

Osservatorio Nazionale  
**SHARING MOBILITY** 

PROMOSSO DA



**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

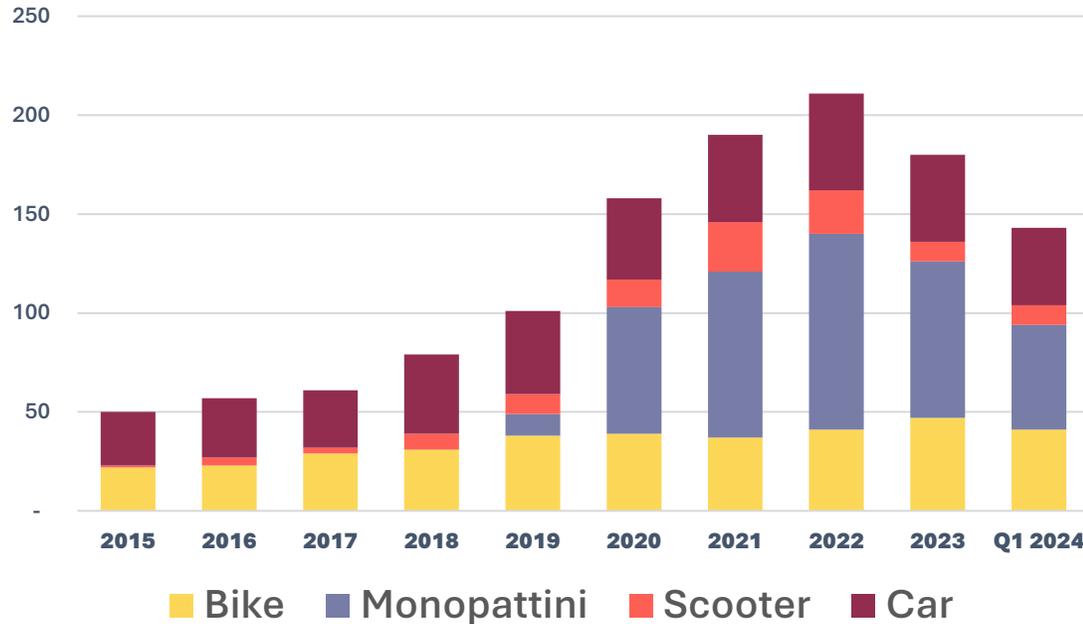
## 6. Demand Responsive Transit (DRT)



