

Taking the Pulse of the Sharing Economy

Alison Cohen

Bicycle Transit Systems

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Cohen, Alison, "Taking the Pulse of the Sharing Economy" (2016). *Travel and Tourism Research Association: Advancing Tourism Research Globally*. 28.

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The Business of Bike Share, and How Visitors Ride

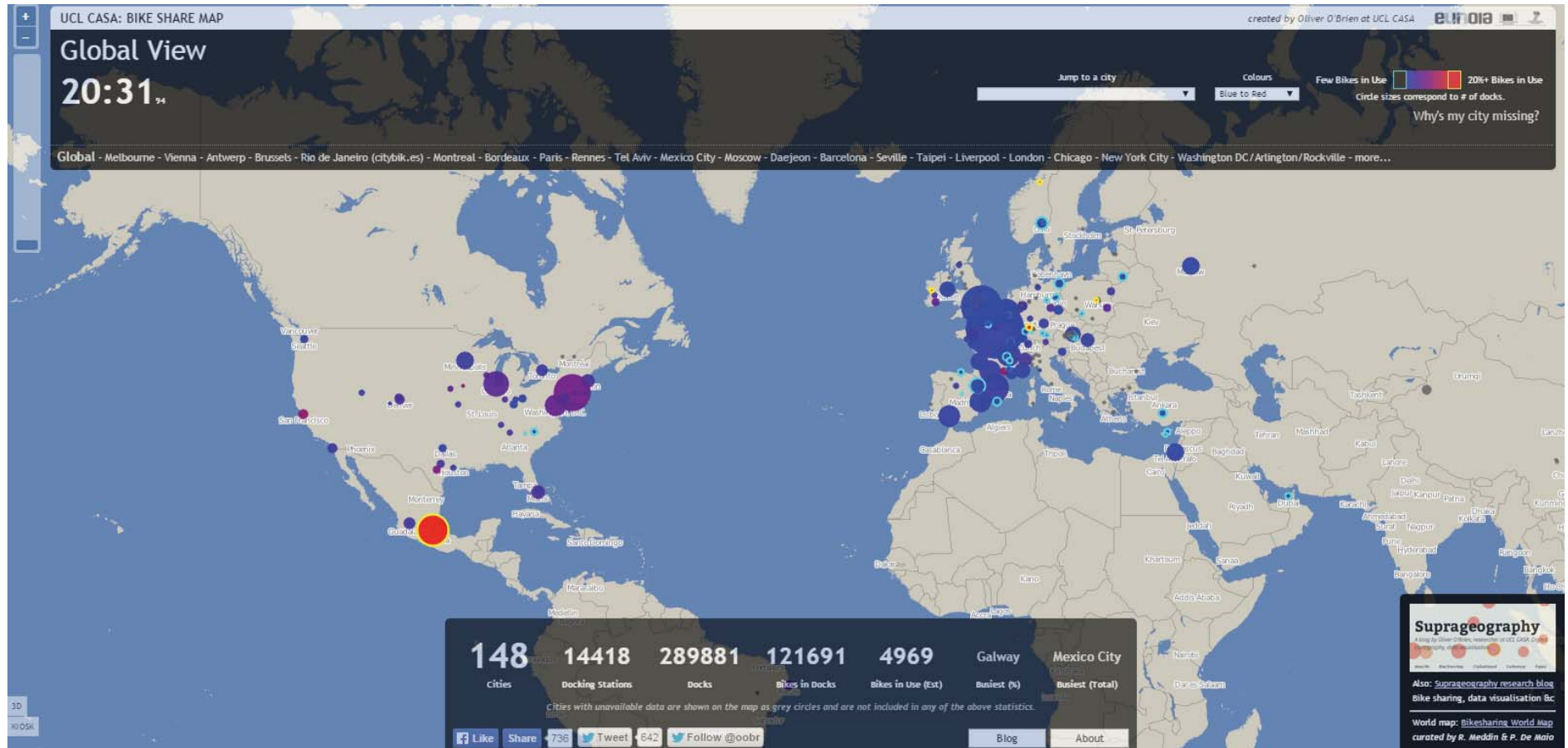
ALISON COHEN, PRESIDENT AND CEO

BICYCLE TRANSIT SYSTEMS

OCTOBER 28, 2015



