

Osservatorio Nazionale
SHARING MOBILITY



PROMOSSO DA



MINISTERO DELL'AMBIENTE
E DELLA SICUREZZA ENERGETICA



MIT
MINISTERO
DELLE INFRASTRUTTURE
E DEI TRASPORTI



FONDAZIONE
PER LO SVILUPPO
SOSTENIBILE

Sustainable Development Foundation

8° RAPPORTO
NAZIONALE
SULLA **SHARING**
MOBILITY

2024



Indice dell'8° Rapporto Nazionale sulla Sharing Mobility

1. Vehiclesharing

- Focus: Incidentalità nei servizi di micromobilità in sharing nel 2023
- Focus: Dimensione economica del settore del vehiclesharing
- Focus: La percezione dei servizi di vehiclesharing secondo i clienti

2. Carsharing

- Focus: Regolazione del settore

3. Bikesharing

4. Monopattini in sharing

5. Scootersharing

- Focus: Scootersharing case study

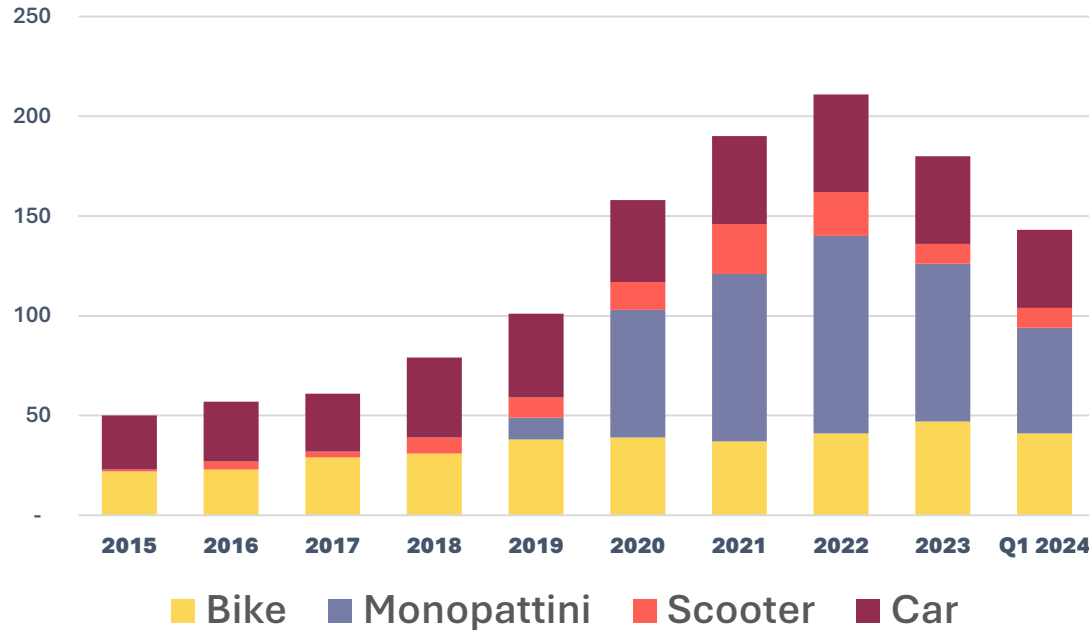
6. Demand Responsive Transit (DRT)



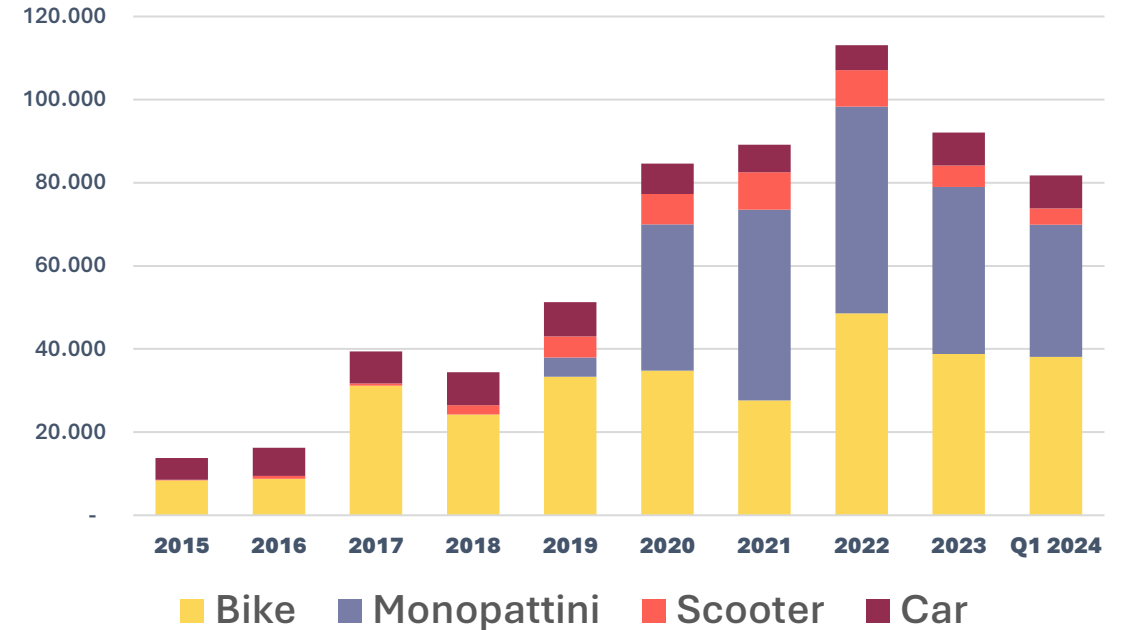
L'offerta di vehiclesharing



Numero dei servizi



Numero dei veicoli



Servizi 2022: 211
 Servizi 2023: 180 (-19%)
 Servizi Q1 2024: 143 (-21%)

Veicoli 2022: 113mila
 Veicoli 2023: 92mila (-19%)
 Veicoli Q1 2024: 82mila (-11%)

#menoservizi #rimodulazione #nuovibandi

#menoveicoli #monopattini

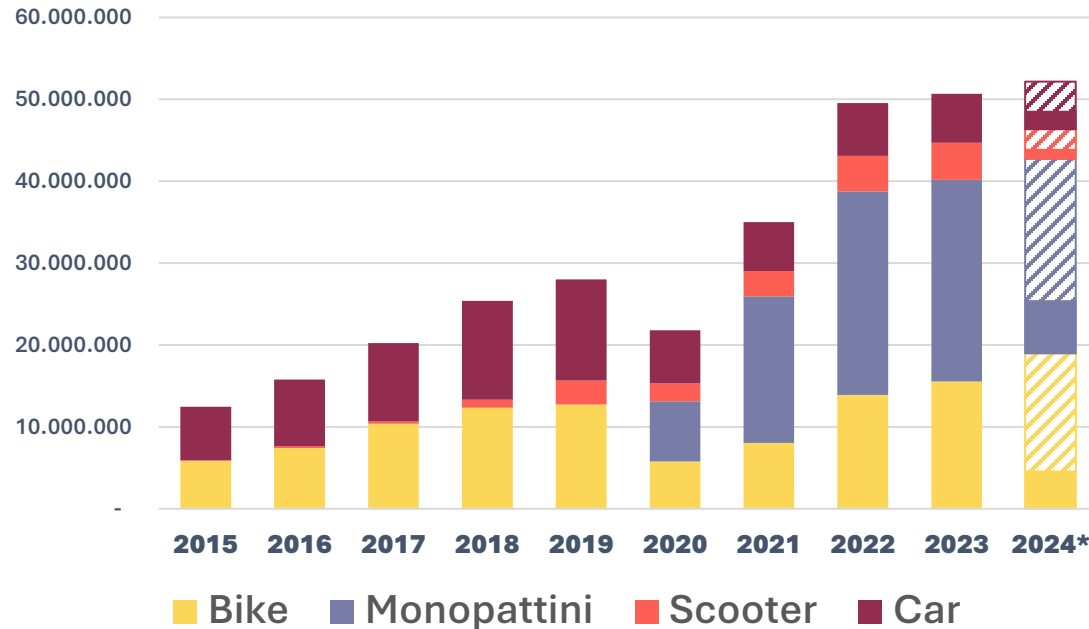




La domanda di vehiclesharing

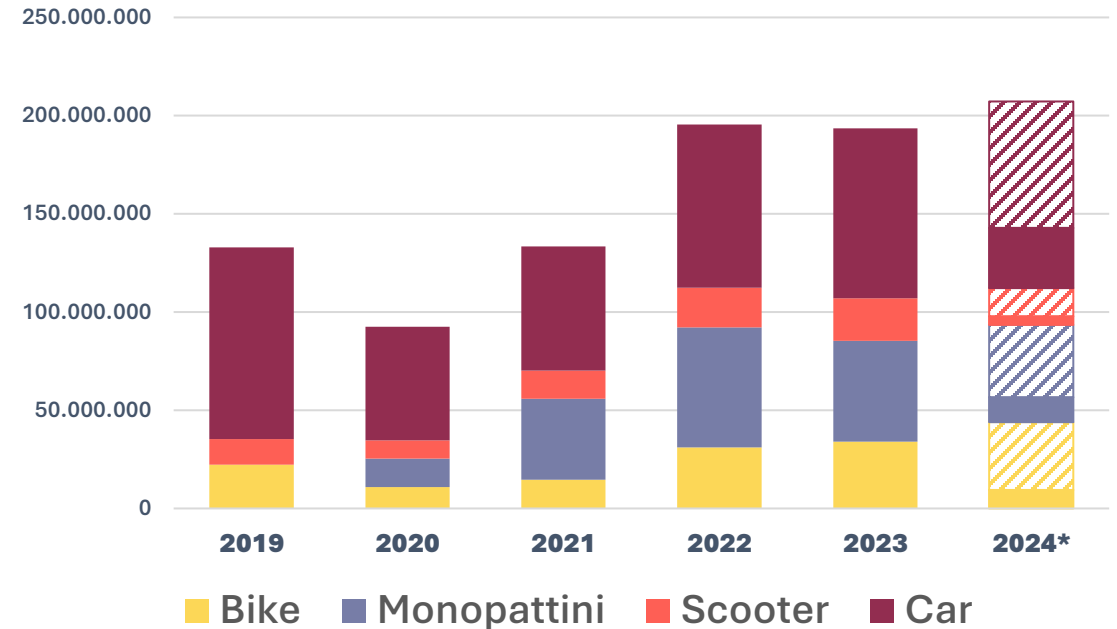


Noleggi



Noleggi 2022: 49,5 milioni
 Noleggi 2023: 50,7 milioni (+2%)
 Noleggi 2024*: 52,2 (+3%)