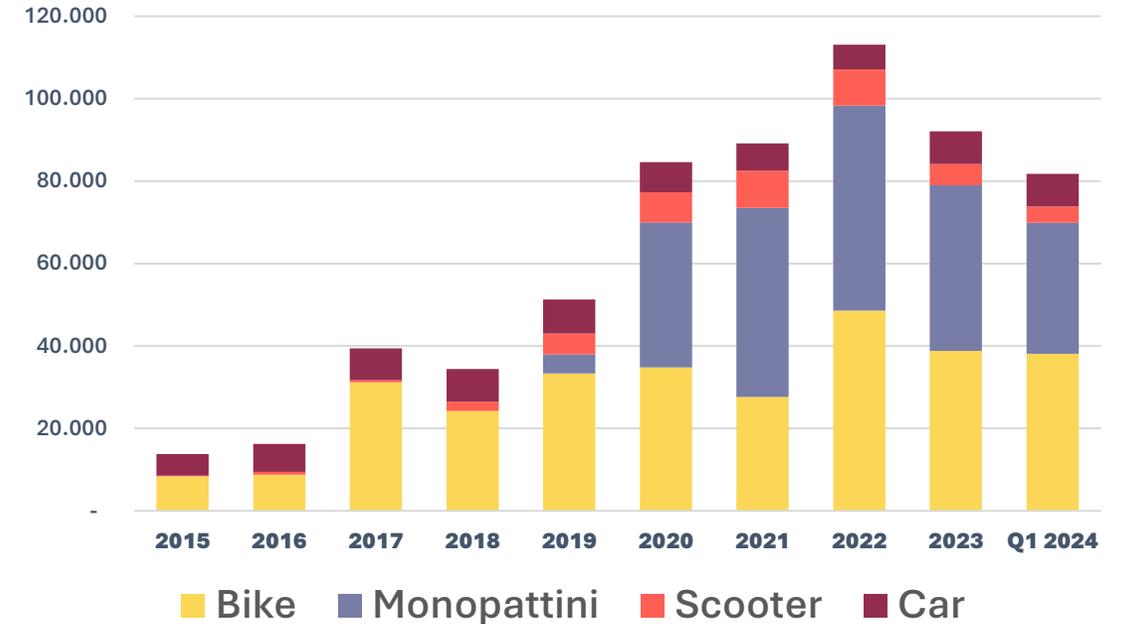
# L'offerta di vehiclesharing



### 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

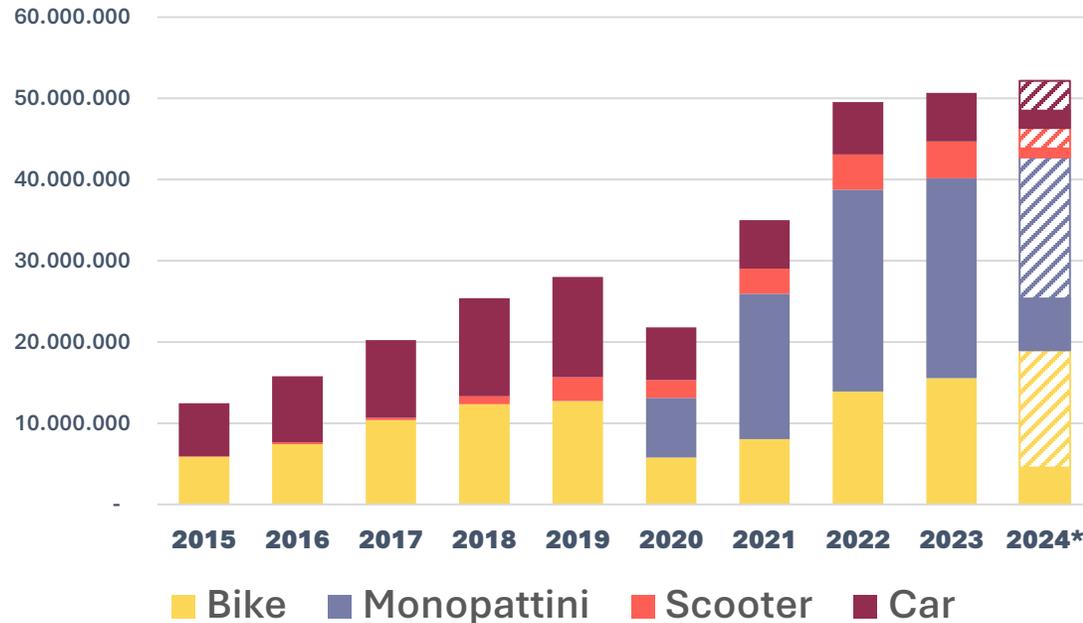
#menoveicoli #monopattini



# La domanda di vehiclesharing



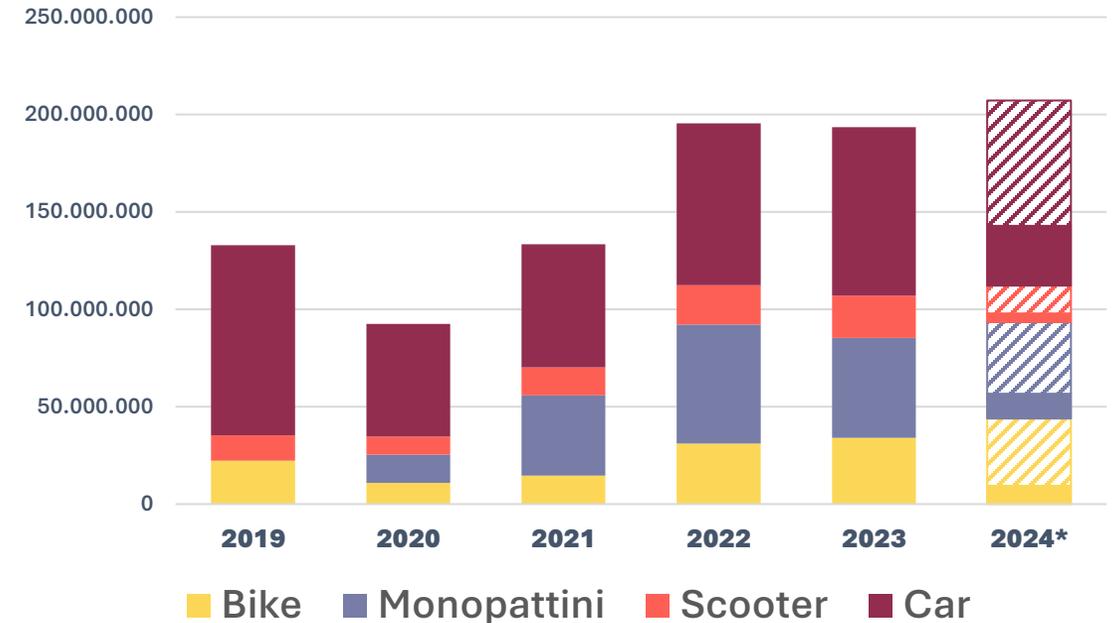
## Noleggi



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

#plateau #noleggi

## Km percorsi

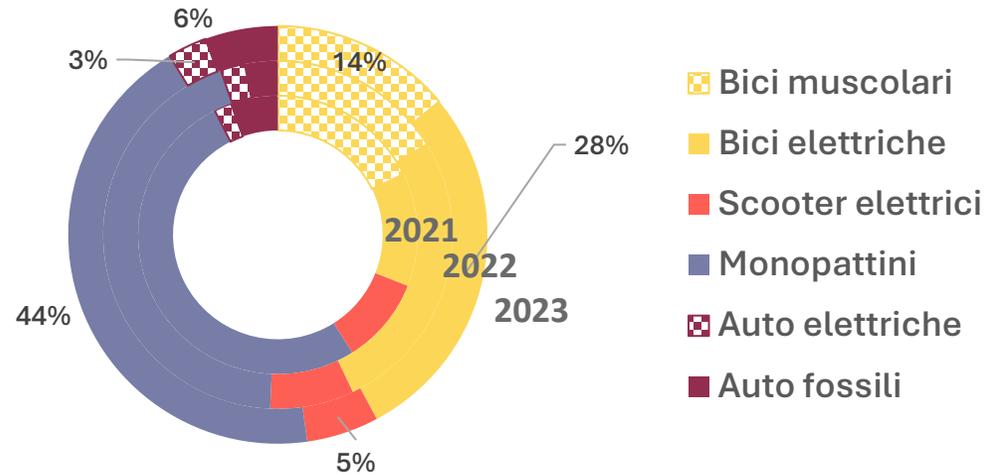


Percorrenze 2022: 195.5 milioni  
Percorrenze 2023: 193,5 milioni (-1%)  
Percorrenze 2024\*: 207,2 milioni (+7%)