Global Emergence of Bike Share



Oliver O'Brien's Bike Share Map <http://bikes.oobrien.com/global.php>

A Little History: 1st Generation



Amsterdam White Bikes and Portland Yellow Bikes - no locks, no tracking

A Little History: 2nd Generation



2nd Generation: Copenhagen Bycyklen - Coin-operated



A Little History: European Ad Battle



Rennes, France 1998

Vienna, Austria 2000

Trondheim, Norway 2001

Drammen, Norway 2001

Bergen, Norway 2002

Oslo, Norway 2002

Porsgrunn, Norway 2002

Lyon, France 2005

Stockholm, Sweden 2006

Brussels, Belgium 2006

Aix-en-Provence, France 2006

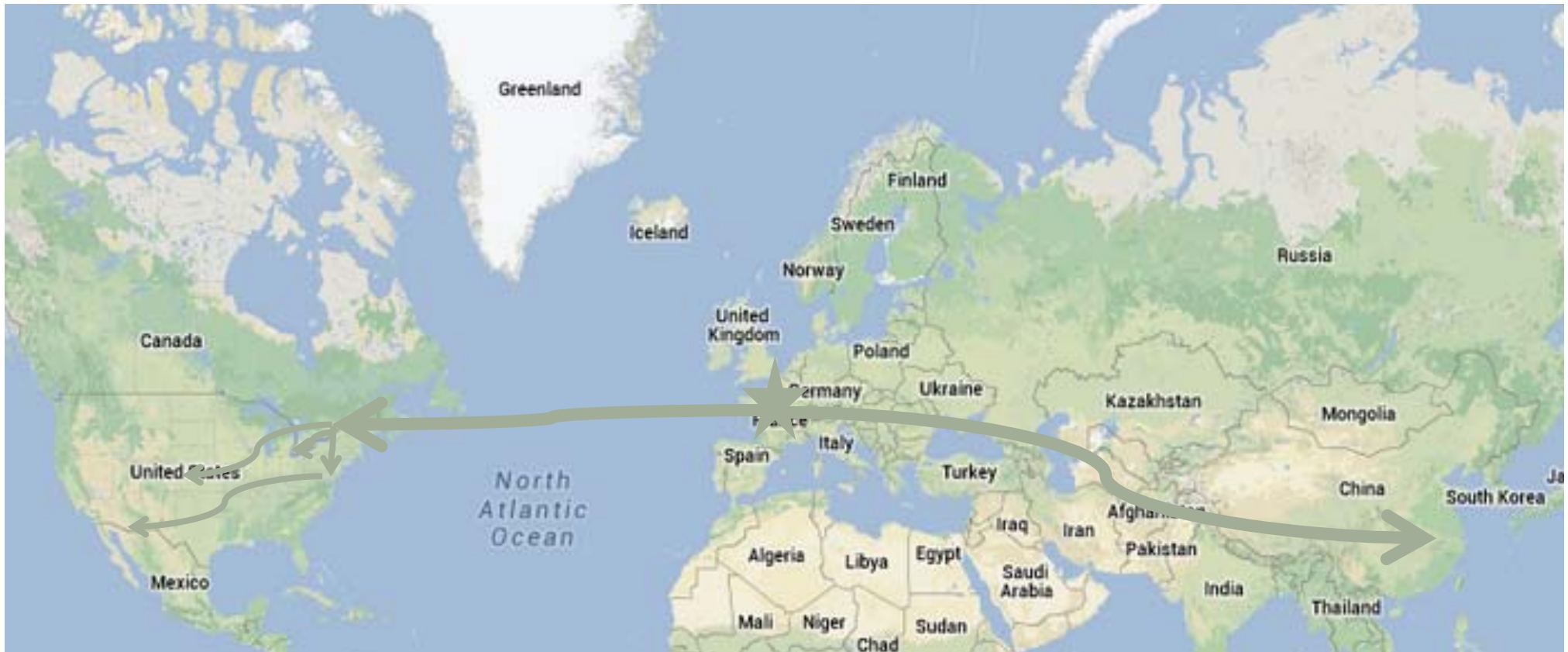
Sandnes, Norway 2001

Burgos, Spain 2006

Paris, France 2007



A Little History: Export from Paris

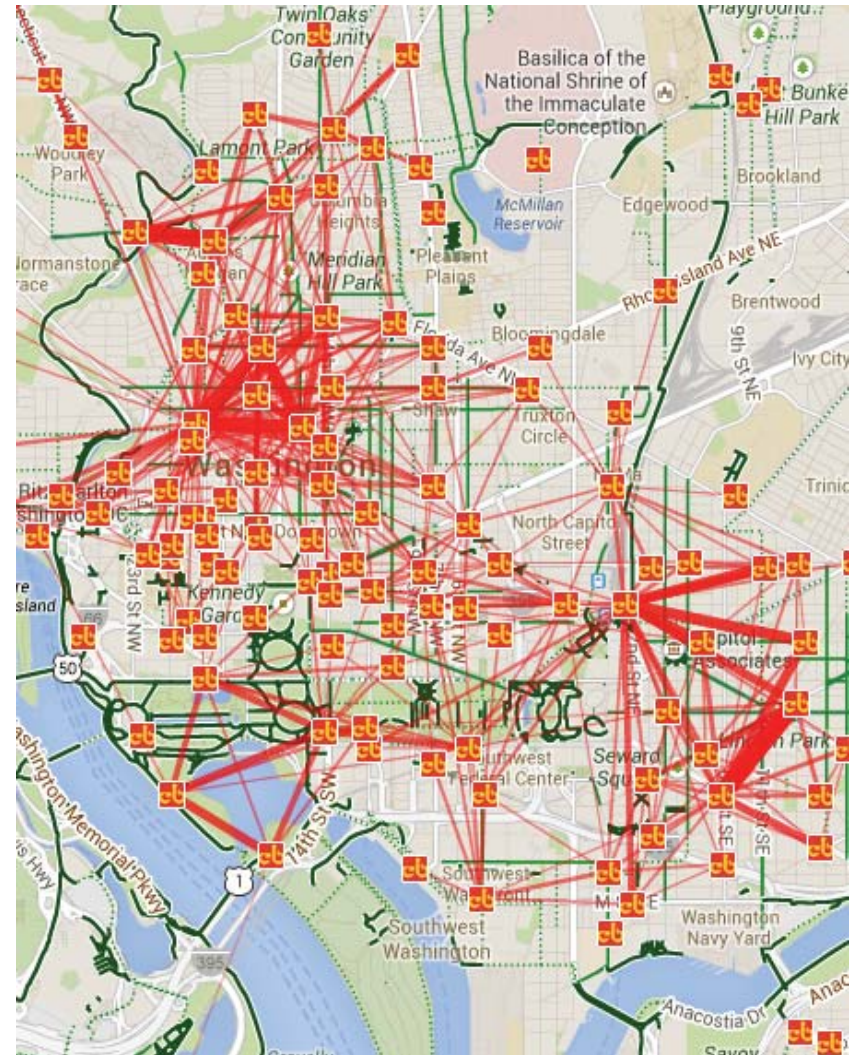


US Bike Share Systems

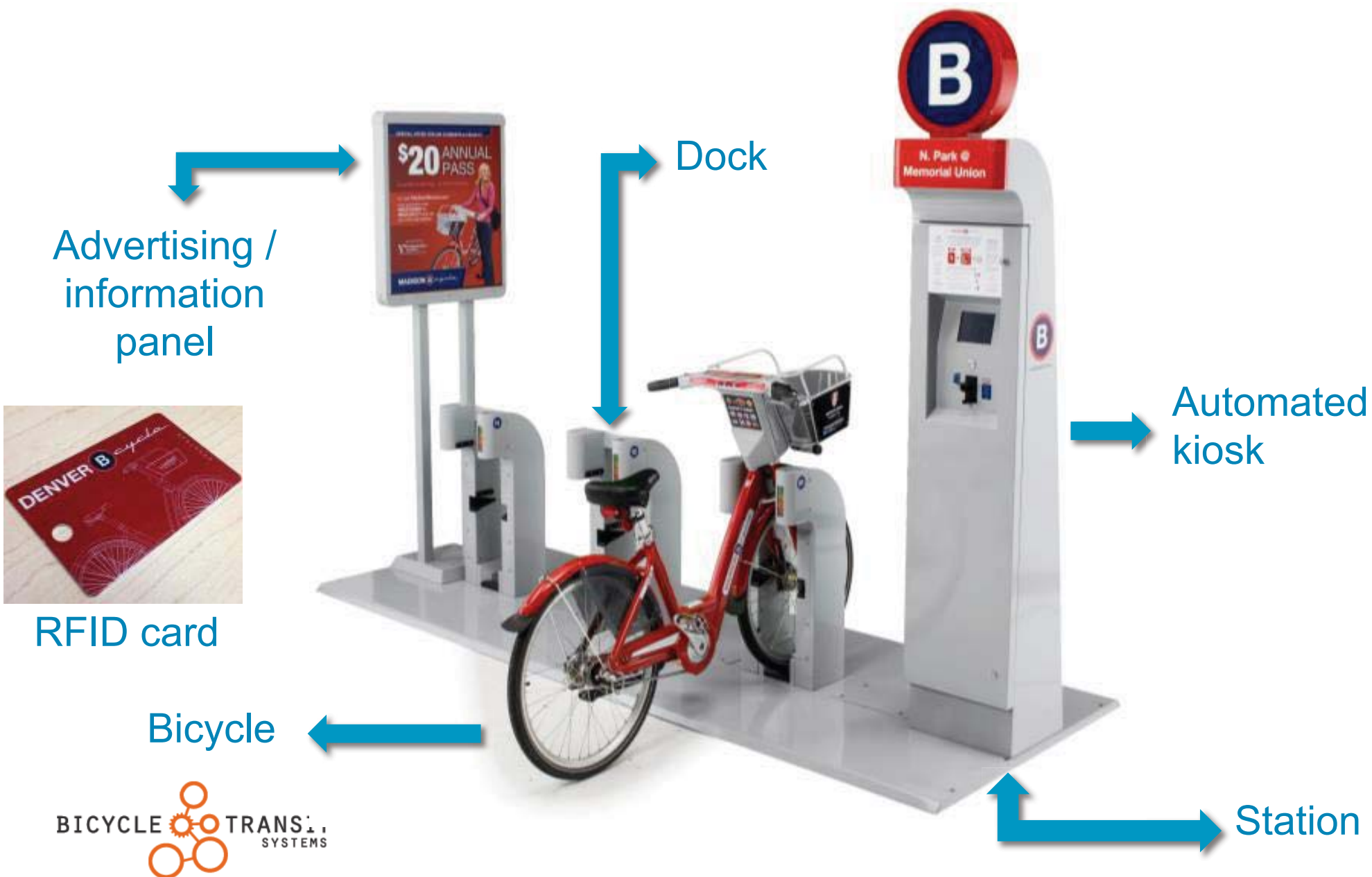


What is bike share?

- Automated self-service bicycle rentals
- Short, one-way trips
- Membership based
- Dense network of stations located conveniently