Km percorsi



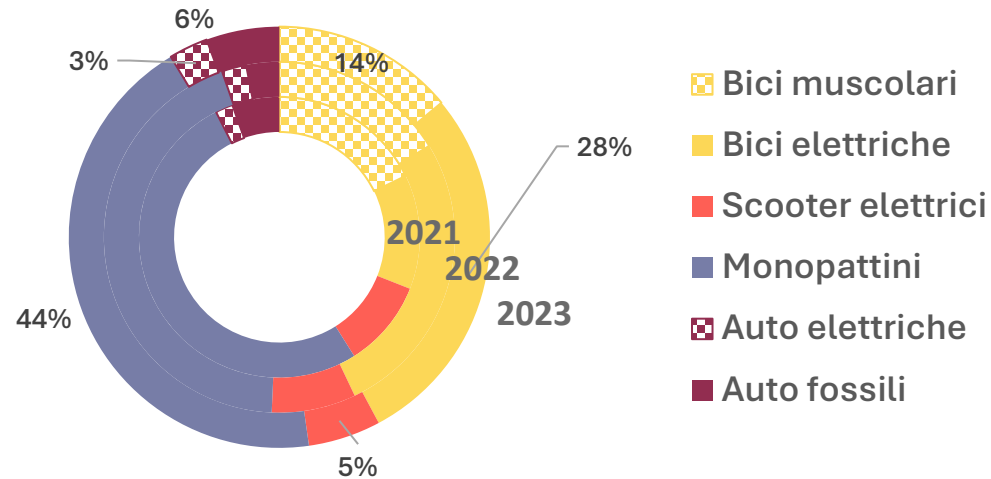
Percorrenze 2022: 195.5 milioni
 Percorrenze 2023: 193,5 milioni (-1%)
 Percorrenze 2024*: 207,2 milioni (+7%)

#plateau #noleggi

• #percordanze #aumentato #bikesharing



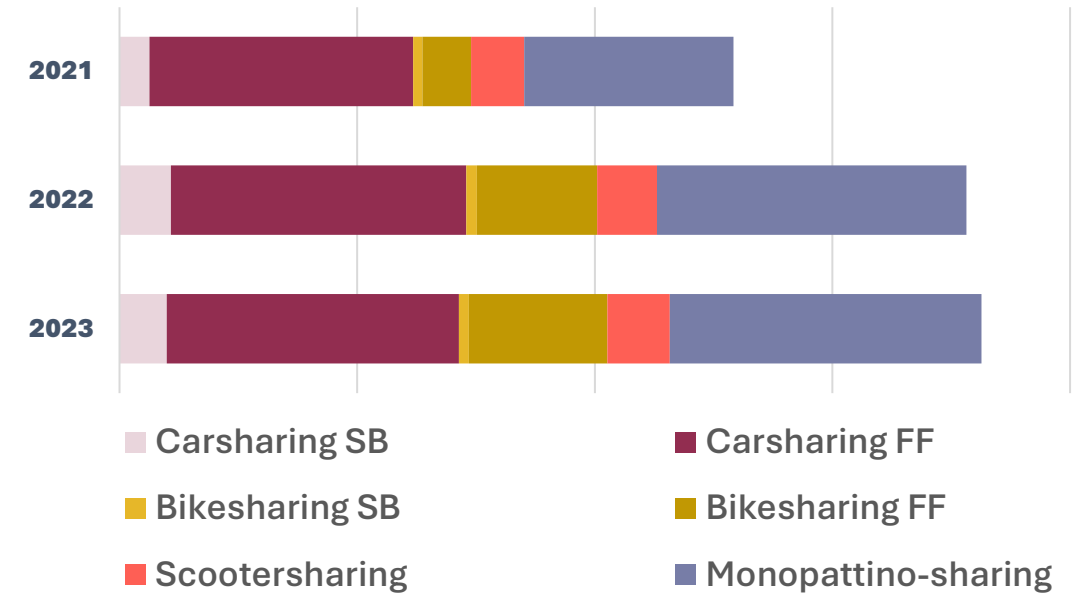
Composizione della flotta



Bici elettriche nel 2021: 13% della flotta in sharing
Bici elettriche nel 2023: 29% della flotta in sharing

#bicielettriche #freefloating

Fatturato del settore vehiclesharing per tipologia di servizio negli anni



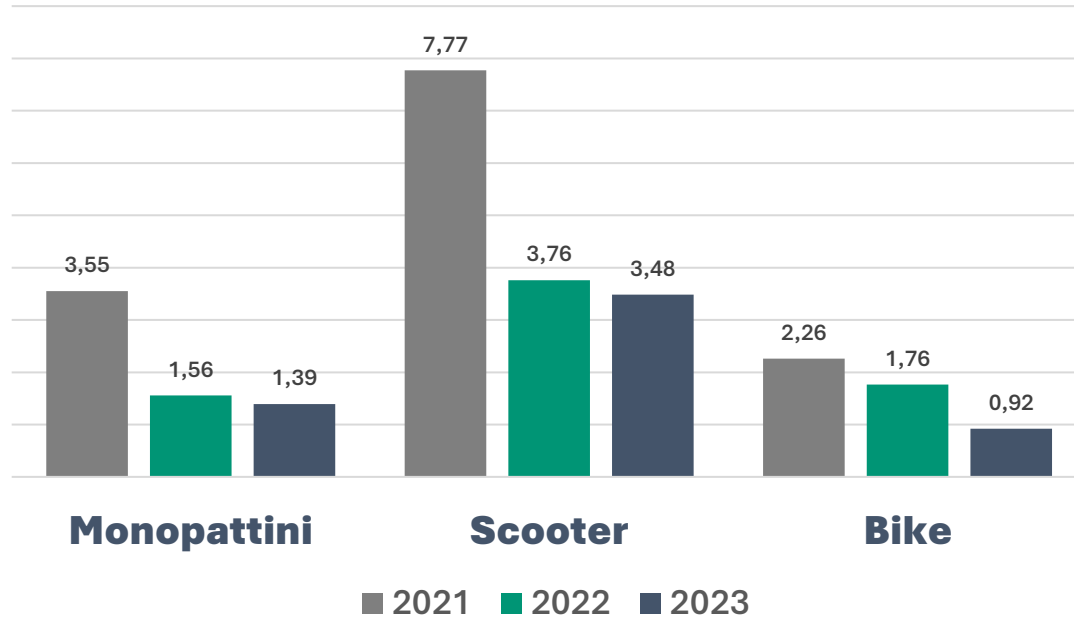
Fatturato 2021: 129 milioni di €
Fatturato 2022: 175 milioni di €
Fatturato 2023: 178 milioni di €



