



DELIVERABLE 2.4

BIKE SHARING FOR DIFFERENT TARGET GROUPS

WP 2: Communication &
Organisation Knowledge Centres

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Introduction

Bike sharing schemes offer mobility for a wide range of (potential) users. Depending on the organisational and operational design, the schemes serve mobility needs for leisure, business, commuting and any every day trip in the city.

VeloCittà distinguishes five main target groups: residents, students, commuters, employees and tourists. Users might find themselves in more than one of these target groups but this perspective helps to assess the needs and benefits of wide user groups.

The following report assesses the requirements of each target group, the benefits that they bring to the scheme, the challenges they can cause and a variety of communication measures carried out in the project.

1 Target group requirements

Different target groups have different requirements for a bike sharing scheme to fit their mobility needs. These requirements refer to the spatial layout (e.g. station location), technology, tariff, information and framework conditions such as the overall cycling safety situation. The following chapters list the main requirements that the five target groups may have.

1.1 Residents

Residents form a main, but diverse target group in all cities. Accommodating their transport needs and fostering behavioural change towards a more sustainable mobility are main motivators for the implementation of bike sharing schemes. To accommodate their needs and achieve a lasting acceptance of bike sharing, some basic requirements should be fulfilled. The main aspects to be considered and improved are:

- # Location of docking points: it is very important that bicycle docks are located near public transport hubs, near residential areas and destinations like main shopping centres or large leisure locations.
- # Price: the economical convenience of this mode of transport is one of the key factors to motivate inhabitants to change their daily way of travelling within the city. Other important measures are monthly or annual rates to make the service more convenient and the introduction of user loyalty schemes.
- # Availability: high availability of bicycles and bicycle redistribution service well balanced. The peak usage for residents is usually during the weekends and after working hours, as the majority of this target group uses the bicycles for leisure purposes.
- # Safety: residents need to perceive the whole system - registration, the bicycles itself and the cycling infrastructure - as safe. Even though a bike sharing scheme can be widely known, like in London, if the common perception is that cycling in the home town is dangerous this can completely undermine its usage.



1.2 Students

Students often use sustainable modes of transport and large shares of them cycle. Thus they are an important target group for bike sharing schemes. To accommodate their needs and to achieve a lasting acceptance of bike sharing, the following basic requirements should be fulfilled.

- # Location: bike sharing stations should be located on campuses and close to student's housing areas. An in-depth-analysis of student's moving patterns is necessary to cover their mobility needs over the day (campus-to-campus, campus -to-home, and campus-to-library).
- # Availability: a large number of bikes should be available at the stations on campuses and at other location where a high number of students has the same mobility need at the same time. Stations in front of main buildings should provide at least 20-50 bikes/racks. This is often easily possible as campus grounds are often subject to fewer regulations than roads and adjacent areas. One should have in mind that this number of bikes is used less or not at all during weekends and semester-breaks.
- # Price: students, often having the "luxury" of PT discounts and often using own bikes, are not willing to pay high charges per use or per year.
- # Access media: most students own smartphones or other devices; they are familiar with RFID-cards and thus do not need sophisticated terminals or other rental infrastructure. Unlocking their student-cards (RFID student Ids or PT cards) gives all of them access to the scheme at low costs.

1.3 Commuters

Commuters need reliable options for their daily transport. Bike sharing provides a last-mile solution for users of PT. To provide a bike sharing scheme that fits their needs, the following main aspects should be considered:

- # Price: the economical convenience of this mode of transport is one of the key factor to motivate people to change their daily way of travelling within the city. Commuters should be provided with tariffs for regular usage, such as monthly or annual passes.
- # Location of docking points: bike sharing stations near train and metro stations and working places are essential. Another strategic solution is *park-and-ride* lots with the localization of docking points in proximity of parking areas.
- # High availability of bicycles: bikes and free docking points must be available during peak hours. This requires a well organised balancing system.
- # Travel information: commuters require integrated real time information (e.g. Apps) to have information about available bikes and empty docks available at any time.
- # Integrated ticket: an integrated ticket, preferably with one access cards makes daily use easy and convenient.