Equipment: Elements of a Smart Dock System

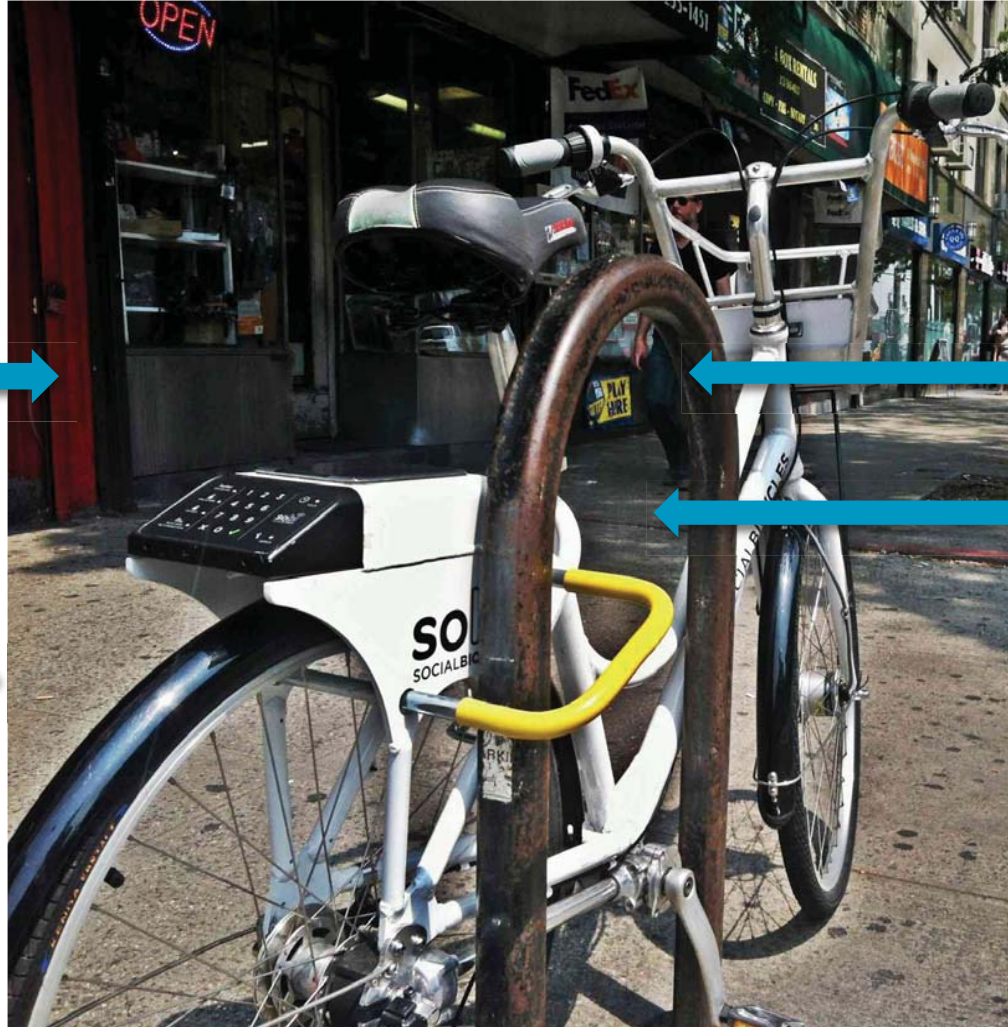


Equipment: Elements of a Smart Bike System

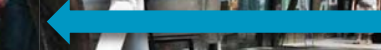
Control unit



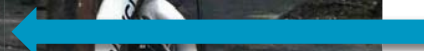
Bicycle



Bike rack

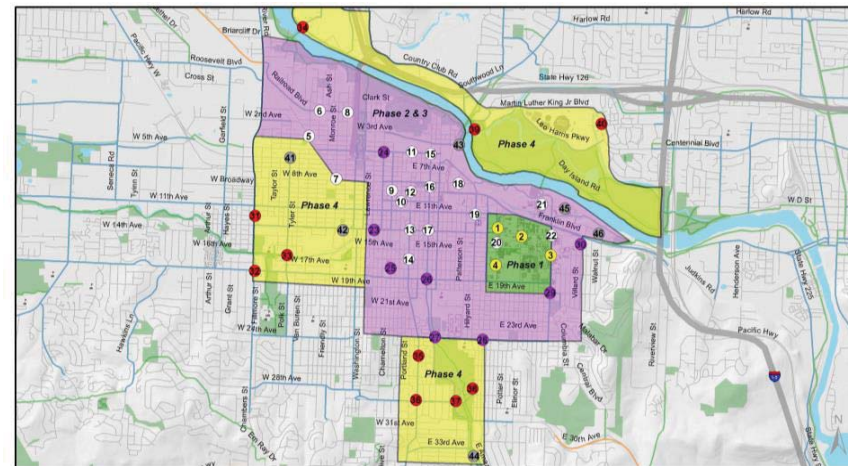


Lock



System Planning

- Analyze existing conditions
 - Bike infrastructure
 - Bike parking
 - Residential density
 - Employment density
 - Public transit
 - Retail
 - Tourism
- Result: Bike share heat map
 - System area
 - Number of bikes
 - Number of stations
 - Phasing
 - Density
- Align with system goals

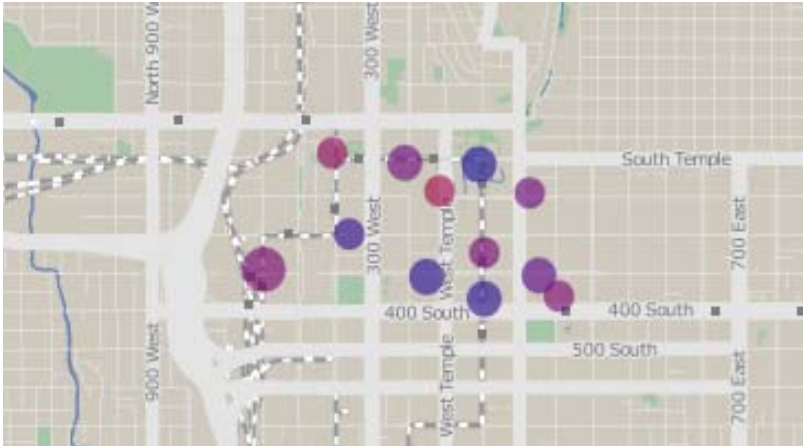


Proposed system map from Eugene, OR study with multiple phases

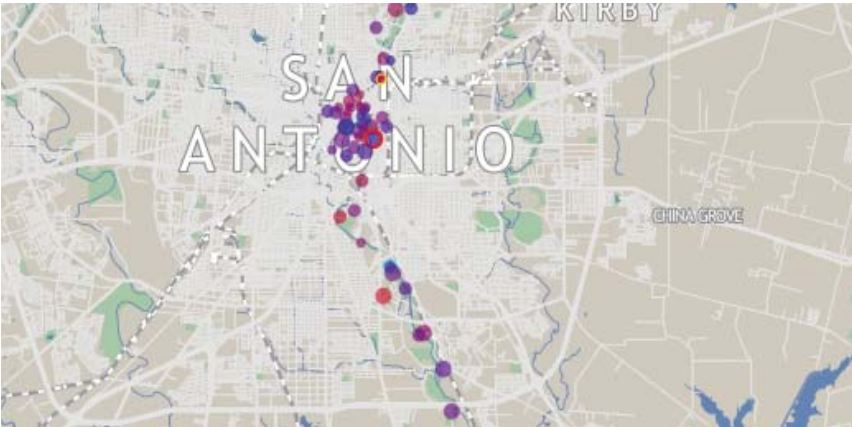
Station Layout and Density



Washington DC region



Salt Lake City

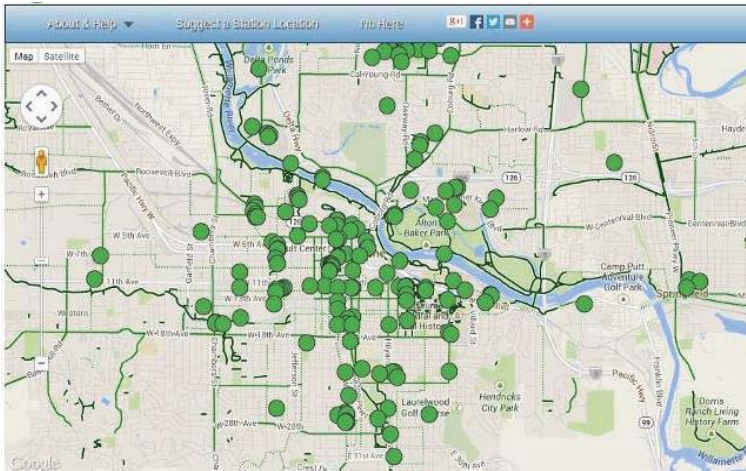


San Antonio



Bay Area

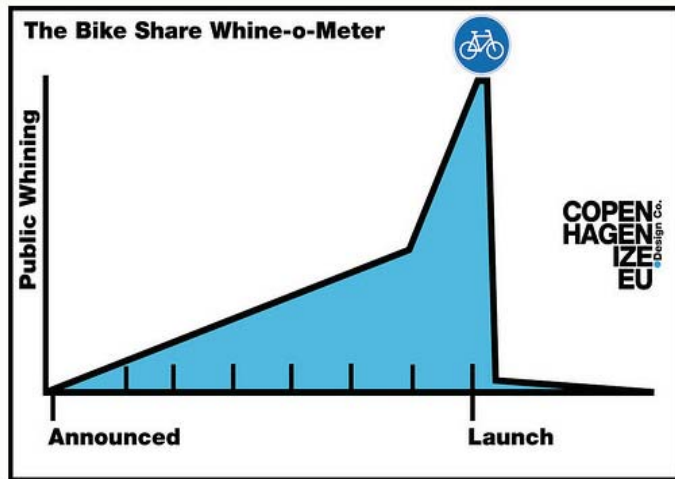
Public Input



Eugene's station suggestion website



Philly's location-based outreach program



NYC public meeting on station locations

System Naming and Branding



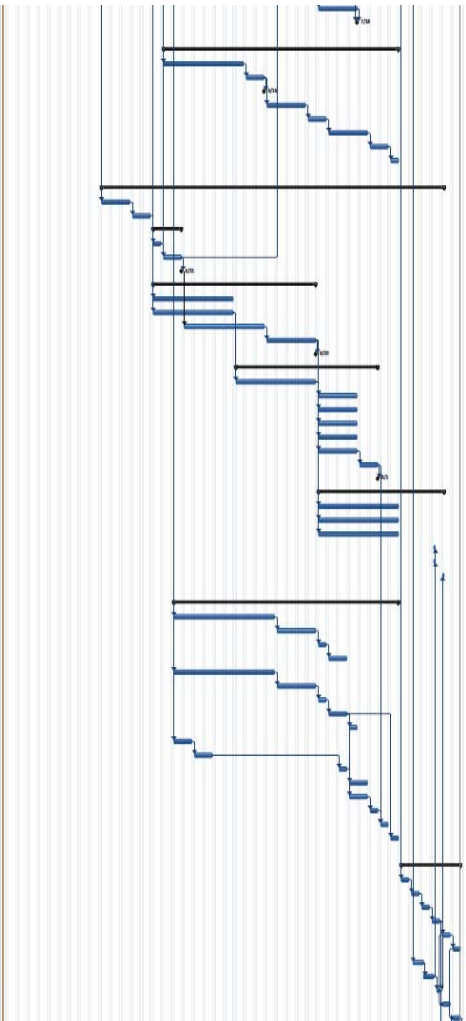
Hubway



Launch Planning and Implementation

- Launch timeline from finalizing branding
- Branding & Marketing
 - Website
 - Bicycle supply
- Site planning and permitting
 - Station supply
- Operations preparation
 - Facilities and equipment
 - People and training
- Equipment delivery and logistics
 - Station installation
 - Bike assembly
- System launch

Station lease agreements as required	4 wks	MM 18/2014	04/18/2014	22
Station 6 - site permitting complete	30 days	04/18/2014	04/18/2014	23/22
Human Resources	130 days	MM 18/2014	MM 18/2014	
Identification, selection and recruitment of Managerial Staff	2 wks	MM 18/2014	04/18/2014	04/14/14
Training of Managerial Staff	2 wks	MM 18/2014	04/18/2014	27
Station 4 - General Manager Appointed	10 days	04/18/2014	04/18/2014	28
Identification, selection and recruitment of lead staff	4 wks	MM 18/2014	04/18/2014	28
Training of lead staff	2 wks	MM 18/2014	04/18/2014	30
Identification, selection and recruitment of field staff	4 wks	MM 18/2014	04/18/2014	31
Training of field staff	2 wks	MM 18/2014	04/18/2014	31
All staff - Safety and Compliance training	1 wk	MM 18/2014	04/18/2014	31
Marketing	100 days	MM 18/2014	MM 18/2014	
Collaboration for system name selection	1 wks	MM 18/2014	04/18/2014	7
