EXECUTIVE SUMMARY

Bike share systems provide affordable, easy access to a fleet of bikes, on a pay-per-use basis. Across North America, data shows that 70% of users of shared bikes and scooters use these devices to connect to transit. In the National Capital Region, bike share is a key missing piece of the region's transportation network. Bike share can offer a practical, on-demand, low-cost, and low-carbon mode of transportation that extends and enhances the transit system, connecting residents and visitors to key destinations. Though Ottawa-Gatineau's cycling infrastructure is strong and growing, other barriers to cycling still exist, including access to bikes, limited quality of bike parking at destinations, ongoing bike theft, and the convenience of one-way and intermodal trips.

Between October 2024 and May 2025, the City of Ottawa, Ville de Gatineau, National Capital Commission, Société de transport de l'Outaouais, OC Transpo, EnviroCentre, MOBI-O, and the Ottawa Climate Action Fund came together to assess the feasibility and many benefits that bike share would bring to the region. Led by Mobycon, the core partner team developed a vision and objectives, evaluated an initial service area, discussed governance models and financing, and an implementation plan. The study, led by EnviroCentre and Mobycon, included benchmarking and interviews with peer bike share systems, mapping and travel modelling, and financial analysis to demonstrate the value of bike share in the National Capital Region.

This report maps out a bold and practical plan to bring bike share back to the region!

The partners established the primary objectives for the system that guided the development of this plan. They agreed on the following goals and objectives for a regional bike share system:

- Support a **multimodal transportation system** that **complements public transit**, helps grow transit ridership, and gives people **more options** to get around without a car.
- Provide a **reliable service** that is available on demand and is designed to **last.**
- Supports the people who need mobility options most by locating in **equity**-deserving areas and offering **affordable** pricing.
- Reduce car trips in the region, **reducing congestion** and lowering the region's transportation-related carbon **emissions**.

Key Findings

The goal of this feasibility study was to assess the optimal launch scenario, including the system size, station density, and types of bikes that would be required for a regional, interconnected system. Governance models for the system were reviewed, with three options discussed for further consideration. The process included modelling scenarios leveraging existing data from the Canadian census, the 2022 origin-destination survey, weather data, and historical ridership from bike share systems in Montréal and Toronto.

Mapping was used to visualize predicted demand across the region, and four lenses (equity, trip conversion potential, popular destinations, and future growth) were developed to establish and refine an **initial service area** for the system. The size of the proposed area and fleet is based on benchmarking with peer systems, the region-specific goals and objectives for the system.