• #percorrenze #aumento #bikesharing



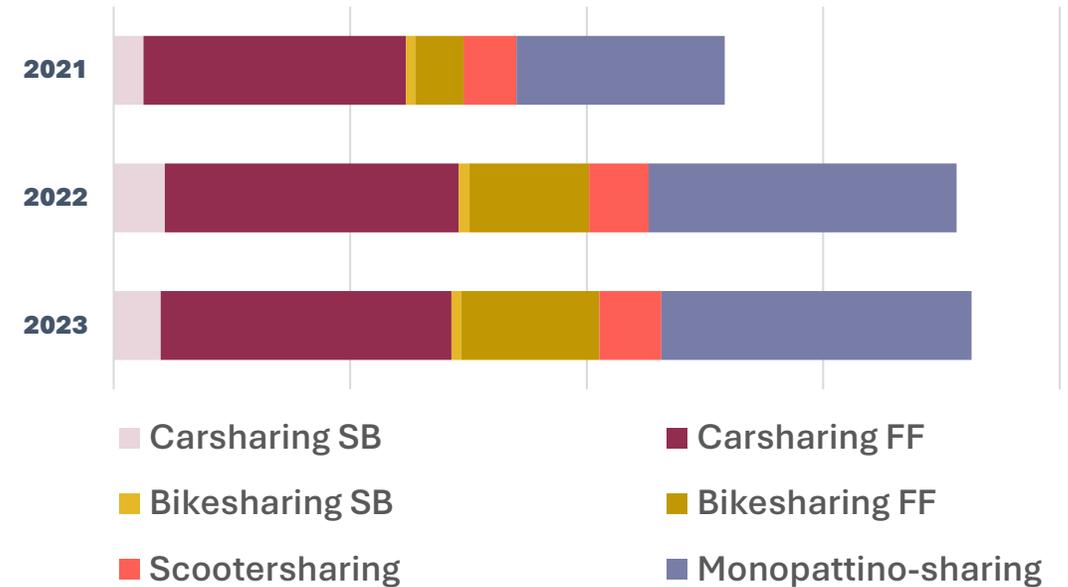
## Composizione della flotta



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 €

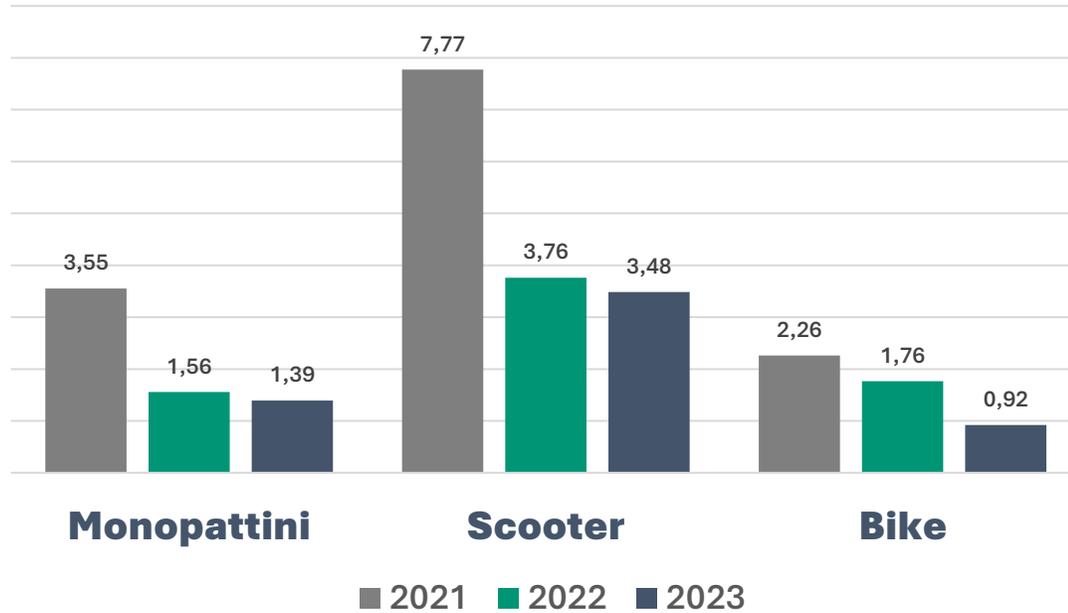




# Incidentalità nei servizi di micromobilità in sharing

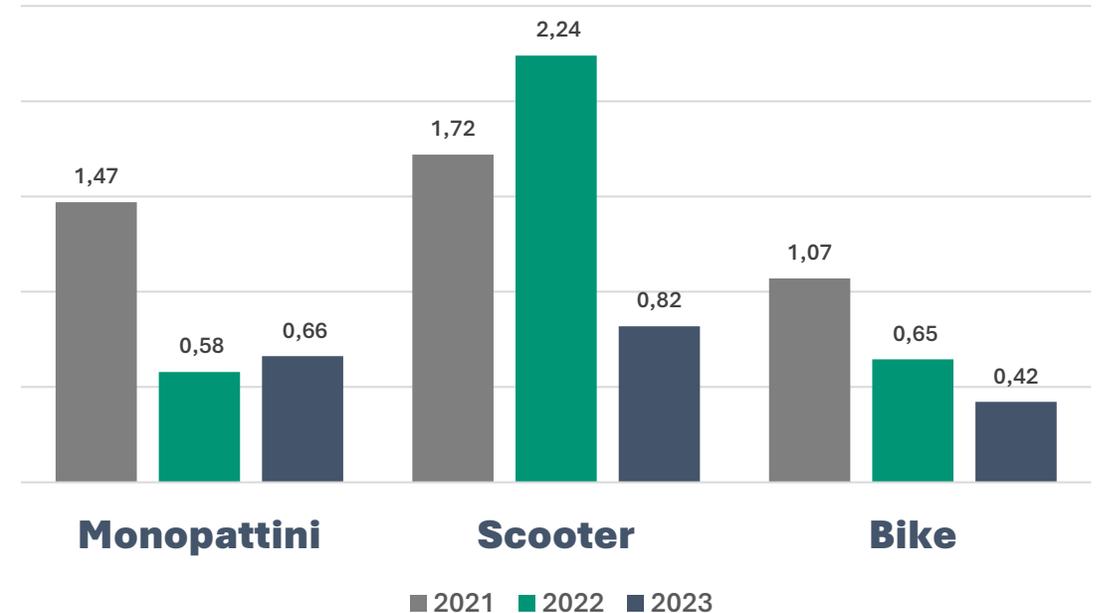


### Incidenti per 100.000 noleggi

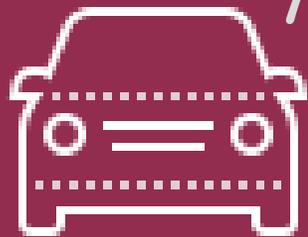


Monopattini: -11%  
Scooter: -7%  
Bici: -48%

### Incidenti per 100.000 km



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



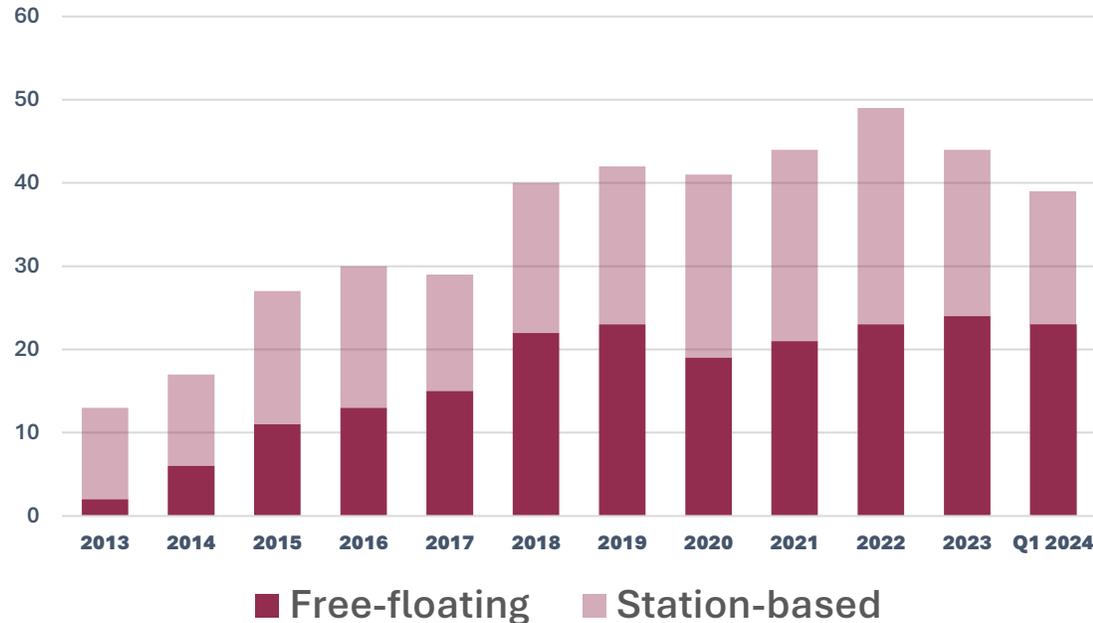
*A thread on...*

# Carsharing KEY DATA





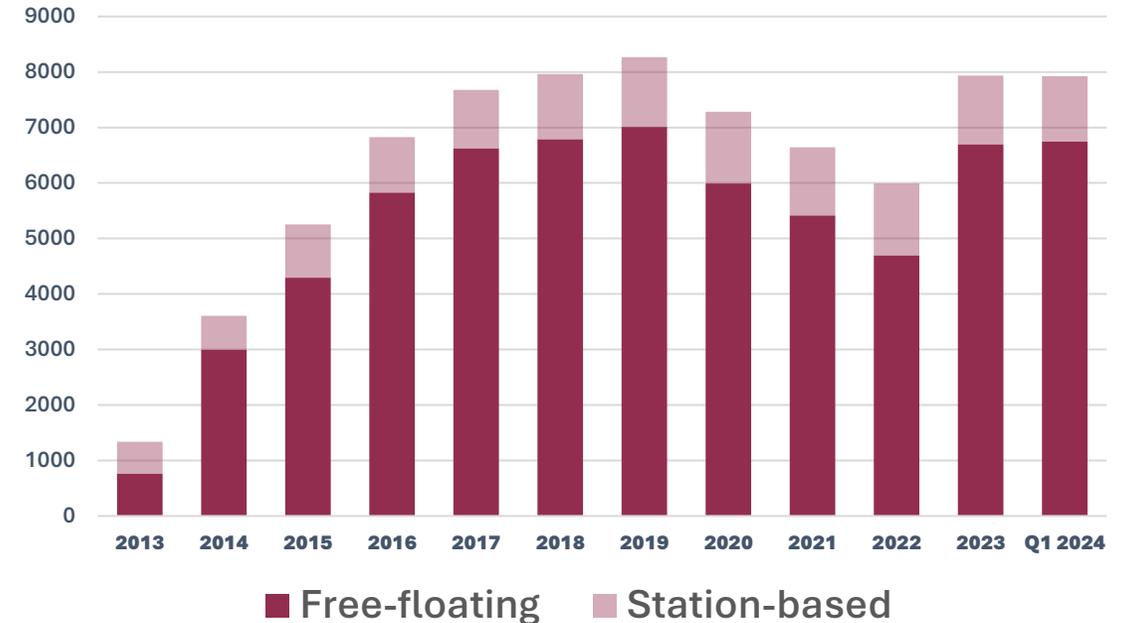
## Servizi di carsharing



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

#menoservizi #menocittà

## Flotta del carsharing

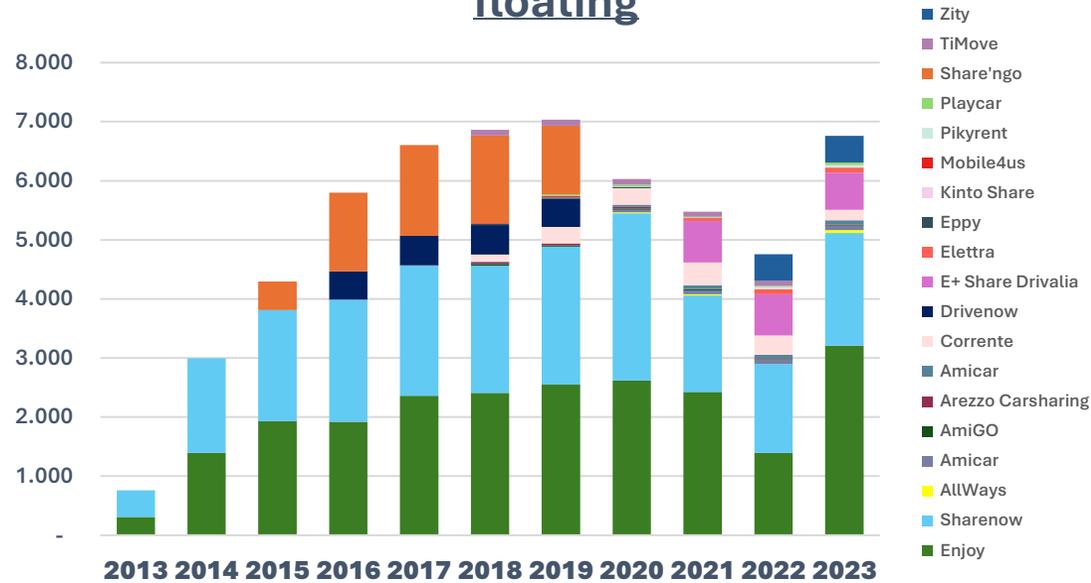


Veicoli 2022: 5.991  
 Veicoli 2023: 7.931 (+32%)  
 Veicoli Q1 2024: 7.922 (=)

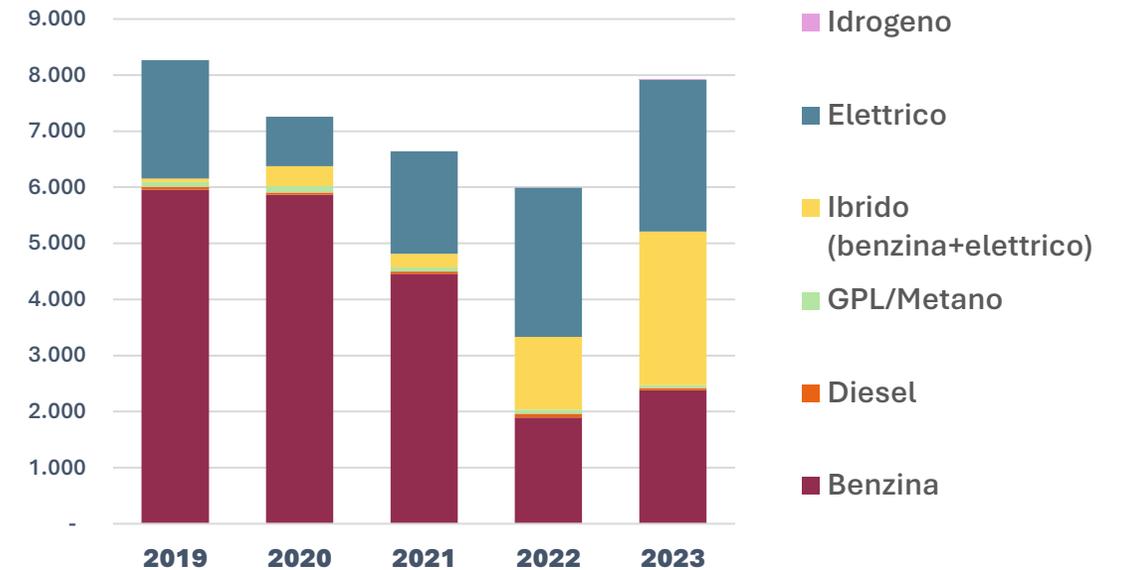
#ampliamento



## 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%

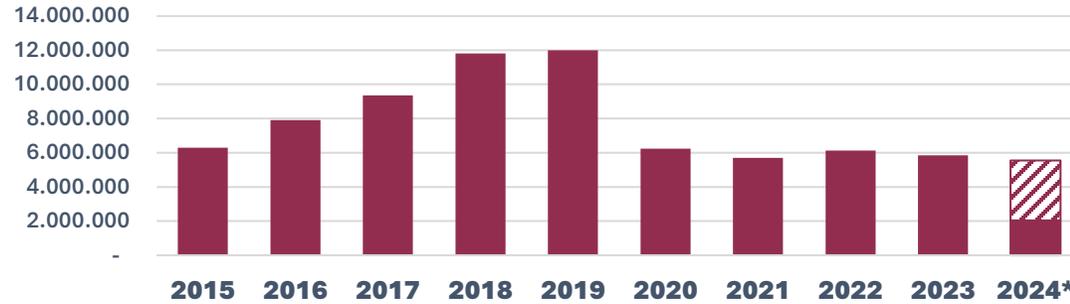
#mercato #articolazione

#elettrificazione #BEV #HEV

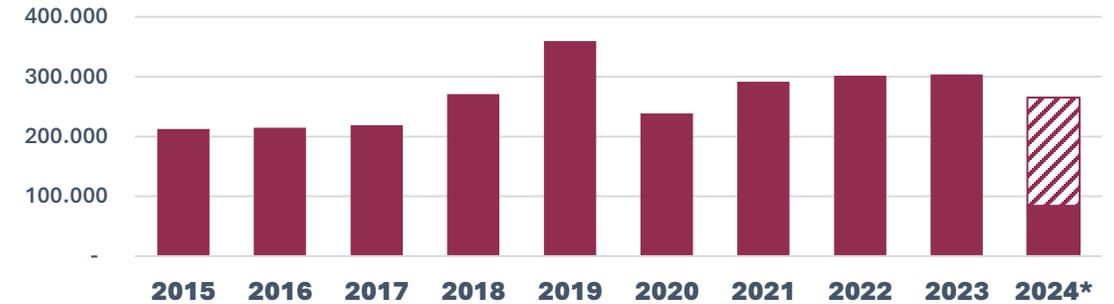




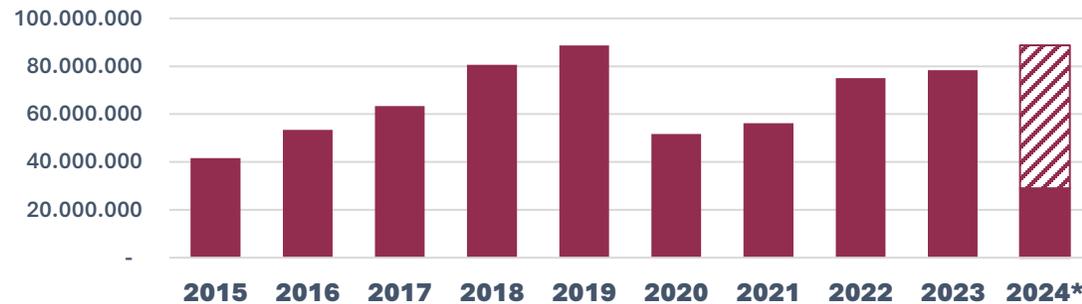
### Noleggi del carsharing free-floating



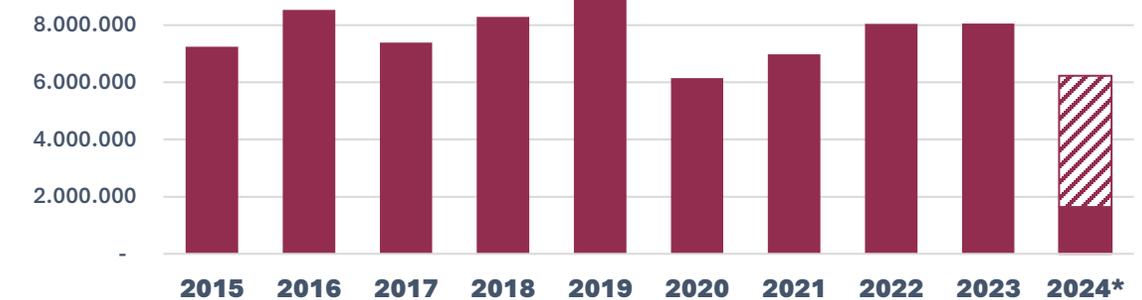
### Noleggi del carsharing station-based



### 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



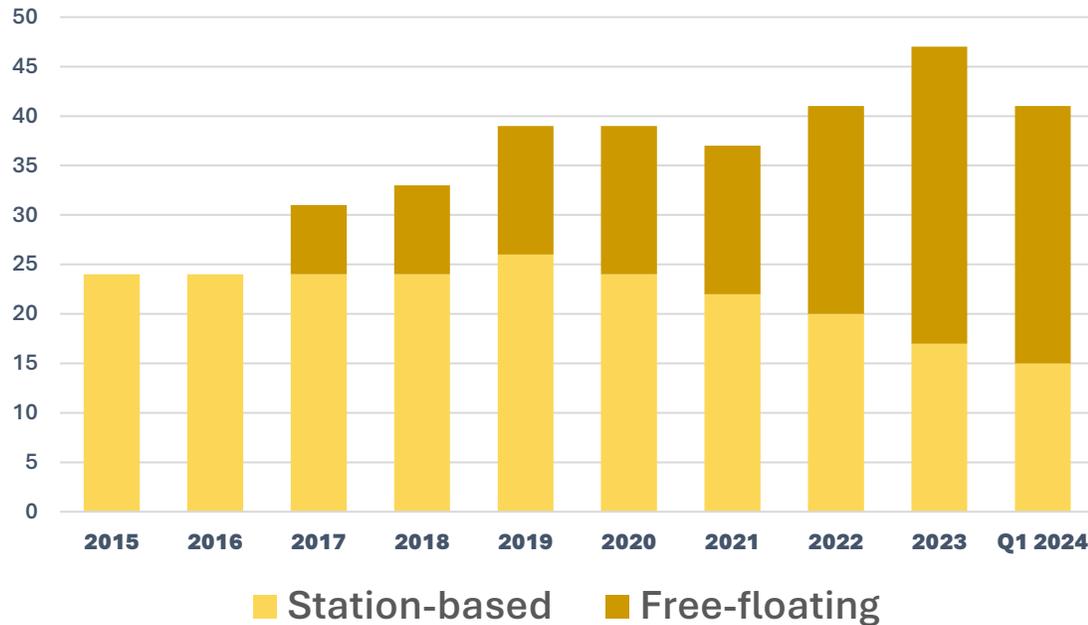
*A thread on...*

# Bikesharing KEY DATA





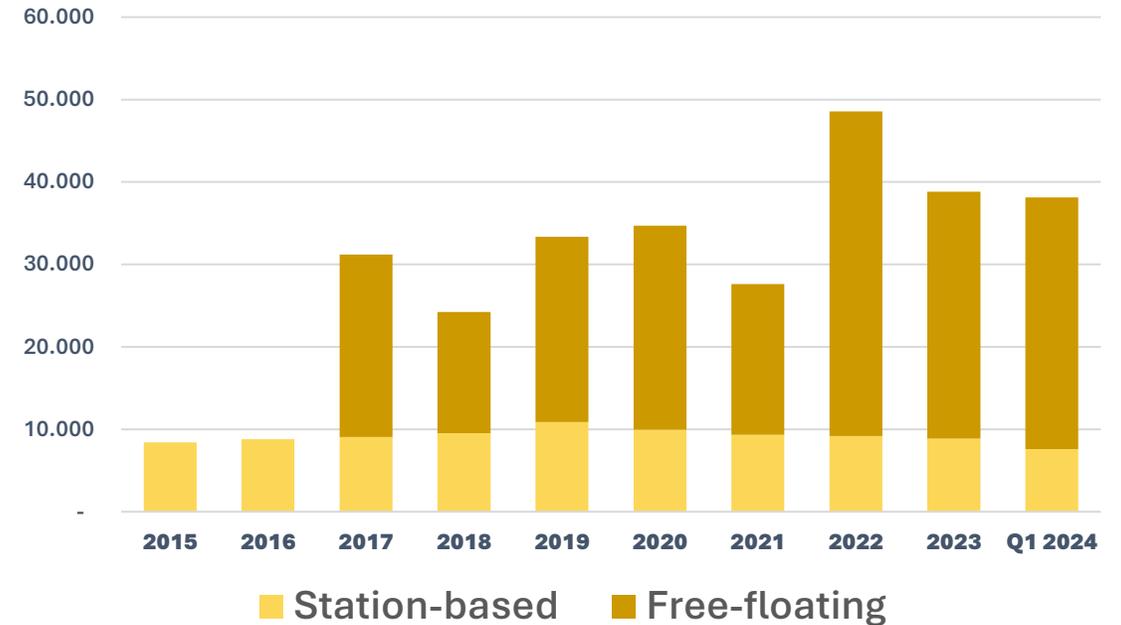
## Servizi di bikesharing attivi in Italia



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

#servizi #variabilità

## Flotta del bikesharing

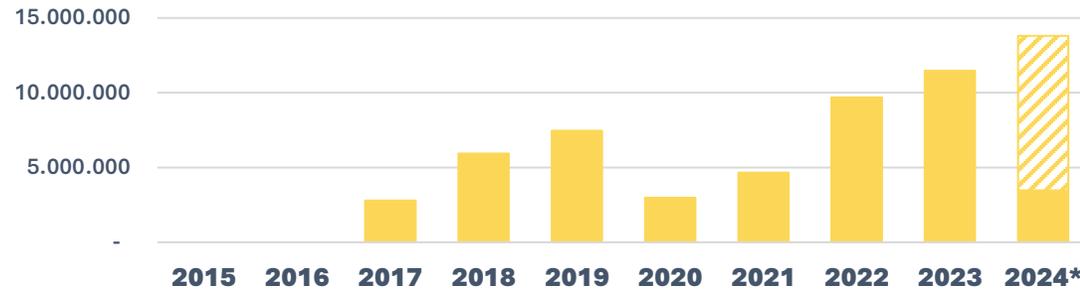


Veicoli 2022: 48,5 mila  
 Veicoli 2023: 38,8 mila  
 Veicoli Q1 2024: 38,1 mila

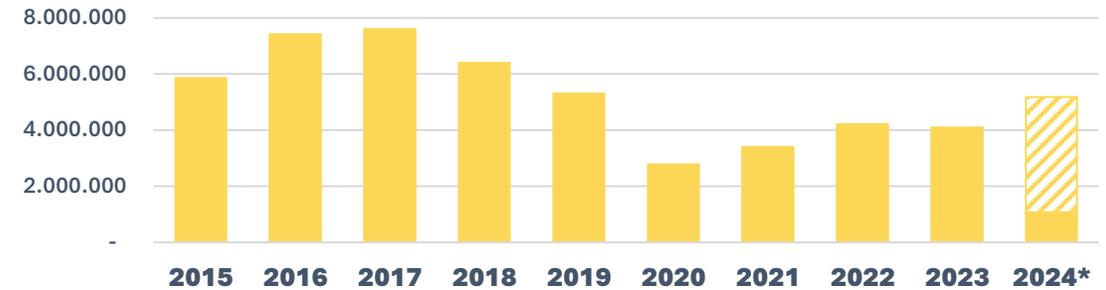
#offerta #italia



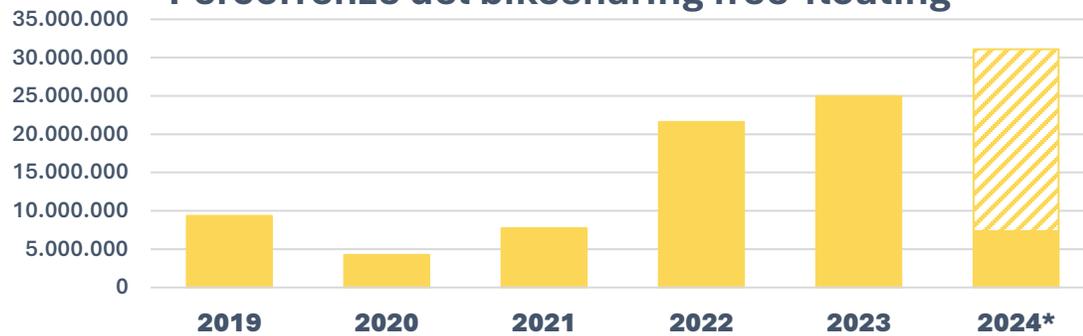
### Noleggi del bikesharing free-floating



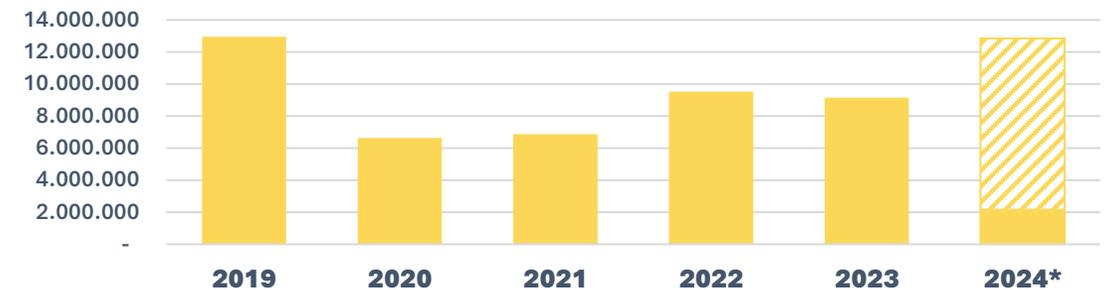
### Noleggi del bikesharing station-based



### 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%\*

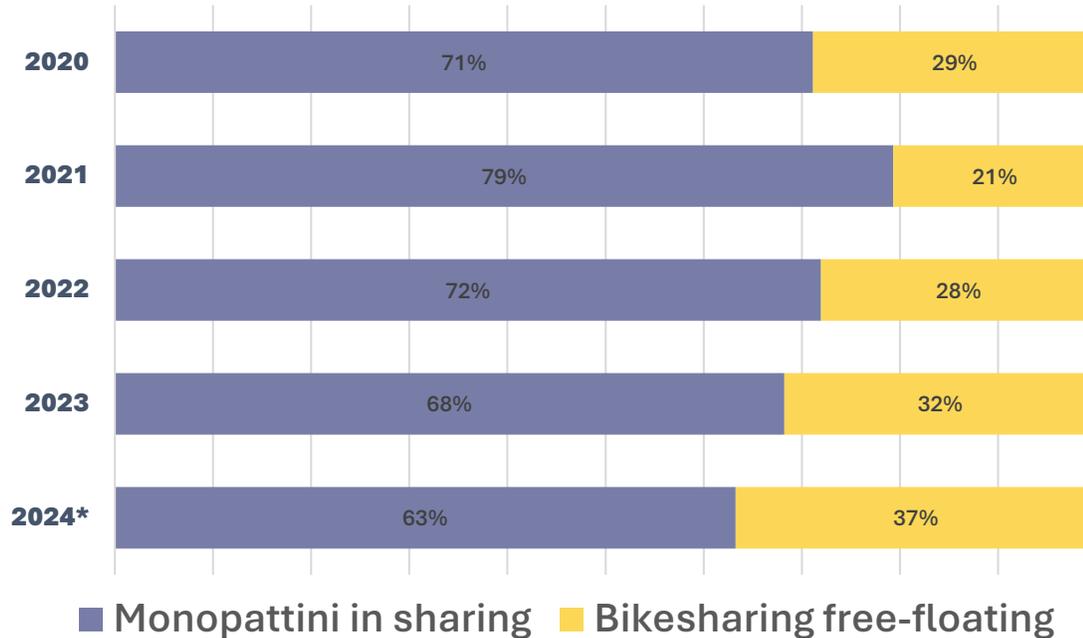
#crescita #bikesharing

#offerta #italia





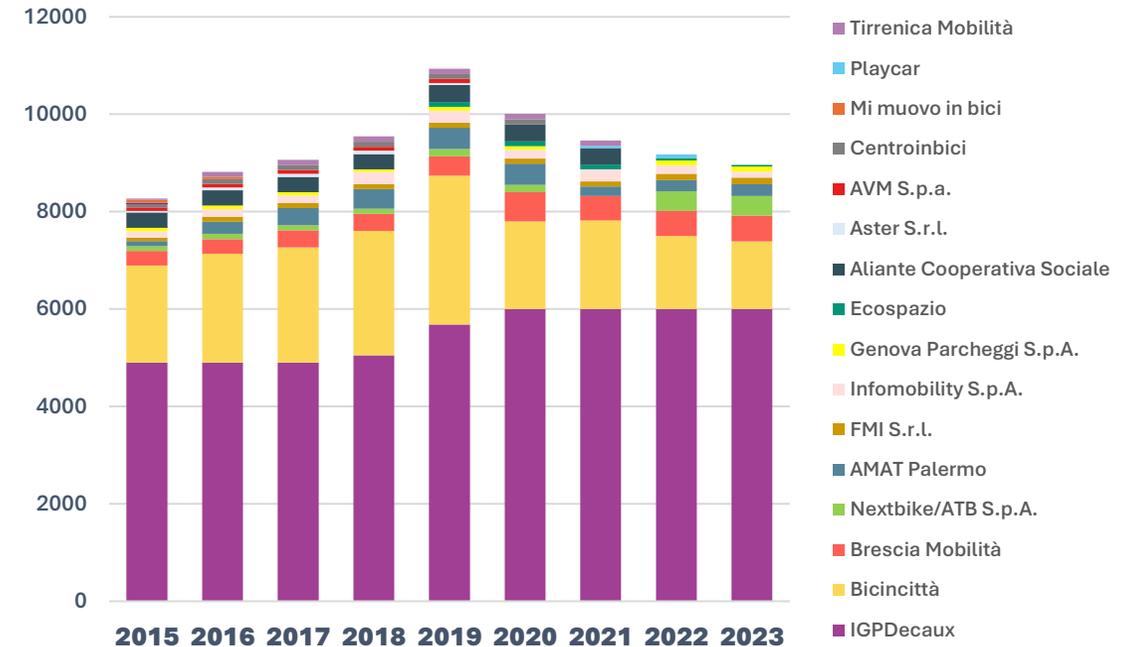
## Noleggi di bikesharing free-floating e monopattini in sharing



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



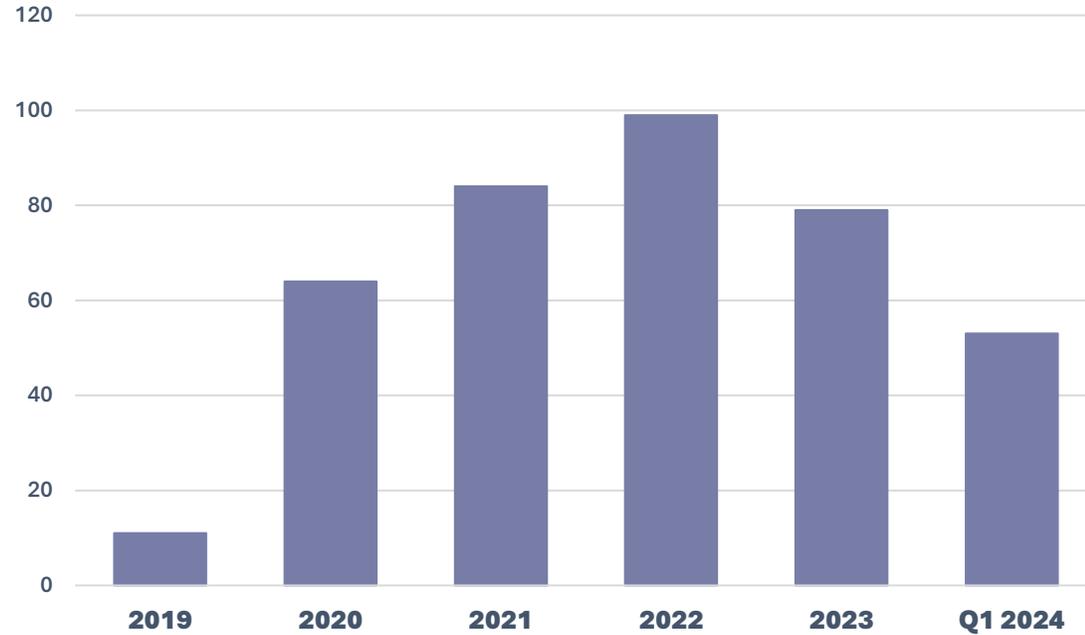
*A thread on...*

# Monopattino-sharing KEY DATA





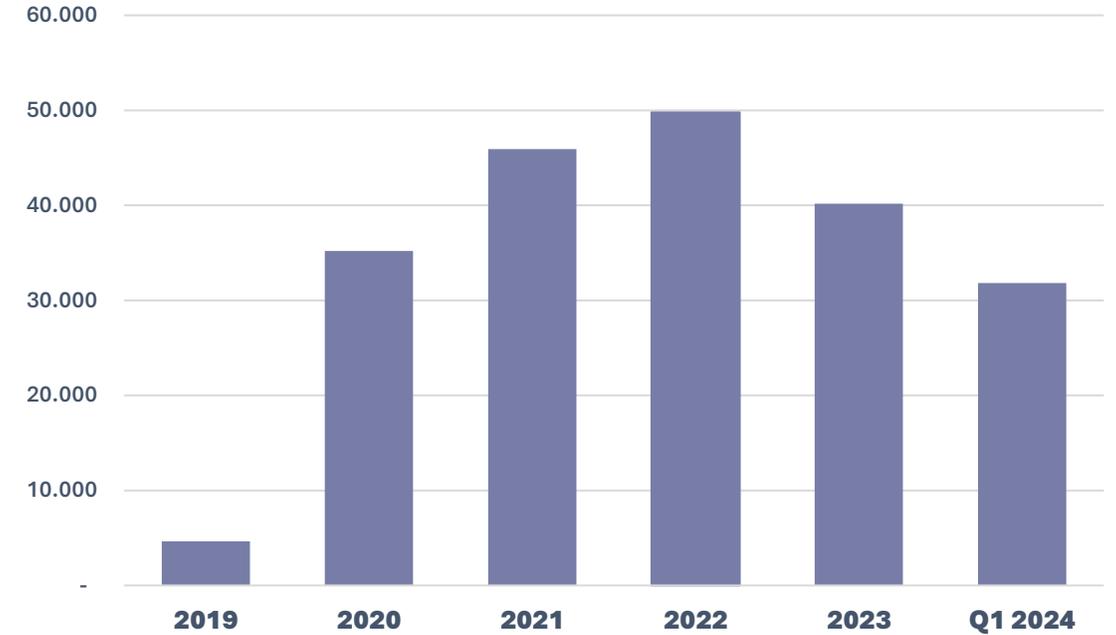
## Servizi di monopattino-sharing



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

#servizi #città #riduzione

## Flotte di monopattino-sharing

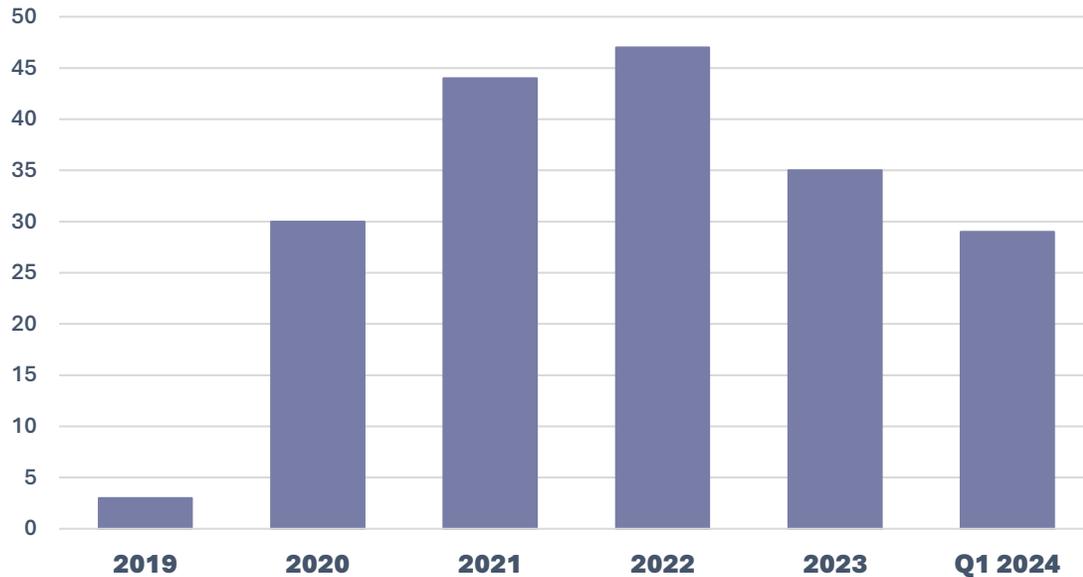


Veicoli 2022: 49.780  
 Veicoli 2023: 40.165 (-19%)  
 Veicoli Q1 2024: 31.820 (-21%)

#flotte #calo



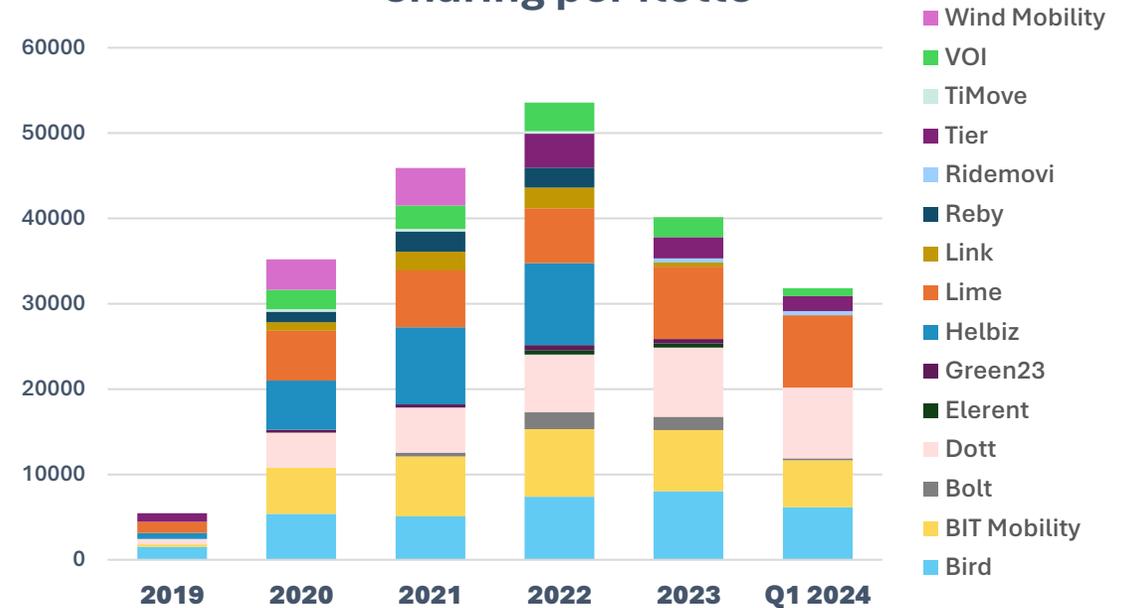
### Città capoluogo italiane con almeno un servizio di monopattini in sharing



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

#menocittà

### Articolazione operatori monopattini in sharing per flotte



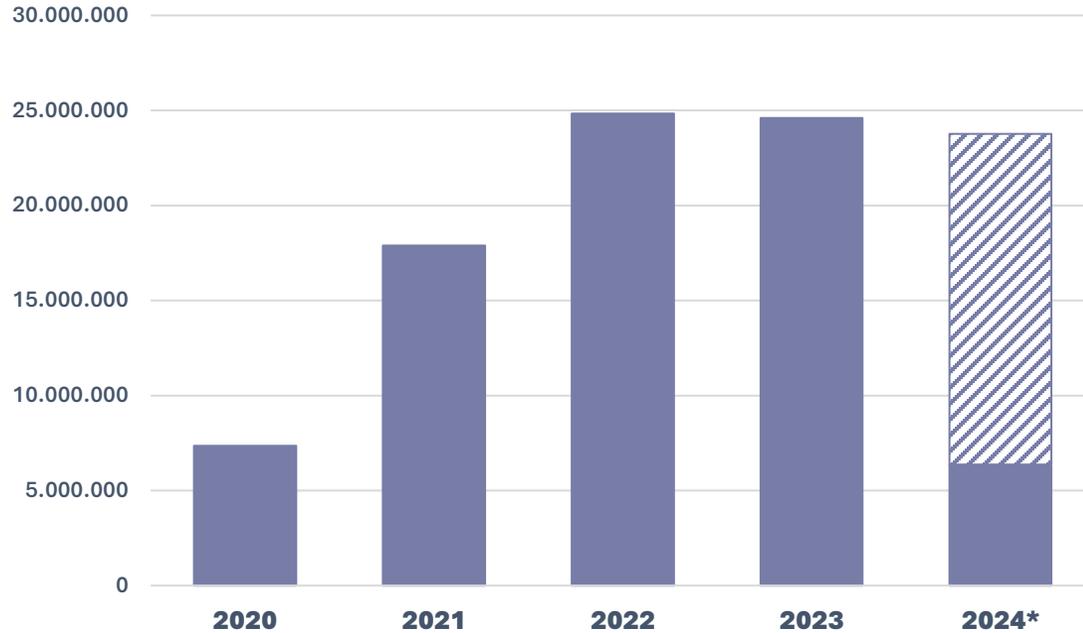
Operatori 2022: 13  
Operatori 2023: 11  
Operatori Q1 2024: 8

#mercato #concentrazione



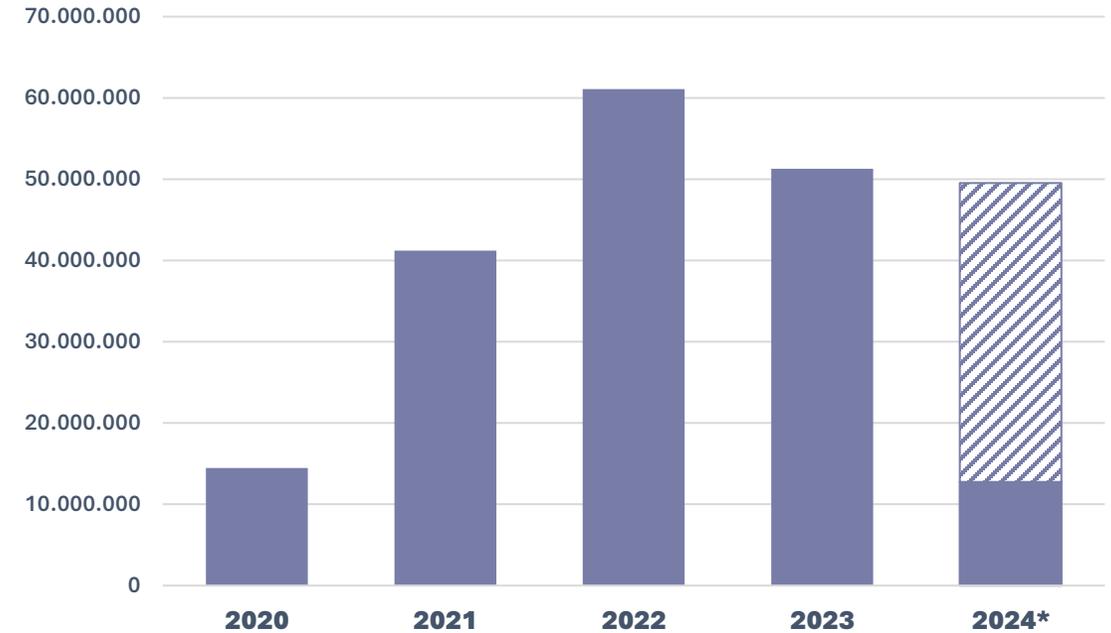


## Noleggi di monopattino-sharing



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**

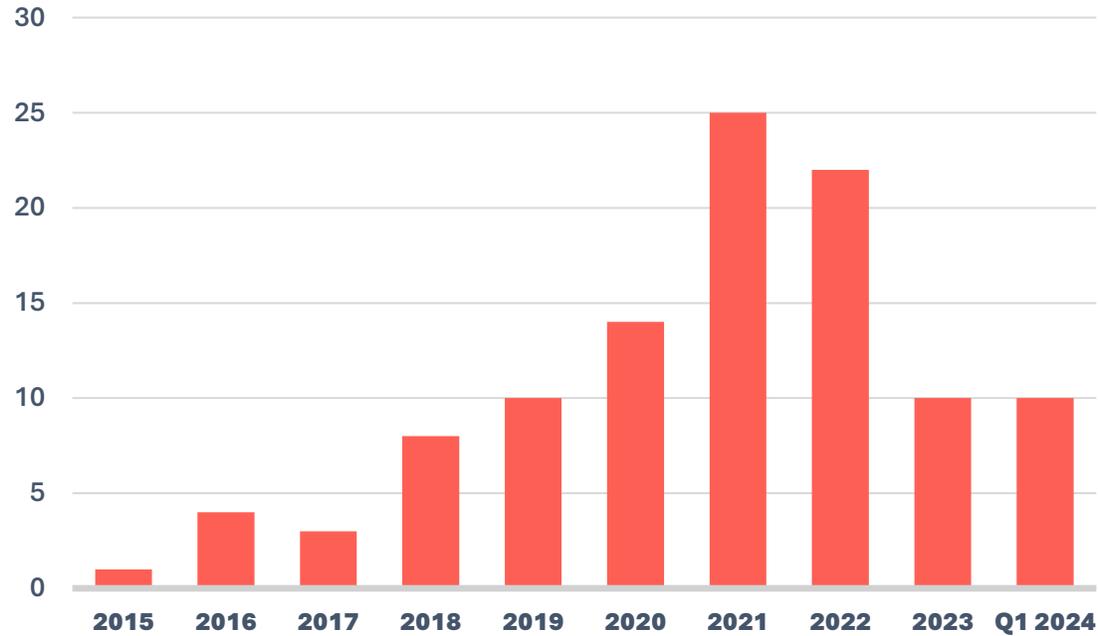
**#percorrenze #riduzione**

*A thread on...*

 **Scootersharing KEY DATA** 



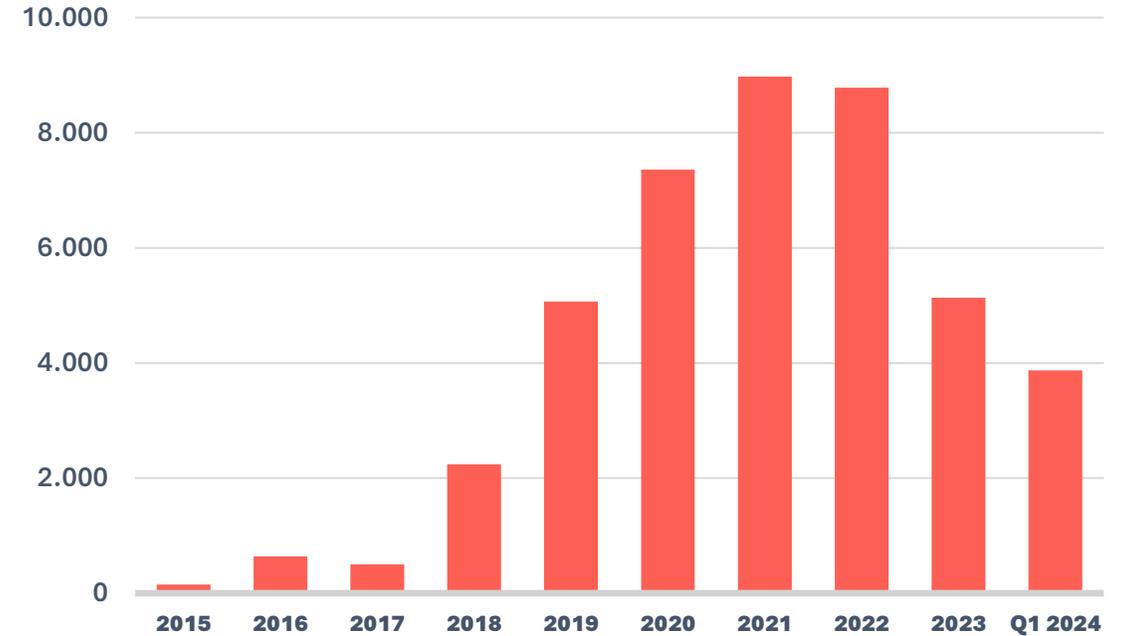
## Servizi di scootersharing



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

**#contrazione #offerta**

## Flotta dello scootersharing

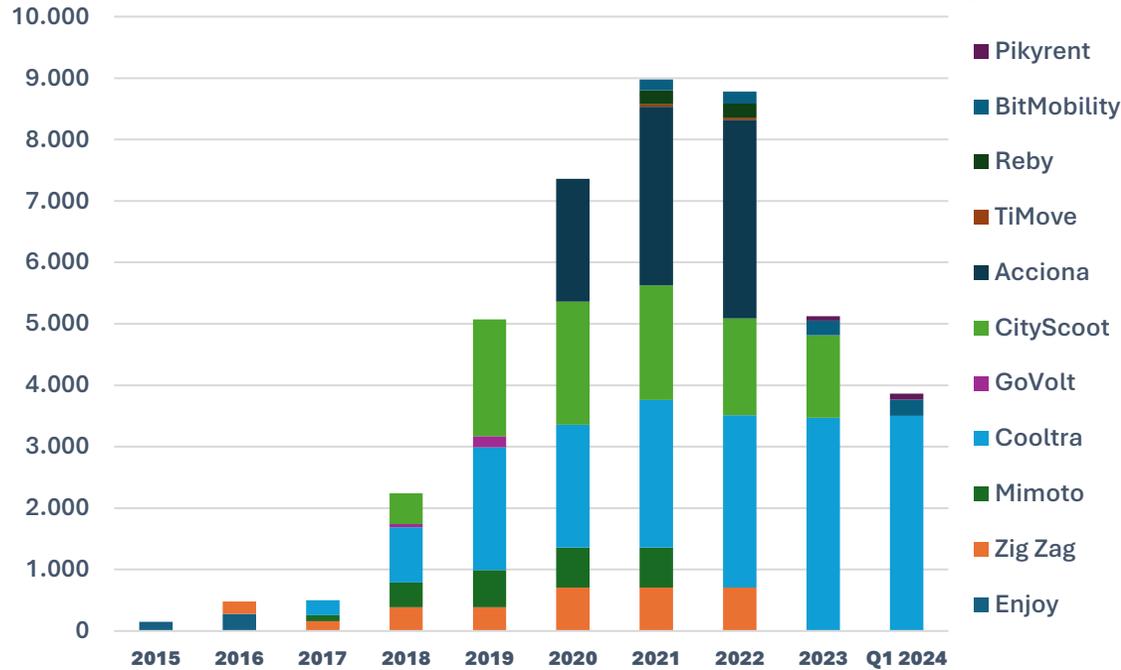


Veicoli 2022: 8.782  
 Veicoli 2023: 5.133 (-41,5%)  
 Veicoli Q1 2024: 3.869 (-24,6%)