Development of logo and associated brand elements	2 wks	MM 18/2014	04/18/2014	17
Development of branding guidelines	10 days	MM 18/2014	04/18/2014	26
Station design finalized	1 wk	MM 18/2014	04/18/2014	30
Station 2 - Permitting and bonding complete	10 days	04/18/2014	04/18/2014	31
Informational Website	10 days	MM 18/2014	04/18/2014	
Development of customer content	3 wks	MM 18/2014	04/18/2014	9
Realization of styling structure	3 wks	MM 18/2014	04/18/2014	9
Application of styling guidelines	3 wks	MM 18/2014	04/18/2014	12
Informational website launch	3 wks	MM 18/2014	04/18/2014	14
Station 3 - Website launched	10 days	04/18/2014	04/18/2014	17
Marketing Website	10 days	MM 18/2014	04/18/2014	
Finalization of user agreements	4 wks	MM 18/2014	04/18/2014	15
Developing branding member promotions	4 wks	MM 18/2014	04/18/2014	16
Developing branding corporate member promotions	4 wks	MM 18/2014	04/18/2014	16
Communication to under-represented communities	4 wks	MM 18/2014	04/18/2014	16
Website launch and integration	4 wks	MM 18/2014	04/18/2014	16
Member gateway integration	4 wks	MM 18/2014	04/18/2014	16
Marketing website launch - member site beta	1 wks	MM 18/2014	04/18/2014	16
Station 4 - Marketing site beta	10 days	04/18/2014	04/18/2014	16
Search Event	10 days	MM 18/2014	MM 18/2014	
Engage local media campaign	3 wks	MM 18/2014	04/18/2014	17
Identification of local advocacy and support groups	3 wks	MM 18/2014	04/18/2014	17
Development of collaborative awareness events	3 wks	MM 18/2014	04/18/2014	17
Station installation events	1 day	04/18/2014	04/18/2014	18
Branding launch event	1 day	04/18/2014	04/18/2014	18
General public launch event	1 day	04/18/2014	04/18/2014	18
Operations Setup	130 days	MM 18/2014	MM 18/2014	