1.4 Employees

Employees as users of shared bikes have only one priority: it should be hassle free! The paying client of the company in this case is the employer. In order for a BSS system to compete with the existing preferred mode of transport it should be better with regards to:

- # Availability: stations must be available at the company premises and at the point of destination. Bikes must be available at any time. Reservation functions made available for company locations can increase the reliability.
- # Reliability: the worker should be able to rely on the technical functioning of the bike. The track record with regards to punctures, lights, smooth chain, derailleur and gears should be impeccable.
- # Price and billing: Employers require attractive packages with reduced fares and/or minute packages per employee. Furthermore, depending on the local legal/tax requirements, easy travel costs breakdowns must be available from the operator, preferably with common IT-interface solutions. For employees, private usage allowances with the same access, paid by the employer are an attractive incentive.

1.5 Tourists

Tourists form a significant target group in almost all bike sharing schemes. To accommodate their needs and achieve a lasting positive image of bike sharing, some basic requirements should be fulfilled.

- # High visibility: many bike sharing schemes, lack visibility among tourists. Tourists need clearly visible BS stations along the main touristic sights, near the railway station and hotels.
- # Ease of use: the registration should be as simple and straightforward as possible and information about registration should be available at least in English and preferably additional languages based on the main tourist originations.
- # Safety: tourists need to perceive the whole system - registration, the bicycles itself and the cycling lanes - as safe. Even though a BS system can be widely known, like in London, if the common perception is that cycling in the tourist destination is dangerous this can completely undermine its usage.
- # Integrated ticket: unique card or ticket for public transport and shared bicycles offers to tourists a smooth and simple multimodal journey. With the possibility to connect bike sharing with other modes of transport, new mobility options are being created.

2 How bike sharing benefits from...

Addressing potential users does not only increase the number of customers, each target group can improve the functioning of the BSS with their specific requirements and usage behaviour. For a solid and cost efficient operation, operators should address more than one of the main target groups as the different locations and times of usage, turnover flows and infrastructure requirements balance the scheme.



2.1 Residents

Actively involving residents and targeting them as users for the local bike sharing scheme generates a number of benefits for the scheme itself and for the municipality.

- # Visibility & perception: residents can boost volume, thereby adding to an increase in the overall visibility of the scheme. They can have a positive influence on other possible users by word of mouth. When satisfied customers, residents can be loyal to the scheme for a long time.
- # Scheme size & density: new or enlarged stations on large leisure destinations like stadiums, shopping centres, local beaches or lakes contribute directly to the overall scheme size.
- # Turnover: even though residents do not have a high individual willingness-to-pay, they can contribute to the scheme collectively. Also a consistent demand from people living within the city is good for the business case, since it provides a significant revenue stream.
- # Mobility behaviour: mobility behaviour in a person's early years can have a lasting impact on behaviour in adult life. Familiarising residents from a young age onwards with shared mobility and with cycling in general can cement a car-independent-lifestyle. Moreover, residents' positive cycling experience can bring added value and benefits not only on bike sharing schemes but more in general to cycling mobility.

2.2 Students

The decision to actively involve students and to targeting them as users for the local bike sharing scheme generates a number of benefits for the scheme itself, for the university and for the municipality.

- # Visibility & perception: students use bikes frequently and in high numbers. The overall scheme visibility can be increased.
- # Scheme size & density: new or enlarged stations on university premises, close to campuses or close to student's housing areas contribute directly to the overall scheme size.
- # Turnover: even though students do not have a high individual willingness-to-pay, they can contribute to the scheme collectively. The bike sharing scheme can for example be embedded in the semester-fee-structure to receive a small contribution from a large number of individuals.
- # Market opening: universities are an ideal showcase in cities where bike sharing schemes do not (yet) exist. Operators can erect a university-wide-scheme to convince the municipality that bike sharing complements the city's mobility landscape.
- # Product development: students are creative and willing to dedicate a lot of time and passion into developing future concepts and products. Operators can use this potential to improve their services with fresh ideas.



2.3 Commuters

Commuters' positive experience and regular use bring added value and benefits not only on bike sharing schemes but also for public transport and the overall mobility landscape.

