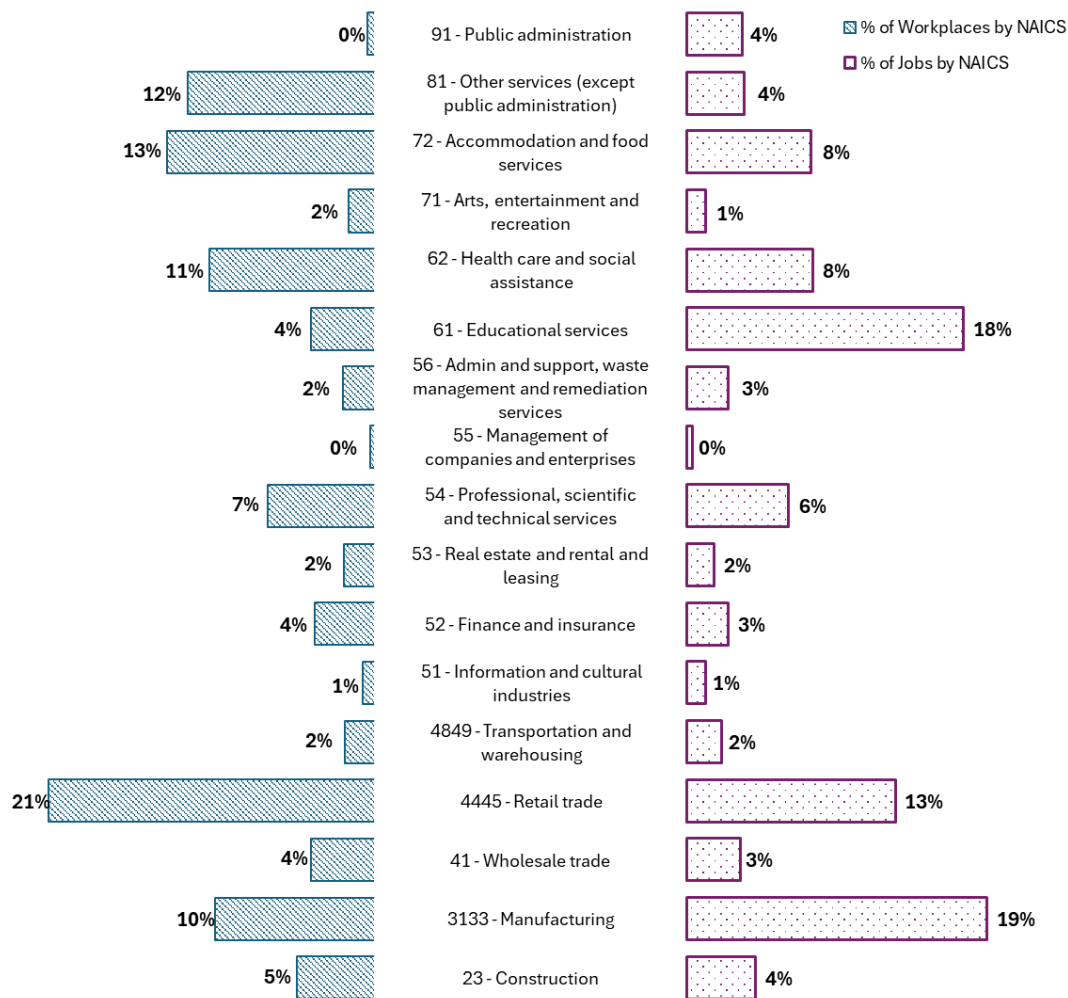
**Figure 2: Jobs and Workplaces by Size of Workplace**



## Employment by Sector:

The Workplace Count uses the 2022 North American Industrial Classification System (NAICS) to categorize employment by sector. Manufacturing reported the highest employment in the Region, consisting of 19% of the Regions surveyed employment, with the majority of those jobs being full-time. Three post-secondary institutions in the Region contribute to the educational services sector employing the second highest proportion of jobs, at 18%. Retail trade is the top sector in terms of business locations with over one fifth (21%) of all the Regions workplaces identified (Figure 3).

**Figure 3: Employment Breakdown by Sector**



The following table provides a breakdown of employment based on NAICS into broader employment sectors. The Workplace Count data was collected and categorized based on NAICS. NAICS is an industry classification system developed by statistical agencies in North America, to classify business establishments for the purpose of collecting and analyzing business information. The broader employment sectors are groupings of common industries in terms of the physical space and geographic locations they occupy.

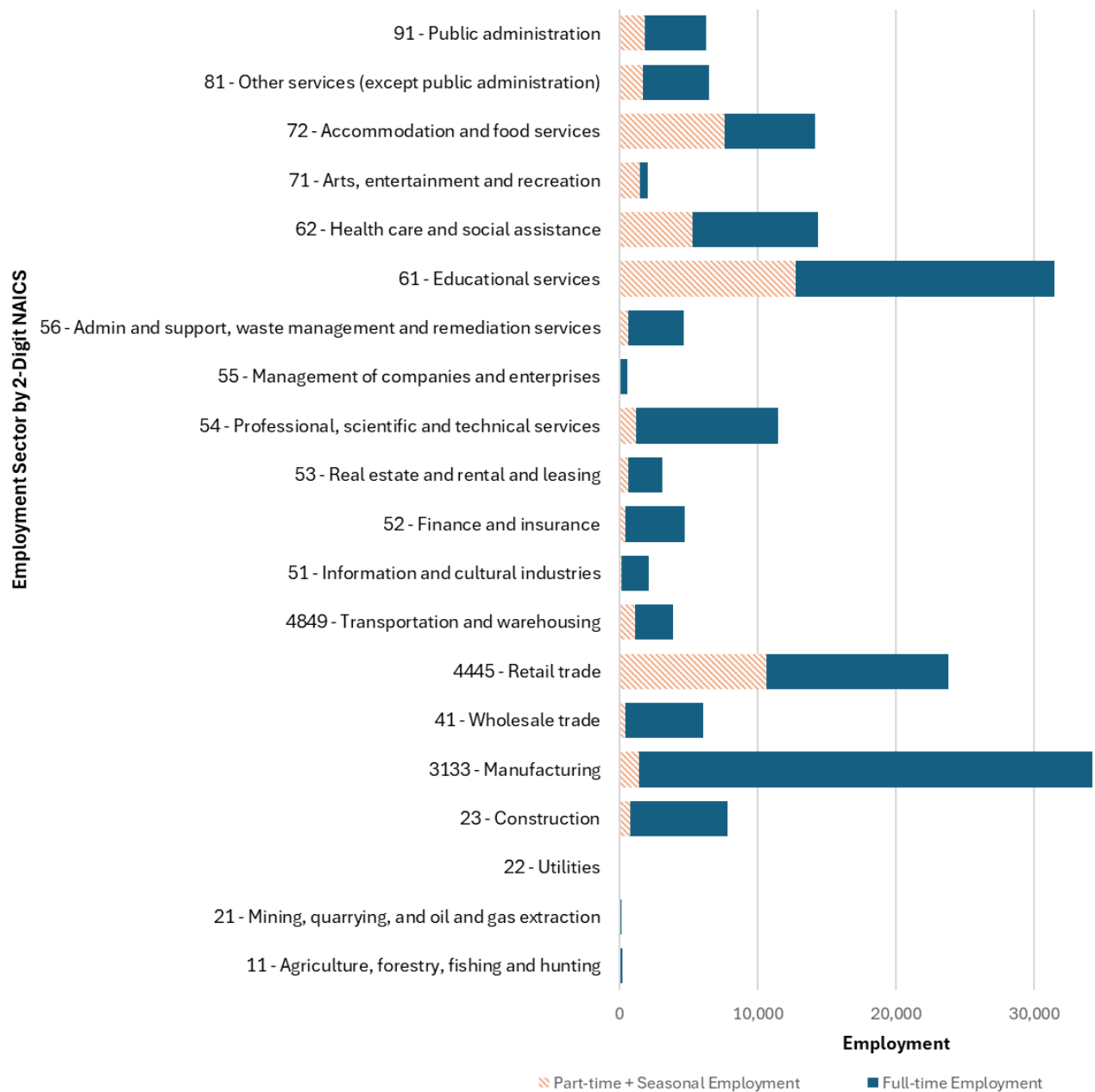
**Table 1: Employment Sector Breakdown by Two-Digit NAICS**

<b>Sector by 2-Digit NAICS</b>	<b>Employment Sector</b>
11 - Agriculture, Forestry, Fishing and Hunting	Primary
21 - Mining, Quarrying, and Oil and Gas Extraction	Primary
22 - Utilities	Industrial
23 - Construction	Industrial
31-33 - Manufacturing	Industrial
41 - Wholesale trade	Industrial
44-45 - Retail trade	Retail
48-49 - Transportation and warehousing	Industrial
51 - Information	Office
52 - Finance and Insurance	Office
53 - Real Estate and Rental and Leasing	Office
54 - Professional, Scientific, and Technical Services	Office
55 - Management of Companies and Enterprises	Office
56 - Administrative and Support and Waste Management and Remediation Services	Office
61 - Educational Services	Institutional
62 - Health Care and Social Assistance	Institutional
71 - Arts, Entertainment, and Recreation	Retail
72 - Accommodation and Food Services	Retail
81 - Other Services (except Public Administration)	Retail
91 - Public administration	Institutional

### **Employment by Sector and Employment Status**

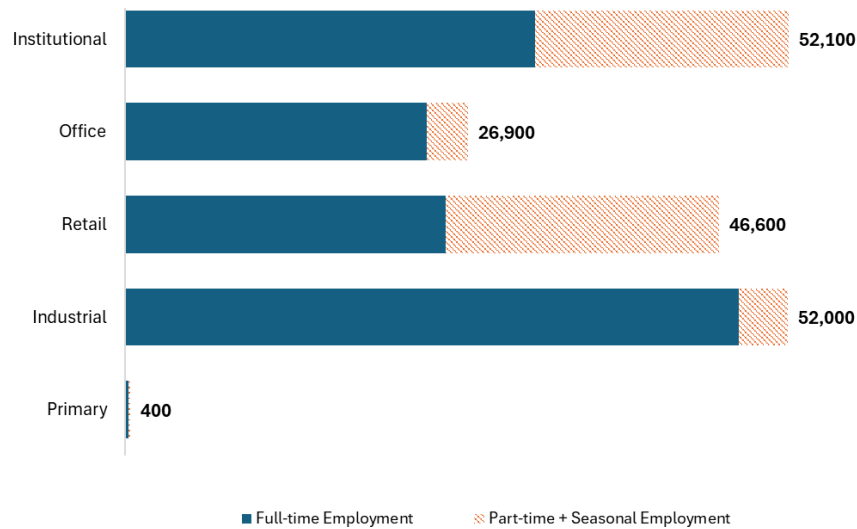
Across all sectors, 73 per cent of employment in the Region was full-time, while 27 per cent of employment was part-time. The arts, entertainment, and recreation sector had the highest proportion of part-time jobs at 71%, followed by accommodation and food services, where 54% of employment was part-time. Conversely, 96% of manufacturing jobs were full-time, the highest proportion among all sectors for full-time employment. Similarly, transportation and warehousing, wholesale trade and construction are primarily comprised of full-time jobs (Figure 4).

**Figure 4: Employment by 2-Digit NAICS and Employment Status**





**Figure 5: Employment by Sector and Employment Status**

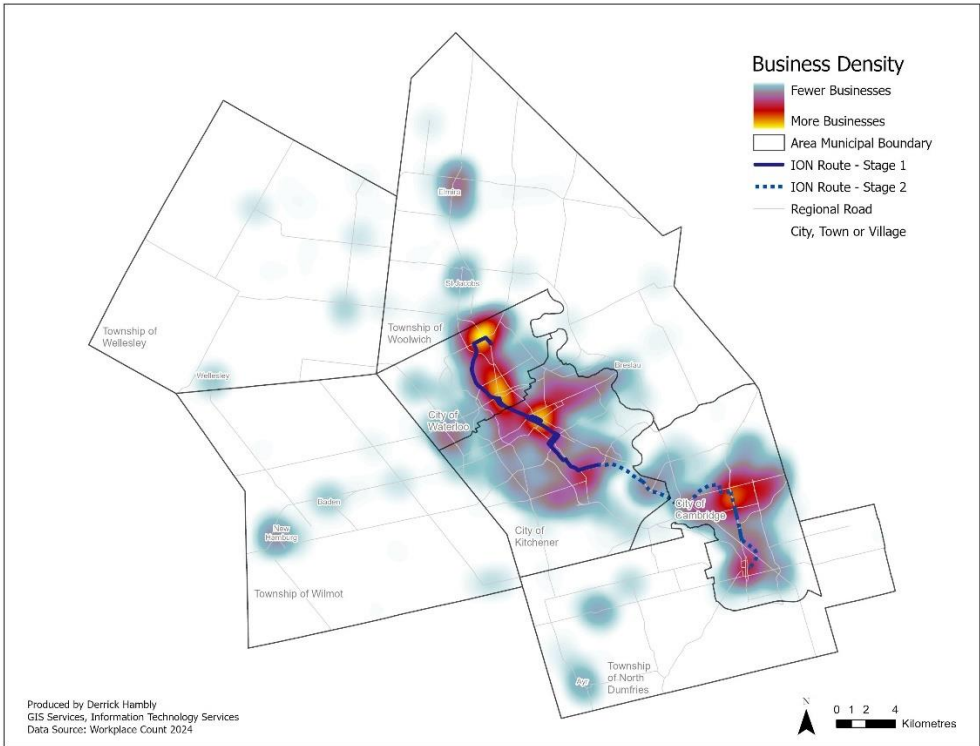


### **Geographic Distribution of Businesses and Jobs**

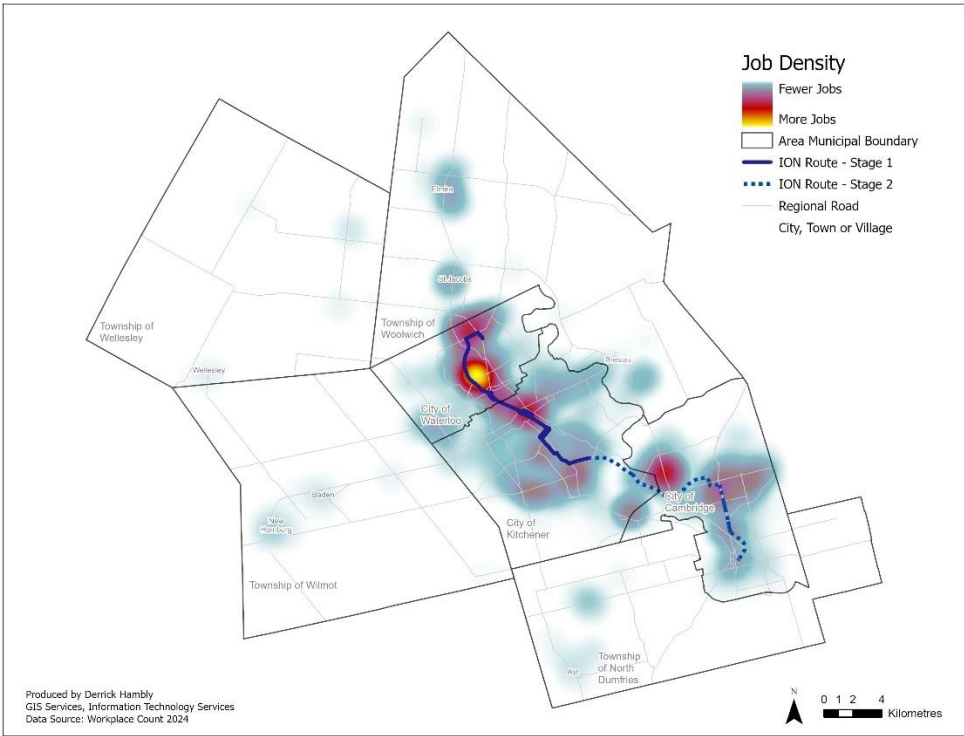
The Regions businesses are largely concentrated around the ION rapid transit route, connecting the larger malls (Conestoga, Fairway, and Cambridge Centre), to the core areas of Uptown Waterloo, Downtown Kitchener, and Downtown Galt (Map 1). Nearly a third of all businesses in the Region are located within 800 meters of an ION station, these areas primarily consist of retail, institutional, and office-based businesses.

Comparatively, the Regions jobs are largely concentrated around the Universities in the City of Waterloo, along the ION route in both Kitchener and Waterloo as well as in employment areas such as the East Side Lands in Cambridge (Map 2). These areas are comprised of Institutional, Retail, and Industrial employment.