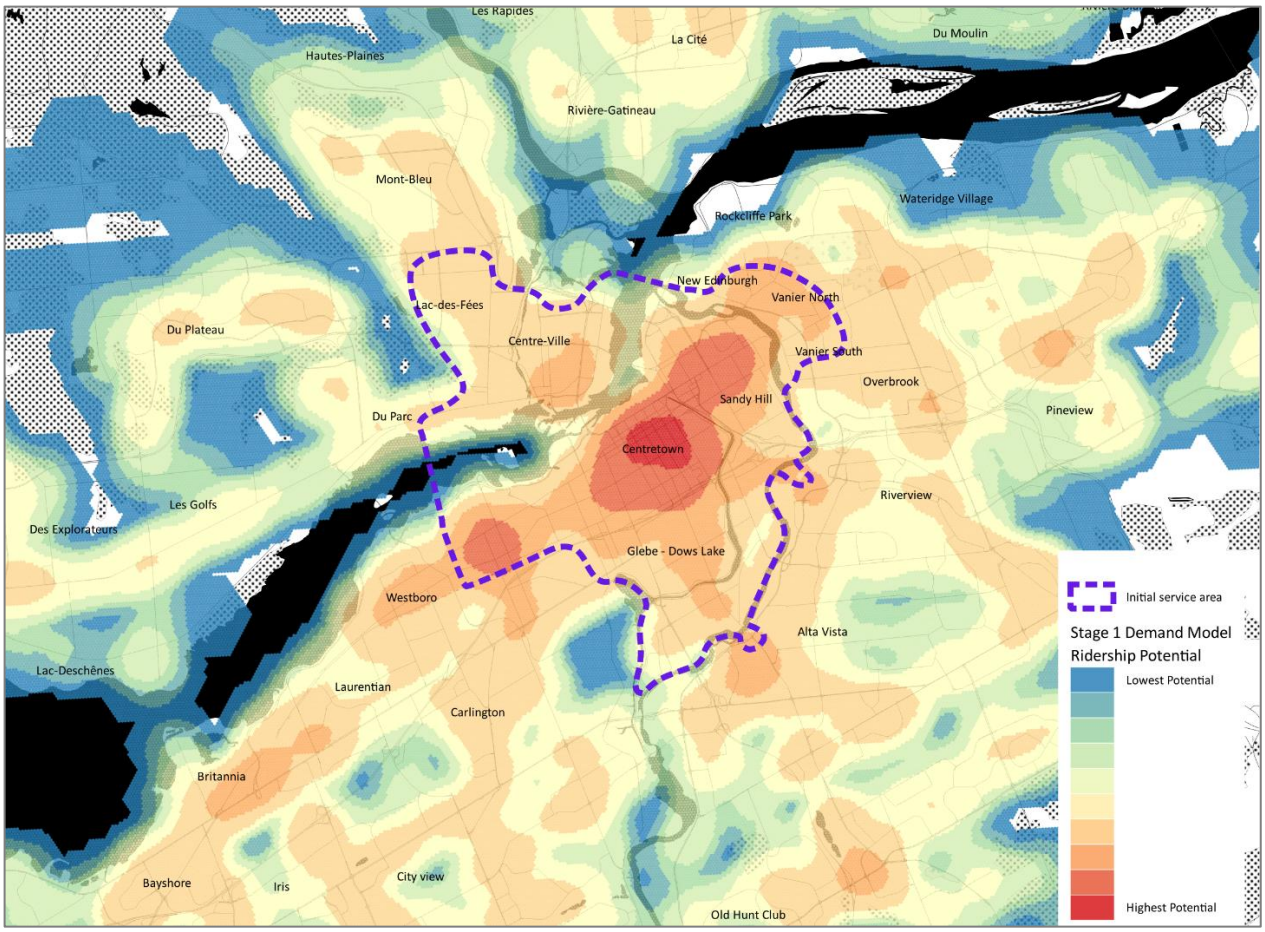

Figure 1: Proposed initial service area overlaid on ridership potential

The proposed size for the launch of the system is 1,200 bikes and 115 stations. Ottawa would launch with 900 bikes and 90 stations, and Gatineau with 300 bikes and 25 stations, serving an area of 30 km^2. This initial service area encompasses major employment areas and tourism destinations, four universities, 16 rapid transit stations, and six interprovincial bridges (including one exclusively for pedestrians and cyclists).

Within this network size, two launch scenarios were considered further:

- **Scenario 1:** launch with a fully non-electric fleet of bikes
- **Scenario 2:** launch with 20% of the bikes and stations electrified

Many other factors were considered and are discussed in detail in this report and summarized in Table 1. Financial estimates of costs and revenues were developed by benchmarking against other bike share providers and considering factors such as market uncertainty and inflation. The estimated total, regional ridership, and financial cost for a mature, eight-month service is summarized in Table 1. It is important to note that the estimates for ridership are valid for a "mature" bike share system, which is defined as having achieved the status of being a well-established and trusted component of the transportation network. These estimates apply to the entire region, with costs allocated among jurisdictions. In this report, total costs are distributed with 25% assigned to Gatineau and 75% to Ottawa.

Table 1: Summary of bike share factors considered

Year-round operation	• Benefits: consistent and reliable mobility for users year-round • Challenges: costs, lower average ridership, reduced performance of e-bikes • Peer systems: Hamilton and Toronto have operated year-round since inception; Québec City's system is currently a six-month service and BIXI Montréal has an ongoing winter operation pilot with a reduced system size. • Year-round operations should be explored as part of the system design and/or expansion, in collaboration with system operators.
E-bikes	• Benefits: popular, provide access for more people • Challenges: additional costs and implementation complexities • Peer systems: Toronto, Montreal, and Washington have added e-bikes to their fleet, Québec City's fleet is entirely e-bikes, and Hamilton expects to add e-bikes in 2025. • E-bikes are explored as an option for the system launch. Even if e-bikes are not included in launch, they should be added soon afterwards.
Equity	• Benefits: provides affordable transportation in locations and at times (such as late at night) that may be under-served by other modes. • Peer systems: Hamilton Bike Share's "Everyone Rides" initiative operates as a separate non-profit organization offering highly subsidized bike share memberships, access to adaptive cycles, and cycling education. • Equity was one of four lenses used to determine the initial service area and should be considered in system planning (for example, reduced price memberships such as OC Transpo EquiPass and STO ECHO Pass and provide adaptive bicycles).
Mobility Choice	• Benefits: bike share extends the mobility ecosystem giving people more transportation choices, increasing transit access, and reducing car dependency. • Other systems: according to the North American Bikeshare and Scootershare Association (NABSA), in 2023, 115 North American cities have concurrent bike share and shared e-scooter programs and 63% of all shared micromobility trips were to connect with transit. • The study examines how bike share can be integrated with other modes such as by co-locating bike share stations at transit stations and near car-share services.