- # Visibility: just as other frequent users, commuters use the bikes regularly and make cycling in general and bike sharing in specific visible in the streets.
- # Scheme size & density: large stations at public transport stops, bike & ride facilities and workplaces contribute directly to the overall scheme size and availability.
- # Redistribution: commuters are a reliable target group in terms of usage time and location. Thus they provide the operator with reliable redistribution information.
- # Turnover: commuters, mainly using monthly or annual subscriptions, bring a constant and reliable revenue stream.
- # Public transport: depending on the overall strategy, bike sharing can take the pressure out of frequented PT lines or increase utilisation by making the overall PT system more attractive with integrated offers and reliable first and last mile solutions.

2.4 Employees

Employees are a hard target group to reach because they can only be approached indirectly through their employer. The paying client of the BSS operator is the company that needs to become aware of the benefits of bike sharing. However, involving companies and their employees brings a number of benefits for the bike sharing scheme:

- # Scheme size & density: new or enlarged stations in industrial zones or close to large office buildings contribute directly to the overall scheme size. Companies can participate in the station investment and "order" their own stations.
- # Turnover: framework contracts with big employers offer a considerable revenue stream to the system. Despite reduced fares, this can create a reliable and significant turnover amount.
- # Image: partnering up with large companies can bring image gains for both sides. Employers strengthen their green image while the bike sharing operator is perceived as reliable partner of the local industry.

2.5 Tourists

Not all bike sharing schemes allow tourists to register as bike sharing competes with private bike rental services and this is often considered an inappropriate market influence with public money. In schemes where tourists are allowed to register, they form a beneficial target group.

- # Visibility & perception: for many cities, tourists come in such large numbers that they are a great potential increase the overall scheme visibility. Their positive experiences with bike sharing brings added value and benefits not only to bike sharing schemes but more in general to cycling mobility.



- # City branding: as cities are competing for tourists and guests, they invest a big effort in presenting their city as modern and innovative. In that context bike sharing can be seen as an environmentally friendly service to support the modernity and individuality of a city. Getting to know the city by bicycle can be promoted more actively as a unique experience. Bike sharing schemes and city marketing should go hand in hand and can open up new areas for visitors.
- # Scheme size & density: new or enlarged stations at main tourist destinations, close to big hotels or close to conference centres contribute directly to the overall scheme size.
- # Turnover: tourists generally have a high individual willingness-to-pay and can thus contribute considerable additional turnovers to the scheme.

3 Challenges that target groups bring along

Involving different target groups brings different challenges along. These challenges should be considered from operational and cost perspectives. Having a look at benefits and challenges as well as on potential effects that target groups have on each other - sometimes the effects neutralize each other, sometimes they amplify each other - is essential for a smooth and sustainable functioning of the BSS.

3.1 Residents

Residents bring not only benefits for the local bike sharing scheme but can also put the scheme to the test.

- # Operating costs: building BSS infrastructure in a wide range of residential areas and ensuring appropriate redistribution is expensive. Cities often choose to start on a smaller scale and in the city centre.
- # Location of docking stations: residents are obviously scattered all over the city, whereas the majority of the docking stations is in most cases in the city centre, near tourist sites or in main industrials / office areas. More remote neighborhoods often have a lower density of potential customers and therefore much fewer - if any - available bicycles. This might deter residents from trying the system and leads to a much smaller potential pool of customers. A municipality should rather focus marketing actions on a sub-segment of residents who live in the city centre or near other docking stations.
- # Local opposition: residents can turn against bike sharing due to for example the place the bikes take on their sidewalks, potential danger of having cyclists near playgrounds or areas frequented by seniors or losing parking spots for cars to docking stations. Residents are more prone than the other segments to organize opposition against the scheme by localizing neighbors and local interest groups and coordinating complaints to the municipality.



3.2 Students

Students bring not only benefits for the local bike sharing scheme but can also put the scheme to the test.