Identification and acquisition of workforce	10 wks	MM 18/2014	04/18/2014	04/14/14
Workforce testing	4 wks	MM 18/2014	04/18/2014	17
Launch workforce record	1 wk	MM 18/2014	04/18/2014	18
Operations equipment	1 wk	MM 18/2014	04/18/2014	18
Identification and acquisition of operations and call center	10 wks	MM 18/2014	04/18/2014	04/14/14
Operations and call center testing	4 wks	MM 18/2014	04/18/2014	21
Operations and call center record	1 wk	MM 18/2014	04/18/2014	22
Operations and call center improvements	1 wk	MM 18/2014	04/18/2014	21
IT and office equipment purchased	1 wk	MM 18/2014	04/18/2014	21
Vehicle finance arranged	2 wks	MM 18/2014	04/18/2014	04/14/14
Vehicle lease and contract	1 wk	MM 18/2014	04/18/2014	21
Vehicle delivery	1 wk	MM 18/2014	04/18/2014	22/14/14
Vehicle branded and commissioned	1 wks	MM 18/2014	04/18/2014	28
Call center building	2 wks	MM 18/2014	04/18/2014	24
Phone system and center integration	1 wk	MM 18/2014	04/18/2014	30
Call Center launched	1 wk	MM 18/2014	04/18/2014	30/14
Track and equipment purchased	1 wk	MM 18/2014	04/18/2014	24/14/14
Assembly and installation	10 days	MM 18/2014	MM 18/2014	
Station delivery	1 wk	MM 18/2014	04/18/2014	04/14/14
Station assembly	1 wk	MM 18/2014	04/18/2014	16
Station installations 1-15	1 wk	MM 18/2014	04/18/2014	17
Station installations 16-30	1 wk	MM 18/2014	04/18/2014	18
Station installations 31-75	1 wk	MM 18/2014	04/18/2014	19
Station installations 76-200	1 wk	MM 18/2014	04/18/2014	19
Bike delivery	1 wk	04/18/2014	04/18/2014	19/14/14
Bike assembly	1 wk	04/18/2014	04/18/2014	19
Block Deployments 1-100	1 day	04/18/2014	04/18/2014	19/14/14
Block Deployments 101-700	1 wk	MM 18/2014	04/18/2014	19/14
Block Deployments 701-1,000	1 wk	MM 18/2014	04/18/2014	19/14