Expansion of the system	• Benefits: an expanded system will provide bike share access and benefits to more residents. • Peer systems: Toronto has gradually expanded bike share such that it now reaches every ward of the city and BIXI Montréal is now expanding to surrounding municipalities. • The study examines the size necessary to establish a successful system while remaining manageable for initial operations. A key recommendation of this study is the development of an Expansion Plan after launch that creates a roadmap for future growth of the system.

Table 2: Estimated ridership and financial cost

		Scenario 1: Fully non-electric fleet	Scenario 2: 20% electric fleet
Estimated mature annual ridership		451,000	462,000
Daily ridership		1,400 to 2,200	
Equipment purchases and one-time launch costs		$11.7 M	$13.4 M
Average annual operating cost (first five years)		$3.0 M	$3.4 M
Annual public investment	**Best case:**	$0.45 M	$0.51 M
	Worst case:	$2.0 M	$2.2 M
Estimated five-year net present cost		$18.6 M	$21.0 M

While the ridership estimate for Scenario 2 was based on the demand modelling work, the methodology used had limitations in its ability to adequately predict e-bike demand. To balance this, a sensitivity test was performed on Scenario 2, applying an assumption that each e-bike in the fleet will be used for twice as many trips as each non-electric bike (based on experience of peer cities). This sensitivity test yields a ridership estimate of 541,000 and an estimated five-year net present cost of $19.4 M.

Action Plan

In establishing the target system size, initial service area, and estimated financial needs, this study provides the necessary information **to progress the project.** The immediate next steps for making bike share a reality in Ottawa-Gatineau are listed in Table 3.

Table 3: Action plan for implementing bike share in Ottawa-Gatineau

Category	What was explored	Next steps
Governance and Procurement	• **Three possible governance models** were identified based on the peer systems reviewed: (1) Collaborative Model, (2) Third-Party Model, (3) Vendor Managed Model. • **Two main contracts** are typically required (logistics operator and equipment supplier), but the contractual relationships differ based on the governance model.	• **Gatineau, Ottawa, and NCC should determine the governance model** they wish to pursue, which may include gathering further information from potential operators. • Gatineau, Ottawa, and NCC should **collaborate on developing procurement requirements** and documents and use the process to gather **refined costs of different system configurations** such as e-bike composition or winter operation, as well as gather information on fare payment systems. • Gatineau, Ottawa, and NCC should review the **regulatory considerations** presented in this report with their respective legal and risk management staff.
Financial considerations	• Successful bike share systems have a **mixed revenue model** that includes grants, sponsorship, revenue from users, and ongoing public investment.	• Secure internal **capital and operating budgets.** • Identify and apply for **grants** to offset capital and/or operating costs. • Explore and secure **sponsorships.**
Station placement and permitting	• Successful bike share systems have clear processes for delivering stations on public and private property and are **supported by their local jurisdictions** and bylaws. • A **station placement exercise** was conducted to validate the proposed number of stations (115).	• Develop a **clear, simple, and free process** for permitting bike share stations in the public right-of-way in each jurisdiction. • Initiate conversations with **third parties** for bike share stations outside of the public right-of-way (e.g., post-secondary campuses). • Work with **OC Transpo and STO** to permit bike share stations on transit property and develop cross promotional initiatives.

Partnerships	• Successful bike share systems engage with the public to build a system that **aligns with community interests and needs.** • Partnering with large associations (student associations, cycling clubs, etc.) or major employers (federal governments, municipalities, school boards or health care services) provides bike share systems with a **stable source of revenue** with recurrent memberships.	• Engage **the public**; for example, to gauge interest in aspects of the system such as station placement, e-bike composition, and year-round operation. • Work with **Hydro Ottawa and Hydro-Québec** to outline procedures for station electrification. • Work with **major institutions and employers** to offer corporate bike share memberships or annual passes (e.g., student associations). • Seek **third parties** for sponsorships, special event partnerships, and other promotional opportunities.

In conclusion, this report finds that a publicly supported bike share system serving the National Capital Region:

- Closely aligns with policy objectives of the City of Ottawa, the City of Gatineau, and the NCC to reduce transport-related emissions and **increase the use of sustainable travel modes**
- Can be procured, launched in Spring 2027, and operated for the first five years for a **net present cost of $19-21M**
- Will **strengthen local transit services** and interprovincial travel, by offering seamless connections with transit stations and across interprovincial bridges
- Will serve as a key tool for **urban and downtown revitalization,** offering an efficient and enjoyable option to reach businesses and major events without sitting in traffic and searching for parking
- Can gradually expand to **outer urban and suburban areas**, ultimately serving residents across the region

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