- # Scheme availability: when offered at low individual charges, the scheme is heavily used by students. Long and very frequent rentals at a few “hot-spots” reduce the overall availability of bikes for other users.
- # Operating costs: student’s collective moving patterns challenge the operator’s redistribution system. Many bikes have to be moved from central spots to the surrounding stations, e.g. when all bikes around the campus are ridden to the canteen at the same time. Additionally the overall maintenance costs increase when bikes are heavily used.
- # Temporary customer loyalty: once students graduate, they tend to move away from their city of education. Thus customer loyalty often ends.

3.3 Commuters

- # Bicycle availability: commuters use the bikes heavily during peak hours on weekdays from and to PT stops and workplaces. This puts concentrated load on the system and is a big challenge for the redistribution.
- # Turnover: once commuters adopt the shared bikes into their daily mobility behaviour, they use it frequently, often more than 100 times a year. While at the same time the operator provides annual or monthly subscriptions, the turnover per trip sinks. As commuters hardly ever use the bikes more than 30 min, which is the regular included time-span, no additional turnover is generated.

3.4 Employees

Employees and their employers bring some challenges that differ from the other target groups:

- # User loyalty: employees that find no available bike just a few times, might return to their regular means of business mobility. As they are not directly linked to the operator, the development of customer loyalty can be difficult.
- # Turnover: when large employers terminate the contract, the BSS operator loses a considerable amount of scheme turnover.
- # Location: whenever an employer decides to not offer this scheme for employees anymore, specific infrastructure on the company premises become redundant.

3.5 Tourists

Not all schemes allow tourists to register. Some of the following points might be the reasons for this:

- # Scheme availability: Long and very frequent rentals at a few “hot-spots” reduce the overall availability of bikes for other users. Redistribution can be logistically complex in a crowded, possibly car-free, city centre.



- # Operating costs: building BSS-infrastructure in the touristic centre or close to popular sights is often difficult due to monument protection or lack of space. Additionally the overall maintenance costs increase when bikes are heavily used.
- # Low customer loyalty: tourists are by definition only visiting shortly and therefore do not form a reliable, fixed customer base.
- # Safety: Tourists are not always familiar with cycling, which can offer challenges regarding safety and related infrastructure.
- # Private bike rentals: privately operated bike rental companies often consider bike sharing a publicly funded completion of their service.

4 How to address...

The following chapter includes hints and tips to address the five main target groups and to meet their requirements for a BSS.

4.1 Residents

The following actions are recommended:

- # Include residents where possible in the planning process when implementing or expanding a BSS. Give them chance to address their wishes, fears or complaints and respond to these.
- # Use a large variety of occasions in and around town to make residents aware of and comfortable with the bike sharing system. For example the opening of a new shopping mall or swimming pool, a large music festival, news about increased congestion, etc. The scheme should convert these occasions into (first) rides and a positive customer experience.
- # Use a variety of departments within the municipality to promote and explain the bike sharing scheme, for example departments related to new resident registering, education, transport, safety etc. As an example, new residents could receive brochures and vouchers for the usage of the local BSS with their registration papers.
- # Use local communication channels like local radio, newspapers, door-to-door magazines to provide informative campaigns on the system and opportunities, health aspects, convenience etc.
- # Emphasise that increasing the availability of bicycle sharing systems will likely result in increasing property values, improved neighbourhood health, and a more vibrant urban environment, thereby improving the local urban environment while at the same time benefiting from economic gains.

4.2 Students

Operators of bike sharing schemes who want to target students must consider that two different groups have to be addressed: students themselves as users of the scheme and universities or students organisations as payers.



- # Define the exact targets that they want to reach by involving students (e.g. increase the number of bikes and stations, gain additional turnover, increase visibility, strengthen the local network) and monitor the results.
- # Incorporate the visual identity of the respective institution, e.g. by using the university colours and logo for the stations on their premises, a dedicated app or access media.
- # When addressing students, keep communication simple, underlining aspects of flexibility, sustainability, fun, convenience, modernity and identification with the city and the university.
- # When addressing universities and students organisations, illustrate sustainability aspects, image gains, mobility strategies and local stakeholder-networks.
- # Marketing and communication by several stakeholder groups is well developed at universities and similar institutions. Use the existing communication infrastructure: magazines, semester information, apps or newsgroups. Furthermore be present at events and use the chance to contribute to academic work with lectures or seminars.