Incidentalità nei servizi di micromobilità in sharing

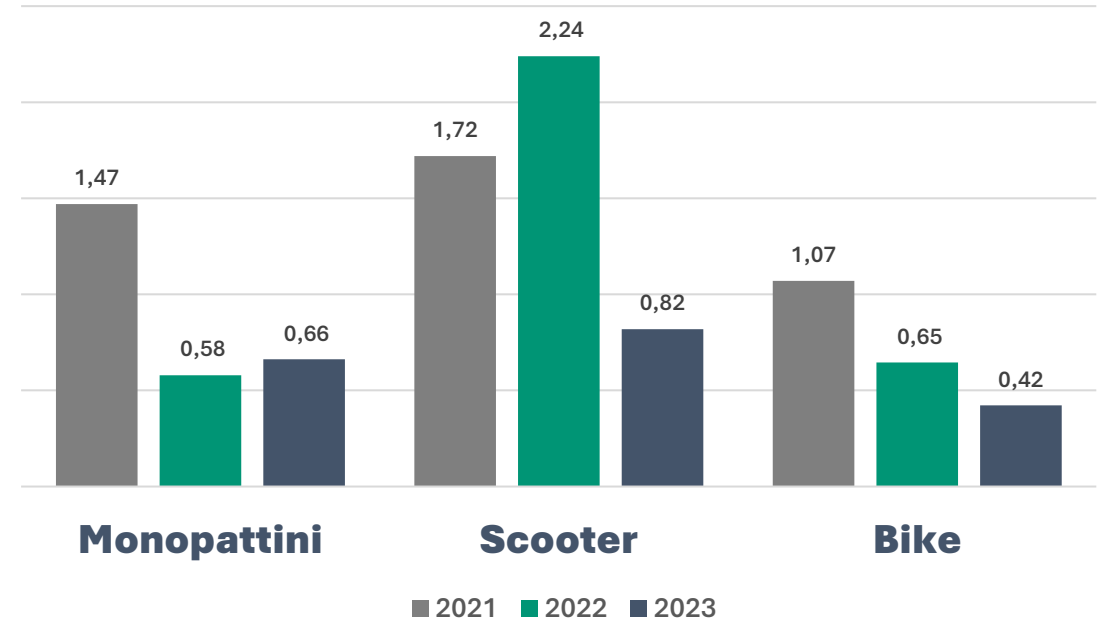


Incidenti per 100.000 noleggi

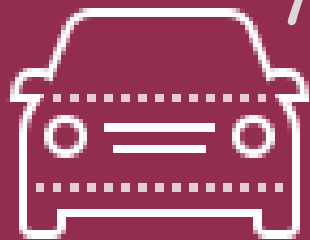


Monopattini: -11%
Scooter: -7%
Bici: -48%

Incidenti per 100.000 km

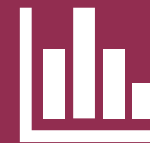


Monopattini: +14%
Scooter: -63%
Bici: -35%



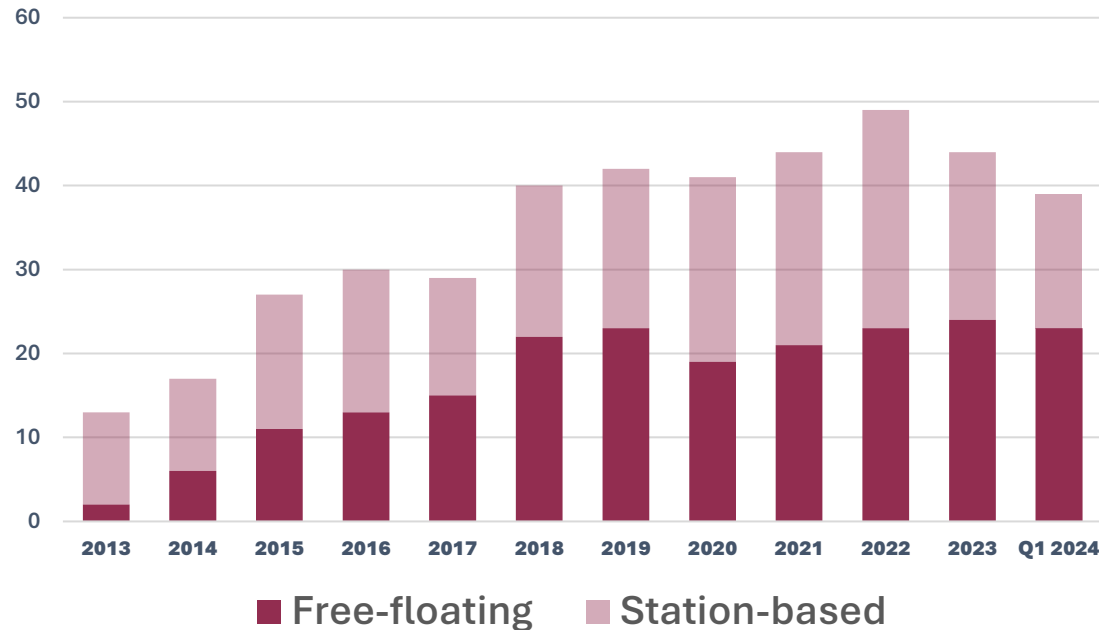
A thread on...

Carsharing KEY DATA





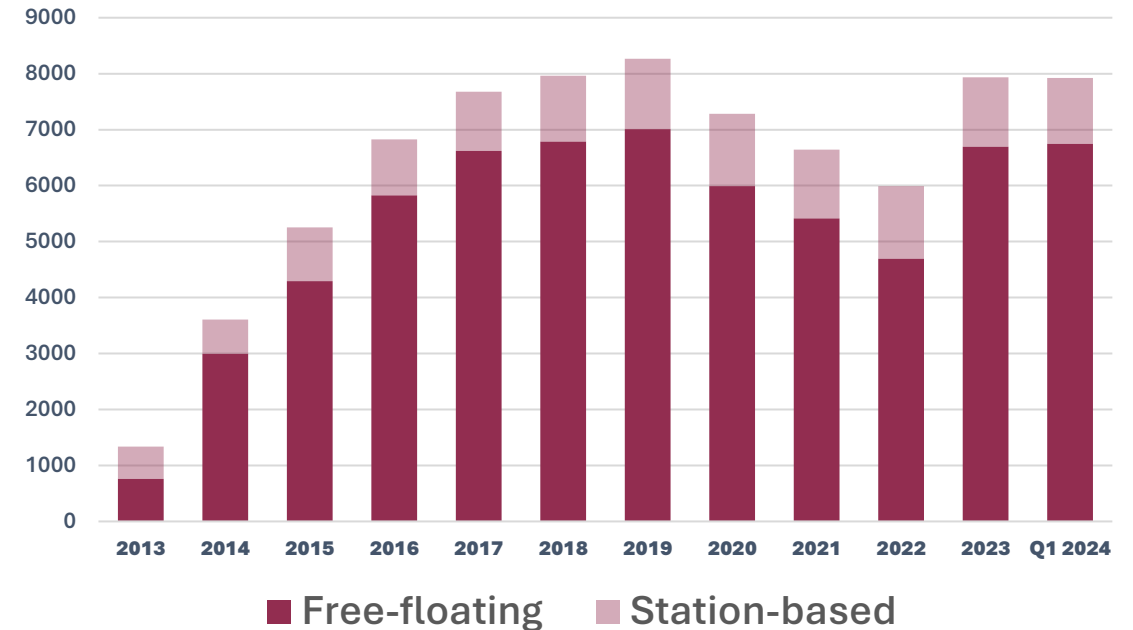
Servizi di carsharing



Servizi 2022: 23 FF + 26 SB
 Servizi 2023: 24 FF + 19 SB
 Servizi Q1 2024: 23 FF + 16 SB

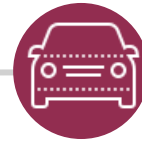
#menoservizi #menocittà

Flotta del carsharing

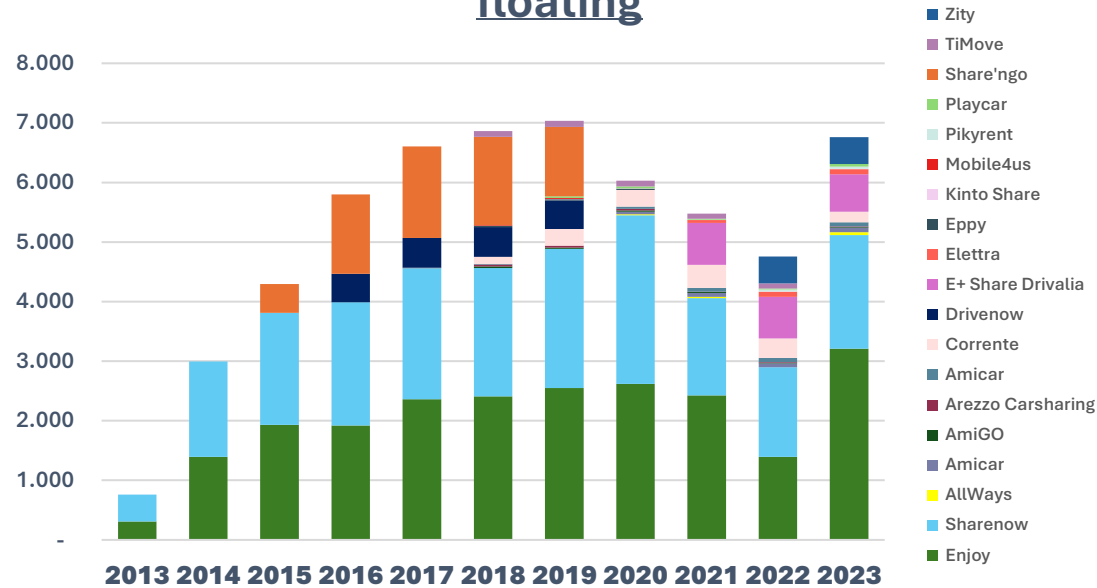


Veicoli 2022: 5.991
 Veicoli 2023: 7.931 (+32%)
 Veicoli Q1 2024: 7.922 (=)

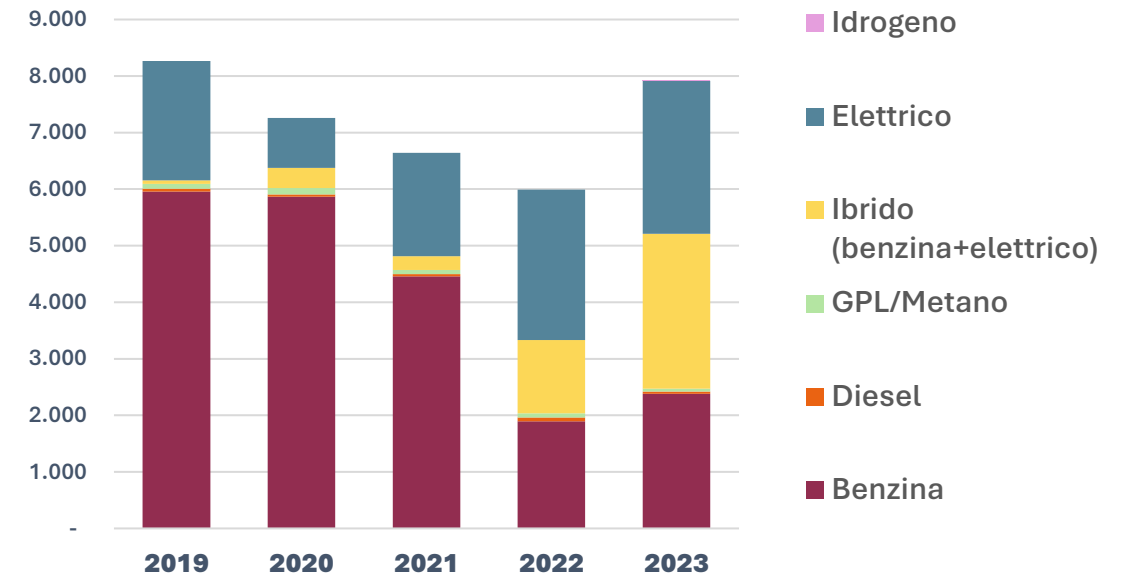
#ampliamento



Operatori e flotte del carsharing free-floating



Flotta del carsharing per alimentazione



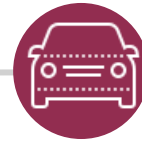
Fino al 2019: 4 principali operatori
 2020: Enjoy e Sharenow hanno il 90% delle flotte
 2022-2023: Più articolazione nell'offerta

2020: BEV+HEV 19%
 2022: BEV+HEV 66%
 2023: BEV+HEV 69%

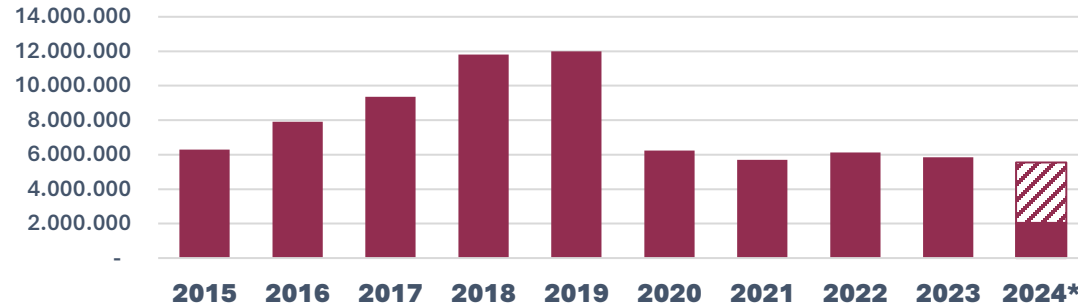
#mercato #articolazione

#elettrificazione #BEV #HEV

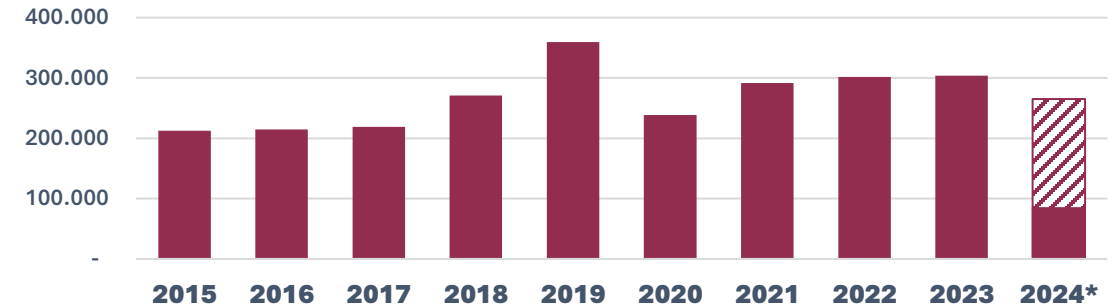




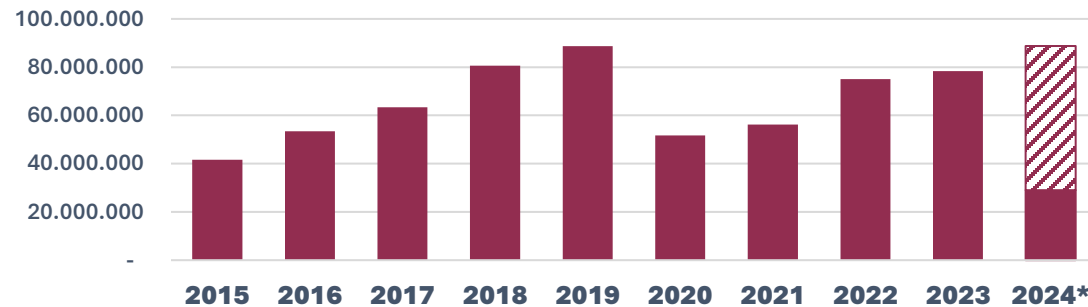
Noleggi del carsharing free-floating



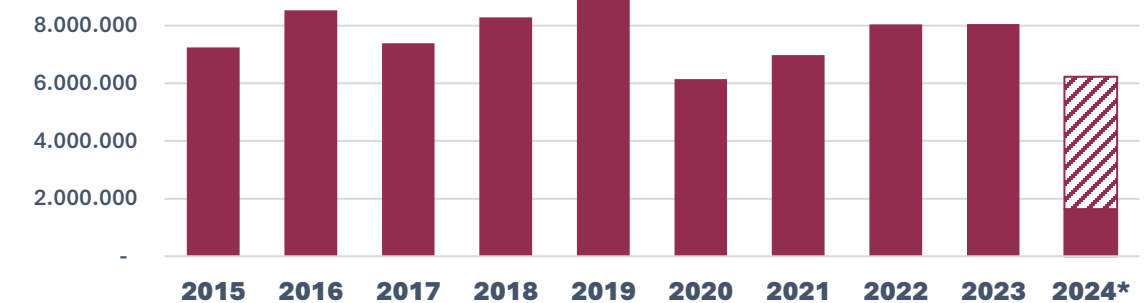
Noleggi del carsharing station-based



Percorrenze del carsharing free-floating



Percorrenze del carsharing station-based



Variazione noleggi 20/23: -6%
Variazione percorrenze 20/23: +52%

Variazione 22/23: +0,8%
Variazione 22/23: +0,1%

#stallonoleggi #percorrenze

#previsione #calo



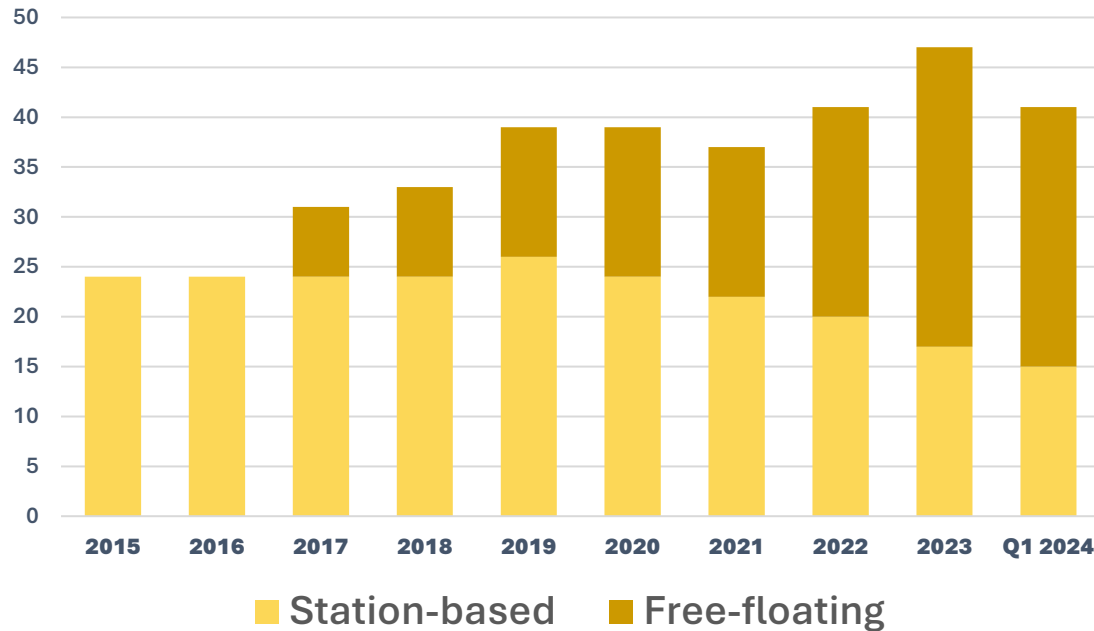
A thread on...

Bikesharing KEY DATA





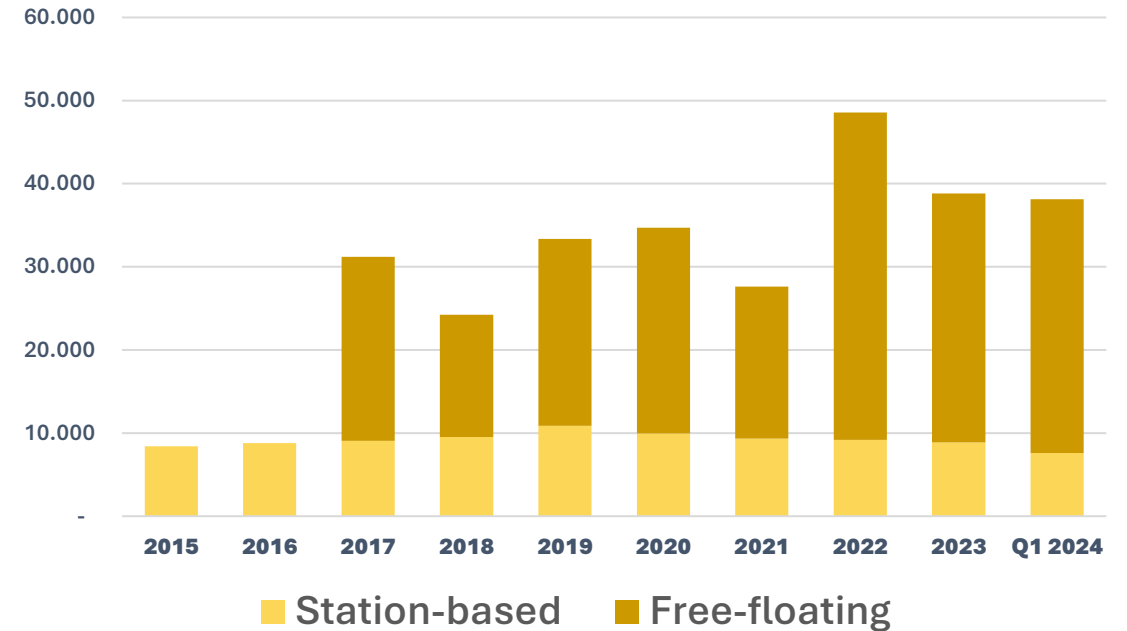
Servizi di bikesharing attivi in Italia



Servizi 2022: 41
 Servizi 2023: 47
 Servizi Q1 2024: 41 (15 SB, 26 FF)

#servizi #variabilità

Flotta del bikesharing

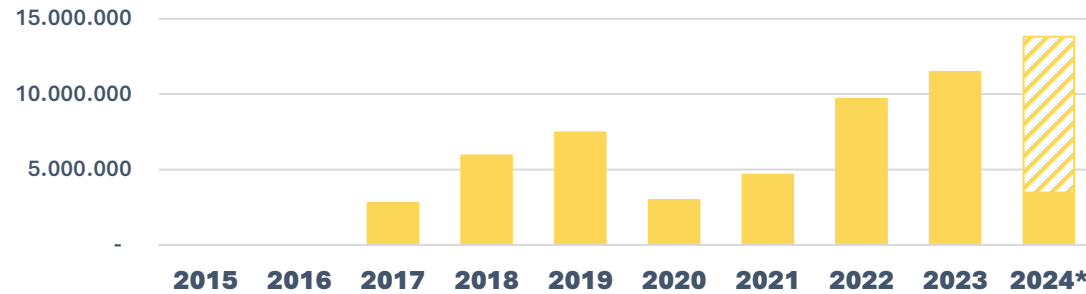


Veicoli 2022: 48,5 mila
 Veicoli 2023: 38,8 mila
 Veicoli Q1 2024: 38,1 mila

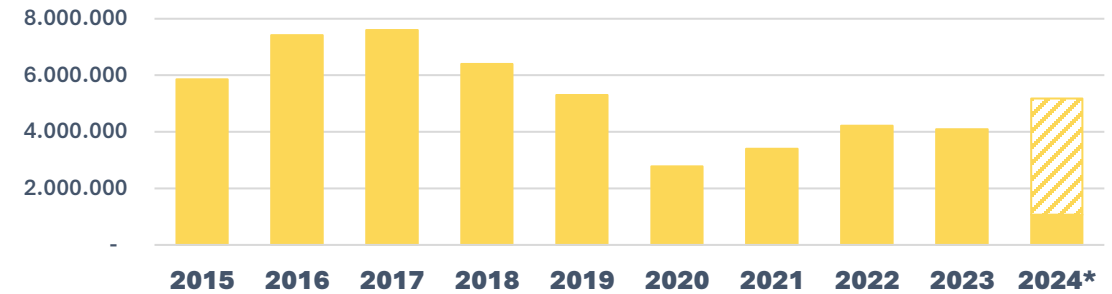
#offerta #italia



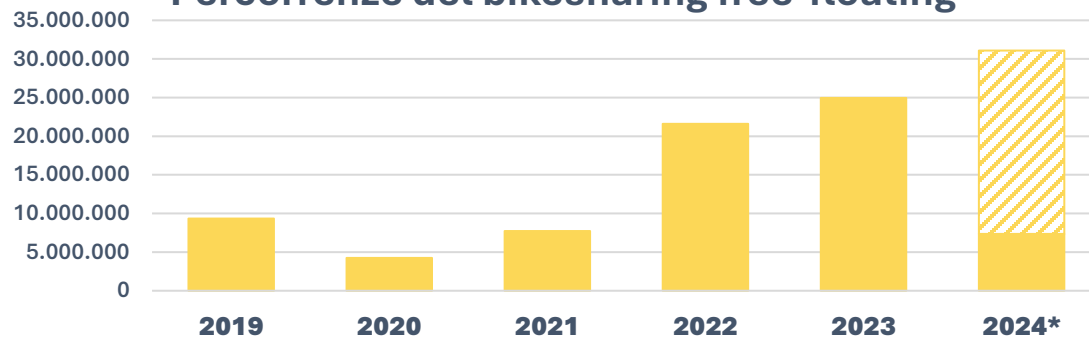
Noleggi del bikesharing free-floating



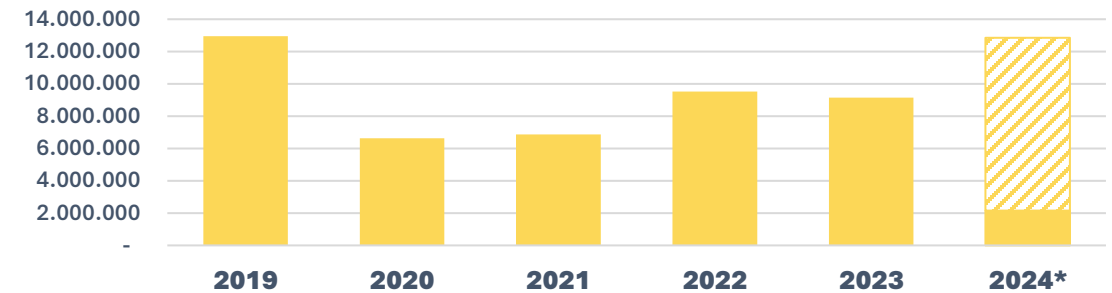
Noleggi del bikesharing station-based



Percorrenze del bikesharing free-floating



Percorrenze del bikesharing station-based



Variazione noleggi 22/23: +18%
Variazione percorrenze 22/23: +15%

Previsione noleggi 23/24: +27%*
Previsione percorrenze 22/23: +41%*

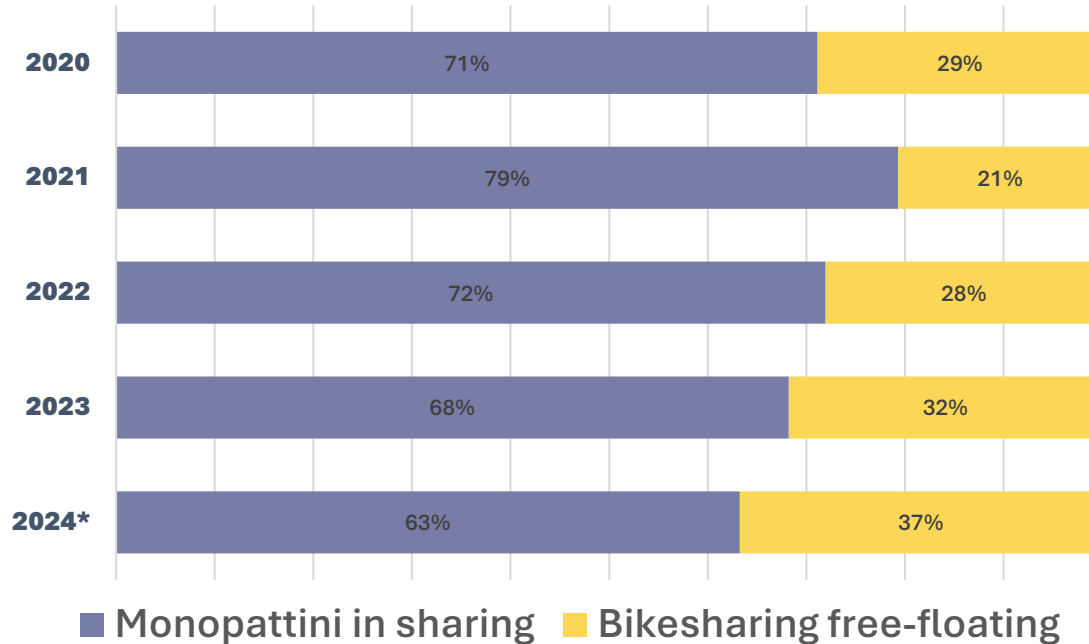
#crescita #bikesharing

#offerta #italia





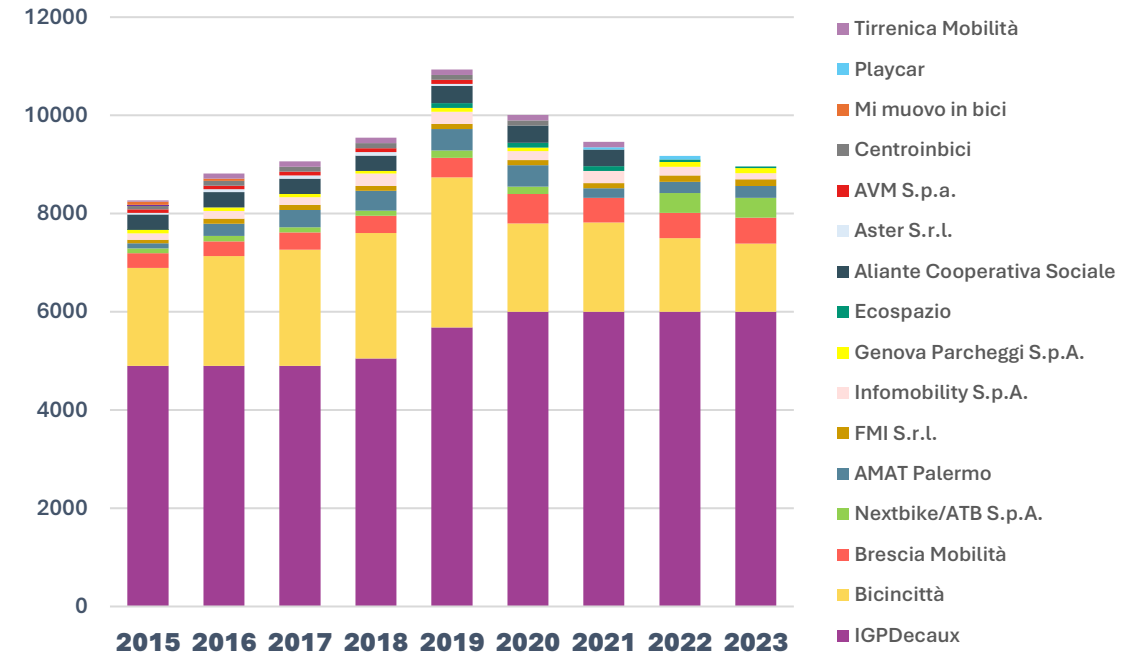
Noleggi di bikesharing free-floating e monopattini in sharing



Aumento medio della quota del bikesharing tra 2022 e 2024: 22%

#mercato #micromobilità

Articolazione operatori per flotte del bikesharing station-based



Numero operatori 2015: 14

Numero operatori 2023: 9

% flotte dei due principali operatori nel 2023: 82%

#piccolioperatori #offerta



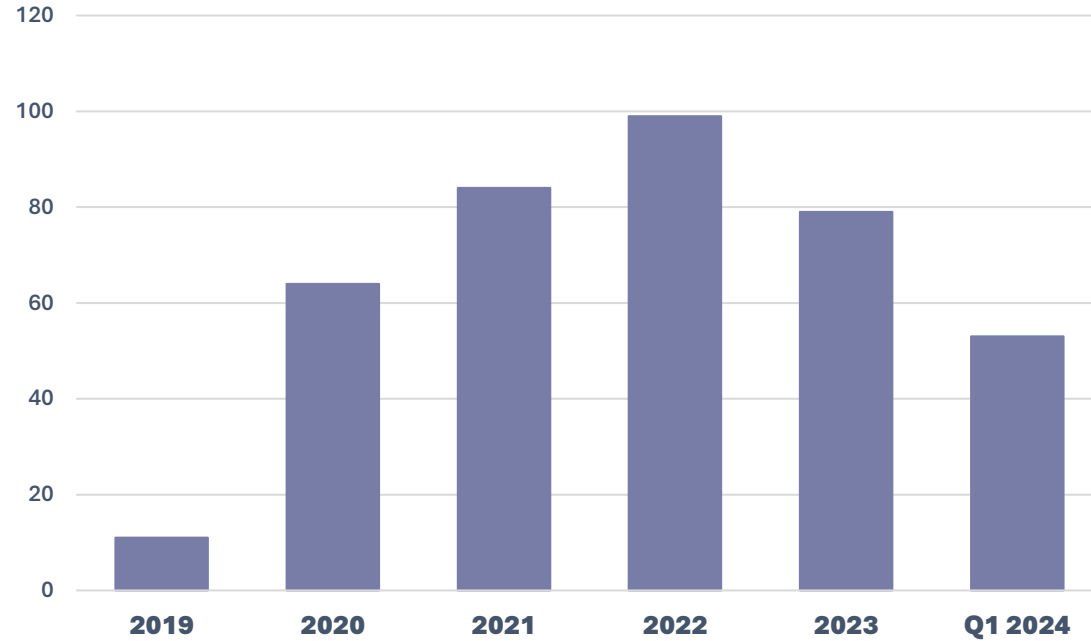
A thread on...