**Map 1: Locations of Businesses**



**Map 2: Location of Jobs**



### Employment Areas:

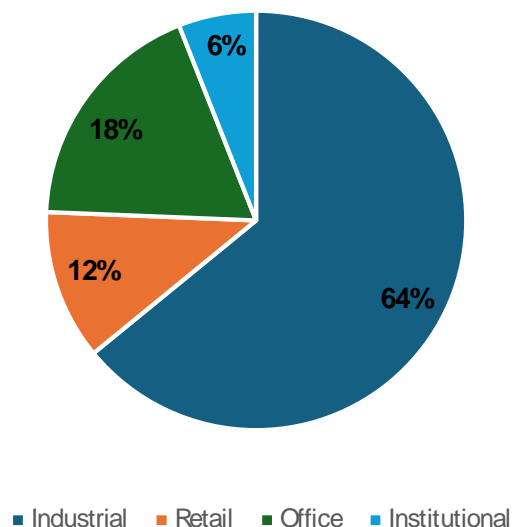
The Region's Employment Areas are strategically located areas intended to accommodate business and economic activities, such as manufacturing, warehouses, research and development and associated retail and ancillary facilities. These areas are crucial for the Region's long-term economic health and are to be protected for current and future employment uses.

Currently, Employment Areas contain 30% of identified workplaces and 38% of all jobs in the Region. Furthermore, a substantial 82% of the Region's manufacturing jobs are concentrated within Employment Areas as illustrated in Map 3.

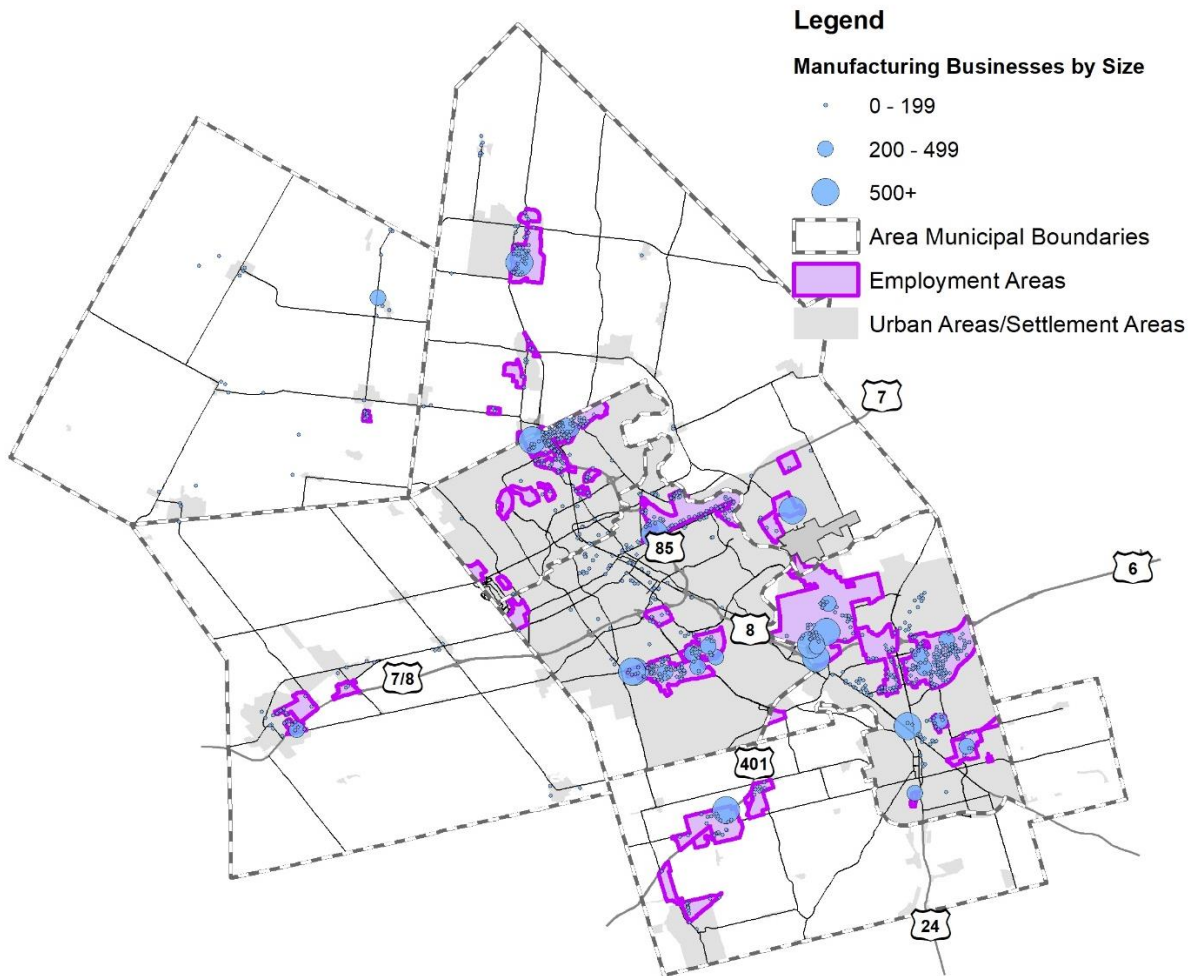
Recent updates to Provincial planning policies have tightened the criteria for designating Employment Areas. With this change, certain uses, including institutional, commercial, retail and office spaces not directly related to the primary employment activities, are no longer permitted within these areas.

Figure 6 shows a breakdown of employment by type within Employment Areas. Notably, nearly one in three job types may no longer meet the new designation criteria. This could potentially result in the gradual conversion of these uses to non-employment uses.

**Figure 6: Breakdown of Employment by Type on Employment Areas**



**Map 3: Distribution of Manufacturing Businesses**



**Major Transit Station Areas:**

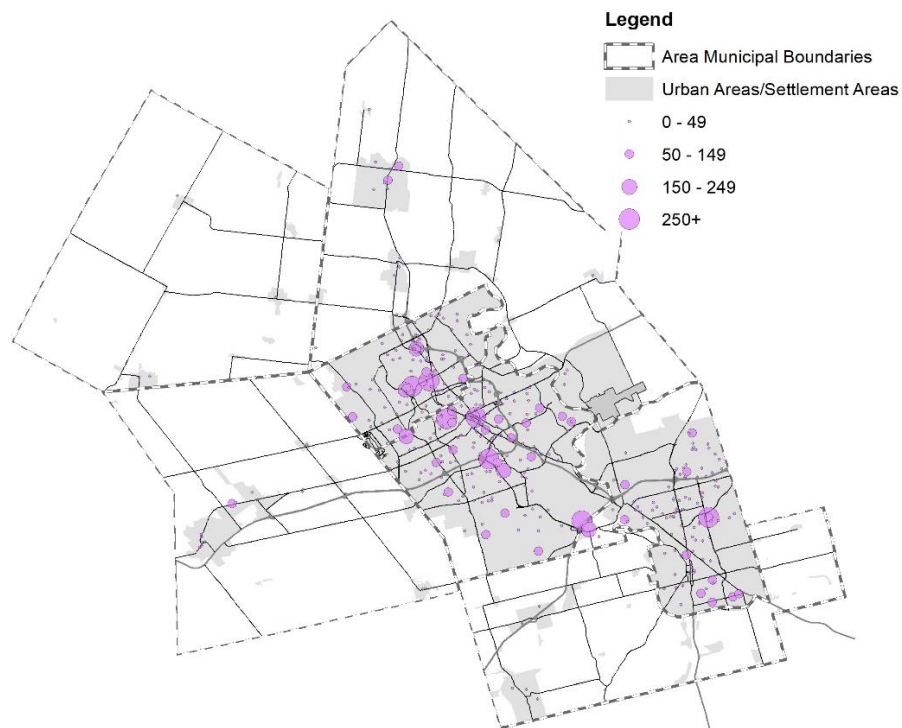
Major Transit Station Areas (MTSAs) are generally defined as the area within an approximate 500 to 800-metre radius of a transit station. This is considered the distance most people will walk to take rapid transit. Waterloo Region has 27 MTSAs along the ION rapid transit corridor. Over 30% of the Region's workplaces, including some of the regions major employers, exist within MTSAs. The establishments located within MTSAs employ more than 50,000 workers, representing 28% of the surveyed jobs across the Region. This indicates that a large share of the Region's jobs are serviced by rapid transit, with an even larger share being serviced by the Grand River Transit bus network.

**Map 4: Distribution of Businesses within MTSAs**



## Appendix A: Spatial Distribution of Businesses by Sector

### Map A: Educational Services by Number of Employees

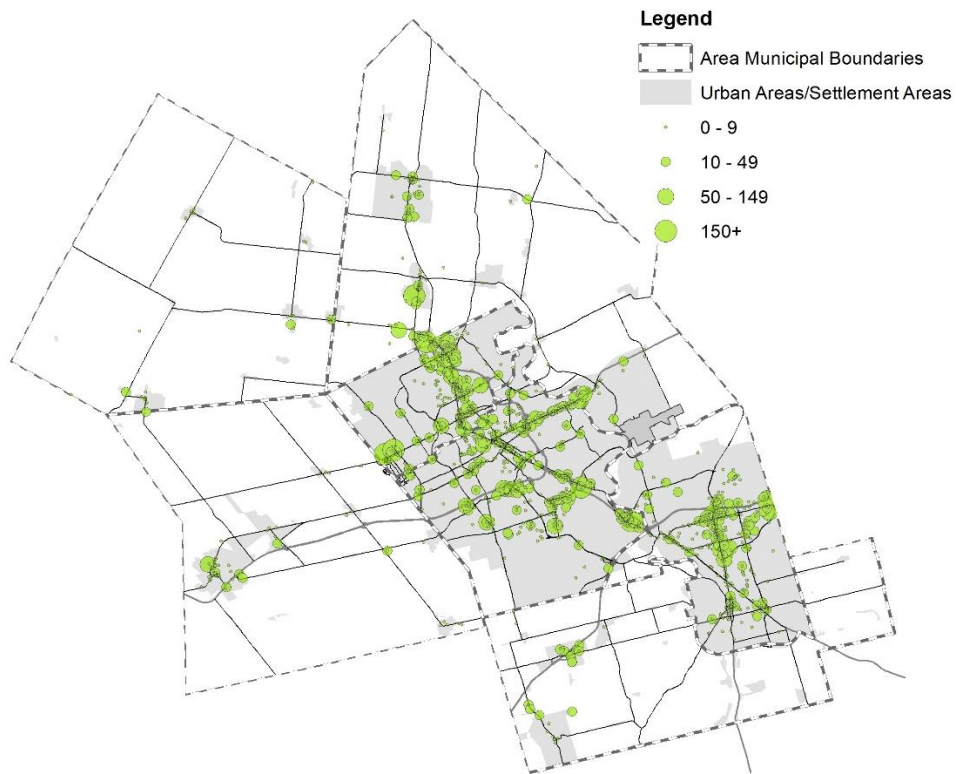


### Map B: Office Businesses by Number of Employees

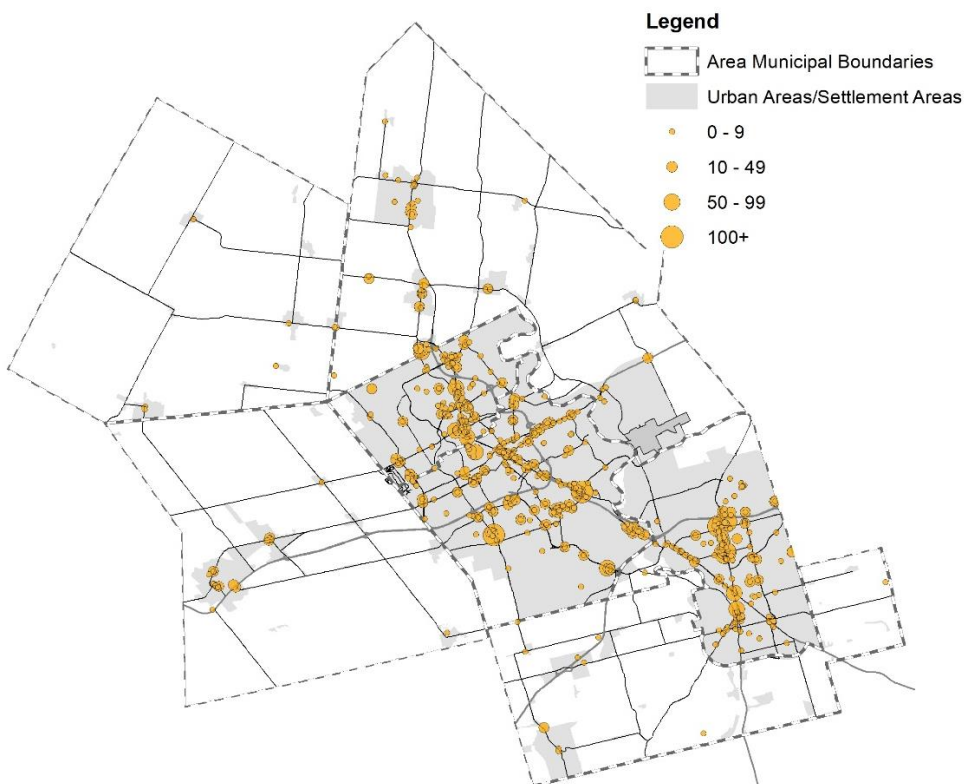




**Map C: Retail Businesses by Number of Employees**

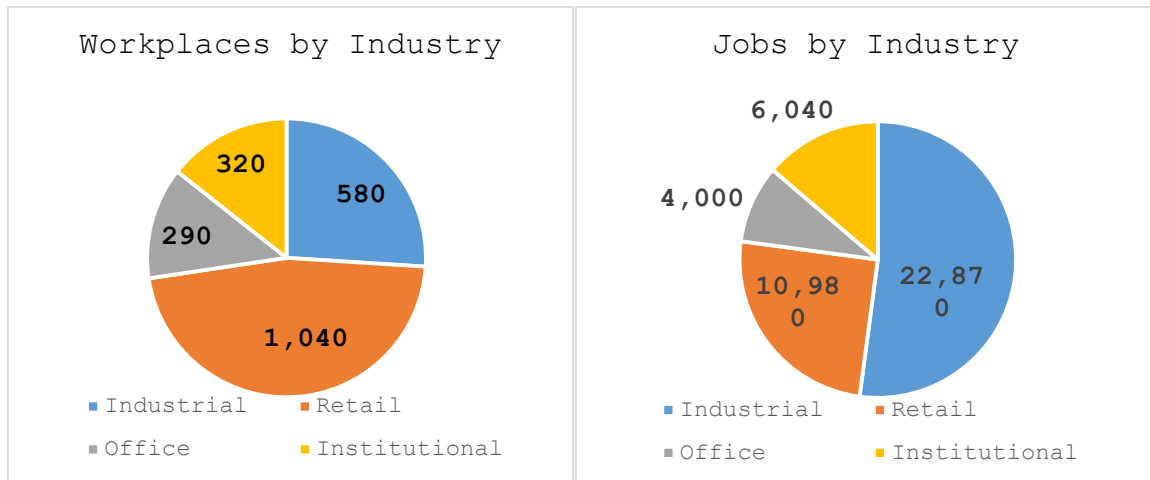


**Map D: Accommodation and Food Service Businesses by Number of Employees**



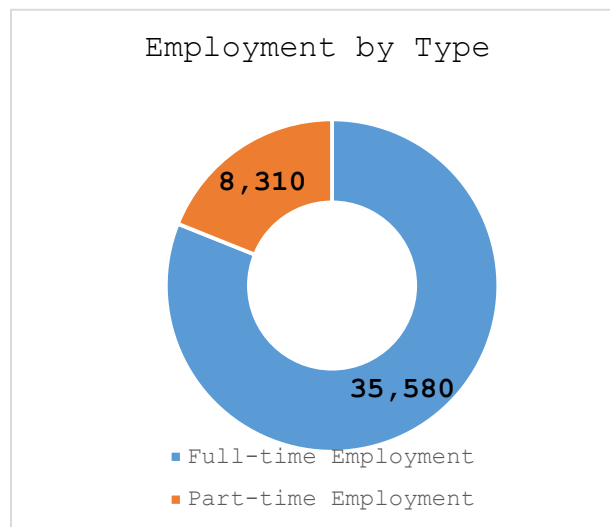
## Appendix B: City of Cambridge Profile

The City of Cambridge contains over 2,200 unique workplaces, which represents 27% of the regional total. Retail and industrial makeup a significant portion of the City of Cambridge's workplaces and jobs. Nearly a quarter of workplaces in Cambridge are industrial. However, the industrial sector employs more than half of the 44,000 jobs located within the City of Cambridge.