4.3 Commuters

Recommendations:

- # Team up with the local PT operator(s) to provide commuters with integrated information, access solutions and communication campaigns.
- # Work together with companies. Employers and Mobility Managers can be collaborative actors and can contribute to encourage employees to experiment the BSS (Ex.: discount tickets campaigns, target communication within the companies' buildings...)
- # Provide more capacity at central PT stops and workplaces.
- # Use existing campaigns, such as the European Cycling Challenge to promote "bike to work" travels.

4.4 Employees

Operators of bike sharing schemes who want to target employees must consider that two different groups have to be addressed: employees themselves as users of the scheme and employers as potential payers. The following actions are recommended:

- # Contact companies in the industrial area or in areas with large office buildings and let them pay for or sponsor (additional) docking stations.
- # Make a package deal for companies that could include a subscription in advance for employees, subscription in advance for customers, loyalty program or sponsored docking stations. An insurance and provision of helmets can also be included.
- # Make more docking stations available in the industry area for employees to use the BSS in combination with public transport.



4.5 Tourists

Tourists, being in the city only for a very limited time, should be approached as follows:

- # Make BSS as accessible as possible for tourists. Provide websites and on-site information in different languages and provide an easy registration and payment service.
- # Team up with hotels to offer them the bike as flexible mobility option during their stay. Schemes with complex registering procedures can provide hotels with access cards and billing software that allows guest to use the service without extra registration.
- # Include bike sharing in the visitor card that your city offers to tourists.
- # Give tourists a sense of safety by giving instructions what is expected from them in terms of behaviour, the rules and regulations on the streets, what they can expect on the street.
- # Create simple cycling routes both inside and outside the city with information on the attractions and sights they can expect on the way. Make for example an Architecture route, Food Route, Parks route, Historic Route, Channels and rivers Route, etc.

5 The VeloCittà activities

During VeloCittà, six partners in five cities carried out a variety of measures to address existing or potential users. Some of these measures are briefly described in the following chapters. For a more detailed review, consult the “Report on all communication and operation activities”(project deliverable number 3.5).

5.1 Burgos

The local BSS Bicibur was optimised in many ways during VeloCittà. The scheme was upgraded with 100 new bikes and a new website was introduced. As the numbers of registrations dropped after the introduction of a 15 € yearly subscription fee, the main target of the campaign in Burgos was to increase the overall number of registrations. Bicibur doubled the number of active users from under 500 in 2014 to about 1.000 in 2016.

This was done mainly by focussing on residents, students and commuters. A campaign in 2016 informed widely about the registration options and a raffle for new users was carried out.



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Ayuntamiento de Burgos
Gobierno de Burgos
Confederación de las Regiones Europeas
Programa de la Unión Europea

Figure 1: Poster informing about the raffle for new users

Bicibur sent promoters to the university and student events to make the offer known among students. The electronic student can be used access the Bicibur system after a simplified registration process.



Figure 2: Promoters at the University



To strengthen the integration of Bicibur and public transport, the option of using the bike sharing scheme with the BonoBur was promoted during the project.



5.2 Krakow

Krakow was going through the process of tendering and implementing a new bike sharing scheme during the project. Thus, the activities focussed on an overall promotion of cycling in the city and informing about the upcoming scheme.

In summer 2016, the bikes for the new system were presented to the public. The department of infrastructure and transport (ZiKiT) carried out a poll to let locals decide about the new name for the scheme. Among four options, WAVELO was chosen to be the new local bike sharing offer.



Figure 3: The new WAVELO



Figure 4: Sightseeing by bike

The city administration offered two different types of tours, one addressing residents and focussing on bike safety and everyday cycling in Krakow, and one offering different themed bike tours for tourists.

To increase cycling in general and bike sharing specifically among students, the city administration sponsored cycling students at university events.



Figure 5: Sponsored students of 53. Endorphins Rally of University of Technology in Kraków

5.3 London

Santander Bikes in London is promoted by TfL and Santander in citywide campaigns. This leaves little room for individualised activities but TfL supports the boroughs with on-site events by providing staff that explains the scheme to the attendants.