Monopattino-sharing KEY DATA





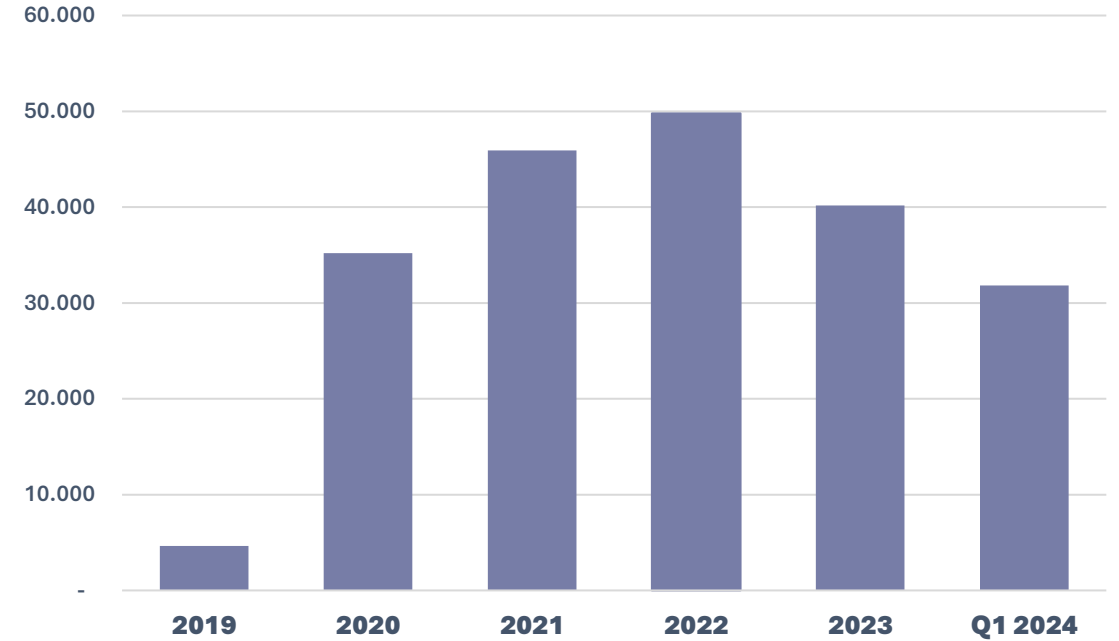
Servizi di monopattino-sharing



Servizi 2022: 99
 Servizi 2023: 79
 Servizi Q1 2024: 53

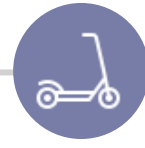
#servizi #città #riduzione

Flotte di monopattino-sharing

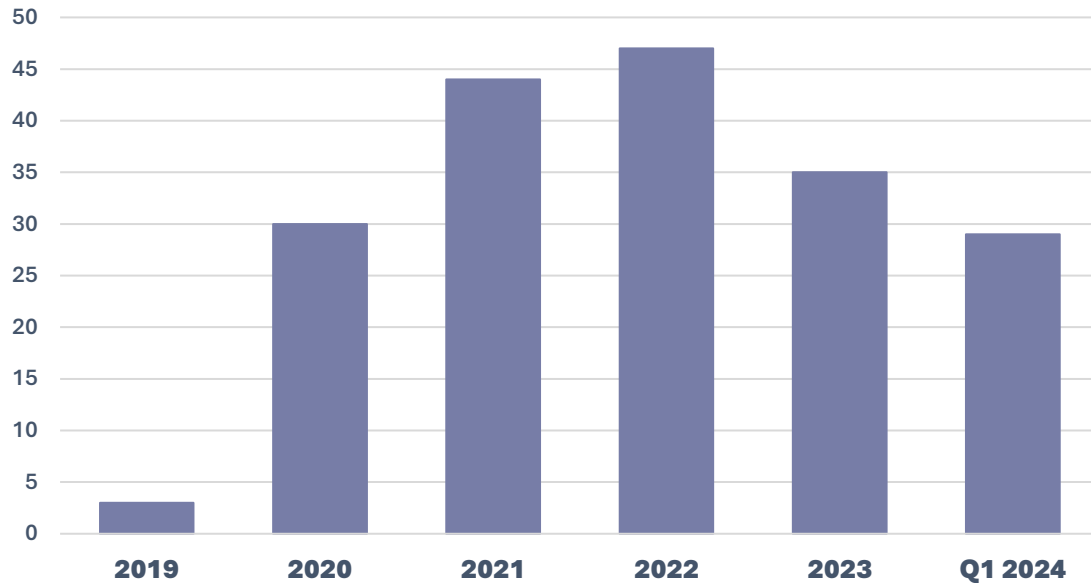


Veicoli 2022: 49.780
 Veicoli 2023: 40.165 (-19%)
 Veicoli Q1 2024: 31.820 (-21%)

#flotte #calo



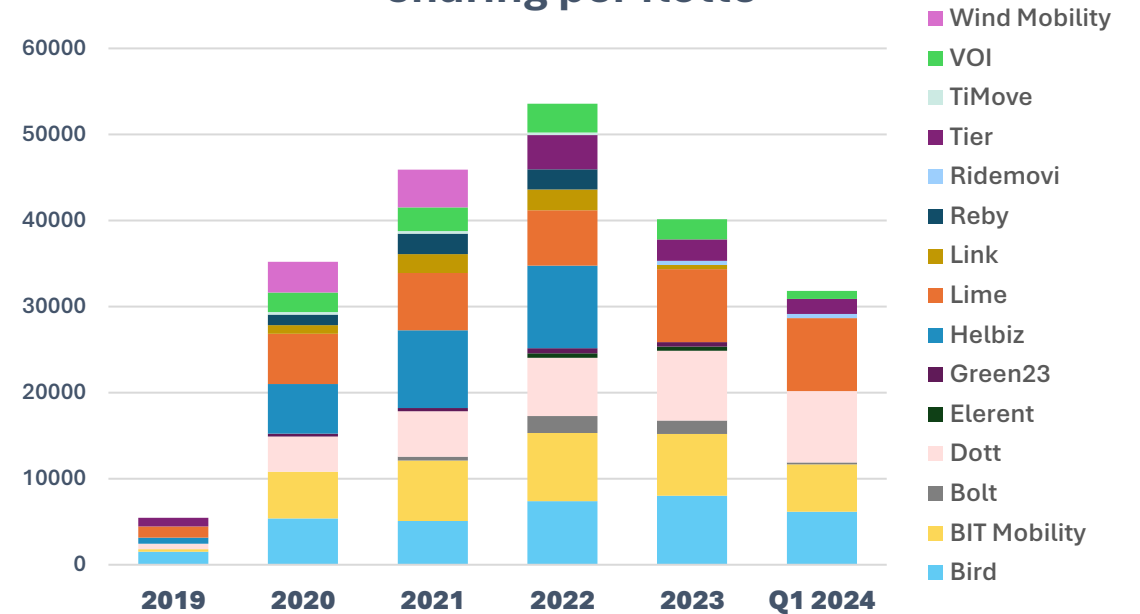
Città capoluogo italiane con almeno un servizio di monopattini in sharing



Città servite 2022: 47
Città servite 2023: 35
Città servite Q1 2024: 29

#menocittà

Articolazione operatori monopattini in sharing per flotte



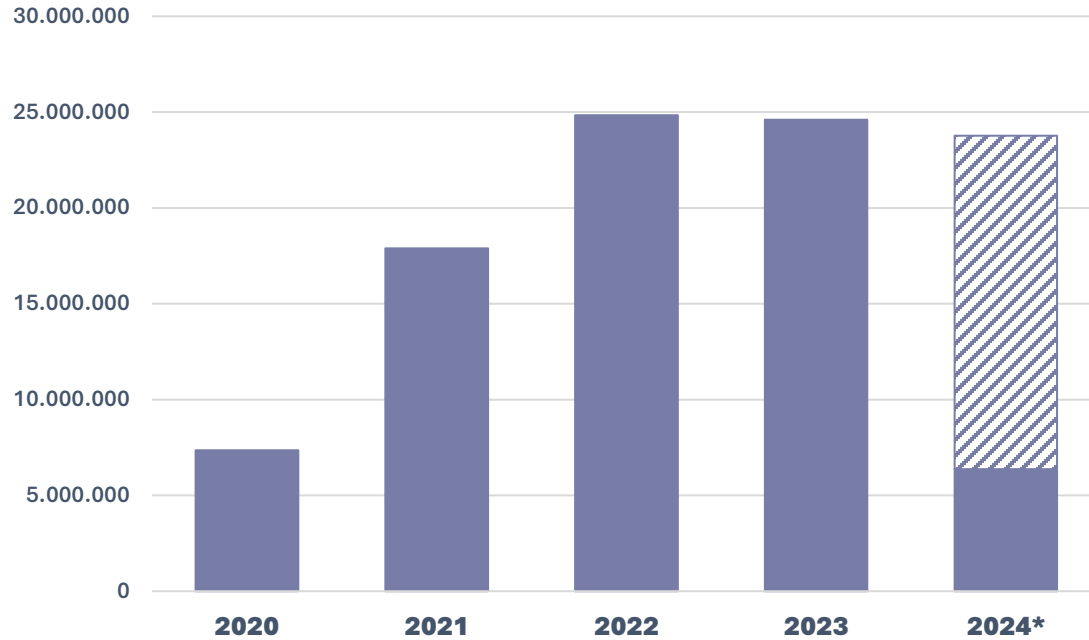
Operatori 2022: 13
Operatori 2023: 11
Operatori Q1 2024: 8