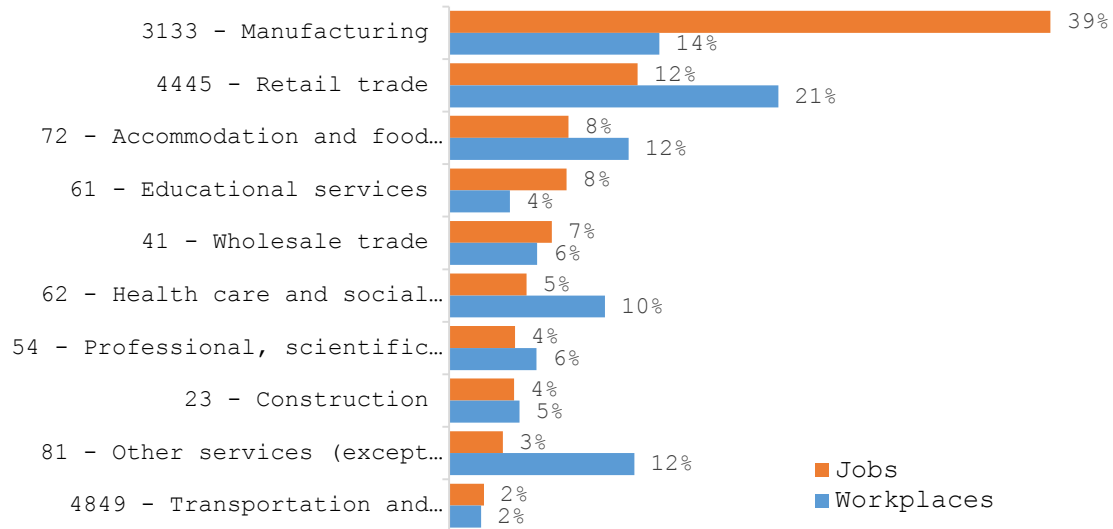
## Employment by Type

Of Cambridge's 44,000 jobs, 81% are full-time and 19% are part-time. The proportion of full-time employees in Cambridge is higher than the Regional average of 73%. This is reflective of the large share of industrial jobs located in Cambridge, which generally employ full-time workers.

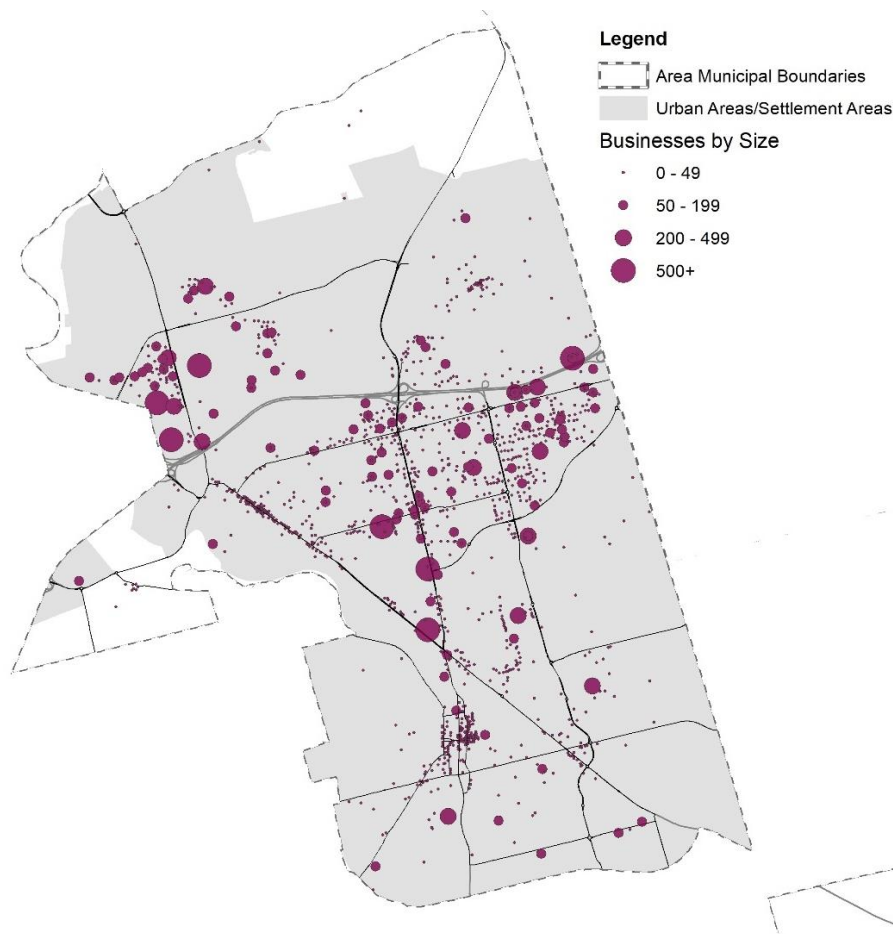




### Top 10 Employment Sectors in Cambridge

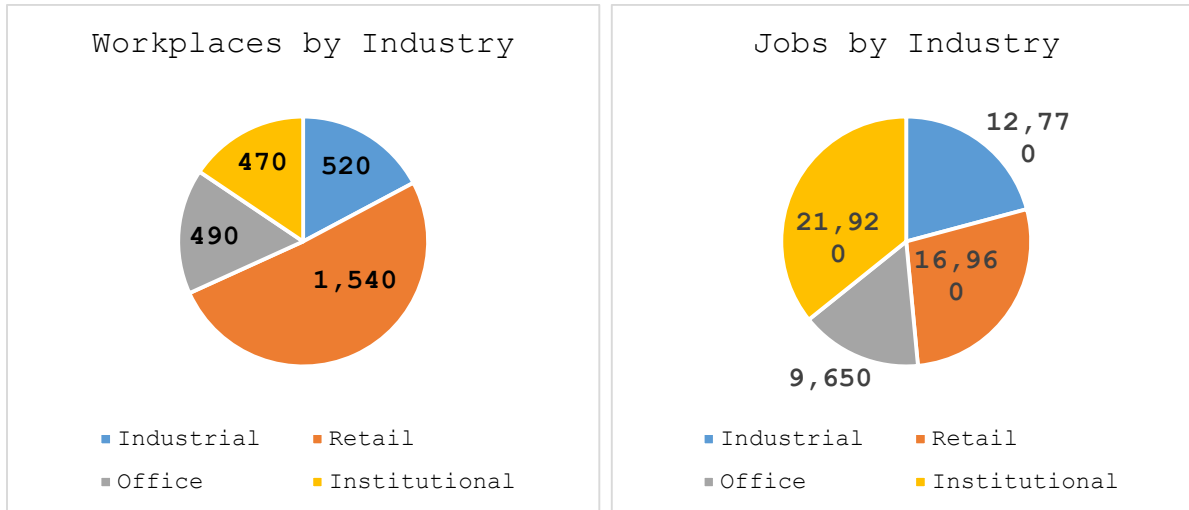


### Spatial Distribution of Businesses in Cambridge



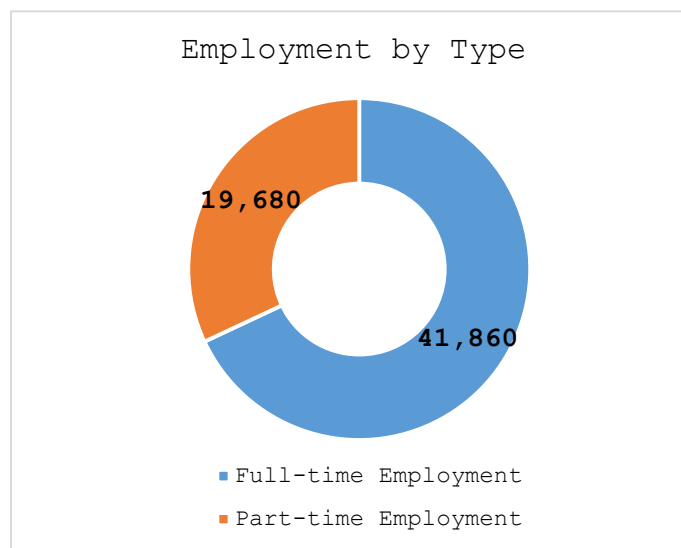
## Appendix C: City of Kitchener Profile

The City of Kitchener contains over 3,000 unique workplaces, which represents 36% of the regional total. The retail sector makes up a significant portion of the city's workplaces (51%). Jobs are more evenly distributed across industries, with institutional containing 36% of jobs, retail with 28%, industrial at 21% and office at 16% of jobs in Kitchener.

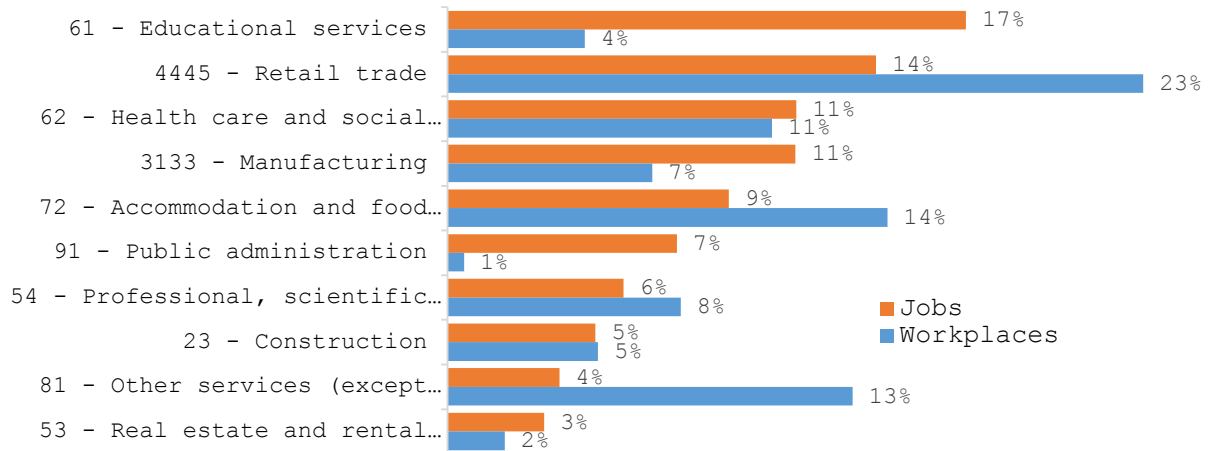


## Employment by Type:

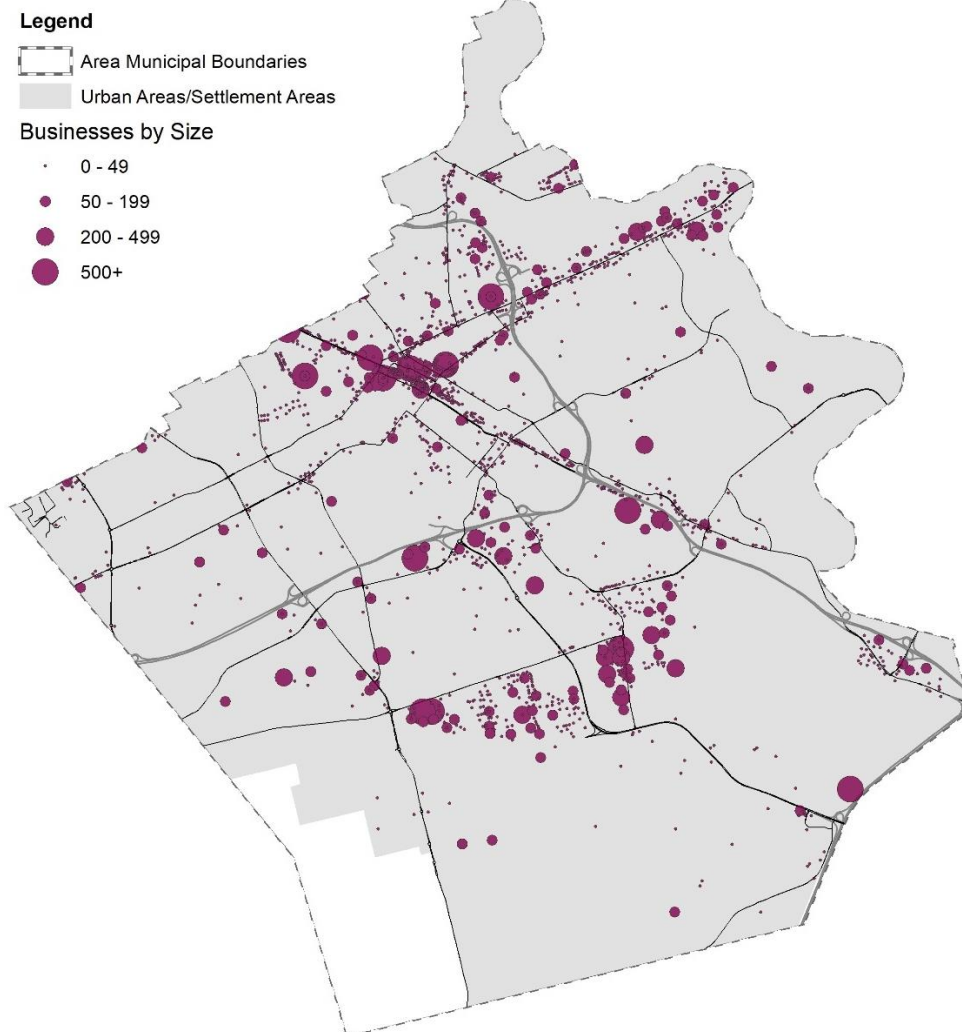
Of Kitchener's 61,500 jobs, 68% are full-time and 32% are part-time. The proportion of full-time employees in Kitchener is lower than the Regional average of 73%. This is reflective of the large share of institutional and retail sectors in Kitchener, which generally employ a higher proportion of part-time employees.



### Top 10 Employment Sectors in Kitchener

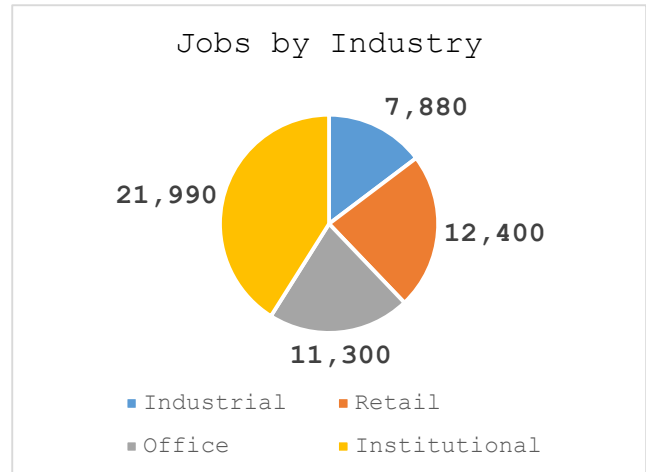
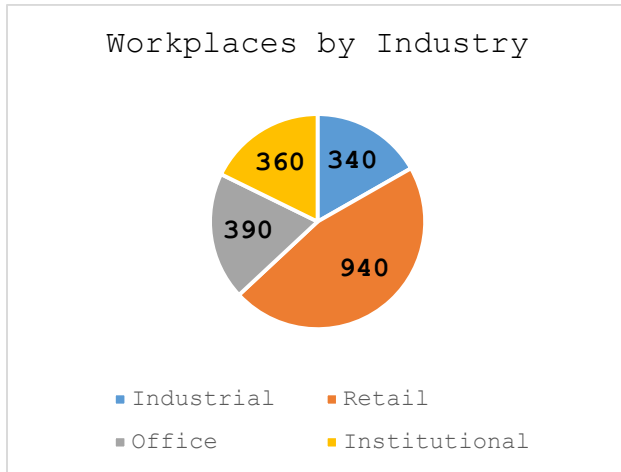


### Spatial Distribution of Businesses in Kitchener



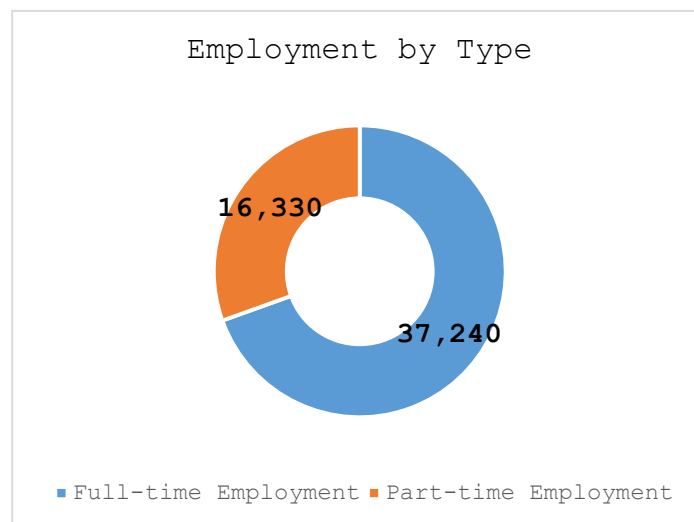
## Appendix D: City of Waterloo Profile

The City of Waterloo contains over 2,000 unique workplaces, which represents 24% of the regional total. The retail sector makes up a significant portion of the city's workplaces (46%). Institutional jobs make up the bulk of employment in Waterloo (41%). Employment in the remaining sectors (retail, office, and industrial) are evenly distributed.

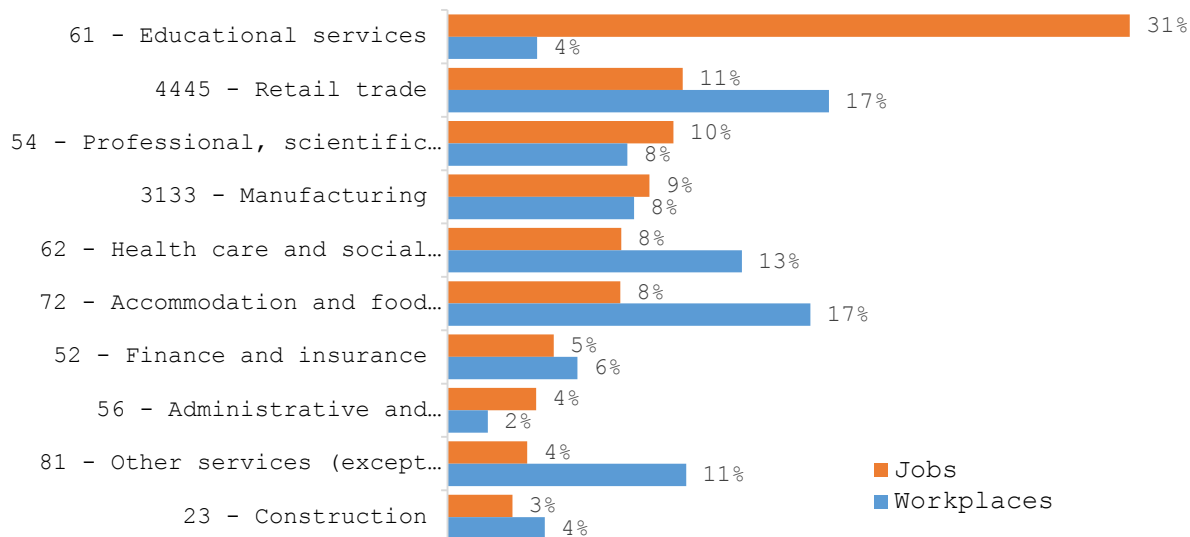


### Employment by Type:

Of Waterloo's 54,000 jobs, 70% are full-time and 30% are part-time. The proportion of full-time employees in Waterloo is lower than the Regional average of 73%. This is reflective of the large share of institutional and retail sectors in Waterloo, which generally employ a higher proportion of part-time employees.



### Top 10 Sectors by Employment in Waterloo



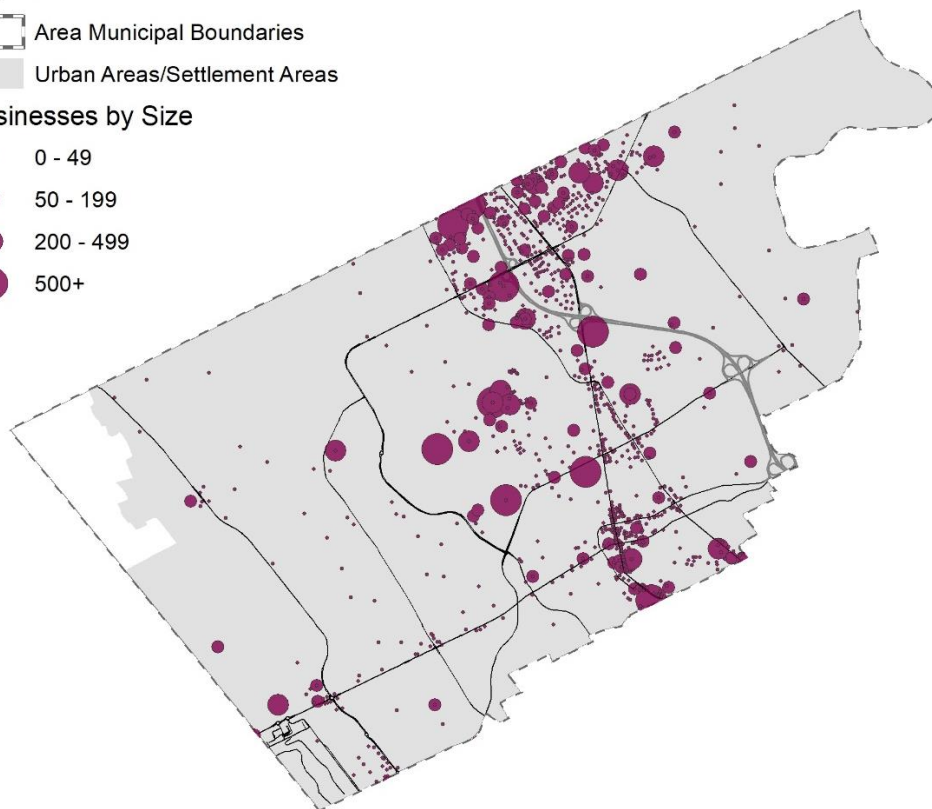
### Spatial Distribution of Businesses in Waterloo

#### Legend

- Area Municipal Boundaries
- Urban Areas/Settlement Areas

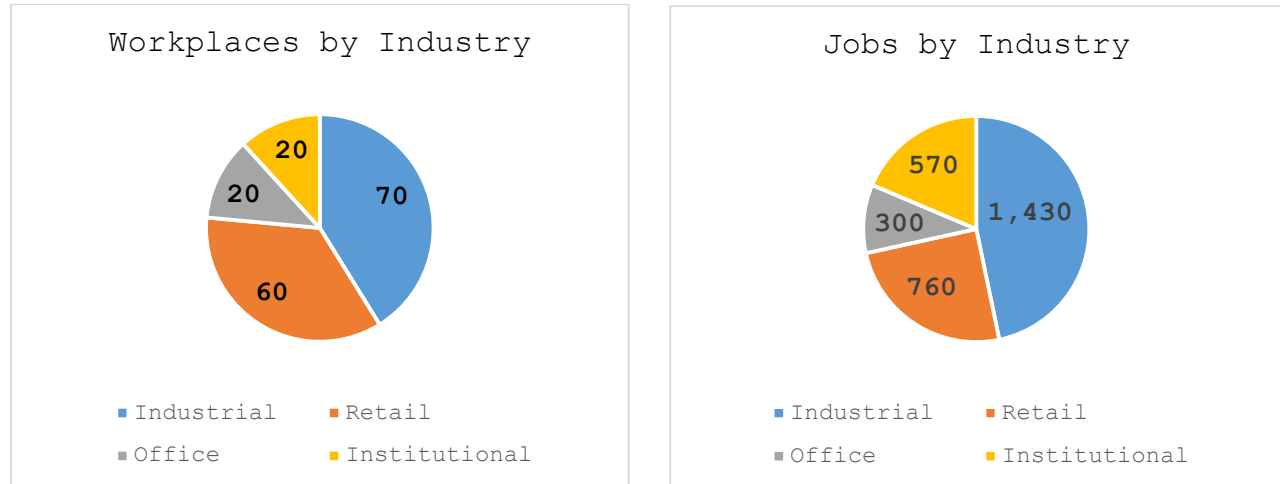
#### Businesses by Size

- 0 - 49
- 50 - 199
- 200 - 499
- 500+



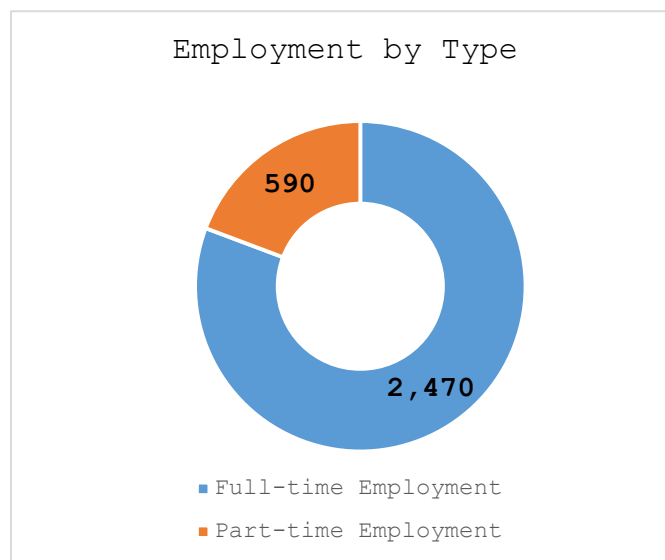
## Appendix E: Township of North Dumfries Profile

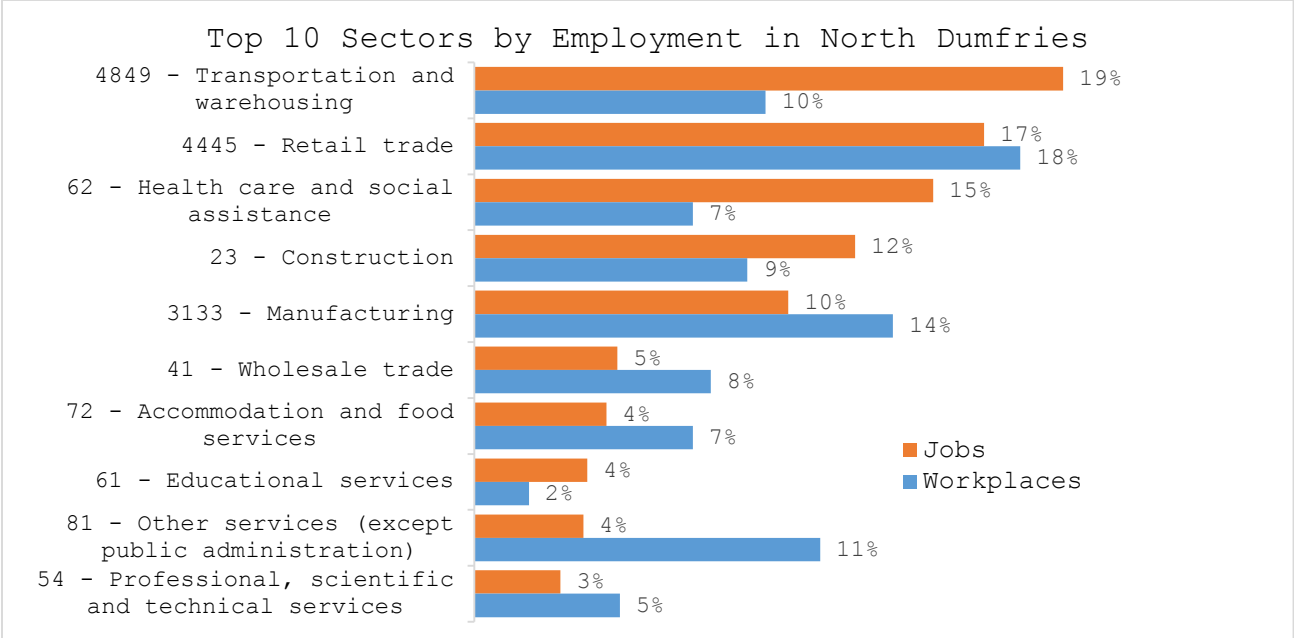
The Township of North Dumfries contains 170 unique workplaces, which represents 2% of the regional total. The industrial sector makes up a significant portion of the township's workplaces (41%). Similarly, jobs are concentrated in the industrial sector in North Dumfries.



### Employment by Type:

Of North Dumfries 3,000 jobs, 81% are full-time and 19% are part-time. The proportion of full-time employees in North Dumfries is higher than the Regional average of 73%. This is reflective of the large share of industrial jobs located in the township, which generally employ full-time workers.



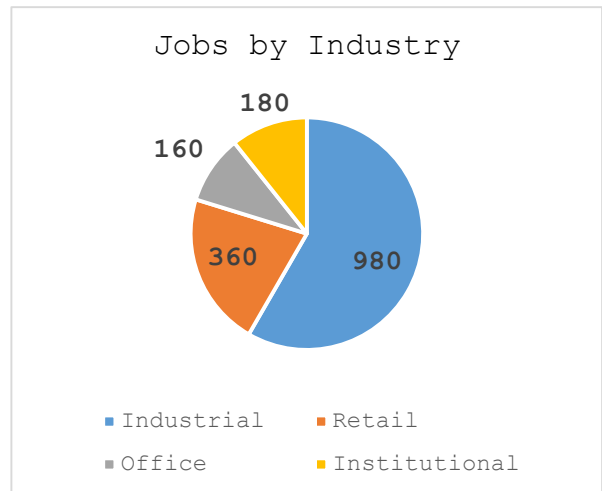
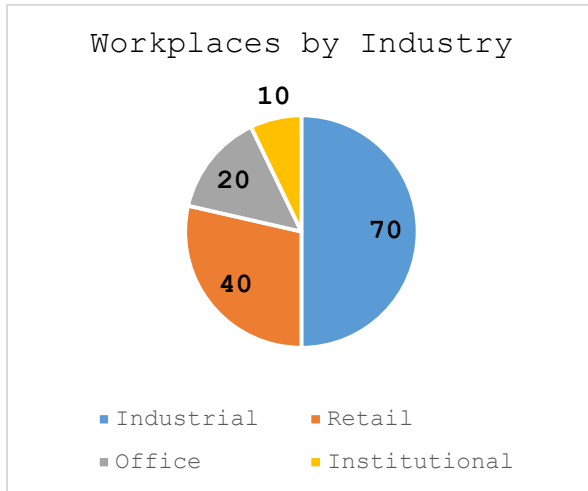


### Spatial Distribution of Businesses in North Dumfries



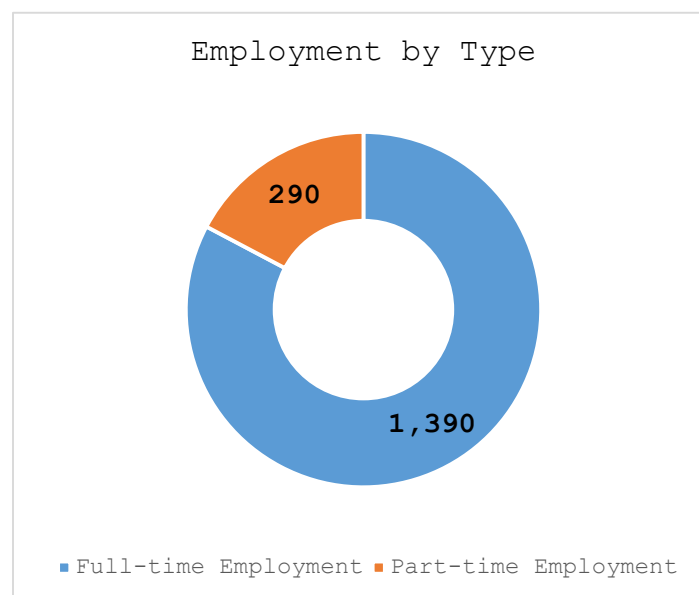
## Appendix F: Township of Wellesley Profile

The Township of Wellesley contains over 140 unique workplaces, which represents 2% of the regional total. The industrial sector makes up half of the township's workplaces and employs 58% of jobs in the township. Retail is the second largest sector in the township, employing 21% of surveyed jobs.



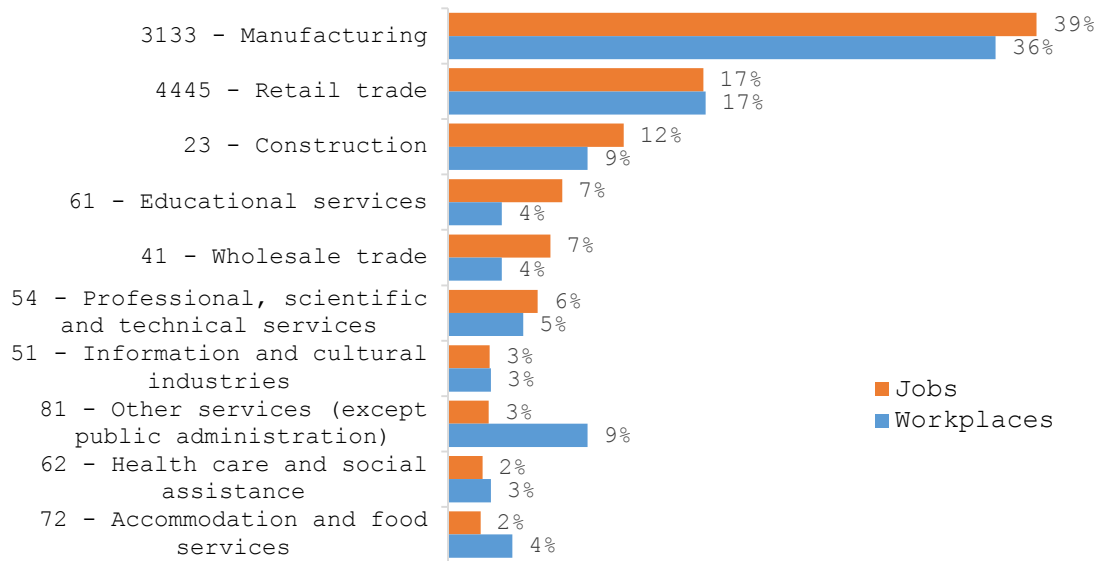
### Employment by Type

Of Wellesley's 1,700 jobs, 83% are full-time and 17% are part-time. The proportion of full-time employees in Wellesley is higher than the Regional average of 73%. This is reflective of the large share of industrial jobs located in the township, which generally employ full-time workers.





### Top 10 Employment Sectors in Wellesley



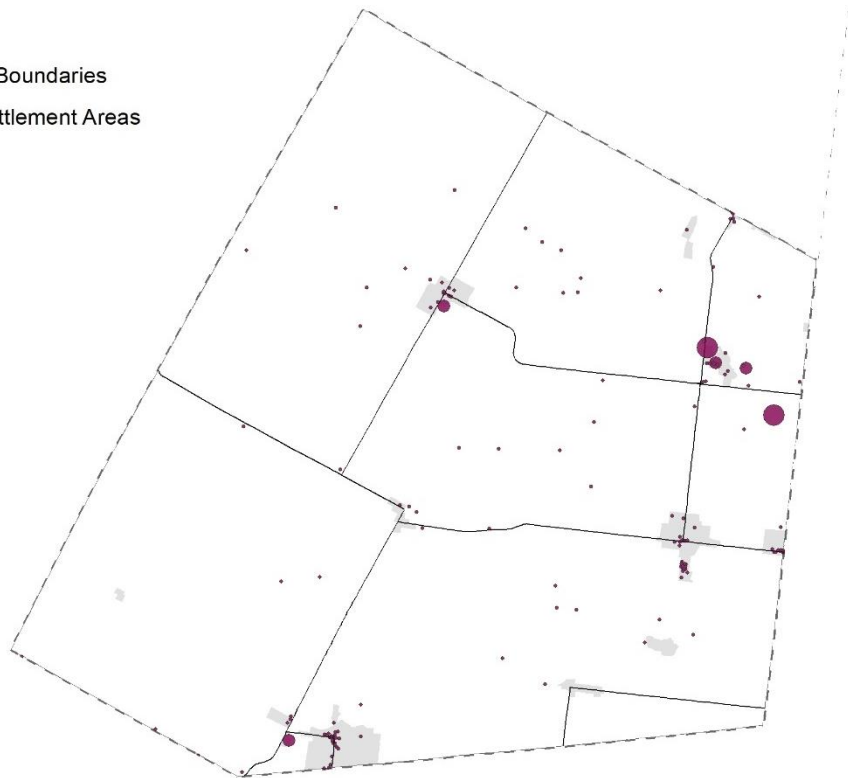
### Spatial Distribution of Businesses in Wellesley

#### Legend

- Area Municipal Boundaries
- Urban Areas/Settlement Areas

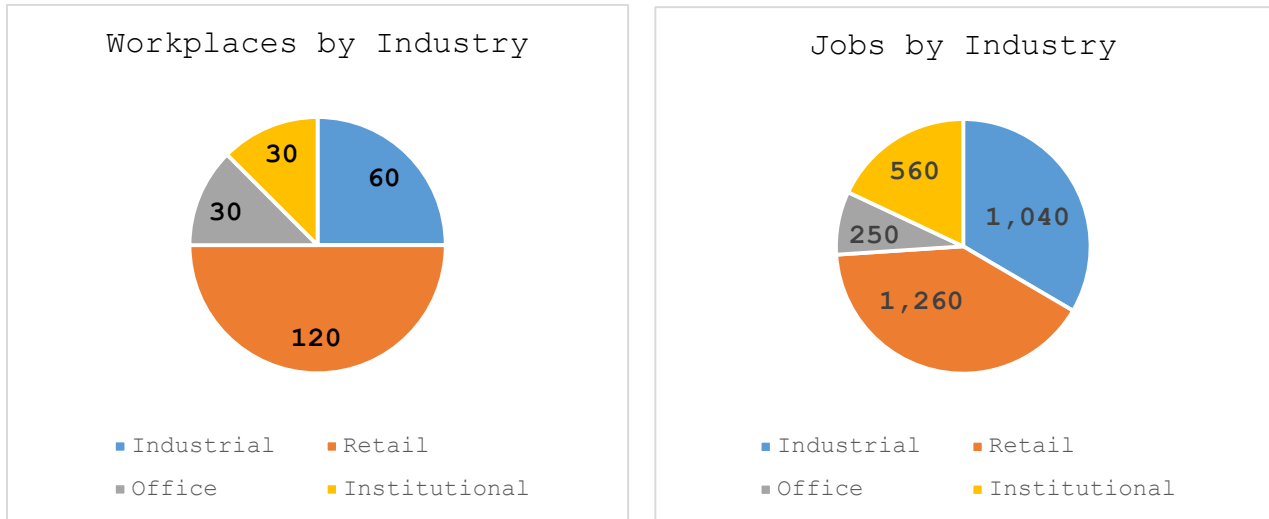
#### Businesses by Size

- 0 - 49
- 50 - 199
- 200 - 499
- 500+



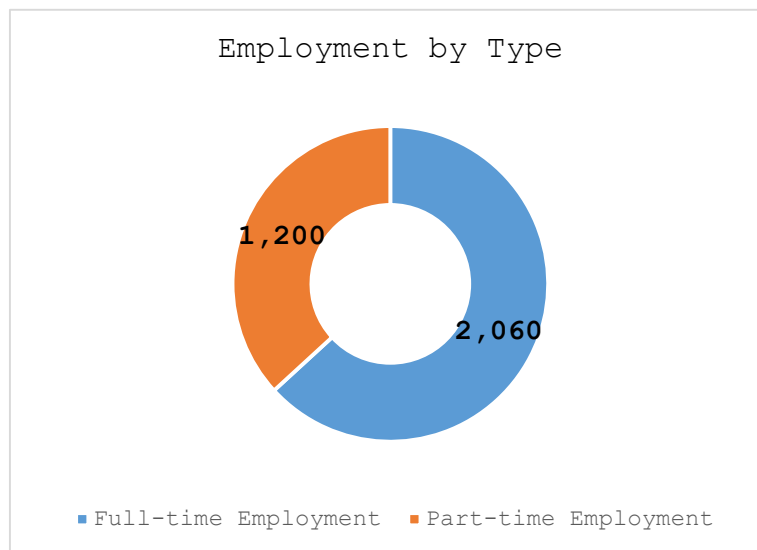
## Appendix G: Township of Wilmot Profile

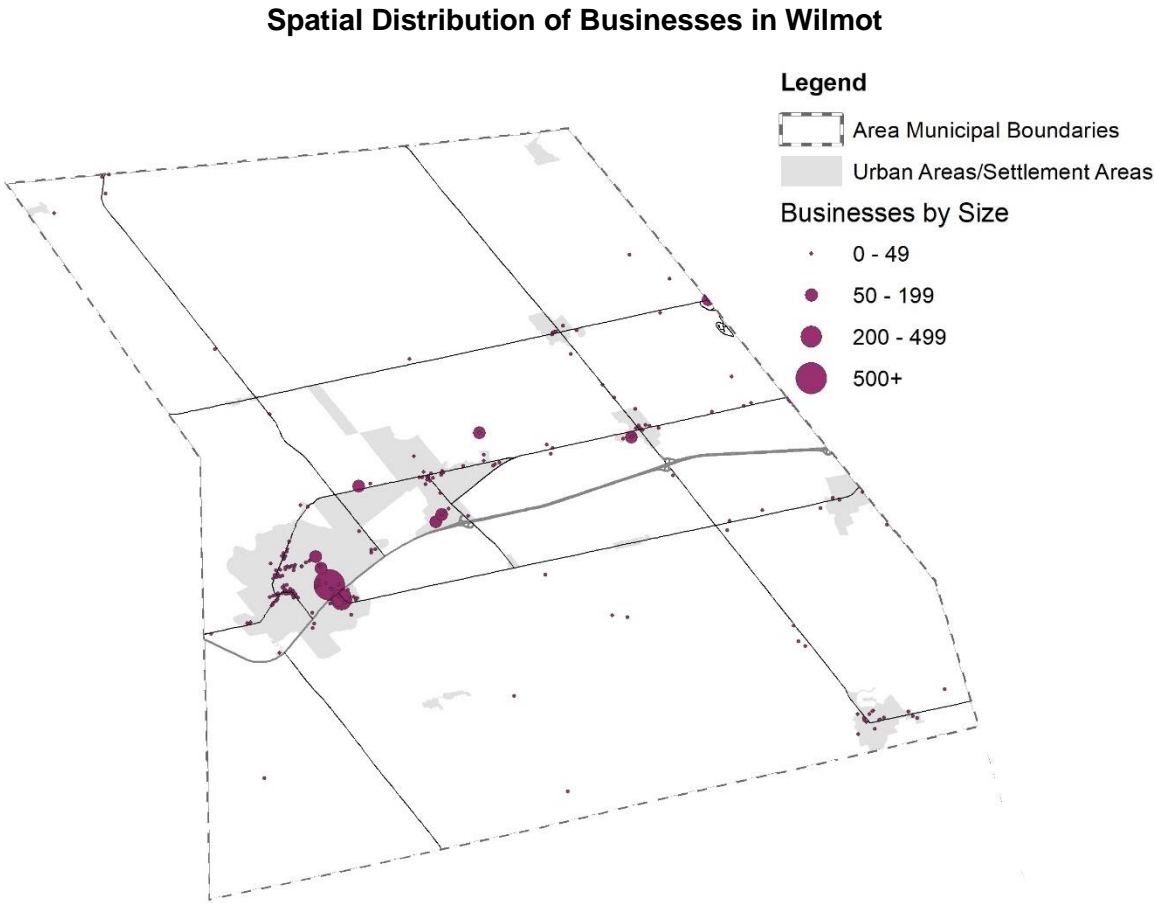
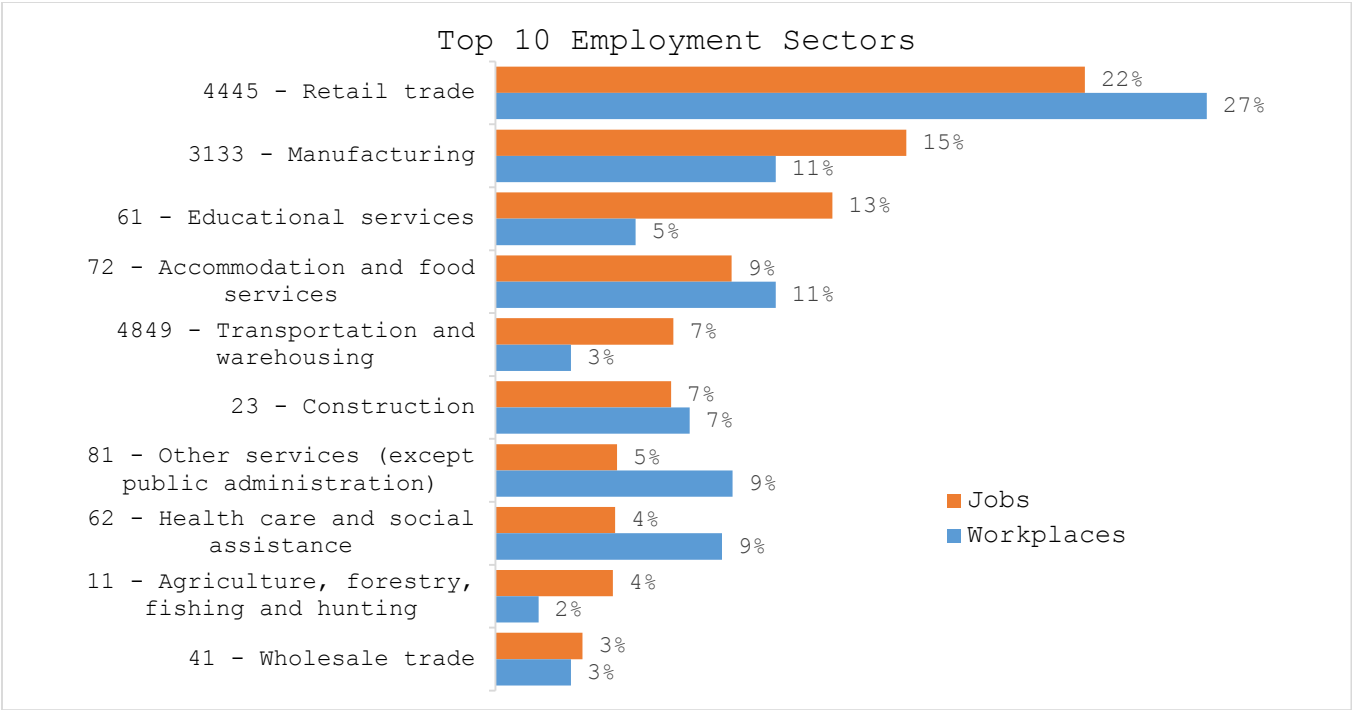
The Township of Wilmot contains over 250 unique workplaces, which represents 3% of the regional total. The retail sector makes up a significant portion of Wilmot's workplaces (50%). Similarly, retail makes up a majority of identified jobs in the township (41%). This is followed by manufacturing, which has 33% of identified jobs.



### Employment by Type:

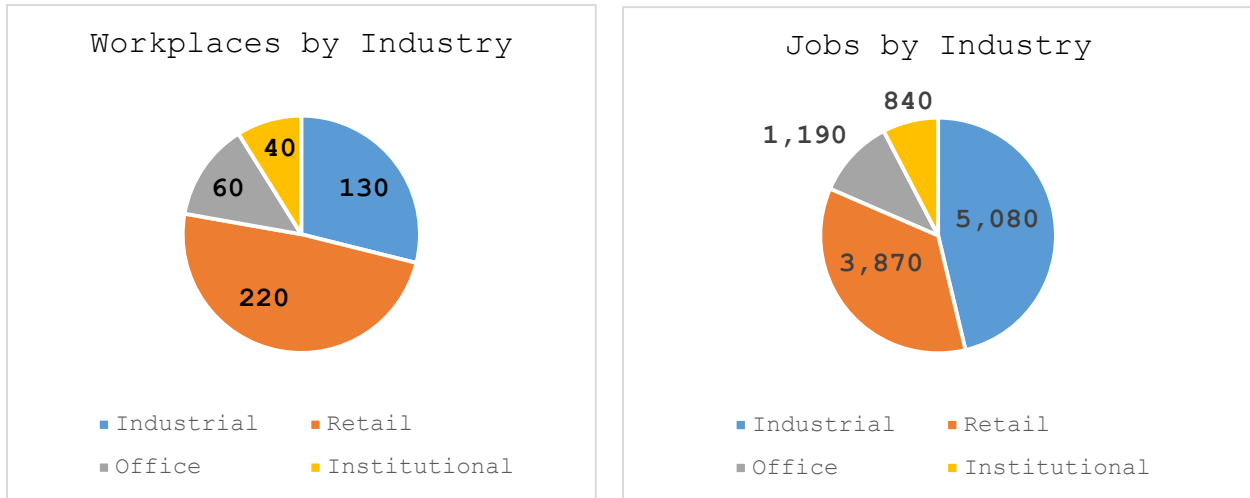
Of Wilmot's 3,200 jobs, 63% are full-time and 37% are part-time. The proportion of full-time employees in Wilmot is lower than the Regional average of 73%. This is reflective of the large share of jobs in the retail sector, which generally employ a higher proportion of part-time employees.





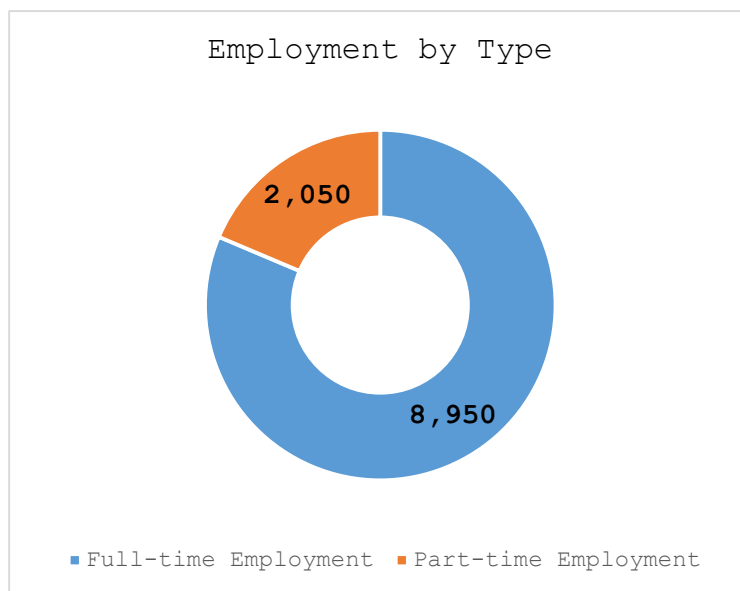
## Appendix H: Township of Woolwich Profile

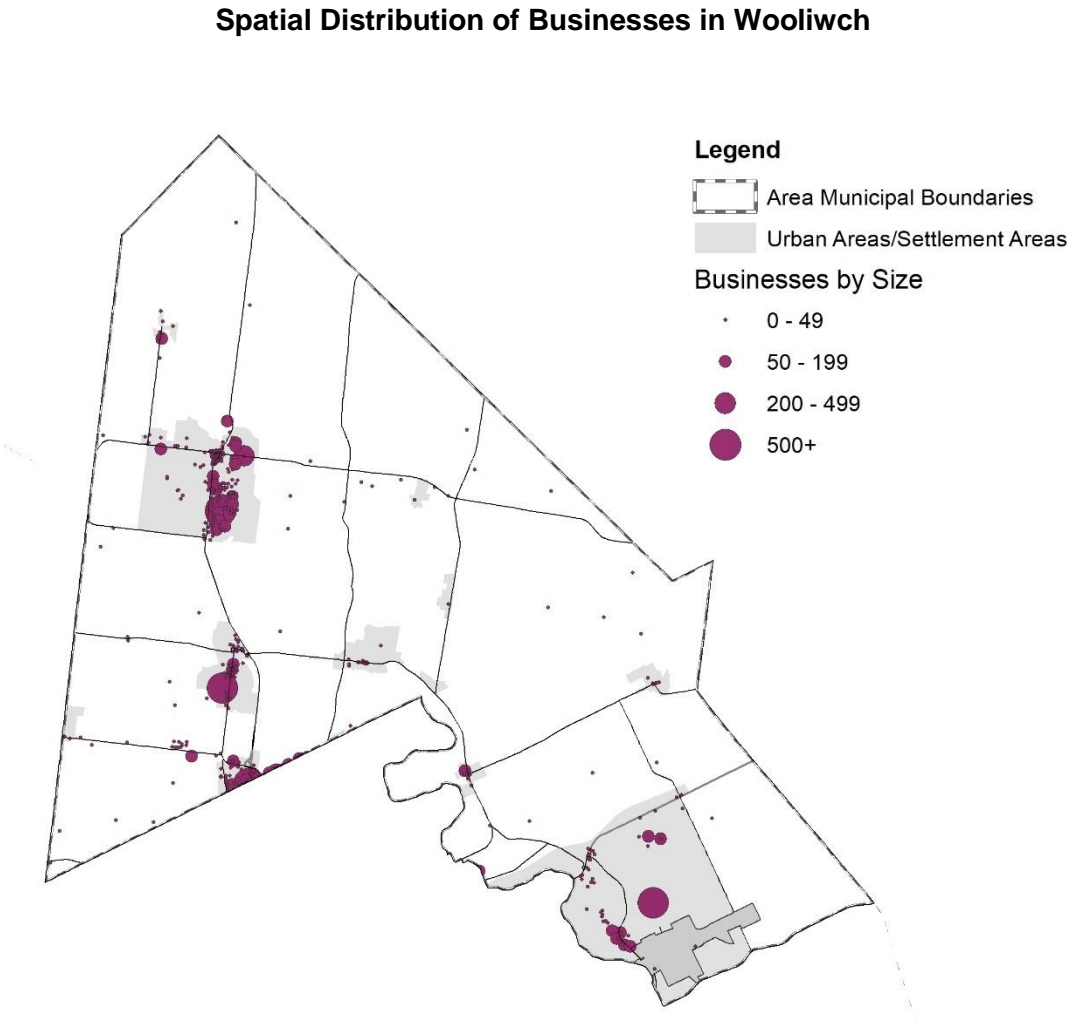
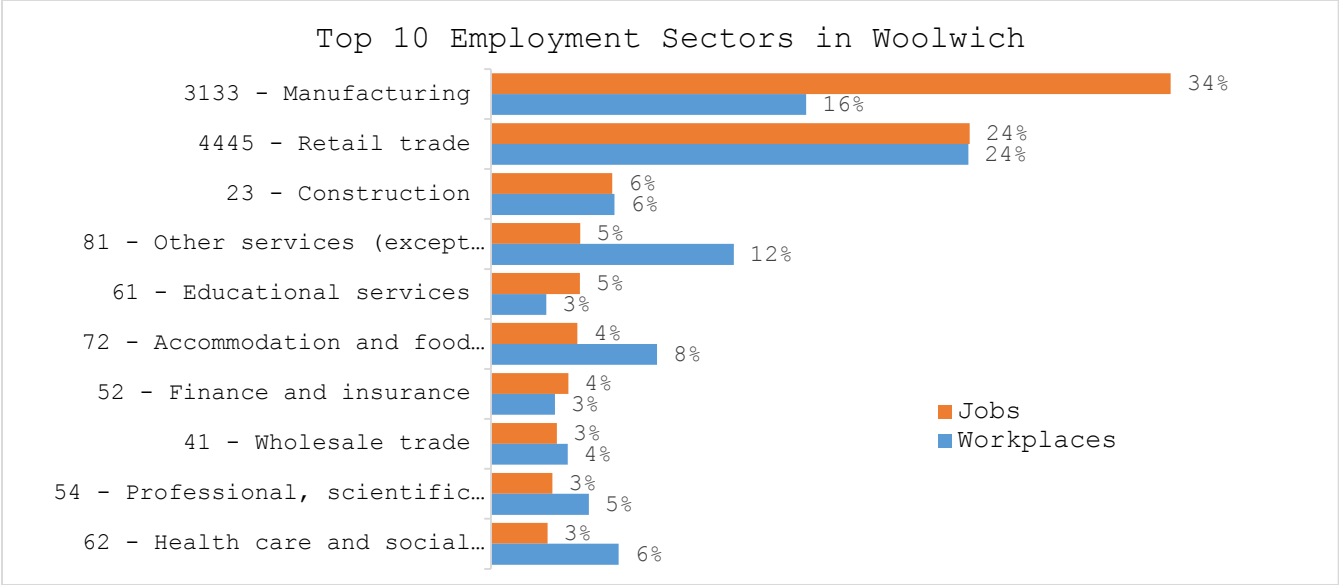
The Township of Woolwich contains over 460 unique workplaces, which represents 6% of the regional total. The retail sector makes up a significant portion of the city's workplaces (49%). The majority of identified jobs in Woolwich are within the manufacturing (46%), and retail (35%) sectors.



### Employment by Type:

Of the 3,300 jobs in Woolwich, 81% are full-time and 19% are part-time. The proportion of full-time employees in Kitchener is higher than the Regional average of 73%. This is reflective of the large share of industrial jobs located in the township, which generally employ full-time workers.







Region of Waterloo

## Planning Information Bulletin

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**Date:** February 11, 2025

**Subject:** 2024 Rural Business Survey

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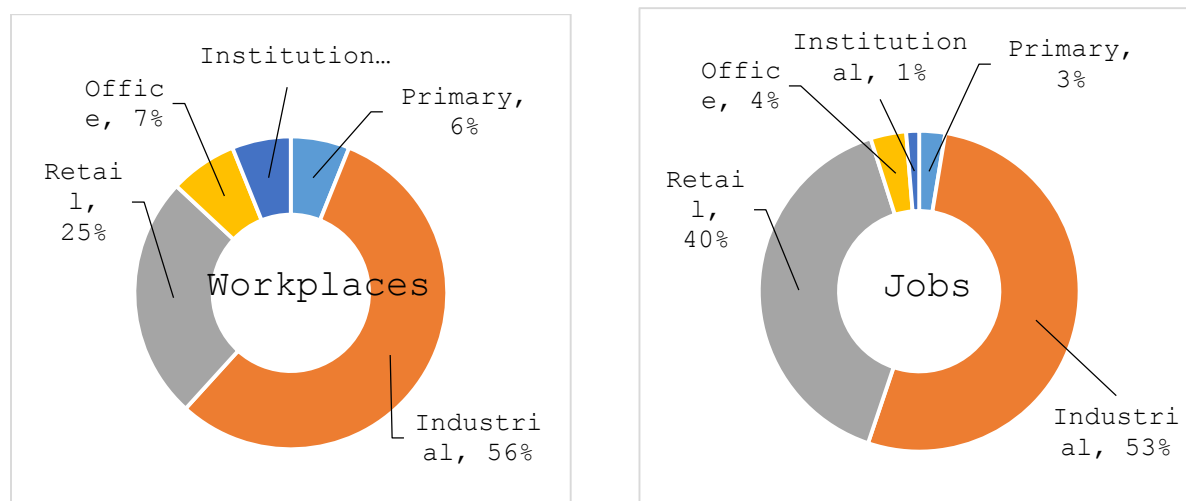
Historically, the Workplace Count only focused on collecting data from the cities, and urbanized areas in the townships such as New Hamburg, Elmira, and St. Clements. Data was still collected in these geographies, and the results for these businesses can be found in Appendix A of report PDL-GDS-25-002. The 2024 survey was expanded to collect information from businesses located in rural areas, outside of the aforementioned settlement areas. Data from the census of agriculture is available for businesses that solely participate in agricultural activities, but this data does not include information on rural businesses that have distinct operations unrelated to agriculture. This prompted the rural survey to focus on surveying businesses where there is little or no information available. The Rural Survey targeted businesses that are not primarily engaged in agricultural activities such as growing crops or raising animals. Some examples of the rural businesses surveyed include furniture manufacturers, sheet metal fabricators, or carpentry shops. Many of these businesses exist as ancillary uses on farm properties, often referred to as on-farm diversified uses.

### Survey Results:

Responses were received from 118 establishments that fit the category of businesses located in rural areas, not primarily engaged in growing crops or raising animals. These 118 businesses employ more than 900 individuals across the townships.

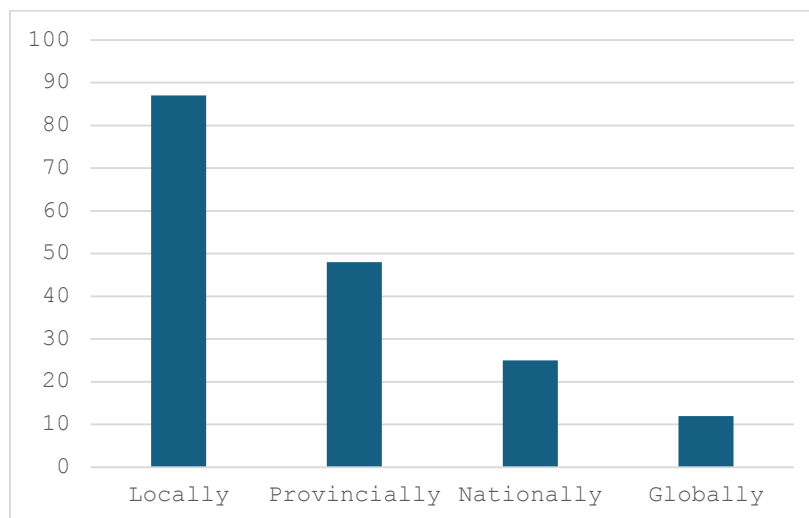
Of the 118 businesses, the majority are industrial (56%), followed by retail (25%), office (7%), and institutional and primary, both at (6%). In terms of employment, more than 90% of jobs are in the industrial and retail sectors (Figure 1).

**Figure 1: Workplaces and Jobs by Sector**



Additional questions were added to the rural survey to get an understanding of the extent that rural businesses contribute to the local economy, and more broadly the provincial, national and global markets. The majority of rural businesses sell their products and services in local markets (within Waterloo Region). Nearly 50 businesses sell their products within Ontario (provincially), 25 sell their products nationally (within Canada), and 12 sell their products globally (Figure 2). A number of businesses sell their products across a combination of the four sales areas.

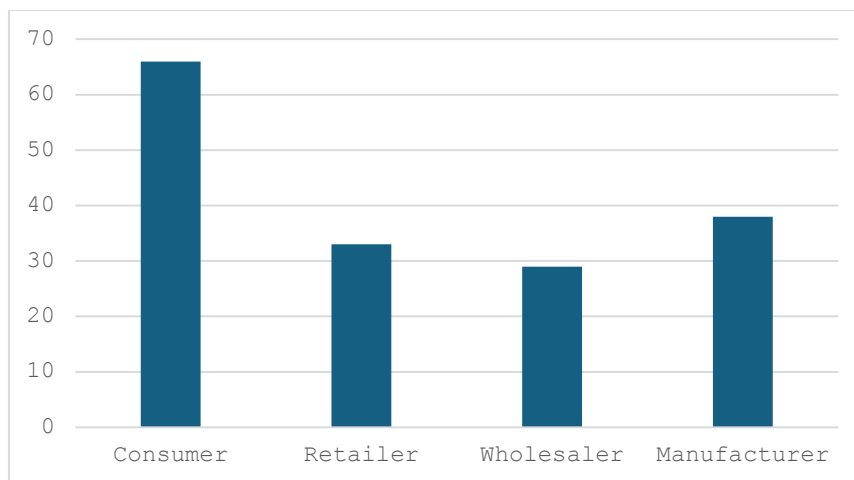
**Figure 2: Where Products and Services are Sold**



Knowing who businesses sell their products and services to, whether it is to the consumer, retailer, wholesaler, or manufacturer, can help to understand where these businesses exist in the supply chain. Most businesses sell their products directly to the consumer. The number of businesses that sell to retailers, wholesalers, and

manufacturers are relatively even (Figure 3). Some businesses sell their products or services to a combination of the four categories.

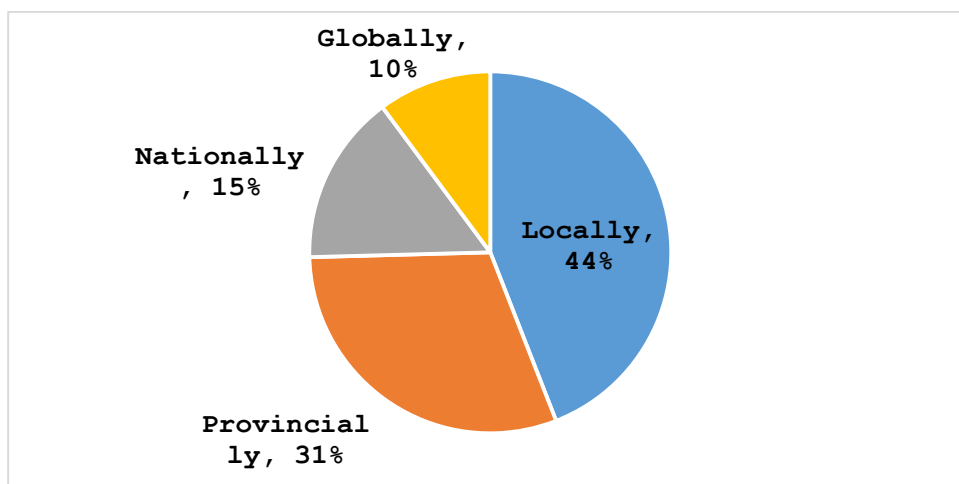
**Figure 3: Who are Products and Services Sold to?**



### **Rural Business Contributions to the Manufacturing Sector**

Manufacturing is the single largest employment sector in Waterloo Region and rural businesses play an important role in the local manufacturing supply chain. Of the rural businesses that report to sell to manufacturers, the majority (44%) sell to local manufacturers. Provincial manufacturers make up the next highest share at 31%, followed by national at 15% and global at 10% (Figure 4).

**Figure 4: Products Sold to Manufacturers**

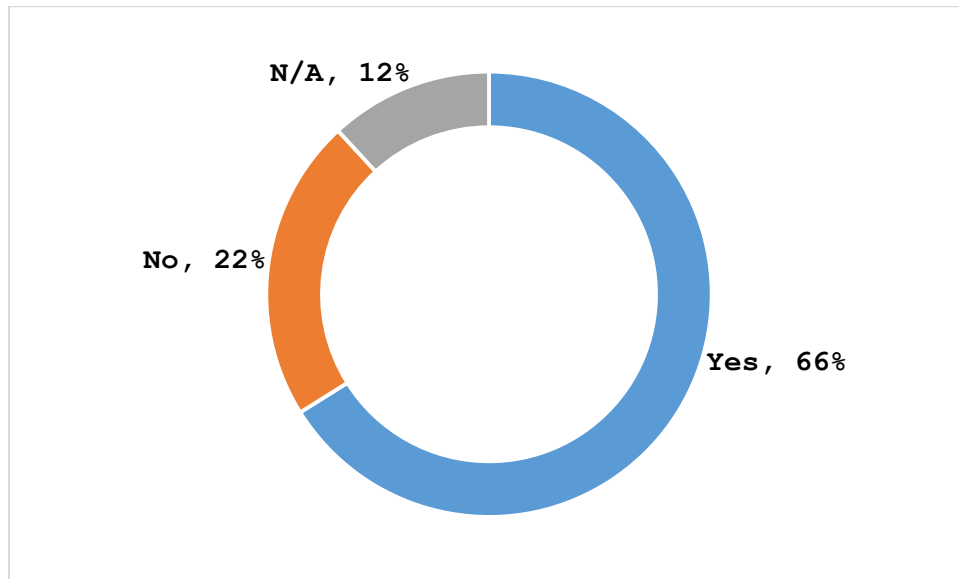


Of the 118 rural businesses that responded, the majority anticipated their business to grow in the future (66%), 22% of respondents do not anticipate growth. The remaining

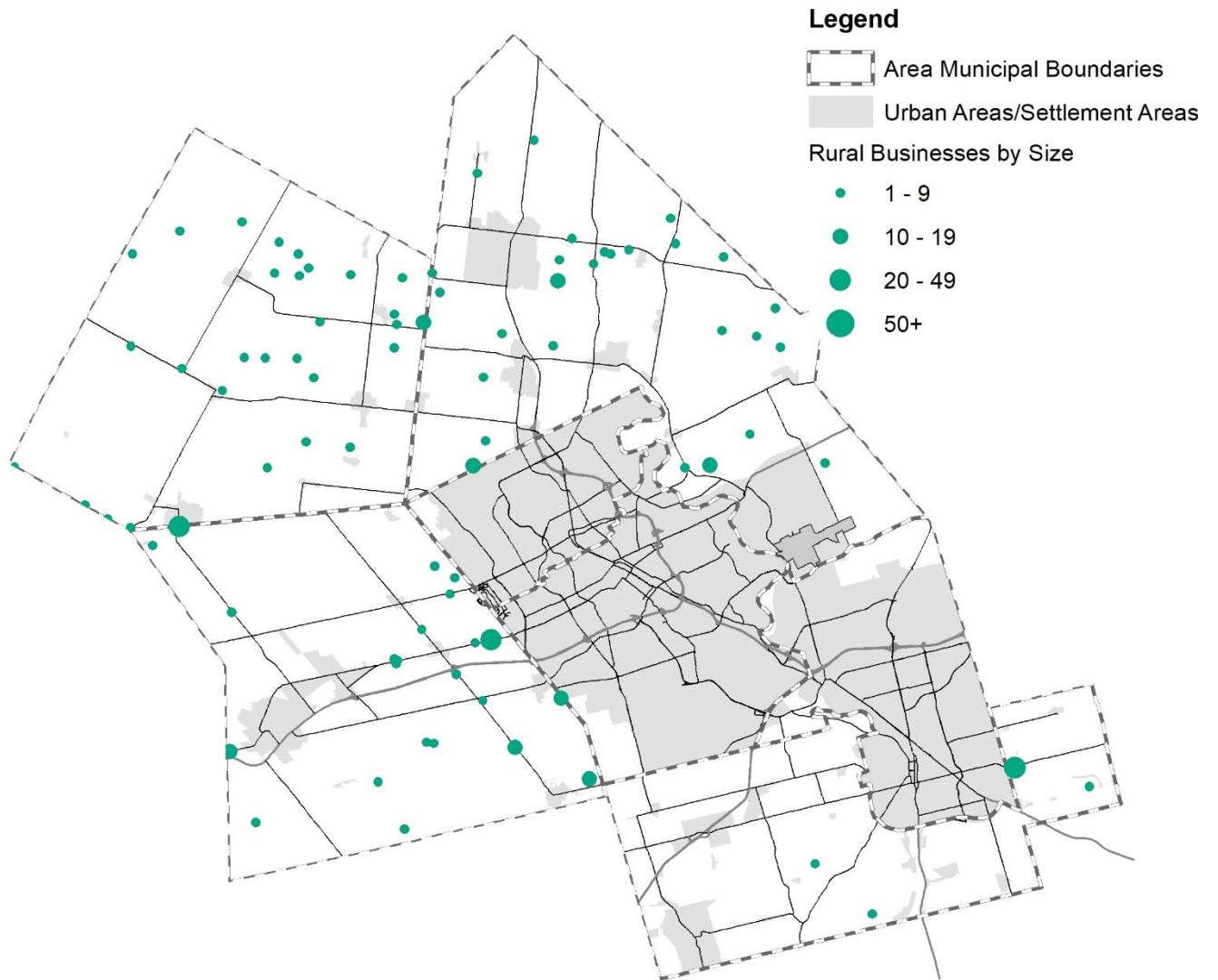


12% were unknown (Figure 5). Additionally, based on the responses provided, the average length of time a business remained at the same location was 19 years.

**Figure 5: Anticipate Growth**



**Map 1: Spatial Distribution of Rural Businesses**



# 2024 Workplace Count

Sustainability, Infrastructure, and  
Development Committee

February 11, 2025



Region of Waterloo

# About the Workplace Count



A SURVEY OF PLACES  
OF EMPLOYMENT  
ACROSS THE REGION



PAST SURVEYS  
UNDERTAKEN IN 2011,  
2016, 2018 AND 2021



GUIDED BY A  
MUNICIPAL ADVISORY  
GROUP



DATA IS NOT AVAILABLE  
FROM ANY OTHER  
SOURCE

# What is the data for?

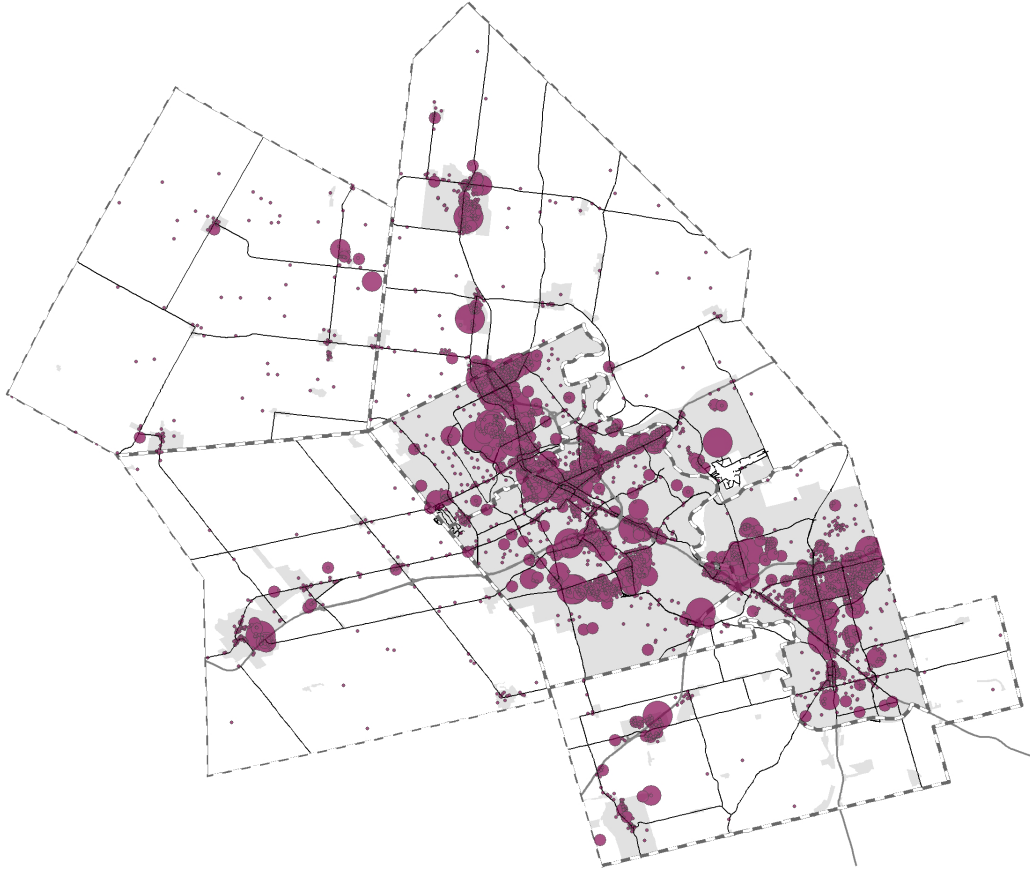
- Development Charge Background Studies
- Monitoring change in the CTC
- Stage 2 ION employment density estimates
- Economic Development
- Employment estimates and growth forecasts for infrastructure planning
- Area Municipal Official Plan Updates

**Count your business in!**

Help us plan for future growth and support business in Waterloo Region.  
Be part of the 2024 Workplace Count!



# How is the data collected?



- Data is primarily collected in the Regions Urban Areas and Rural Settlement Areas (New Hamburg, St. Clements, etc.)
- New to the 2024 survey is the collection of data on Rural businesses located outside of settlement areas
- Data is not collected on home-based businesses and farms

# Overview of Results

Over 11,000 businesses visited

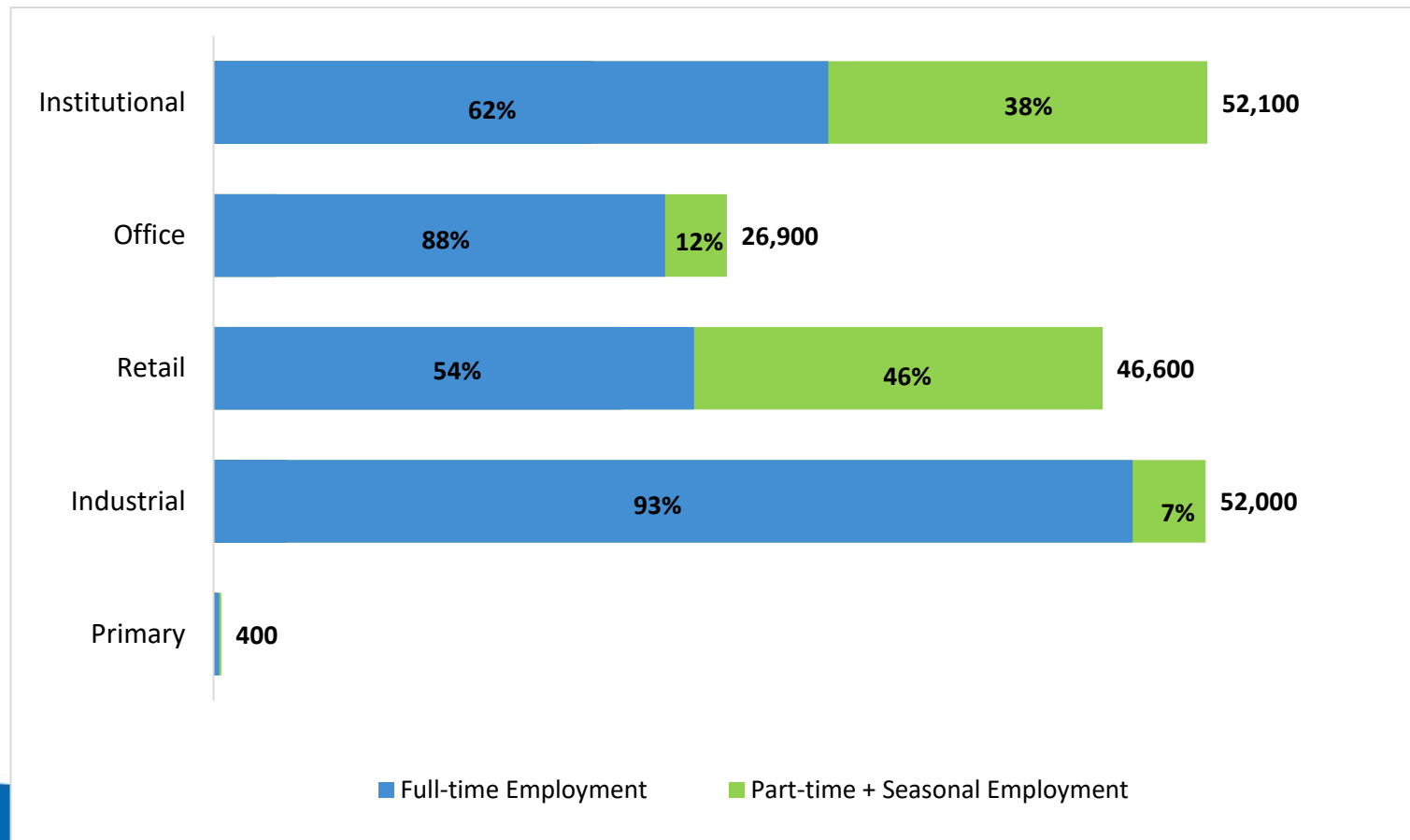


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graph TD; A[Over 11,000 businesses visited] --> B[8,300 responses]; B --> C[Participation rate: 74%];
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8,300 responses