On-Street Operations

Station Maintenance

- Scheduled cleaning and preventative maintenance
- System monitoring and issue response

Bike Maintenance

- Monthly maintenance and safety checks
- Damaged bikes
- Annual service

Rebalancing

- Pre-balancing and re-balancing
- Corrals
- Alternative vehicles

Snow emergencies

- System shut down and re-opening
- Snow and ice removal



Marketing and Promotions

- Marketing Plan Elements
 - Public Relations
 - Online (website, social media)
 - Community partnerships
 - Member community building
 - Corporate / bulk sales
 - Sponsor activation
- Measure Outcomes
 - Metrics and reporting



Outdoor Advertising

Paris, Lyon, Barcelona, Mexico City

Outdoor advertising company (not on bikes) funds bike share system



JC Decaux advertising funds bike share in Paris



Clear Channel's EcoBici in Mexico

Public Funding

Capital Bikeshare, Chicago



Public funding, private operations



Public funding, private operations

Title Sponsorship

London's Barclays Cycle Hire, New York Citi Bike, Itau system in Santiago



London



NYC



Santiago

Multiple Sponsors



Boston

Charlotte



Investor Funding

Miami Beach DecoBike



Philadelphia's Indego



Operations



Equipment



Sponsorship



Indego Ridership

- Launched April 23, 2015 with 700 bikes and 70 stations
- Very strong!
- 250,000 rides in <5 months
- 4-5 trips per bike per day
- Beating projections in revenue and ridership
- Emphasis on equity and accessibility



Indego Operations



Rebalancing



Bike maintenance



Customer service



Station maintenance



Sales and marketing



Weather and emergency response

Los Angeles Metro Bike Share

- Launch spring / summer 2016
- 1000 bikes / 80 stations pilot in DTLA (\$11 million contract)
- First large system in the nation owned by transit agency
- First system in the nation to integrate transit and bike share card
- Fast expansion to 4000 bikes in 2017



Visitor Access to Bike Share

- Very important – 2/3 revenue!
- Located at visitor attractions
- Walk-up to kiosks
- 24-hour access or per-30 minute access
- Stations advertise themselves
- Opportunity through hotels
- Helmets



THANK YOU!

Alison Cohen

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