#mercato #concentrazione



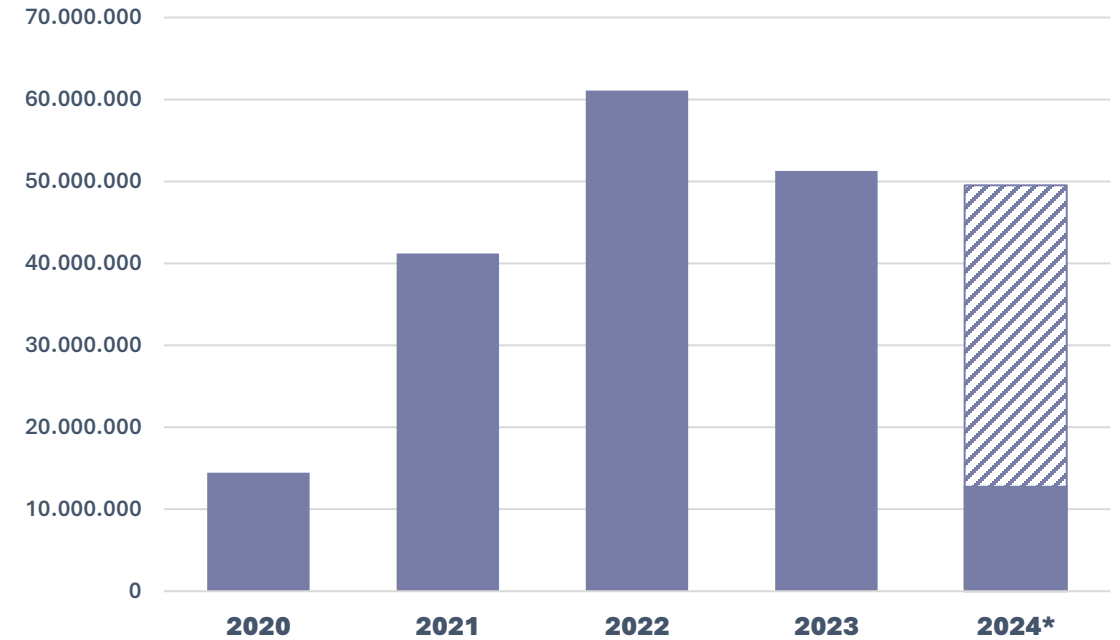


Noleggi di monopattino-sharing



Noleggi 2022: 24,8 milioni
 Noleggi 2023: 24,6 milioni (-1%)
 Noleggi 2024*: 23,8 (-3%)

Percorrenze di monopattino-sharing



Percorrenze 2022: 61,1 milioni
 Percorrenze 2023: 51,3 milioni (-16%)
 Percorrenze 2024*: 49,5 milioni (-3%)

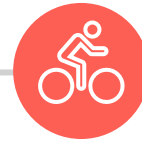
#domanda #noleggi # stabilizzazione

#percorrenze #riduzione

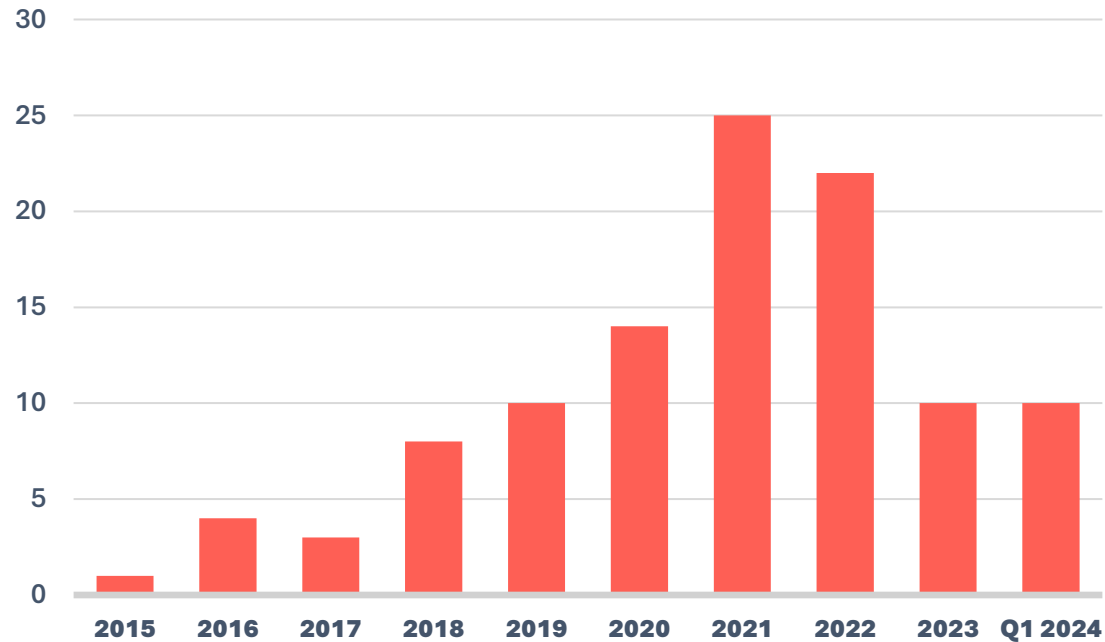


A thread on...

Scootersharing KEY DATA 



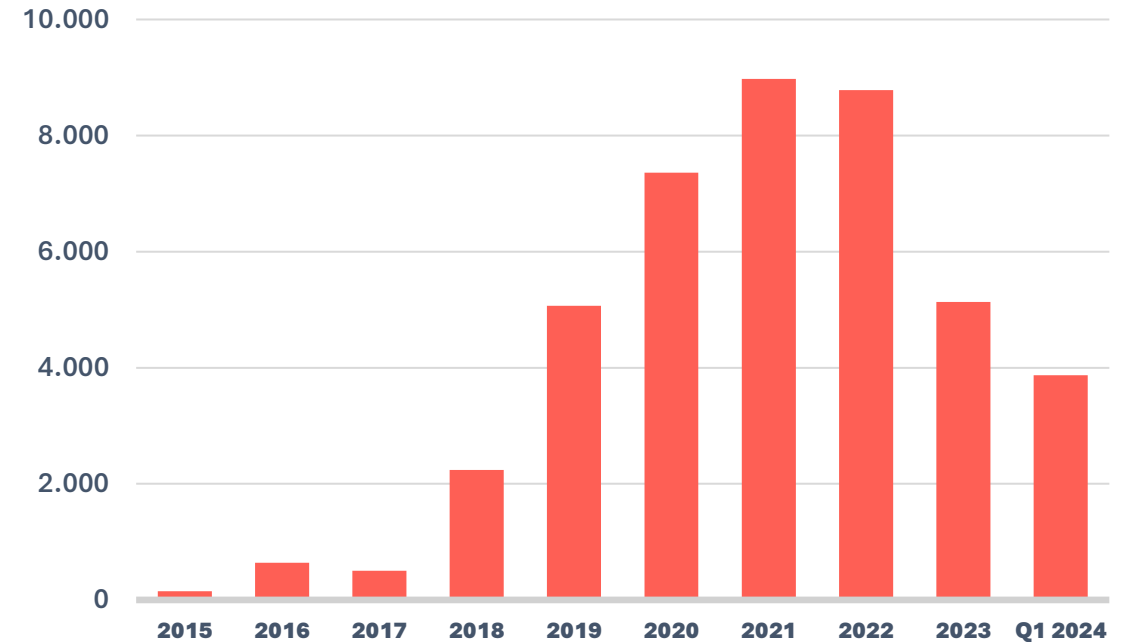
Servizi di scootersharing



Servizi 2022: 22
 Servizi 2023: 10 (-54%)
 Servizi Q1 2024: 10 (-)

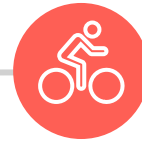
#contrazione #offerta

Flotta dello scootersharing

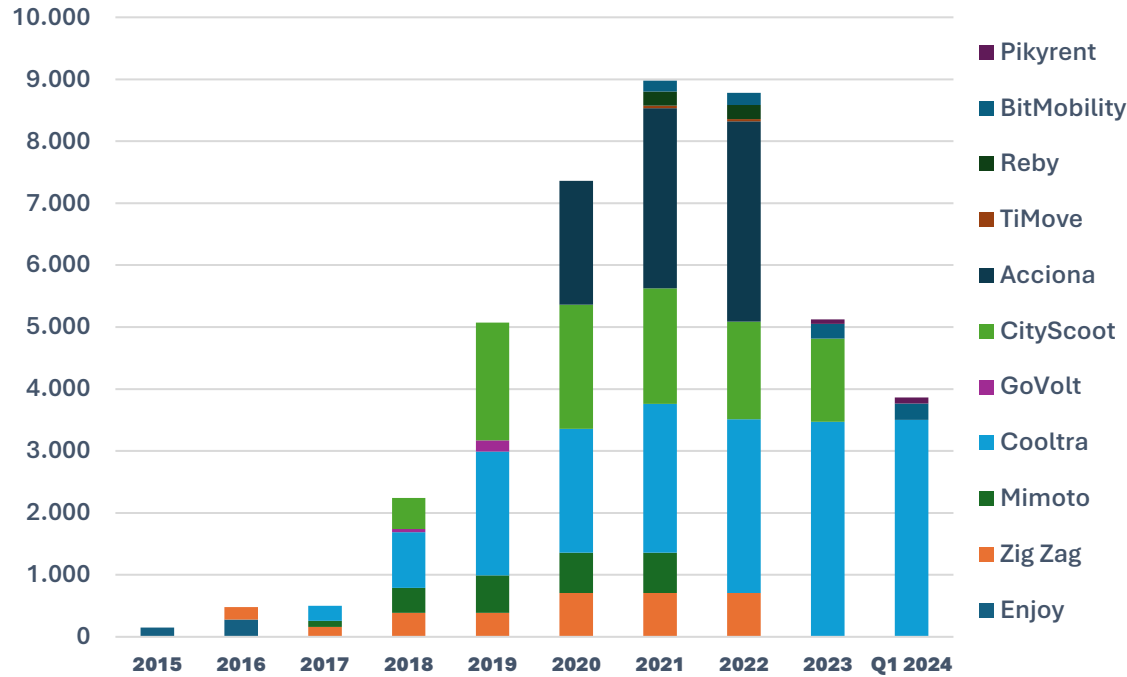


Veicoli 2022: 8.782
 Veicoli 2023: 5.133 (-41,5%)
 Veicoli Q1 2024: 3.869 (-24,6%)

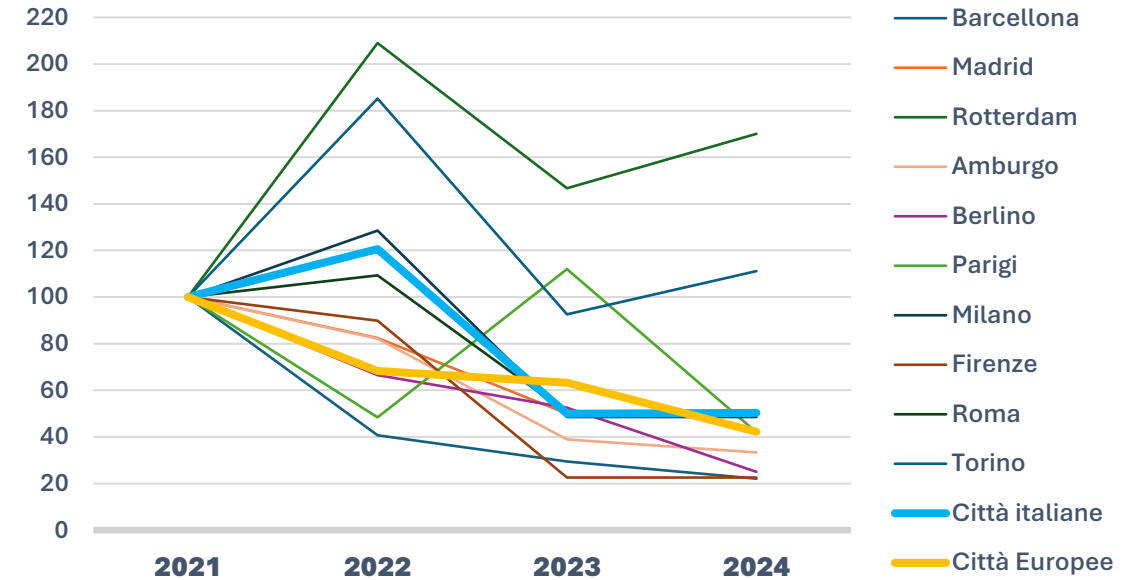
#riduzione #flotta



Operatori e flotte dello scootersharing



Offerta di scooter nelle città italiane ed europee - Numeri indice 2021=100



Operatori attivi 2022: 7
Operatori 2023: 4
Operatori Q1 2024: 3

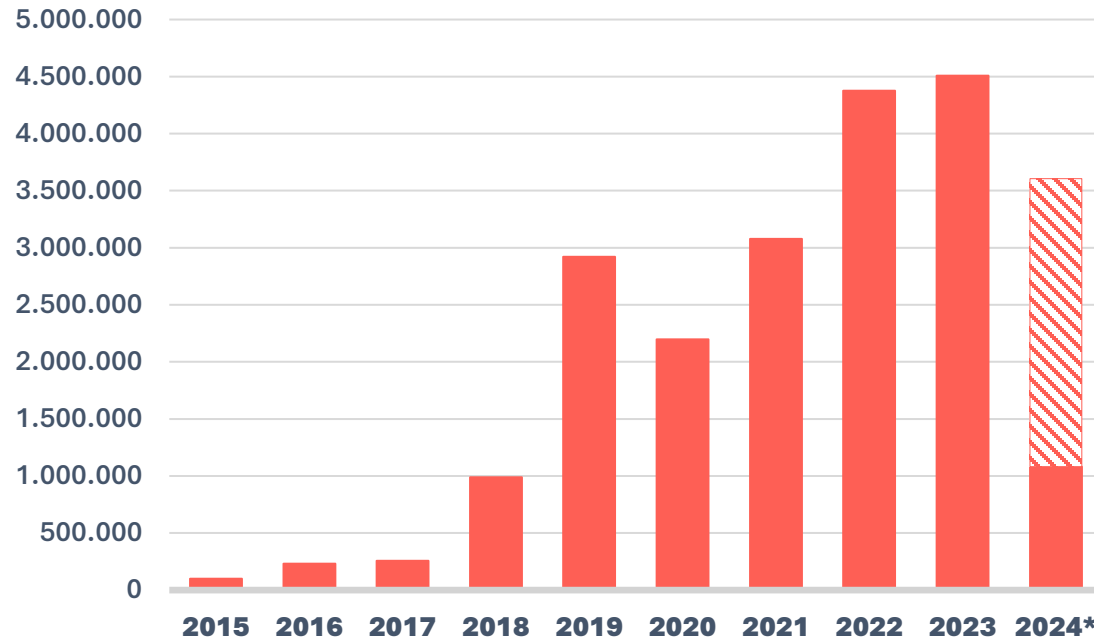
Veicoli 2021/2024 ITA: -50%
Veicoli 2021/2024 EU: -58%
Veicoli 2021/2024 Città di Barcellona: -78%

#operatori #italia

#offerta #europa



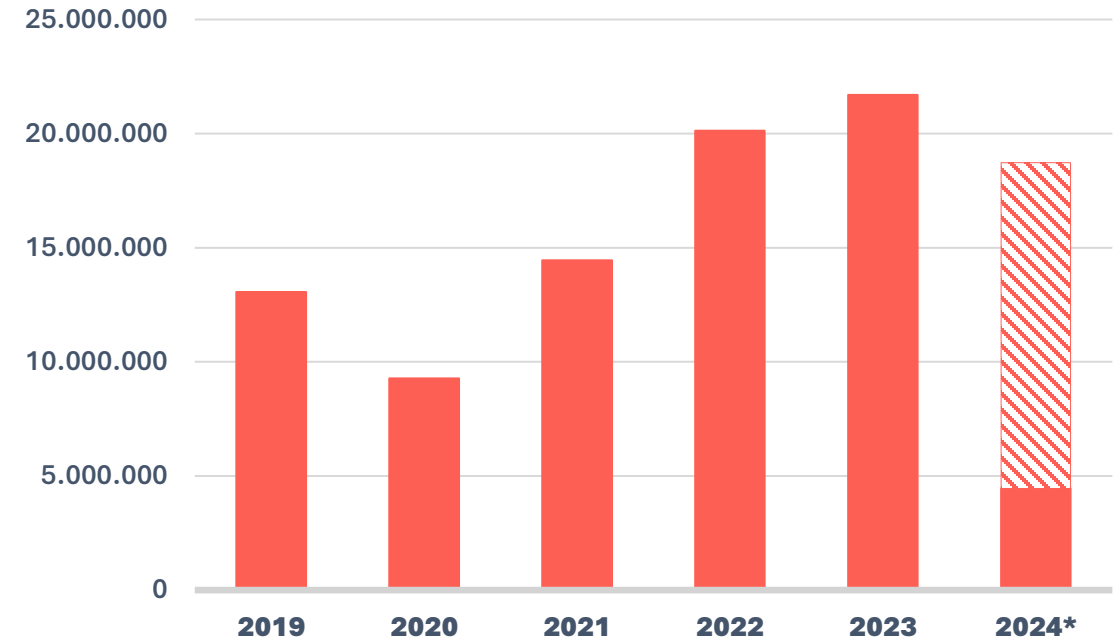
Noleggi dello scootersharing



Noleggi 2022: 4,3 milioni
 Noleggi 2023: 4,5 milioni (+3%)
 Noleggi 2024*: 3,6 milioni (-20%)

#domanda #noleggi

Percorrenze dello scootersharing



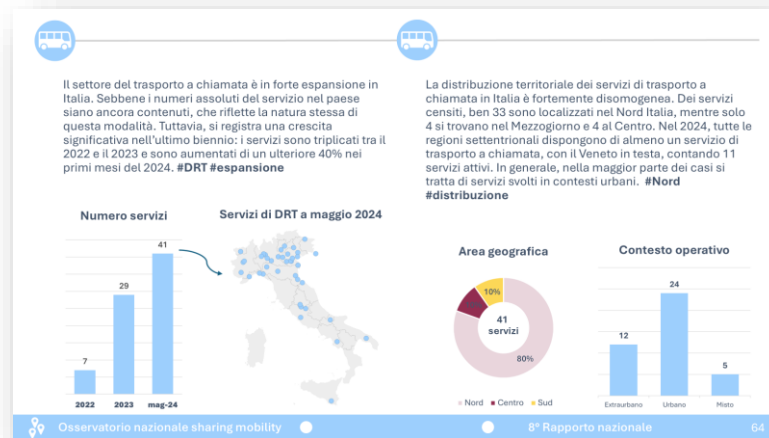
Km percorsi 2022: 20,1
 Km percorsi 2023: 21,7 (+8%)
 Km percorsi 2024*: 18,7 (-13%)

#domanda #percorsenze

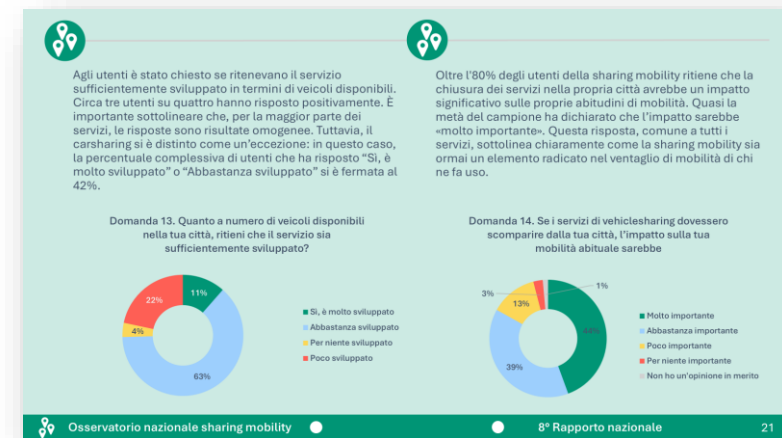


Nell'8° Rapporto Nazionale sulla Sharing Mobility si parla anche di...

DRT (Demand responsive transport) Dati 2024



La percezione dei servizi di vehiclesharing secondo i clienti



IBE Intermobility and Bus Expo – 20 novembre 2024

Grazie!



Sustainable Development Foundation

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asperti@susdef.it*