Lambeth focussed on residents in specific neighbourhoods and on students that live in the borough.



Figure 6: Poster targeting residents Lambeth



Figure 7: Posters targeting Lambeth



Figure 8: Pup-up playground at resident event in Lambeth



Figure 9: Bike stunts in Lambeth



Figure 10: Informing residents in Lambeth



Figure 13: "Super Digits" concept



Figure 14: "Super Digits" on the street

The borough-wide *#cyclehappy* campaign combined on-street elements and online communication to promote bike sharing and cycling in general to residents and employees.



Figure 15: Borough wide campaign cyclehappy in summer 2016



Figure 16: *#cyclehappy* for employees

Additionally to these individual approaches, Southwark also teamed up with transport for London to target residents, students of the South Bank University and businesses. TfL supported the campaigns with free vouchers, one-site staff to inform potential users and marketing materials.



Figure 17: Santander supports Cycle to Work Day

The ongoing communication efforts and the close cooperation with TfL and the operators of the scheme have proven to be successful. In 2015, about 3,300 residents were members of Barclays cycle hire and used the bikes more than 300,000 times.

5.4 Padua

Both stakeholders, the operator of the GoodBike scheme Bicincittà and the city administration are partners of VeloCittà. During the project, they worked jointly on the improvement of the system.

The main focus was put on residents. New marketing materials, e.g. brochures and posters were developed. The campaign was accompanied with social media activities and radio spots. In spring 2016 a total number of 360 radio sports was aired by local radio stations to promote the scheme.

At the same time a new GoodBike App was introduced to facilitate the registration and usage processes.



Figure 18: Campaign poster



Figure 19: GoodBike brochure



Figure 20: Cycling event with the Mobility Councillor

The city administration incorporated GoodBike for the promotion of cycling in general and carried out several events, mainly targeting residents and students. Politicians like the Mobility Councillor participated and helped getting media coverage for cycling as a vital topic for the city.

GoodBike and the city administration were present at events for the Sustainable Mobility Week, the Expobici, the city fair M'illumino di meno and many more.



Figure 21: Bicycle festival 2015

Besides that, discounts were provided for students and commuters that registered during the campaign period. Also, 30 mobility managers of local companies received information about the service and support in informing their employees about the offer.



Figure 22: Brochure for students

5.5 Szeged

CityBike Szeged is operated privately and without financial support from the municipality by Sund. During VeloCittà, Sund improved the corporate identity, upgraded the website and developed a number of merchandising products, such as t-shirts, stickers etc.



Figure 23: CityBike merchandise

The key issue for the operator was to make CityBike widely known and establish the offer in the city. The newly developed CityBike Pass (RFID) was developed and marketed.



Sund also worked on strengthening the cooperation with the city. A brochure, also including the CityBike offer was produced and distributed to 75,000 households by the city administration.



Figure 24: Festival promotion



Figure 25: Bike Tour at the Rose Festival

Furthermore, CityBike Szeged was present at different seasonal events with a focus on residents, students and tourists. Free vouchers, that were handed out at these and further occasions, triggered potential users to register. From October 2014 to October 2016, the number of users increased from 1,600 to 3,900.



Figure 26: Coupons for free trial



About VeloCittà:

The European VeloCittà project brought together five cities that seek to improve their existing bike sharing schemes. In London (UK), Krakow (PL), Burgos (SP), Padua (IT) and Szeged (HU) the performance of the bike sharing system was enhanced through two complementary approaches. On the one hand marketing campaigns tailored to certain target groups, like students or commuters. And on the other hand adoption of the most effective available operational solutions with regard to organisational and financial aspects as well as political involvement. The ultimate benefit of VeloCittà is that it provides inspiration and builds capacity and knowledge in local authorities and bike sharing stakeholders to boost the uptake of bike sharing.

VeloCittà is a demonstration project co-funded by the Intelligent Energy Europe Programme of the European Commission. It had 11 project partners. It ran from March 2014 – February 2017.

For more information, questions, project outputs and reports, please visit www.velo-citta.eu or send an email to info@dtvconsultants.nl

Partners:

