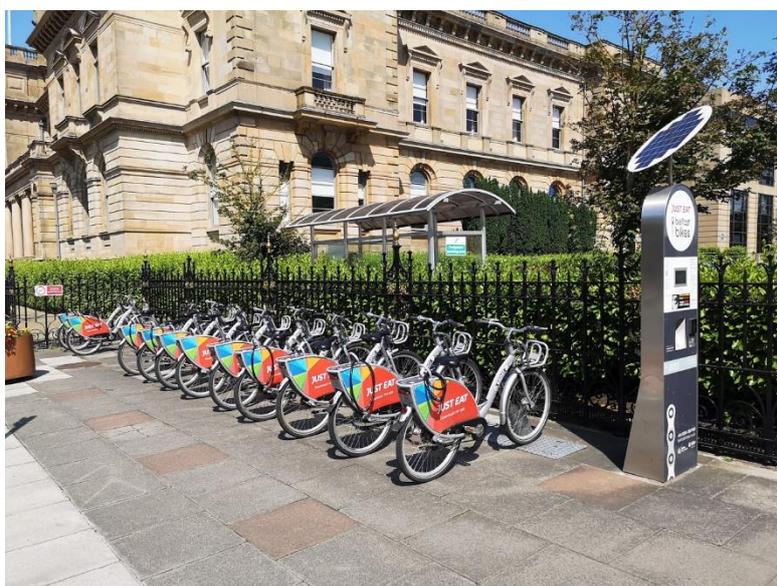




Document Control Record

Just Eat Belfast Bikes Strategic Review



Client

Belfast City Council

July 2020



DOCUMENT CONTROL

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INTELLIGENT TRASPOT SERVICES

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1. **INTRODUCTION**

1.1.1 This report provides details of the Strategic Review of the Belfast Bikes Cycle Hire scheme. The review includes the history of the operation of the scheme, the policy framework, scheme objectives, a review of the network and operations. The report also includes a framework for the future, focusing on operations and financial sustainability.

1.1.2 The review has been conducted using data and background information provided by Belfast City, operators NSL and technical information from manufacturers NextBike.

1.1.3 Docking station locations in the city have been visited to assess the locations and the condition of the docking station and bikes in situ.

1.1.4 Additionally, interviews were conducted with a broad range of stakeholders and partner organisations to understand how the schemes works for them and ways in which the relationships could be strengthened.

1.2 **Policy Context**

1.2.1 Transport policy and projects are the responsibility of the Department for Infrastructure. Belfast City Council is responsible for community planning and local land use planning.

1.3 **The Belfast Agenda**

1.3.1.1 The Belfast Agenda is the city's first community plan. It has been developed by a partnership of organisations with Belfast City Council taking the lead. The 'agenda is for everyone - for all parts of Belfast and our diverse and talented communities as well as for the many people beyond our boundaries who depend on the city's success for work'.

1.3.1.2 The agenda includes focus areas which are:

- Growing the economy
- Living here
- City development
- Working and learning

1.3.1.3 Within the plan is a review of the current situation in the city. The plan highlights that over half of the workforce travel to work by car or van with only 2% making the journey by bike.



1.3.1.4 The agenda also includes a series of indicators and outcomes that include a number that Belfast Bikes can contribute to and benefit from including:

- Reduction in level of preventable deaths
- Proportion of population of adults who rank themselves as having high levels of wellbeing
- Air quality
- Percentage of all journeys which are made by walking, cycling or public transport
- Number of miles of cycle lanes, footways and footpaths

1.3.2 **Northern Ireland**

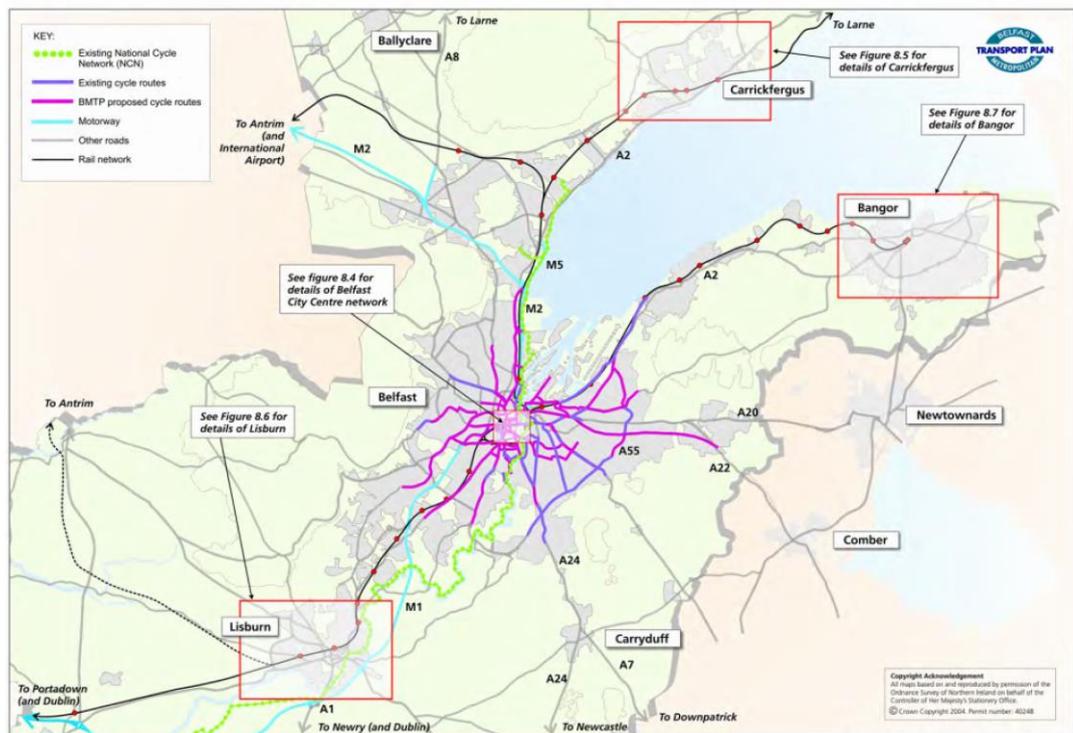
1.3.3 As previously introduced responsibility for the development of a cycle network for the city is largely the responsibility of the DfI. Planning for cycling is included in policy and strategy documents including the Belfast Metropolitan Transport Plan.

1.4 The Belfast Metropolitan Transport Plan (Currently being reviewed)

1.4.1.1 The BMT Plan was launched on November 2004 and is the local transport plan for the Belfast Metropolitan Area (BMA) prepared by DRD (now DfI) to take forward the strategic initiatives of the RTS. The elements of the plan are outlined under four main headings: walking and cycling, public transport, highway network and

management. The document outlines the transport schemes and measures under these headings which are expected to be implemented up to 2015. The plan was subject to an internal interim review by DfI in 2017.

1.4.1.2 The Belfast Metropolitan Transport Plan (2015) includes plans for a cycle network for the city. The proposed network would include routes of varying types of provision determined in part by on street conditions for cycling. The network would include parts of the NI National Cycle Network as shown in the map below.



The routes included in the network identify preferred routes between key locations in the Belfast Metropolitan Area.

1.4.1.3 To further encourage greater levels of cycling the plan suggests the provision of cycle parking at stations and other transport interchanges to encourage combine mobility trips.

1.4.1.4 Both the introduction of a coherent cycle network and combined mobility journeys could be key drivers for increases in use of the Belfast Bikes schemes as shown in many examples in other cities.

1.4.2 A Bicycle Strategy for Northern Ireland

1.4.3 A Bicycle Strategy for NI, published in August 2015, sets out plans to make NI a cycling community over the next 25 years. The strategy promotes the development of a 'three pillar approach' for the development of cycling which includes careful planning, high quality infrastructure and effective behaviour

change campaigns. The strategy also develops four key elements which will contribute to achieving the vision for cycling in NI:

- Developing a comprehensive network in both urban and rural areas
- Safe Places
- Greater Numbers
- Inviting Places

1.4.4 Draft Belfast Bicycle Network

1.4.5 DfI published the draft Belfast Bicycle Network Plan for public consultation in January 2017. The consultation report was published in February 2018.

1.4.6 Cycling infrastructure has been delivered in parts of the city centre. The cycle routes proposals include:

- Grosvenor Road / Durham Street / College Square North / College Street & Queen Street - an upgrade of the existing cycle infrastructure along the Grosvenor Road and Queen Street with an extension to provide a new connecting two way segregated cycle lane along Durham Street and College Square North.
- Middlepath Street - a dedicated connection along Middlepath Street to the eastern city approaches, as well as a connection to Titanic Quarter.
- Cycle Route along Alfred Street /Upper Arthur - an upgrade of the existing cycle infrastructure along Upper Arthur Street with an extension to provide a connecting two way segregated cycle lane along Alfred Street.

Work on extending the network outside the city is outlined in the draft network plan but there is no delivery plan or resources assigned.

1.5 History

1.5.1.1 The Belfast Bikes scheme was developed as part of the Physical Investment Programme. The programme, originally launched in 2012 is a £325 million citywide commitment to making Belfast a better place to live, work, visit and invest. It includes around 350 projects, includes major schemes to boost the economy, create jobs and improve the quality of life in our neighbourhoods. The Department for Regional Development provided initial capital funding for the scheme as part of their Active Travel Demonstration Projects budget.

1.5.1.2 The programme is not simply about building new facilities or assets. Investment decisions are taken in line with the strategic aims and objectives of the Belfast Agenda, the city's first community plan which sets out a vision for Belfast in 2035.

1.5.2 Belfast bikes scheme was launched in April 2015 with a network of 30 docking stations and 300 bikes. The scheme has been operated by NSL continually since inception using bikes and supporting infrastructure from Nextbike GmbH.

1.5.3 The scheme has been expanded to now include 47 docking stations and 432 bikes. The scheme was originally sponsored by Coca-Cola but this was superseded by an agreement with Just Eat in 2018.

1.6 Scheme Objectives

- To support an increase in the modal share for cycling in Belfast and reduce dependency on cars particularly for short trips;
- To improve the health of residents by encouraging a healthier way to travel;
- To give our residents and visitors greater access to places that are beyond reach on foot through an affordable, sustainable transport system;
- Support access to employment and services by linking city centre locations;
- To reduce greenhouse gas and ambient pollution emissions from road transport; and
- To improve the image of Belfast and normalise cycling.

1.6.1 The scheme has achieved its core objectives, further details are referenced later in the report.

2. REVIEW OF NETWORK

2.1 INTRODUCTION

2.1.1 The following sections of the report look into all areas of the Belfast Bikes Scheme to determine how it is performing and how that information may be used to steer the strategic review and to provide recommendations/proposals. See **Section 5** and the proposal table, **Appendix A** for details on all proposals.

2.2 DATA COLLECTION

2.2.1 To undertake the strategic review it was essential to gather as much data about the scheme as possible. This was achieved in a number of ways;

- Inception meeting with Belfast City Council
- Stakeholder Meeting
- Elected Member Workshop
- Meeting with NSL Operations
- Nextbike data collection (Rentals/App information etc.)
- Public Survey
- Ride Outs to new areas

2.2.2 This data has been used to investigate different areas of the scheme and to establish the future of the scheme.

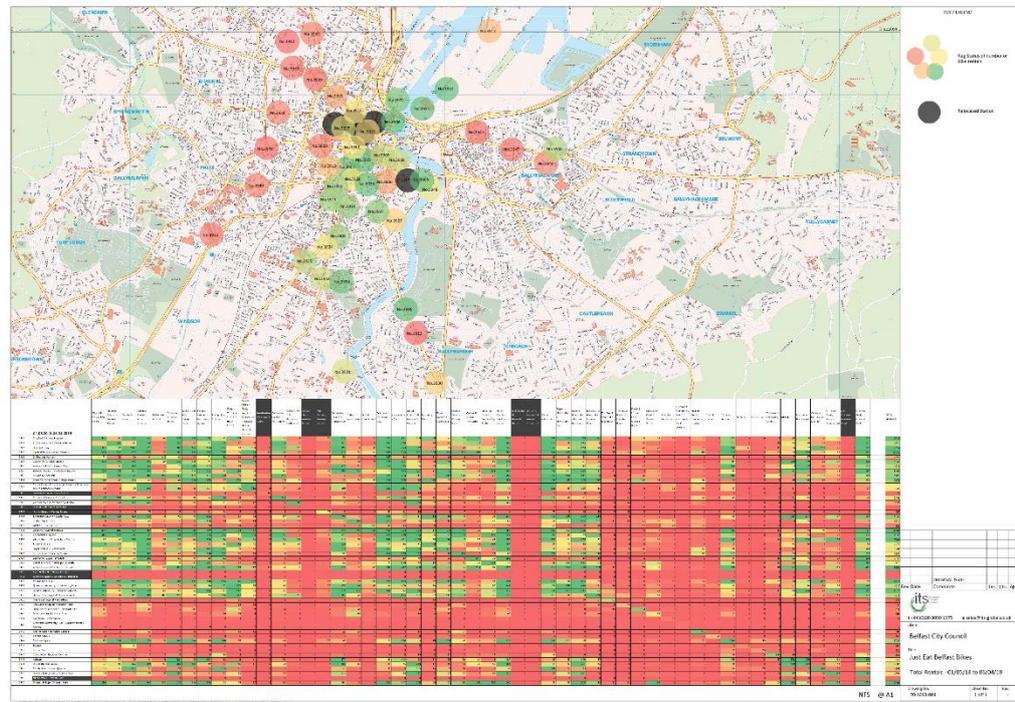
2.3 NETWORK AND DOCKING STATIONS

2.3.1 Whilst assessing the current network and docking stations we needed to establish whether the current scale, coverage and density are correct for Belfast, these 3 core areas of investigation will help to determine what the future proposals are for the scheme.

2.3.2 Based on the information gathered it is clear that the Belfast Bike scheme is a success in terms of it meeting its core objectives by delivering on;

- Increase in modal share for cycling;
- Reduce dependency on cars;
- Improving health
- Increase public transport options

2.3.3 From the data received from NSL we first gathered all the rentals at each station for an entire year. We then tabulated this data, which was then used to provide a rag status of the most used stations over that year. This was graphically represented and is shown as **Drawing No. 70-1093-001 – Total Rentals**.



2.3.4 The table and graphical representation is a very clear indication of where the scheme works well and where it may need adjusting or slight improvements. It is clear that the density of the scheme in the centre of the city works very well and the new stations in the south east also prove that the scheme has scope to expand.

2.3.5 The data also allows us to investigate each station and to review the merits of either extending or reducing the station based on usage. An effective way of adapting a scheme and increasing its size is to review the stations and remove unnecessary docks that are not required. These unused docks can then be utilised elsewhere in the scheme, either to extend busy stations or to add new ones. Full proposals are outlined in **Section 5** and on the table in **Appendix A**.

2.4 STATION REVIEW FORMS

2.4.1 As part of the review we also collated all of the information for each station and populated a one page information sheet. These sheets provides a snap shot of the history and performance of each bike station. Each sheet contains the following information;

- Station name and number
- Operational Date
- Total rentals

- Rentals by type
- Number of Docks
- Configuration
- Station expansion
- Vehicle Service access
- Top 5 station destinations
- Site Location information
- Public Infrastructure review
- History

JUST EAT BIKES - STATION REVIEW
Ref: JEB/2015

Station Name: No 2002 - City Hall Operational Date: April 2015

Rental by Station Type	App	Doc	App	Doc	Docks for Assessment	Yes
12/09/15	App	Doc	App	Doc	Docks	Yes
12/09/15	Website	Doc	Website	Doc	Docks	Yes

Top 5 Destinations:

1. City Hall / Spinnaker Head
2. Central Station / Mays Vauxhall
3. Corporation Square
4. Titanic Belfast / St. Ann's
5. Belfast City / Spinnaker Head

Site Location:

public transport: Yes

station: Central Station

location: Multi use

Notes: / Train / Very High

Comments:

1. None
2. None

2.4.2 These review sheets were used to determine a number of recommendations and proposals as set out in section 5. These can be viewed as **Appendix B**. In addition more detailed recommendations are shown in **Appendix A**.

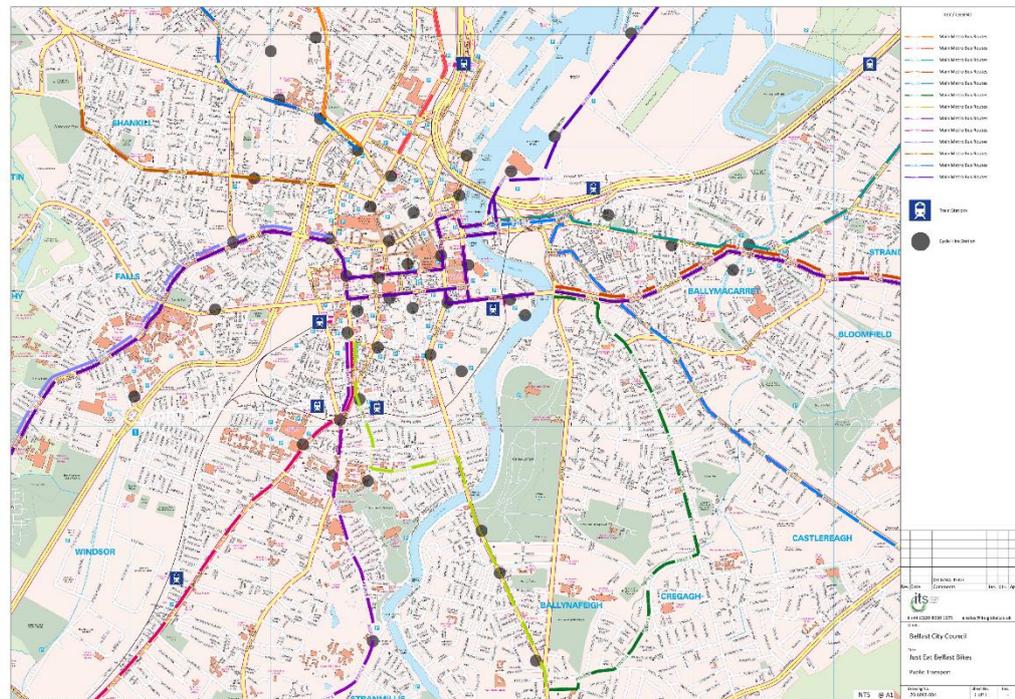
2.5 EXISTING PUBLIC TRANSPORT

2.5.1 As part of the review we also considered how the existing location of bike stations fit in with the primary bus routes and railway stations around Belfast. All of the existing stations sit within a 150m radius of existing public transport whether it is a bus route, bus station or rail station. This provides excellent opportunities for users to switch between different modes of public transport rather than using a private vehicle.

2.5.2 One of the most recent additions to the public transport network is the Glider which operates east to west across Belfast City. In addition to the introduction of the Glider a series of route improvements were made to ensure its success, some of these included bus lanes which also help to encourage cycling by offering a safer space to cycle.

2.5.3 It is important for all areas of public transport to be supported, not just the buses and trains. It is clear that micro mobility is beginning to play a significant part in any cities public transport network and further increases a modal shift away from the private vehicle.

2.5.4 Whilst it is easy to separate bike share from the cities other public transport, authorities should consider the cost, health and social benefits of providing a bike share scheme. (see **Drawing No. 70-1093-004**)



Drawing No. 70-1093-004 – Public Transport

2.6 SCHEME ACCESS

2.6.1 Users can access the scheme via an app, website, call centre or the kiosk at the station location. Signing up is very straight forward with the app being very easy to use. As part of our review we collected data from each station and split the way users accessed the scheme into the 4 categories. These were then presented on to station review forms which can be viewed in more detail in **Appendix B**.

2.6.2 The access period to the scheme is currently 365 days a year, from 6am to Midnight. Although it is envisaged and based on other UK schemes that the majority of rentals do occur in this period, there are arguments for providing the service 24/7, 365 days per year.

2.6.3 To understand if this would be a viable proposal to extend operational hours, we would need to establish the advantages and disadvantages of doing this. These are listed below;

Advantages

- Improved access to public transport for shift/night workers
- Less system failure due to not switching on and off each day.

- Increased Revenue

Disadvantages

- Increase operation costs may be higher than increased revenue
- Risk of users using the bikes under the influence during early morning hours (midnight to 4am)
- Change in redistribution KPI's

2.6.4 Clearly there are plus points for extending the operational hours, however as this would be a substantial change in the contract this could only be implemented should the operations be re-tendered or re-negotiated with the mutual consent of the existing operator.

2.6.5 In addition to the hours of operation, access to the scheme is limited to age unless permission is given by the parent/guardian (14-18). This is an area that could be improved to encourage students to use the bikes to travel to and from school. The current terms are;

- 2) You must be aged over 18 to register. Customers between 14-18 years may register with parental/guardian consent.

2.6.6 Even by moving the registration age down to 16 could have a positive improvement on rentals and also the users embracing a cycling culture at an earlier age.

2.6.7 In terms of access to more groups, this was not reported on and therefore we assume was not available. To improve on this, access to the scheme can be improved by encouraging social enterprise bike companies to work in communities that have either poor public transport links or are in areas of social deprivation. Again however this would be subject to mutual agreement with the current operator and would need to be considered as part of a wider capacity building programme for the sector.

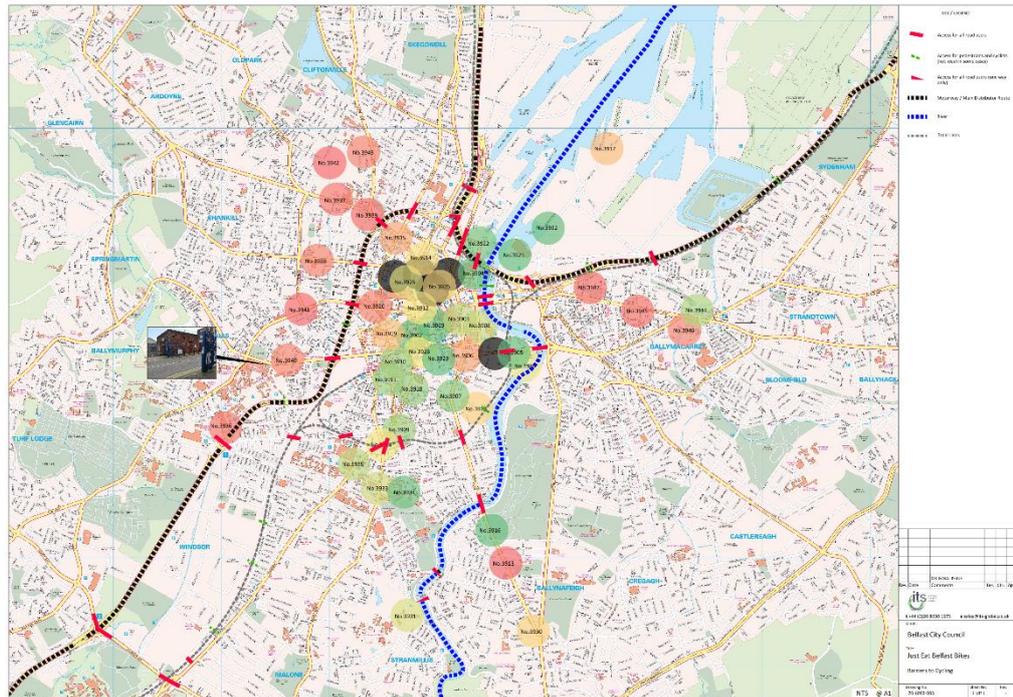
2.7 BARRIERS TO CYCLING

2.7.1 This review also looked at Belfast City as a whole and how the network operated, not only for cycling but also for other road users. As can be seen on the map (**Drawing No. 70-1093-003 – Barriers to Cycling**) there are a number of roads/train lines and the river Lagan that creates barriers for cyclists.

2.7.2 It is clear that the river Lagan is a huge barrier to Belfast Bikes being mobilised to both the north east and south east of the City, with only a few routes across, however, the river also provides one of the best assets for off road cycling along its towpaths. Therefore it is clear that the river will play an important role in developing the scheme further. Only more recently with the introduction of new stations along

Ormeau Road have some parts south eastern side of the City gained access to the scheme. These stations have proved to be very popular and only reinforce the need to expand the scheme into these areas.

2.7.3 The map also shows barriers to the north and west with the main motorway cutting a route from north to south on the western side of the City. As can be seen stations have been provided in this area, however they have not seen the success of the stations to the south and east. This may also partly be due to poor cycle infrastructure in these parts of Belfast. In addition the Royal Hospital has gates that



are closed each night effectively blocking access to large areas around the Royal Hospital.

2.7.4 As part of any expansion to the outskirts of Belfast it is important to look at the area as a whole and to tackle some of these barriers. A good example of this is the new bridge across the river Lagan which will link up at the gas works and land to the north of Ormeau Park. This proposal will hugely improve accessibility to the east and in turn offer the opportunity to expand the scheme.



Gates at Royal Hospital (barrier to cycling and pedestrians)

2.7.5 In particular there is poor connectivity between the city centre and neighbourhoods in the North and West of the city due to a dominant road infrastructure and the lack of cycle infrastructure. A review of the existing cycle infrastructure around these barriers should be investigated further and funding sought to improve access to isolated areas of Belfast. The Draft Belfast Bicycle Network Plan was published for consultation in 2017, however, it has not been finalised. As a priority the West Route 6, The North West Route 7 and the North Route 8 should be prioritised in order to improve connectivity to these areas and encourage the uptake in cycling. Scheme expansion could be planned along the proposed routes.

2.8 TARIFF TABLE

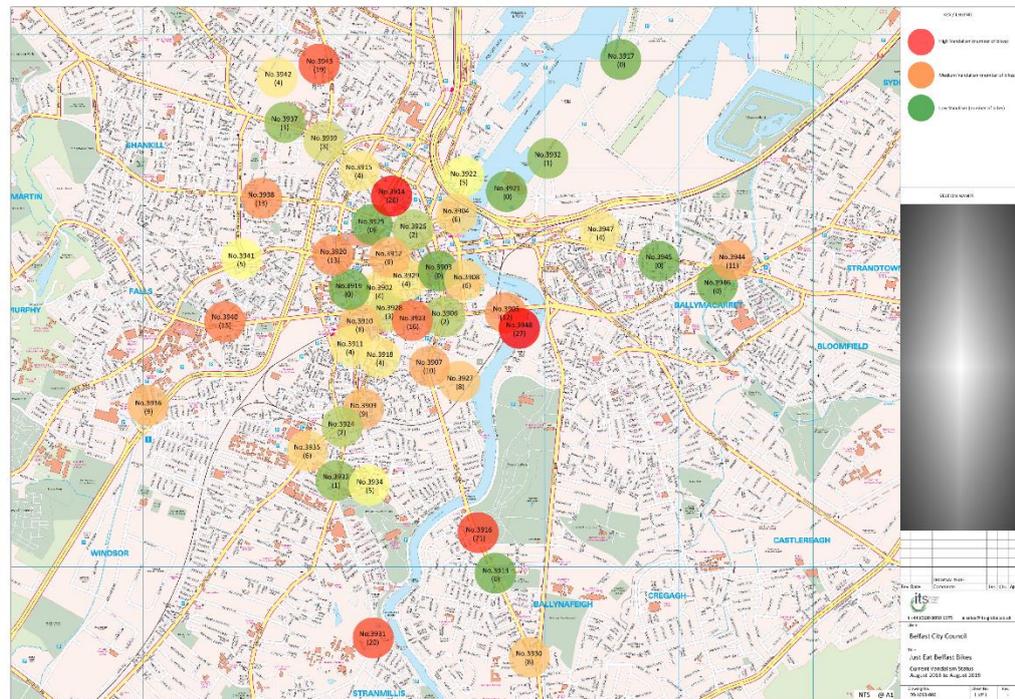
2.8.1 The current charges to users are shown in the table below. The pricing model is very simple and is only made up of 3 price plans, a pay as you go, casual and annual. The annual plan also had automatic renewal for existing users, which has now been changed since the introduction of a new payment platform Worldpay Corporate from the 17th June 2019.

The screenshot displays the Belfast Bikes website interface. At the top, there are navigation links for 'LOGIN', 'HOW IT WORKS', 'LOCATIONS', 'PRICES', 'PRIVACY POLICY', 'COOKIE POLICY', 'CUSTOMER SPOTLIGHT', 'CYCLING IN BELFAST', 'DOCK IT AND LOCK IT', and 'STATISTICS'. Below this, the 'Prices' section is highlighted, stating 'All tariffs at a glance *Pay as you go is charge is per 30 minutes'. A prominent 'Pay as you go' button shows a rate of '£1 /30 min'. A green banner below indicates 'Sign up for free! £5 charge is applied to your account which you can use as credit.' The 'Membership options' section is divided into two columns: 'Casual' and 'Annual'. The 'Casual' plan is priced at '£6 3 days' and includes 'First 30 minutes per rental free of charge', '£0.50 / up to 1 hour', '£1 / each additional hour up to 4 hours of rental', and '£2 / every extra 30 minutes after 4 hours up to 24 hours'. The 'Annual' plan is priced at '£25 year' and includes 'First 30 minutes per rental free of charge', '£0.50 / up to 1 hour', '£1 / each additional hour up to 4 hours of rental', and '£2 / every extra 30 minutes after 4 hours up to 24 hours'.

2.8.2 As we are aware economies change all the time and businesses need to align themselves to remain competitive, the Belfast Bikes scheme is no exception. Existing tariffs and plans should be monitored and adapted if required, in addition two year review cycle should be adopted to remain in line with inflation.

2.9 VANDALISM

2.9.1 A significant problem with the Belfast bikes is the level of vandalism. Vandalism is generally a random occurrence, however there are particular situations where



positioning, lighting, access and location can play a role in increasing these occurrences. It is therefore important to fully consider each site very carefully, their position within the network is very important and should be a primary consideration when choosing new sites. However, once this is decided, designers should also consider the urban environment and ensure they can design out vandalism as much as possible. This can be achieved by placing the station in high visibility areas or areas with CCTV for example.

2.9.2 The map above (**Drawing No. 70-1093-002 – Vandalism**) highlights which of the stations received the most amount of vandalism in a 12 month period from August 2018 to August 2019.

2.9.3 The majority of vandalism is caused by the younger generation trying to remove bikes from the docks, this causes the damage to the fork lock, the dock and in some cases bikes are removed and vandalised beyond repair.

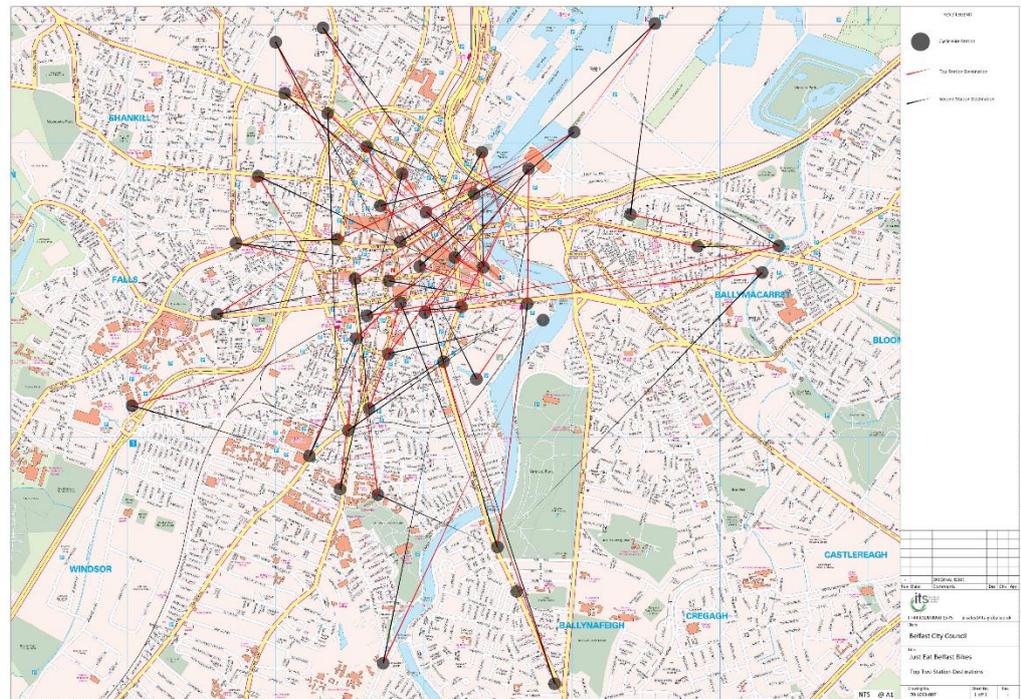
Reported Issues and review findings

2.9.4 This is an area that needs a lot of attention as it effectively has an effect on all aspects of the scheme from operational issues, sustainability and user perspective. Vandalism must come down to improve the scheme.

2.10 USERS FAVOURITE STATIONS

2.10.1 As part of the review we were also interested in where users were using the bikes and what routes they may have taken.

2.10.2 The spider gram below (**Drawing No. 70-1093-007 – Two Top Station Destinations**) gives an insight into origin and destination of users from each bike station. We have taken the 2 top destinations from the station review sheet and plotted them

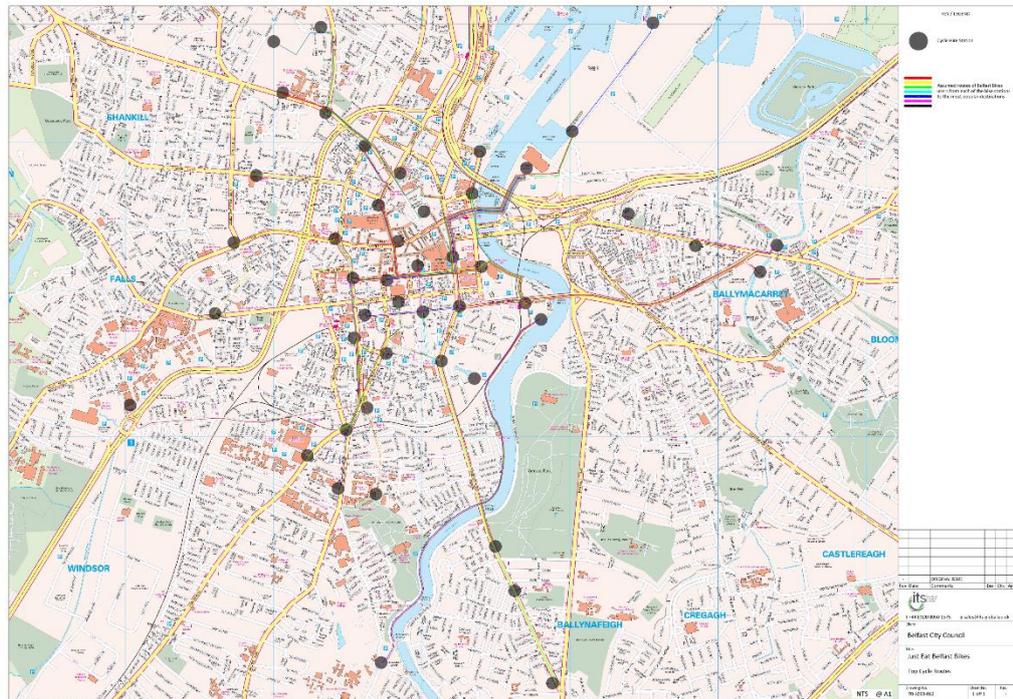


accordingly. This clearly shows the intensity of the scheme in the centre of Belfast but also how popular some of the new stations are in the south and east.

2.10.3 An additional detailed map has also been produced which takes the top destination of each station and assumes the most efficient route to that destination by a user. The intention of producing this data is to inform designers where cycle infrastructure would benefit most users.

2.10.4 Due to the way the road network is built up in the centre of Belfast, particularly around the City Hall, it is likely that some cyclists not just users of Belfast Bikes will

disobey the current highway code. This could be by either by cycling on the pavements, riding on the wrong side of the road or riding the wrong way up a one way street.



Top route destination map (Drawing No. 70-1093-012 – Top Cycle Routes)

- 2.10.5 A map has also been completed which concentrates on showing the likely routes users would take to their top destination. As the map shows there are a number of routes that overlap over and over again that users use to reach their final destination. Some of the areas that would benefit from infrastructure improvements are around the City Hall, Victoria Street and around the Odyssey. This is shown as **Drawing No. 70-1093-012 – Top Cycle Routes**. This map also highlights the need for increased cycle infrastructure to the north and west of the city, it is widely agreed that poor cycle infrastructure does have a detrimental effect on cycling in general.
- 2.10.6 There are also a number of one way streets in Belfast that would benefit the introduction of cycle contra flows. Two important routes that could improve access across the river are Kings Bridge and Governors Bridge. The introduction of contra flow cycle lanes will improve journey times for users and also create a safer environment for all users of the public highway. It is important to support Belfast bikes with improved cycle infrastructure and to consider aligning and including Belfast Bikes in all subsequent bids for improvements.
- 2.10.7 It is also clear that the cities tourist attractions are also very popular with users, the area around the Titanic Quarter is a very popular destination from a high number of stations. Consideration for tourist areas that generate high footfall should rank

high when choosing new locations to improve and grow the network. A typical example of this would be Belfast Castle and train stations such as York Street.

2.11 STAKEHOLDER CONSULTATION AND ELECTED MEMBER WORKSHOP

2.11.1 Stakeholders

2.11.2 A number of stakeholder meetings were held on the 26th June with key people over the course of the day. The list included representatives from NI Greenways, Universities, sponsorship consultants, translink, Cycle unit, Belfast City centre management and the Department for Communities. .

2.11.3 The format was fairly informal, stakeholders were asked various questions to help begin a debate around the Belfast Bikes scheme. As such, some of the debates were quite focused on each of the stakeholders particular specialised areas.



2.11.4 The general consensus was that Belfast Bikes was a success and that is now a key part of the Cities transport and tourist industry. However, there was also a number of negative points that all of the stakeholders shared. All these issues mainly related to the bikes and stations, the key items that stakeholders were keen to help improve were, bike maintenance, distribution and the accuracy of bike information at each station.

2.11.5 Elected Members Workshop

2.11.6 A workshop was held with elected members and staff from Belfast City Council on Tuesday 27th August 2019 in City Hall. The initial findings and draft recommendations were presented for discussion. It was noted that the presentation contained early proposals and recommendations from the workshop would also be considered in the final review report.



Example of presentation slides

2.11.7 The feedback from elected members was very positive with all that attended having proposals to expand the scheme into new areas. Although the discussions around new stations and ideas were positive it was clear that a system to prioritise proposals was required to ensure the growth of Belfast Bikes was sustainable and was reaching the areas with clear demand.

2.11.8 Areas identified for new stations could also be tested using a temporary bike station that could be easily relocated if the forecasts prove to be lower than expected.

2.11.9 It was agreed that revenue raised from stations in expanding areas would then be used to expand in the areas where the demand is lower. Although a lower demand is present in some areas it is still important to provide the Belfast bikes service in these areas to improve social inclusion.

2.11.10 Additional requests were also made to include Lisburn and Castlereagh City Council in discussions to include Forestside and Antrim and Newtownabbey. It is envisaged that should the demand for Belfast Bikes extend out of the Belfast City boundary then these would also be considered and discussed with neighbouring local authorities.

Social Enterprise

2.11.11 A short video was also presented at the workshop, the video featured a charity named Bike 4 Good. Bike 4 Good currently operate a bike share scheme in Glasgow, however they also provide services that potentially encourage all people the opportunity to ride a bike. The key message is around bringing bikes to all and how this can encourage ownership from areas to embrace Belfast Bikes.

The benefits of working with a social enterprise and an operator can bring some of the following improvements;

- Inclusion
- Ownership
- Reduced vandalism
- Access to employment

2.11.12 This proposal was embraced by all elected members and each were keen to progress this idea as soon as practically possible. Again this would be subject to mutual agreement with the current operator.

2.11.13 The current operator is under contract until April 27th 2024. There may be an opportunity to negotiate this at break clauses within the contract. Any negotiation would require scoping of potential operators from the social enterprise sector.

2.11.14 In addition to the stakeholder and elected member consultation, a request to consider providing free rides to under 25 has been proposed. This is potentially very difficult to implement due to restrictions in the bike share payment platform and software, however we feel this should be an option worth following up.

2.12 SURVEY QUESTIONNAIRE

2.12.1 Introduction

2.12.2 A user survey was developed as part of the review. The main aim was to get customer feedback on the existing operation of the scheme, pricing and future operation and expansion. The survey was hosted on Survey Monkey between 23 August 2019 to 13 September 2019. Recipients were sought including both members and non-members of the scheme through council and scheme communication channels. A total of 172 responses were received.

2.12.3 Summary

2.12.4 The majority of respondents were male and in full time employment. The age range of responses was quite broad with most relatively well represented in responses. Nearly three quarters of responses were from existing users.

2.12.5 Most respondents who use the scheme were previously car drivers suggesting a modal shift from the scheme. Current users appear to use the bicycle as their main way to get around Belfast but interestingly the next most popular more is private car (as driver), suggesting a further opportunity to nudge more people from driving to cycling and increase cycling's overall mode share in Belfast through the scheme.

- 2.12.6 Also underlining the importance of the scheme to cycling in Belfast is the fact that 25% of respondents do not own a bicycle meaning Belfast Bikes provide their most readily available cycling option in the city.
- 2.12.7 Most usage is during the week, but it appears users of the service do so relatively infrequently and normally only 1-2 times a month. Travel time is important to respondents, it being the most selected reason for using the bikes. The most likely purpose of trips was commuting to either work, college or university. The introduction of the PAYG option was very popular and is showing a positive take up.
- 2.12.8 Word of mouth is one of the most powerful promotional tools and responses to the survey suggest respondents mainly positive experience of the scheme means they would recommend the service to friends.
- 2.12.9 Respondents thought the scheme should be expanded with suggestions mainly focused in the south and east but with locations in the north and west such as Belfast Castle also relatively frequently mentioned. In the south and east Ballyhackmore, Forestside, Lisburn Road and Ravenhill Road were most popular areas requested for expansion.
- 2.12.10 When asked whether they had experienced difficulties when using it, 69% of respondents stated that they had. However, the customer experience of the scheme was highly favourable, with three quarters of respondents saying their experience was good (31%), very good (21%) or excellent (20%).
- 2.12.11 When asked what improvements could be made to the scheme improved maintenance was most mentioned 27 times in 131 comments.
- 2.12.12 Also mentioned were improvements in bike distribution and increased availability of bikes. When asked how respondents could be encouraged to use the scheme more cycling infrastructure and more docking stations were the main choices with ranks of 0.93 and 0.84 respectively. Users of the scheme are driven by the potential time savings the scheme can bring to commutes and personal choices around sustainability.
- 2.12.13 Key points
- Scheme is generally meeting expectations of users
 - Availability of bikes deters usage of the scheme for existing and potentially new users
 - Expansion of the scheme in the south and east was the most popular areas, supported by respondents
 - Improvements in cycling infrastructure would support increase in usage
- 2.12.14 **Discussion**

2.12.15 A table is also available as an appendix, this table discusses the results of the user survey. It is structured using the questions as they were asked and the order they appeared in the survey. **Please refer to “Appendix C”**

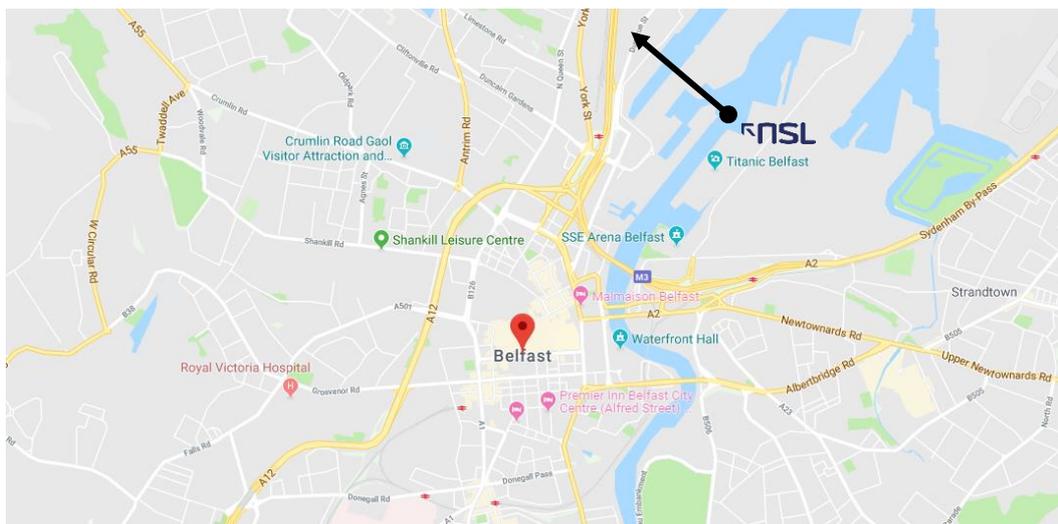
3. OPERATIONAL REVIEW

3.1 BACKGROUND AND LOCATION

3.1.1 NSL have been operating the Belfast Bikes scheme since its inception on 27th April 2015. To achieve a better understanding of the current operation and facilities a visit to the premises was made on the 24th July 2019. As part of this visit the day was set aside to discuss the current staffing, operations and procedures. During this meeting recommendations and improvements were also discussed.

3.1.2 The meeting was very useful, a number of questions were tabled to establish how the current operation is being organised. This included, maintenance, distribution, monitoring, customer care etc...

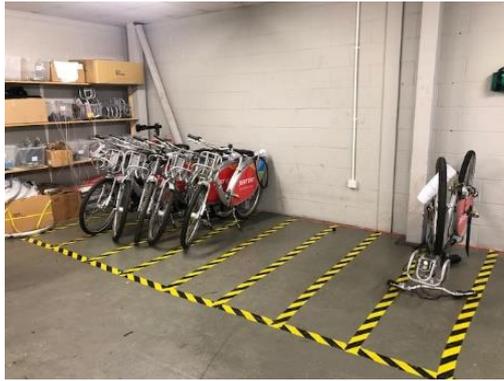
3.1.3 The operation is based in Duncrue Street to the North of the City, the premises is very well suited internally with a separate workshop, build up or mobilisation area and office and welfare facilities on the first floor.



NSL Workshop Location

3.1.4 There is ample space outside for two vehicles to pick up and drop off bikes to facilitate re distribution and on-site maintenance. In terms of access to the City centre and the bike stations, the premises is located in an area close to the major and primary road network with the M2, M3 and A12 being easily accessible. This enables an efficient start to a planned distribution or maintenance plan.

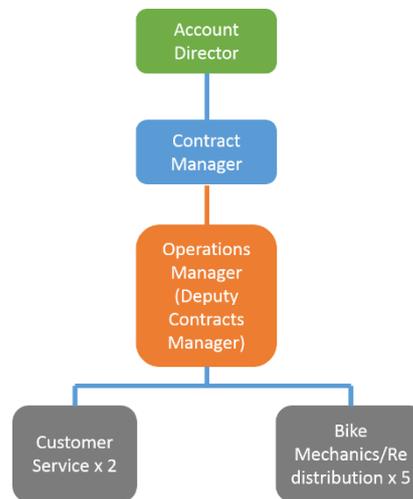
3.1.5 The current workshop facilities are also large enough and located to be able to facilitate further growth of the scheme.



Workshop Photos

3.2 STAFF STRUCTURE

3.2.1 To understand the resourcing requirements of operating the Belfast Bikes scheme NSL shared their staff structure, this is the current structure to deliver the scheme and KPI's as set out in the contract documents.



3.2.2 The above structure contains a total of 10 full time members of staff. To be able to service the scheme 365 days a year the team is split into 3 shifts. These shifts cover the operating times of the scheme of 6am to midnight. These are 5am to 3pm, 2pm to midnight and a middle shift which is staffed by management and customer service. There are no part time staff employed or required to operate the scheme.

3.2.3 It was also noted that during busy periods and outside of core hours all calls are directed to the nextbike general call centre in Germany. There is a cost associated to these calls which could be managed by Belfast Bikes staff outside of core hours.

3.2.4 In terms of training for the bike mechanics, no cyctech or equivalent qualifications are offered to staff as per the contract. Investment in staff is key to delivering a high quality level of service and to help with staff retention.

3.2.5 It was reported staff turnover has been an issue in the past.

3.3 NSL CONTRACT – KPI's

3.3.1 As part of the contract a number of key performance indicators were set by Belfast City Council to ensure the successful bidder provided a high quality product and service. A list of the KPI's are listed below.

Core KPI	Performance Standard	Expectation
1	All agreed bikes fully operational in docking points at 6am each morning	100%
2	All Docking Points fully operational at 6am each morning	100%
3	All Terminals fully operational at 6am each morning	100%
Notes		
KPI 1s	Performance target	Expectation
1.0 Service & Quality	KPI 1.1- Response time: % of reactive and scheduled maintenance met within agreed timeframe.	90%
	KPI 1.2- First time fix; % against total call outs	75%
	KPI 1.3- Scheduled maintenance; % tasks complete per specification	95%
	KPI 1.4- Reactive maintenance; 143 out of 143 defects, 100% of defects/ faults/ acts of vandalism closed per period	95%
2.0 Health & Safety	KPI 2.1- Accident Management; % of accidents processed properly, 0 for month	100%
	KPI 2.2- Accidents; Number of reportable accidents in period. None=100%, 1-2=60%, 3 and over=0% 0 for month	90%
3.0 Customer satisfaction	KPI 3.1- User feedback; User feedback on average monthly sample	85%

	KPI 3.2- Complaints; % of complaints resolved/ corrective within 3 days	100%
	KPI 3.3- Chases/ escalations; % of issues on escalation log to user satisfaction	90%
4.0 Financial	KPI 4.1- Transactions; % of user transactions successfully completed against total number of transactions	90%
	KPI 4.2- Budget accuracy; % of budget estimates submitted within reporting period	95%

3.3.2 A number of monthly management reports have been supplied as part of the review. These reports indicate through the KPI's that the operator is meeting all their targets each month every month. The results of the stakeholder meetings and questionnaire and also our own experience reviewing the scheme would indicate that maybe some of the KPI's are not being met.

3.3.3 A review of the KPI's should be considered to ensure continuous improvement to operations. As this would mean a change in the terms of the contract this may be difficult to achieve.

3.4 EQUIPMENT, BIKE SPECIFICATION SOFTWARE

NSL chose nextbike as its technology partner for its experience and expertise in successfully implementing its product across a number of schemes. The proposed Assets are based on proven design solutions developed over an extended period and based on experience of implementing a number of cycle hire schemes. The design is continually improving as nextbike develops its product and wherever possible (and agreed with the Council) these improvements will be incorporated into the Belfast scheme as per the contract.

Bike, Kiosk and Docks



- 3.4.1 The bikes were designed to be as inclusive as possible, with low step-over, fully integrated chain guard, mud-guards, basket and attractive sponsorship space. They are designed for long lasting performance with all parts guaranteed for a proven operation time greater than five years.
- 3.4.2 As the project is over 4 years old now, nextbike has moved on with different specifications of bike/dock for newer schemes it implements in the UK and Worldwide. The Belfast nextbike locks into a dock via a disc mounted on the forks, whilst newer models have a cable lock into a dock or a rear wheel lock. Both of these newer versions are a smart bike technology where the tech is on the bike rather than the dock.
- 3.4.3 Whilst undertaking the review we tested the system for compliance, access, condition and availability. Access to the bikes is via one of 4 routes, the kiosk, android and iphone apps, IVR and the website.
- 3.4.4 One of the key issues we found and was also linked with the customer survey was when bikes are showing as available in the app but once you arrived at the station there were no bikes. The opposite of this was also raised by users, bikes were at the station but were unable to be rented. This is not uncommon in bike share, to resolve this the operator just needs to check the stations on their distribution tours.
- 3.4.5 We understand that GPS trials were undertaken, however this information was not available to us to review.

3.5 MAINTENANCE AND DISTRIBUTION

Maintenance

- 3.5.1 The maintenance of the fleet is currently undertaken in the workshop. This is organised over 3 shifts utilising 5 staff members. With an average staff member working approximately 240 days per year we can safely assume an output of maintaining 3-4 bikes per day per member of staff depending on parts availability. Based on this we can safely assume that NSL have an excellent resource for the maintenance of the bikes.
- 3.5.2 These staff also provide the re-distribution of the bikes in the morning shift and also during the day whilst replacing broken bikes.

3.5.3

Whilst the bikes themselves are relatively clean the infrastructure on street appears to be very dirty with particular reference to the terminal keypad. At some stations road dirt has built up around the docks and in some stations weeds growing from the platforms. During our review meeting it was not clear who is responsible for cleaning the equipment.



Weeds growing around platform



Dirty keyboard

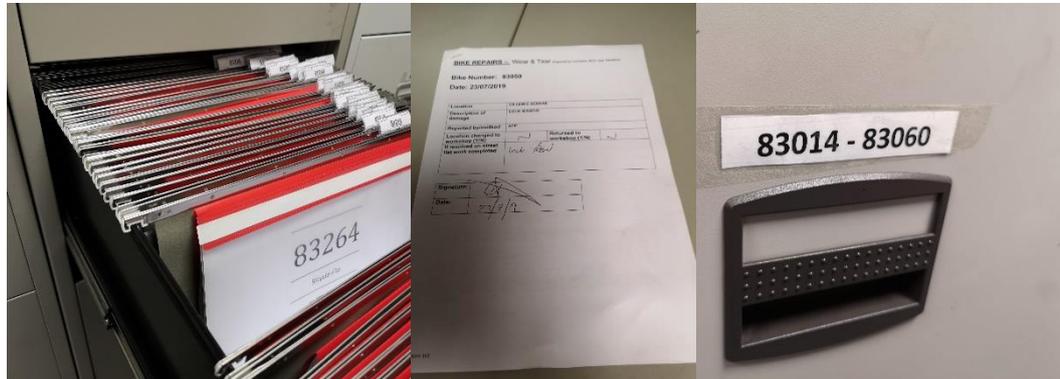


Weeds growing around platforms at Victoria Street and Botanic Gardens

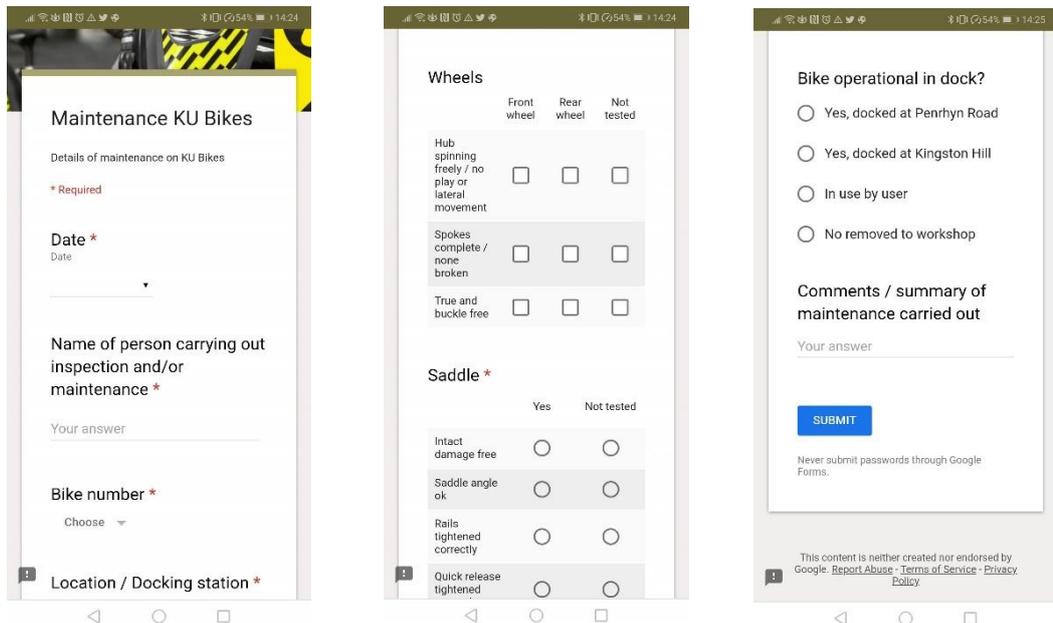
3.5.4

As part of the review NSL have undertaken a test on a typical station with a 130AH leisure battery. The results are very encouraging, with the kiosk lasting over 20 days. A change across the board could significantly increase the productivity of staff in this operation.

3.5.5 All maintenance activities on the bikes and terminals are undertaken using paper forms and are filed in a secure area at the workshop address. On inspection of the maintenance system for the bikes, it was clear and very easy to locate the bikes and the records were detailed and clear.



3.5.6 The issue with this way of reporting is that operatives need to be able locate existing forms when investigating issues with particular bikes. This could be time consuming. Although an online database would be beneficial we do not see it as having a detrimental effect on maintenance of the scheme.



Examples below of digital maintenance records

3.5.7 One issue that could have significant implications to the operation of the scheme are Spare parts. The level of spare parts at the workshop at the time was sufficient to be able to fix any problem that a bike may have. However, when a spate of vandalism occurs then sometimes availability of parts can be an issue. Generally spare parts are sufficient, however we would recommend to have at least enough parts to fix up to 20 bikes at once. This would only work on a regular delivery of

parts which have been chosen specifically based on the experience NSL have gained on the scheme.

Distribution

3.5.8 As part of the signed contract it is required that the operator ensure all agreed bikes are fully operational in docking points at 6am each morning. It is understood that a number of stations are excluded from this process and have been agreed by the City due to unsustainable vandalism.

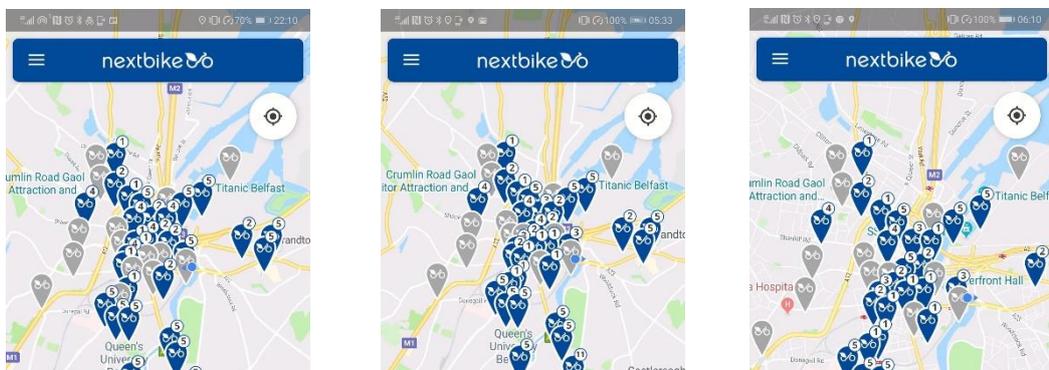
3.5.9 The operator has provided a distribution sheet which is undertaken every morning prior to 6am, this is named as “Early Station Lap Sheet”. The items checked are shown in the table below.

Station Location (to be completed in this running order)	Time At Station	Battery Changed * / ✓	Bikes Checked * / ✓	Terminal Checked * / ✓	Checked Bike Racks (X,N,F,R) * / ✓	Occurrence (i.e; Vandalism/Theft/Damage/Unattended Bikes/Accident/Incident/Terminal) Problems
3922 Corporation Square						
Etc.....						

Early Station Lap Sheet Example

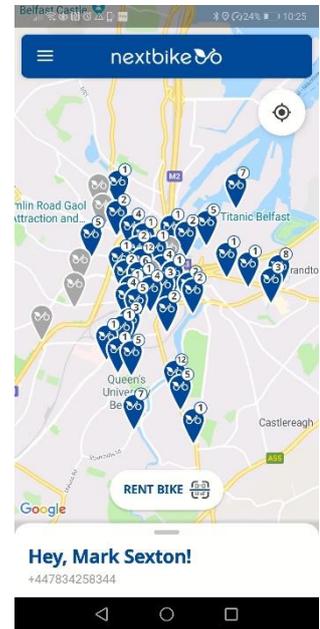
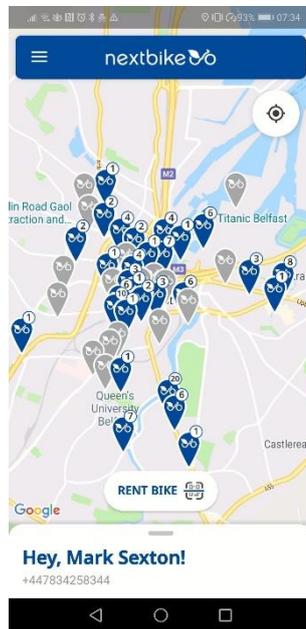
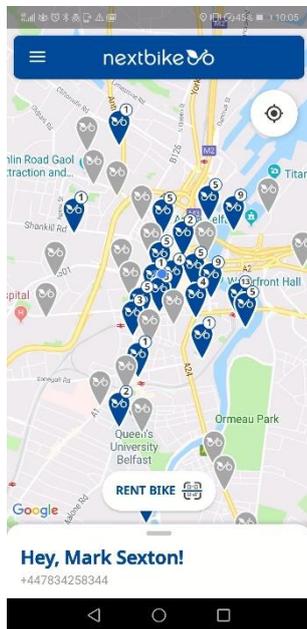
3.5.10 Once this distribution is undertaken there is no other contractual requirement to distribute the bikes to stations that are either empty or full. It is understood that during the picking up of damaged bikes and dropping off fixed bikes during the day, this is when any distribution takes place. This appears to be based on the number of bikes repaired during the day. There are no tools on the vehicles that would enable small basic repairs to bikes on street rather than bring them to the workshop.

3.5.11 As part of the review we took a number of snap shots of the availability to understand if the re distribution was being completed and whether availability of bikes was adequate at all stations during the core hours. A snap shot is shown below.



26 JUNE 2019 @ 22:10	27 JUNE 2019 @ 05:33	27 JUNE 2019 @ 06:10
Prior to scheme closing at midnight a number of stations are empty.	Scheme just about to open, a number of stations are still empty.	Scheme "live". Only after 10 minutes availability is zero at too many stations.

3.5.12 In addition to the previous snap shot of availability, we also undertook some random snap shots during the core hours.



27 AUGUST 2019 @ 15:32	25 SEPT 2019 @ 07:34	29 SEPT 2019 @ 10:25
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<p>Mid-point of core hours of the scheme. A very high number of empty stations. This has a detrimental effect of user experience and availability.</p>	<p>A key time period during commuting. Many key stations empty. When prospective users often see empty stations then it is unlikely they will sign up due to the unknowns over availability.</p>	<p>Scheme into mid-morning, most stations have availability. This is a good example of station availability.</p>
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3.5.13 Distribution plays a key part in ensuring reliability and availability of bikes, however, we appreciate it is not an exact science and patterns need to be learned and put into place. With the scheme operating for over 4 years a suitable daily distribution plan can be implemented. This would be subject to contractual agreements and changes to KPI's.

3.5.14 During our operational meeting we also requested a snap shot from the system of the actual number of bikes available in the stations at that time. A total of 246 bikes were in the docks, the number in use was not available. In addition to this there were approximately 15 bikes in the workshop. It is very important to keep track of current assets. It would be useful for the City of Belfast to have a copy of this availability prior to the operational hours of 6am.

3.6 MARKETING/SCHEME INFORMATION

3.6.1 The operator currently does undertake some marketing with its users with some offers in the app.. It appears that most of the information shared with users is via social media platform such as twitter or facebook. Whilst this may reach users, it is unlikely that it will reach all users as not everybody uses social media. This is even more so or the older generation of users.

3.6.2 It is understood that the operator does support the City of Belfast and other stakeholders in other forms of marketing or promotion to the scheme. In addition the operator attends events and also provides the bikes and merchandise for these events.

3.6.3 This is an area that can benefit from improvement on both sides to engage with the users more directly. With a focused marketing campaign users can feel more inclusive and can take ownership of the bikes. This can lead to increased feedback and loyalty.

3.7 CUSTOMER FEEDBACK ON OPERATIONS

3.7.1 As previously mentioned in section 2, the overall feedback from stakeholders is that the bikes appear to be poorly maintained and the equipment unreliable.

However, a huge amount of positive responses were also received in relation to the scheme and its place in the City.

- 3.7.2 In terms of providing customer feedback, the operator informs that when bikes are reported damaged, vandalised or not working a procedure is in place to ensure all parties are informed.

3.8 CRIME AND ANTI SOCIAL BEHAVIOUR

- 3.8.1 It is our understanding from the operator that on-going conversations and workshops are being held with local enforcement to look into ways of combating the vandalism.
- 3.8.2 For the review we do not see any benefit in providing any further proposals to the operator due to the ongoing discussions already taken place.

3.9 GENERAL SUMMARY OF OPERATIONS

- 3.9.1 The general set up of operational facilities is good and is large enough to allow scheme expansion. Its location is also sited to take advantage of all the Cities main routes which allow easy access to the south and east of the City.
- 3.9.2 We feel staff retention could be improved by investing in training courses for the mechanics and distribution staff. A more dynamic workforce should also be encouraged to help deal with difficult times, for example high levels of vandalism.
- 3.9.3 The maintenance and distribution could be improved by way of altering the KPI's. The operator should also be measured for availability during the scheme core hours and not just at the beginning of the shift.
- 3.9.4 Marketing is very light, although this is not within the contract and therefore has no bearing on the operator. A joint approach between Belfast City Council and the Operator should be adopted.
- 3.9.5 Customer feedback was positive for the scheme in general, however it was clear users were of the impression that the Belfast bikes and docks were not maintained properly.

Equipment

Consideration should be given to newer technology and security improvements from Nextbike to ensure infrastructure and user experience can be improved in the future

4. FINANCIAL SUSTAINABILITY

4.1 INTRODUCTION

4.1.1 As part of the review we were requested to investigate the financial sustainability of the project and to identify routes to additional funding or revenues. The following sections discuss possible routes to this funding.

4.2 SURROUNDING COUNCILS AROUND BELFAST

4.2.1 Outside of the City of Belfast district boundaries there are few opportunities to expand Belfast Bikes. However, there are a few pockets that could be included, these are Galwally in Lisburn and Castlereagh, Bangor and Holywood in Ards North Down and Newtownabbey in Antrim and Newtownabbey.

4.2.2 As extending the scheme into these areas could cause considerable expense to the service provider, Belfast City would need to compensate the operator to serve these areas.

4.2.3 Other districts outside of Belfast City would need to provide an annual fee to help support the operations in their respective areas and the additional benefits their constituents have gained by having access to over 45 stations in the Belfast City Districts.

4.2.4 Any new stations would be subject to design and operational considerations.

4.2.5 An agreement on the management and maintenance on the infrastructure outside of Belfast City Council boundary would need to be considered to ensure a suitable management and maintenance schedule is in place.

4.2.6 The land ownership, access and management for an expansion of infrastructure outside of Belfast City Council boundary would need to be brought forward by the respective council.

4.3 SPONSORSHIP

General Framework for Sponsorship in the bike-share industry

4.3.1 Sponsorship involves associating the image of one or more companies to the bike share service, this has been done in similar projects internationally, exploiting the values and visibility offered by the public bike service in these cities or towns. The parts of the system generally used to display the sponsor's image are as follows:

- **The bikes themselves** – All the plastic components of the bike have been designed for stickers, the bike frame is generally used to display the service's image or logo.



- **The stations** – The terminal also offers a great space for displaying logos or the owner of the service logo. It has also been known to have individual stations named. For example a business may want a new station outside their premises and as part of the arrangement the business can contribute towards the operation.
- **Operational Vehicles** – These vehicles give the operator a forward facing image to the users.
- **Digital media** – Websites can be used to highlight the brand and give information about the sponsor. Mail outs to users are also useful tools to engage with customers.
- **RFID Cards / Access cards** – Should RFID access be required then the card can be printed with sponsors logos and values.
- **Naming rights** – The sponsor has the opportunity to name the scheme, this is an extremely useful marketing tool.

Examples of Sponsorship in the bike share industry

4.3.2 Sponsorship practices can vary hugely between countries, in particular, to the communication culture, the relationship with sponsors and more or less restrictive local regulations. Countries like France and Ireland for example have a financing model for the bike-share system that is connected to an advertising contract for street furniture generally which is separate from the station itself. For most, though, the traditional sponsorship model is adopted which uses the bike share infrastructure and digital platforms to showcase a service/product.

4.3.3 The greater the visibility and identification of the sponsor, the greater its contribution.

4.3.4 The income generated by sponsorship can vary considerably from one service to another, according to the level of sponsor visibility on the various parts of the service. Here are some examples of revenues generated by similar operations internationally

- Barcelona signed a sponsorship agreement with Vodafone for a sum of €1,500,000 per year, (€250 per bicycle per year).
- Coca Cola signed a sponsorship agreement in Cork, providing €3,000,000 over 5 years for 700 bicycles (€850 per bicycle per year).
- London has recently signed an agreement with Santander Bank for a sum of €8,500,000 per year, (€990 per bicycle per year).

4.3.5 Similar projects conducted in cities in the United States provide other examples of income generated by sponsoring, with an average income per station of €7,500, according to a report released at the NABSA Conference (North America Bike share Association) in Boston. Advertising

Examples of sponsorship media on bikes and stations

Scheme	Photograph
Edinburgh	
Slough	

<p>London</p>	
<p>London</p>	

Canvassing

4.3.6 Sponsorship projects can only work properly if the local authority is determined and actively supports the search for a sponsor. In addition we do not want to engage in a search based on a very small amount of authorised spaces, for example where existing advertising media is available. We need to consider the overall reach of the sponsorship and how far around and past the city boundaries we are willing to allow. We feel there is greater potential on the fixed station equipment and bikes, however providing the sponsor opportunities outside of the city limits may also provide a level for higher interest and higher contributions.

4.3.7 The very nature of the sponsor must ideally resonate with the values of the Belfast bikes brand centred on the core objectives, health, the environment and sharing. We also have to recognise that this space may have limited interest and therefore all businesses interested should be given the opportunity to bid for Sponsorship.

The potential of partial and multiple sponsorship

4.3.8 The co-branding model is very common in other countries such as Switzerland and North America where corporate foundations themselves will invest in the stations that serve them in their local area. In France, this model has been met with some reluctance given the high taxes levied on employers for investment in public transport. Some companies may still be sensitive about it. The privatisation of

stations is also a common approach in some countries, for example; Slough have used companies to pay for a new station outside their business when requested.

Selling bike accessories licenced by Belfast bikes

4.3.9 Another option open to the city is to allow the sponsor to sell accessories licenced by Belfast Bikes. This, again provides a sponsor further ways to reach users and encourage the use of the scheme.

4.3.10 By allowing a trademark licence and marketing the products related to the bike, we thereby give users the best possible user experience and help promote the service (rain protection, water bags, clips for attaching bags, umbrellas that can be clipped on to the handlebars. The indirect objective is to generate additional income to contribute to the indirect financing of the project.

Planning sponsored events

4.3.11 A very good way of promoting the sponsor which offers more value is to organise events which can raise the profile of the sponsor and the bikes. Examples that could be deployed/offered:

- Sponsored free periods of time.
- Specific bonuses.
- Sponsored subscription campaigns,
- Especially at the beginning of the season and during events held in Belfast.
- Setting up temporary and sponsored Belfast bike event applications.

Routes to sponsorship

4.3.12 As we are aware, where subsidies are not available from local authorities for operating bike share schemes, alternative arrangements need to be made to provide the revenue required to operate a successful scheme. One of the challenges is finding the most cost efficient way to secure that subsidy. There are a number of routes available to local authorities, some are more successful than others, some are a less complicated route and some are far too expensive to procure. Some examples are as follows;

- Via a competitive tender
- Approaching businesses directly
- Open offers/pre-approved packages

4.3.13 In all of the above situations we first need to develop a plan that can be used to invite or attract businesses/operators to consider how the bike share scheme can help them. If a mutually beneficial relationship can be proven this can provide a good tool for leveraging sponsorship.

4.3.14 Let's consider how the Belfast bikes scheme can procure sponsorship;

Offer Value.

4.3.15 Sponsorship comes in many forms, including:

- Adverts on bikes, stations and operational vehicles
- Sponsored posts from the corporation on your social media
- Giveaways of their products to your audience
- User Data
- Advertising
- Events

4.3.16 A document should be created to include a few packages that offer a mix of these activities, or we can let any potential sponsors pick items a la carte. In any of these packages we need to think about how to build a long-term relationship with a sponsor that is engaging for a number of years and is in our best interest to come up with ways to engage them and work with them for years to come.

Know your platform and the companies that match it.

4.3.17 Companies are interested in reaching audiences they typically do not have at their fingertips. It's less expensive than purchasing traditional media advertising and helps them target these individuals through an intermediary that already has their attention and trust. Make sure you can articulate exactly who you serve. Are your customers male or female? How much income do they make? Do they have children? Do they travel frequently?

4.3.18 Once you identify all the characteristics of your customer base, start researching companies that advertise to or want to reach that group. For example, if mothers are your primary customer, look through the pages of parenting magazines and research parenting websites. What companies advertise on those sites? Then make a list of those businesses as potential corporate sponsors.

Ask for your worth.

4.3.19 Many small businesses make the mistake of not asking for enough money in sponsorship. Remember that you are offering these corporations value and direct access to the customers they want to reach. In addition, many of these corporations are used to making deals in the tens of thousands. Don't ask for low amounts from a company that has the budgets to give high value sums. Value your connection to this demographic and charge accordingly.

Follow up!

4.3.20 How many times have you ignored an email or phone call because you're busy or on a deadline? Corporate executives feel the same way. So many people lose sponsorship deals because they do not follow up. If you don't hear back from an organization after you've submitted your proposal, pick up the phone and check in.

Write a compelling proposal that makes it clear why a corporation should sponsor your business.

4.3.21 Write a story about the service or your business that is exciting and meaningful. Don't simply state what you sell; explain why you impact lives. Remember, sponsorship is not just about your business: the company you want to partner with will want to know what's in it for them. How will the company reap benefits it wouldn't otherwise get? Also include in the proposal your target audience demographics and discuss your reach as well as how you'll help the corporation reach its target audience.

4.3.22 Connecting with corporations wanting to target specific audiences through sponsorship can become a win-win relationship, and in doing so can also give your small business a healthy income boost.

4.3.23 The proposed route to sponsorship would be to develop a standard pack that outside parties can use to make Belfast City an offer. The intention would be to simply ask potential sponsors to consider the sponsorship pack and to formulate an offer if interested.

4.4 PRIVATE / CORPORATE ACCOUNTS

4.4.1 In other schemes across the UK operators are using various methods to not only increase the revenue but also the usage. A simple way of doing this is to set up corporate accounts with local businesses or even departments within the local authority.

4.4.2 Typical account holders for the City of Belfast that could be approached;

- Hotel Chains
- Zurich Insurance
- Companies House
- Aecom
- Belfast City Council Departments
 - Planning
 - Traffic and Transportation

4.4.3 As a straight forward proposal we would recommend that businesses should be offered discounted rates for corporate accounts.

4.5 DEVELOPER CONTRIBUTIONS

- 4.5.1 An important consideration of the growth of the Belfast Bikes scheme should be to ensure alignment with the growth of the City and its surrounding areas. As Belfast grows in size and prosperity the authority carefully considers all of its public services. These could include health, schools, policing, roads and public transport. When new developments are introduced the authority can under Section 75 ask for a contribution to improve public services in the areas around the development.
- 4.5.2 As part of this review developer contributions will be recommended as a way to help with the growth of the scheme. This growth will give options around increased options on sustainable transport with a particular reference to the public bike share.
- 4.5.3 The promotion of cycling as a travel opportunity is part of the drive to promote alternatives to the private car and encourage more sustainable means of travel. One step in this process is to improve the provision, safety, convenience and general environment for cycling by ensuring that the needs of cyclists are fully taken into account in the development process.
- 4.5.4 Belfast City Council have an agreed Developer Contributions Framework that specifies that the impact of new development on transport infrastructure and the need to promote sustainable transport will be considered on a case by case basis. In practice this means that typically where development require a transport assessment are more likely to identify the need for specific measures to address infrastructure and sustainable transport contributions. We are aware of a number of developments where this has been applied.

4.6 INCREASE USER FEES

- 4.6.1 As mentioned in section 2.8 an increase in tariffs would increase revenue, therefore this proposal should not be ruled out. (Please refer to proposal table or Section 2).

4.7 JOINT BIDS ON INFRASTRUCTURE PROJECTS

- 4.7.1 The information contained in this review report could be used to set up a policy to include the Belfast Bikes scheme into bids for cycle infrastructure funding. Bike share schemes are often overlooked when authorities are bidding for infrastructure projects that could support the Belfast Bikes.

4.7.2 Joint working should be adopted and when bidding for projects all modes should be considered, this can also increase the success of the bid but also the value of offered.

4.7.3 A simple policy change that will trigger a joint working approach with all parties can be adopted. Although not regular income for the scheme, a welcome injection of capital/revenue alongside other cycle improvements.

4.8 RE-TENDER OPERATIONS

4.8.1 A considerable cost to the Belfast Bikes scheme is the operational costs. It may be that a review of the operational requirements and KPI's could allow for the operation to be re tendered. This does have its advantages and disadvantages but it may also be cost neutral due to the cost in the competitive tendering process or cost effective.

4.8.2 Before this option is considered the local authority must be sure that the existing operator has not provided the service as outlined in the existing contract. Or that over the period of the contract there has not been an approach that would give the authority the confidence that the operator has earned the extension.

5. THE FUTURE

5.1 INTRODUCTION

5.1.1 The results of the Belfast bikes review together with the stakeholder meetings, member meetings and public survey questionnaire have been evaluated and reviewed. The following section makes recommendations on the whole scheme and have been tabled in **Appendix "A"**.

5.2 PROPOSALS

5.2.1 As part of the commission a suite of proposals are recommended to achieve the schemes core objectives, these include;

- Improved operations
- Increased revenue
- Drive towards sustainability
- Increased ridership
- Grow the network/increase the modal split

5.2.2 We have considered a number of ways to provide proposals in a way that can achieve the above which can be flexible and cost effective. A study undertaken for Dublin considered the strategic growth of the scheme by area, whilst this may work for Dublin with its current business model subsidising the bike scheme with advertising, it would be difficult to implement such a strategy for Belfast.

5.2.3 Belfast is a smaller city and therefore proposals to achieve core objectives can be more localised and targeted based on changing demand rather than looking at large areas.

5.2.4 The proposal table is designed to be used as a live tool for Belfast City Council to consider the recommendations, alter timelines and add new proposals based on the growth of the scheme. The full proposal table is shown as **Appendix A**.

5.2.5 The proposals are broken down into 6 key headings with a description for each proposal backed up by the reason and outcome. An indicative target date, priority and cost are also listed. The key headings are listed below.

- Bike Stations
- Operation
- Cycle Infrastructure
- Policy Objectives
- Financial
- Scheme Extension

5.3 DETAILED PROPOSALS

5.4 Bike Stations

5.4.1 A total of 11 proposals have been made that centre around bike stations, most of these proposals are relatively small changes but will make an impact to the overall performance of Belfast Bikes. There are 2 proposals that are linked with developments around North Street and Ulster University, continued discussions with these stakeholders will need to be maintained to ensure any proposals are aligned with the developments and the Belfast Bikes network.

5.4.2 The main proposals around the bike stations are around the timing of introducing stations in particular areas of Belfast. Our research and discussions have steered the growth of the network to the south and east of the existing scheme in the first instance, however we must be mindful of demand the need to encourage cycling in the other less popular areas and social inclusion.

Areas of Expansion

5.4.3 In order to co-ordinate and manage an effective programme for the phased expansion of the Belfast Bikes a strategy based on geographical areas has been developed. These areas are simply split between the 4 area working group boundaries of Belfast City, north, south, east and west (please see **Drawing Nos. 70-1093-008-0011 – Stakeholder Requests**). Due to the relatively small size of the scheme and the limited potential for growing the scheme outside of the Belfast District lines we have to be flexible in our approach to areas. It would be a mistake to specifically split these 4 areas into smaller areas due to different levels of demand at proposed boundary lines. This could cause conflicts between different wards. Therefore larger areas that cross over many political boundaries are less controversial.

Criteria for Expansion

5.4.4 In designing the expansion of the scheme it was important to ensure that the areas selected for expansion by the City or stakeholders could sustain the growth of bike share. With this in mind, a number of key components framed discussions around the selection of locations for the schemes expansion. These included the following:

- Employment Destinations
- Residential
- Public Transport
- Public Amenities
- Resident Requests
- Existing Usage at near by stations
- Gaps in Network

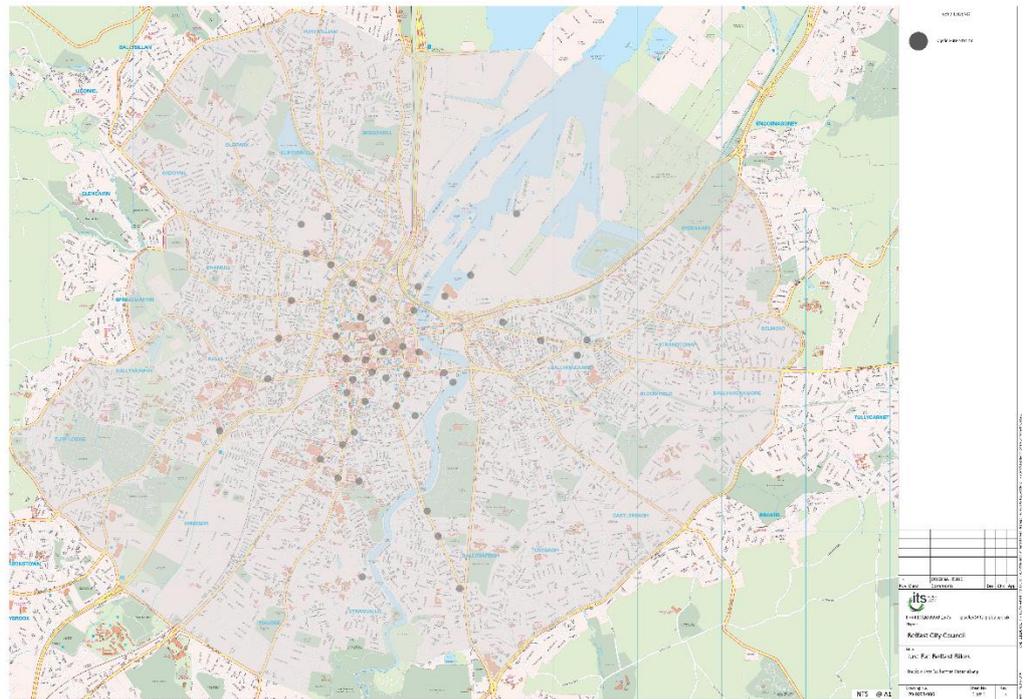
- Survey Feedback
- Cycle Infrastructure
- Land that is either owned or managed by Belfast City Council or where express permission to situate a biking dock in already in place

5.4.5 In addition the experience of the Belfast Bikes scheme to date would suggest that the following should be considered when designing and determining the distribution of bike stations as part of any expansion:

- Bike stations should be located in prominent locations which offer significant levels of visibility
- Bike stations should be able to accommodate an adequate servicing area to support redistribution of bikes

Scale or potential

5.4.6 Belfast bikes already has 40+ stations contained predominantly within the centre of the City. The map below and shown in more detail in **Drawing No. 70-1093-006 – Indicative Scheme Boundary** gives us an indication of the potential size of the scheme.



5.4.7 It is envisaged that the total number of stations to cover this area is approximately between 100 and 120 including existing stations. As we know the approximate limit of the scheme we can make recommendations on a programme of new stations. The usage of stations is also not balanced equally around the existing scheme with the South and East being the most popular followed by the north and then with lower demand from the west and north west of Belfast. As mentioned previously

new stations should follow demand as indicated from the public survey and existing usage figures, this would generate revenue to grow the scheme and eventually the revenue can then pay for expansions to other areas to ensure social inclusion. It is important to note that the areas of low use generally have little or poor cycle infrastructure, this can effect cycle take up significantly. Studies also suggest that areas with high deprivation can also be linked to low cycle use. To make real improvements in these areas then real investment not only in infrastructure but education is required to develop a cycling culture. This can be achieved with partners such as the Department for Infrastructure and Sustrans for example.

5.4.8 Should funding become available to implement a programme that would deliver a network of cycle stations across Belfast then the following numbers would be proposed.

5.4.9 The table below indicates a 5 year programme of growth assuming funding availability. We have assumed a cost of £30,000-£35,000 per station could includes 12 docks and 10 bikes. Please refer to **Drawing No. 70-1093-007-011** for areas.

5.4.10 We have calculated the revenue as number of trips per bike per day multiplied by £1. Based on 181,000 trips between May 18 and April 19, we estimate the scheme is generating 1.52 trips per bike per day. Therefore our calculation for 10 bikes would be as follow;

10 bikes x 365 days x 1.52 trips per day x £1 = £5548.00 we can estimate that with an increase in the network by 1 station and 10 bikes the scheme could generate £5548.00 less additional operational cost.

Year	Number of Stations				Total Number of Stations	Total Cost	Expected Revenue (cumulative)
	North Area	East Area	South Area	West Area			
2020	2 (£11096)	2 (£11096)	2 (£11096)	2 (£11096)	8	£280,000	£44,384
2021	2 (£11096)	2 (£11096)	2 (£11096)	2 (£11096)	8	£280,000	£88,768
2022	2 (£11096)	2 (£11096)	2 (£11096)	2 (£11096)	8	£280,000	£133,152

2023	2 (£11096)	2 (£11096)	2 (£11096)	2 (£11096)	8	£280,000	£177,536
2024	2 (£11096)	2 (£11096)	2 (£11096)	2 (£11096)	8	£280,000	£221,920
Totals					32	£1,400,000	£332,880

New station matrix

5.4.15 To aid the implementation of the programme a simple decision matrix has been developed to help decide and prioritise the best locations for any new station that are recommended. This is shown in **Appendix D**.

5.5 Operation

General

5.5.1 As reviewed in section 3 the operation of Belfast Bikes is currently quite flat and does not appear dynamic in its delivery. This is not necessarily a reflection on the operator but on the existing terms of the contract and how the Belfast Bikes is delivered through its KPI's.

5.5.2 Some of the key comments around the Belfast Bikes scheme was to do with the quality of the bikes, distribution and the accuracy of the app. In addition users were frustrated when bikes were at stations but unavailable or on the app but not at the station.

5.5.3 There are 12 new proposals for consideration by Belfast City to implement, these proposals look to improve all these concerns raised by stakeholders and users. In addition improvements to direct marketing, call centre management, training and vandalism are all proposed to raise the profile and usage of Belfast Bikes. In addition, relationships should be made with local social enterprises to develop the bike share scheme in difficult neighbourhoods, this approach works extremely well in Glasgow with Bike4Good.

5.5.4 Other proposals include re tendering the operation and amending the KPI's, although not a priority, this needs some thought as a new operator or the existing operator will need to be appointed by the end of the extension period. The combination of the absence of a Social Value Act in Northern Ireland and the level of capacity within the sector may make it difficult to ringfence a tender opportunity to Social Enterprises or Co-operatives.

5.6 Cycle Infrastructure

- 5.6.1 The review undertaken has uncovered a number of other improvements that will contribute to the increase in usage of the scheme and provide improved routes for all cyclists. One of the biggest issues around cycling is the ability to go to A to B without too many obstacles, it is important to ensure that a dedicated quality cycle network is provided not only in the City centre but also into the connecting neighbourhoods. One-way streets are an example of a barrier to cycling and where road networks can be improved to remove these barriers this should happen.
- 5.6.2 There is a urgent need to introduce routes that have been proposed in the Draft Belfast Bicycle Network 2017, in particular routes 6, 7 and 8 would enable improved links to and from the City from the west and north.
- 5.6.3 The other significant area for improvements over one way streets is in the centre of the City with particular reference to streets around the City Hall. There are many streets that could benefit from better access and safety proposals.
- 5.6.4 In addition to contra-flows a number of key roads routes have been mapped based on users favourite stations (**Drawing No- 70-1093-012 – Top Cycle Routes**). This information should be used to progress cycle infrastructure proposals for Belfast Bikes alongside other bids by the City.
- 5.6.5 Department for Infrastructure are also developing plans on large scale network improvements around the York Street Interchange , these improvements not only cater for buses and cars but also cycling. It is important to ensure these designs are consulted on when identifying new station locations. Infrastructure projects could be prioritised to coincide with the station expansion and the cycle network.

5.7 Policy Objectives

Longevity of the current cycle infrastructure

We have secured confirmation from Nextbike that their new smart bike fully integrates with the Belfast infrastructure which in turn ensures the longevity of the current equipment and saves on capital expenditure.

Joint Bidding

- 5.7.1 Belfast City Council should also work together with other departments to ensure a joined up approach when bidding for funding. There are huge opportunities to collect additional funding by including Belfast Bikes proposals into infrastructure projects. For example a new cycle route may benefit with new stations along its length which would be a straight forward request for additional funding to provide these.

5.7.2 Belfast Bikes should be included in a regular meeting that discusses new funding opportunities.

City Pledge to support bike share

5.8 Financial

5.8.1 The core proposals around improving revenue are listed below, implementing these proposals would not be easy and does require political support from elected members. The 4 core proposals are;

- Review user plans and tariffs
- Review Tariffs every 2 years
- Produce Sponsorship Packs
- Developer Contribution Calculations

Tariffs

5.8.2 The review of user plans and Tariffs would only need to be done once. Once this is agreed a report to committee can be made with the recommendations, this report can also recommend that a review is undertaken every 2 years on the new tariffs, this is very important as it ensures the revenue will rise with inflation.

Developer Contributions

5.8.3 As outlined in earlier text in section 4 developer contributions can make a huge difference on the growth and sustainability of the scheme. We would recommend the continued application of developer contributions to fund the expansion of the scheme.

5.9 Scheme Extension outside of Belfast City District

5.9.1 As outlined in Section 4.2, it is possible to extend into the areas outside of Belfast City, however the cost implications to the City council on the increased operation costs would need to be met. This expansion would also need to be agreed with relevant neighbouring Councils and the operator.

5.9.2 Should any of the local authorities listed below request a station or stations in their districts then a capital cost an operational fee would need to be calculated or the installation, maintenance and management of the infrastructure and service. It would also be for neighbouring councils to manage and administer the installation of the infrastructure, specifically land ownership, management and access.

- Lisburn and Castlereagh
- Ards North Down
- Antrim and Newtownabbey.

6. **PROGRAMME FOR IMPLEMENTATION**

- 6.1.1 We have not specified a programme of works within the proposals table, we have however, put indicative timescales and a rag status on priority next to each item. As we are aware there is currently no funding for the expansion it was important therefore to split the proposals down into smaller work packages which then allows the implementation of the proposals at a slower more progressive rate.
- 6.1.2 This approach will also allow the implementation of operational improvements, marketing and policy changes without the need to spend huge amounts of funding.
- 6.1.3 It is envisaged that the proposal table will be reviewed and recommendations on work packages will be reported and recommended to be implemented at a Council Committee meeting. The proposals can then be reviewed on a yearly basis taking into account changes in demand and improvements to the City.

7. **CONCLUSION**

- 7.1.1 The Belfast Bikes scheme has changed the way residents, businesses and visitors use and see Belfast City. Since its introduction the scheme has not only grown in size but also in popularity with rentals and users increasing each year. Recent studies by Comouk also conclude the switch from other modes of transport to bikes increases with bike share schemes.
- 7.1.2 The introduction of the Belfast Bikes scheme has developed into a transport alternative that has increased the promotion of cycling as a safe, healthy and environmentally sustainable form of transport. There has been a pronounced increase in cycling usage across Belfast in recent times, more investment is leading to the provision of improved infrastructure whilst more and more people are returning to the bike as an inexpensive, efficient and environmentally friendly mode of public transport.
- 7.1.3 It is also clear from the public surveys that whilst they accept there are issues, they feel the Belfast Bikes is a very good addition and that it now a part of the City life. The bike scheme will be instrumental in encouraging the growth of people living and working in the city.
- 7.1.4 The implementation of the Belfast Bikes scheme has been instrumental to the growth of cycling as a means of public transport Belfast, not just for commuting but for leisure. It is anticipated that the strategic growth of the network will add further momentum to this trend and offer sufficient incentive for people to choose this public service and decide to leave their cars at home.