Participation rate: 74%

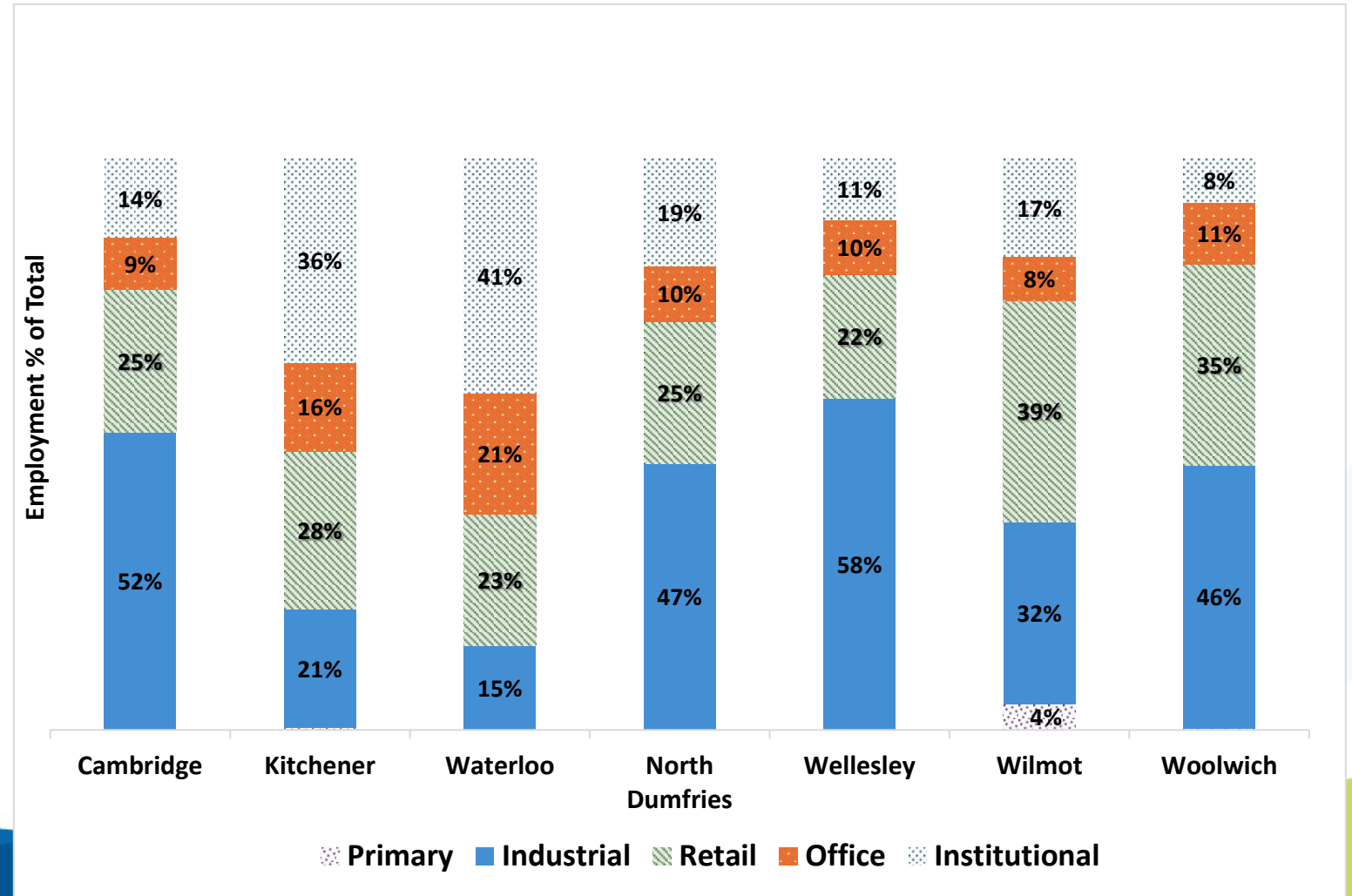
# Employment by Sector



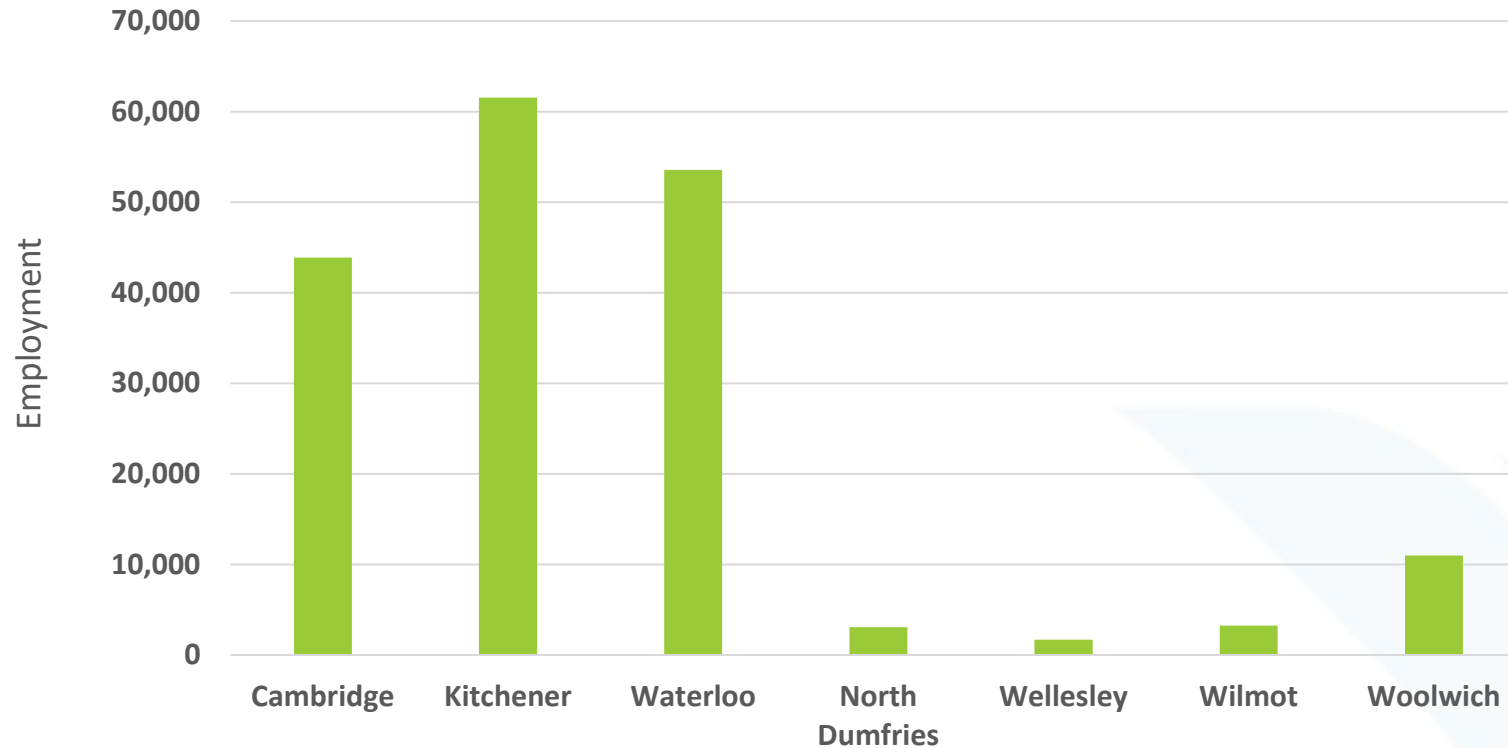


# Employment by Sector

- Cambridge and the townships have a robust industrial sector
- Waterloo and Kitchener have a strong institutional employment

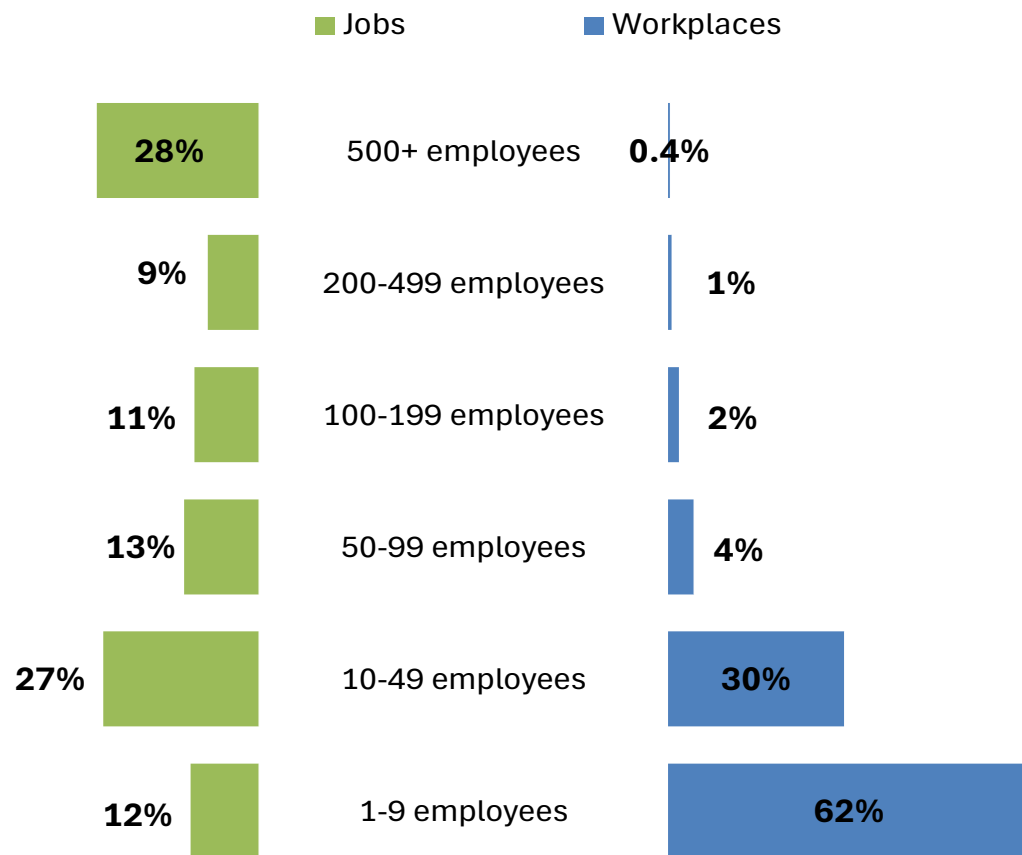


# Employment by Municipality



- The Region's employment is concentrated in the cities
- WPC employment numbers represent a sample of Regional jobs
- Data cannot be compared to census employment

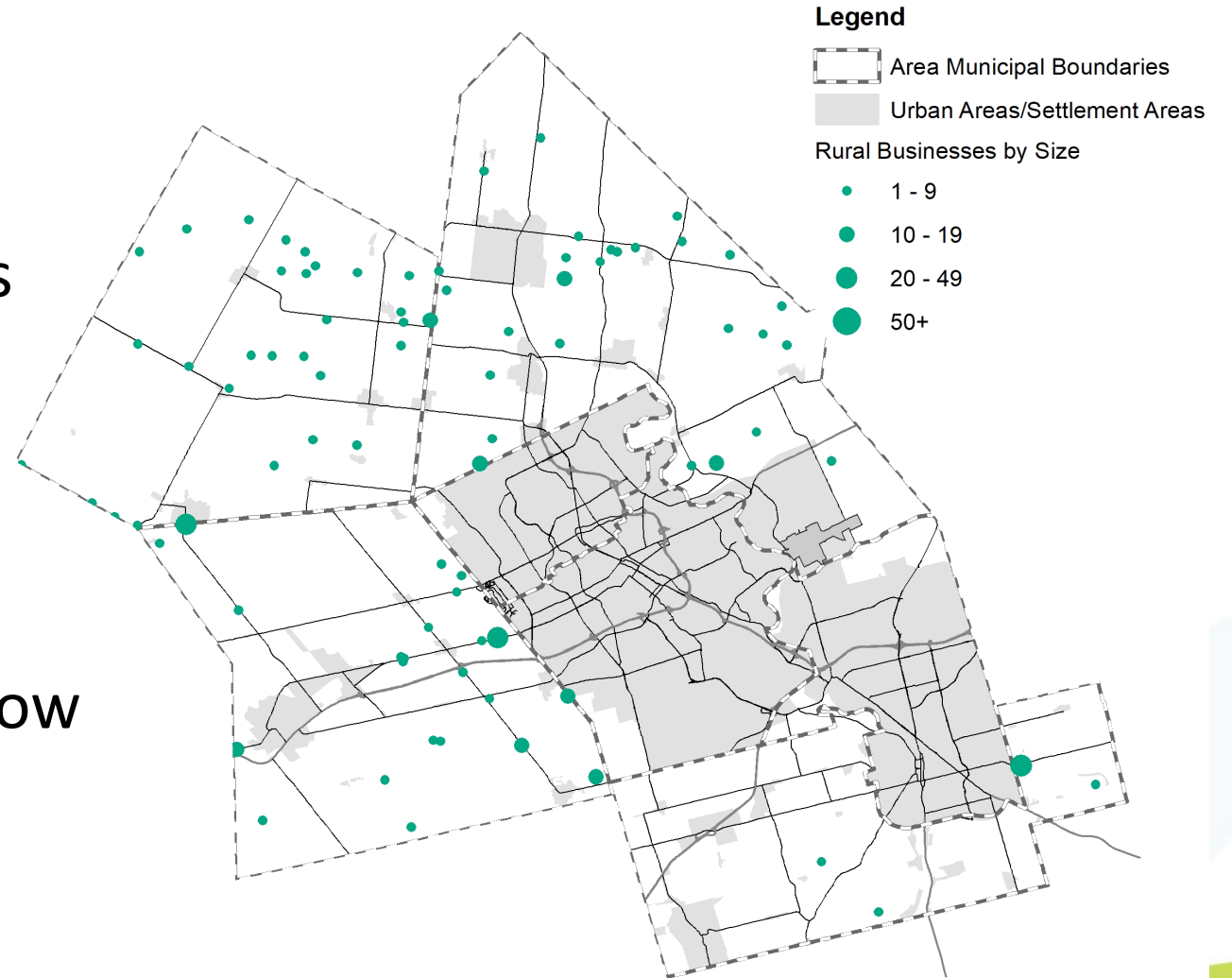
## Workplaces and Jobs by Size of Workplace



- Businesses with 1-9 employees account for 62% of workplaces, but they only employ 12% of jobs
- 500+ businesses represent 0.4% of workplaces, but employ 28% of jobs

# Rural Survey

- Primarily Industrial Businesses
- Rural manufacturers play a critical role in the local supply chain
- Two-thirds of rural business anticipate their business to grow



# How is the data is used day-to-day?

- To visualize Waterloo Region's economic diversity and composition
- As an input for planning studies
- To inform square footage per employee assumptions for Development Charges Background studies
- For business retention and attraction efforts, such as business directories and sector support
- To assess labour force needs in key employment areas
- To inform investment attraction efforts

# Next Steps

Data is shared  
with Area  
Municipalities and  
WaterlooEDC

Future survey  
anticipated in  
2026 to align with  
the Census

<b>Council Enquiries and Requests for Information</b>				
<b>Sustainability, Infrastructure, Development Committee</b>				
<b>Meeting date</b>	<b>Requestor</b>	<b>Request</b>	<b>Assigned Department</b>	<b>Anticipated Response Date</b>
04-Oct-22	Committee	Staff to report back on a plan or program on traffic calming in settlement and residential areas, considering high volume versus high speed.	TSD	Winter 2025
07-Feb-23	Committee	Staff to look more broadly at specialized transit from urban to rural regions	TSD	Q1 - 2025 GRT 2025-2030 Business Plan
22-Feb-23	Strategic Planning and Budget Committee	Staff to bring forward a comprehensive review of age-specific fare for seniors and youth discounts forward as part of the new Grand River Transit Business Plan.	TSD	Q1 - 2025 GRT 2025-2030 Business Plan
05-Dec-23	Committee	The Committee directed staff to report back on the Cambridge Pinebush LRT/GO station land acquisition opportunities.	TSD	Jan-2025
24-Apr-24	Committee	Staff to report on interim measures in Ayr such as posting signage warning oversized vehicles of the limitations of the downtown route using Swan St., Stanley St. and	EES/TSD	Q1 2025
24-Apr-24	Council	Creation of Mobility Plus Business Plan	TSD	Q1 - 2025 GRT 2025-2030 Business Plan

Council Enquiries and Requests for Information				
Sustainability, Infrastructure, Development Committee				
Meeting date	Requestor	Request	Assigned Department	Anticipated Response Date
10-Oct-23	Committee(A&F)	Staff to report back with potential options for the location of an Indigenous hub	PDL/Facilities	Mar-2025
28-Aug-24	Council	Grand River weir damage update	EES	Mar-2025
8-28-2024	Committee	Staff to report back on timelines as it pertains to the Cambridge to Union passenger GO station.	TSD	Q2 2025
01-14-2025	Committee	Staff to report back on the residential tenure of residents in the CTC, including of occupancy of units.	GDS	Mar-2025
01-14-2025	Committee	The Committee provided staff direction to report back on the potential impact of tariffs on economic development and area businesses.	ECD	Q1 2025



# LETTER OF SUPPORT /// NEURON MOBILITY CONTRACT EXTENSION



Nelson Chukwuma, President  
Conestoga Students Incorporated  
Room 2A106  
299 Doon Valley Drive,  
Kitchener, Ontario  
N2G 4M4

February 11, 2025

Sustainability, Infrastructure, and Development Committee  
Regional Municipality of Waterloo  
150 Frederick St.,  
Kitchener, Ontario  
N2G 4J3

## **RE: Update on Shared Micromobility Program and Neuron Contract Extension to 2029**

Dear Committee Members,

I am writing to share Conestoga Students Inc.'s support for the recommendation to extend the contract with Neuron Mobility (Canada) Limited until 2029, as outlined in the report TSD-TRS-25-002 dated February 11, 2025.

The shared micromobility program operated by Neuron Mobility has proven to be a significant success in its second year as outlined in the report. Additionally, CSI has seen the positive impact of Neuron's operations on the Conestoga community. As part of Neuron and CSI's partnership, our organizations have collaboratively worked to:

- Strategically establish on and off-campus parking locations to encourage and make the use of Neuron devices more convenient,
- Provide students with free two-month passes, resulting in 8,623 trips and 13,847 kilometers traveled, and
- Host on-campus ScootSafe events, distribute free helmets, and support orientation week activities to encourage the safe use of shared micromobility.

Over the last two riding seasons, we have also been pleased to see the service area continue to expand, their collaborative efforts to ensure users are safely riding through the community, and their commitment to making their service more accessible and equitable with their future adaptive bikes. Extending Neuron's contract will allow the Region to continue benefiting from the program's positive impact and innovations for sustainable transportation options, while contributing to achieving its climate action goals.

CSI hopes the committee and Council will approve the recommendation to extend Neuron Mobility's contract. This extension will ensure the continued success and growth of the shared micromobility program, benefiting both the environment and the Region as a whole.

Sincerely,

*Nelson Chukwuma*

Nelson Chukwuma,  
President