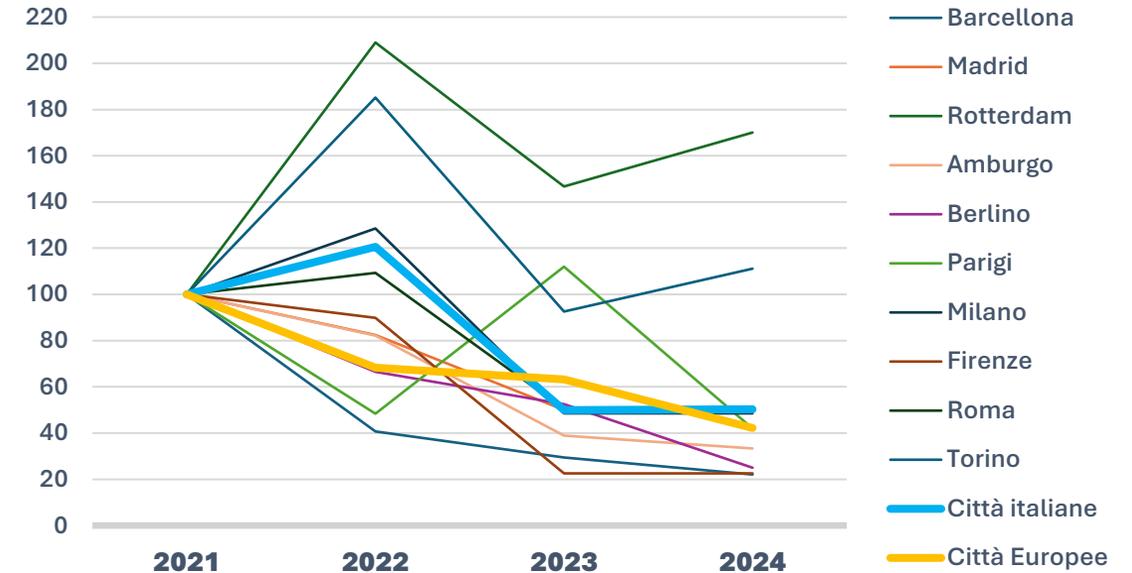
**#riduzione #flotta**



## 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

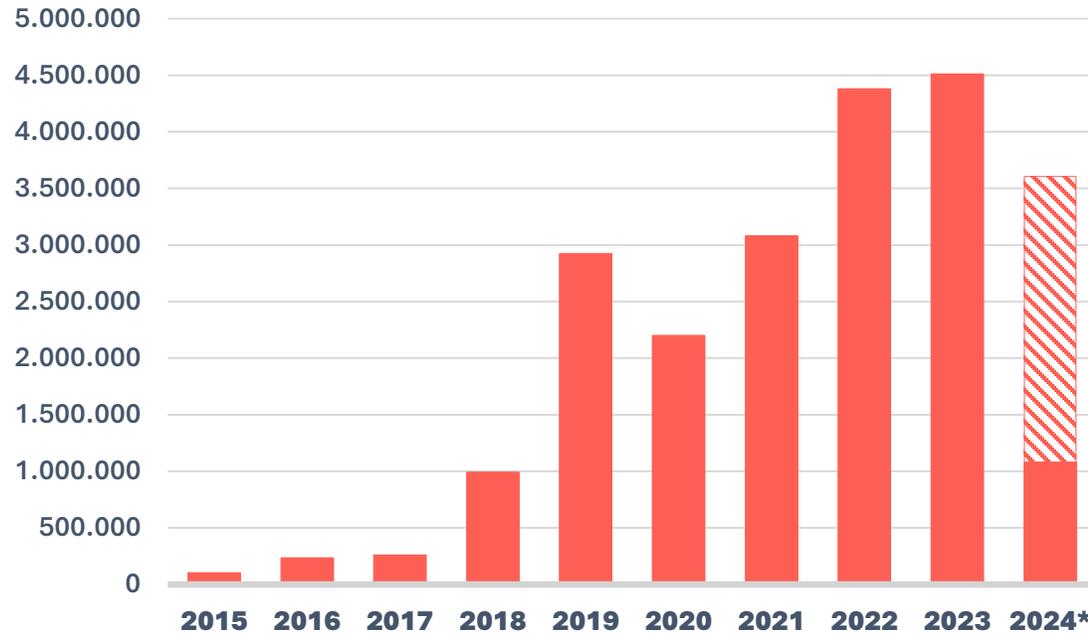
Veicoli 2021/2024 ITA: -50%  
Veicoli 2021/2024 EU: -58%  
Veicoli 2021/2024 Città di Barcellona: -78%

#operatori #italia

#offerta #europa



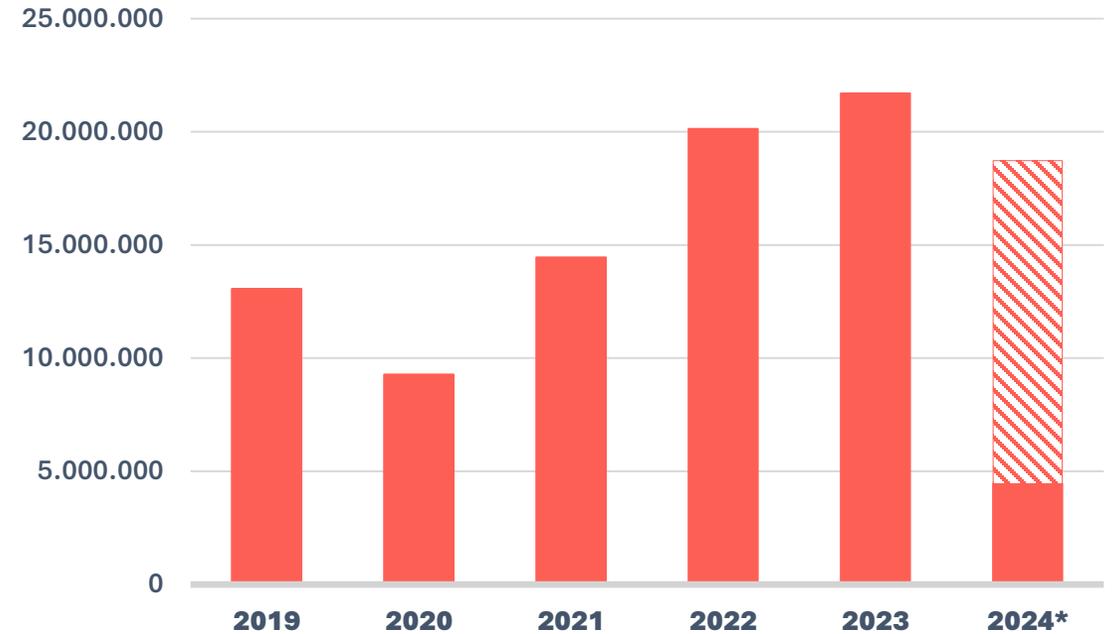
## Noleggi dello scootersharing



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

#domanda #noleggi

## Percorrenze dello scootersharing



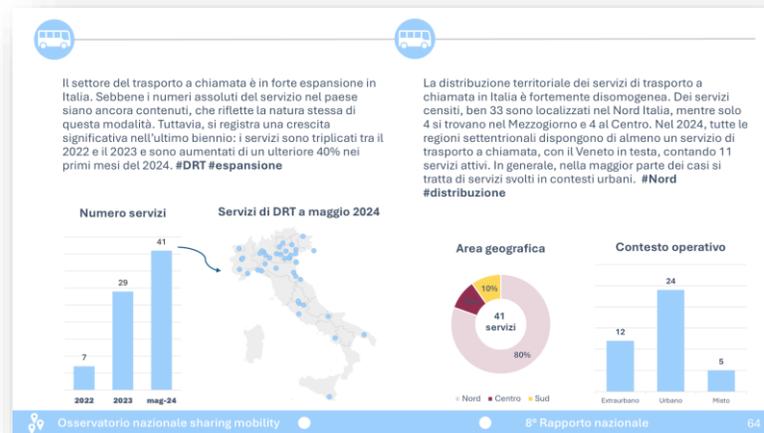
Km percorsi 2022: 20,1  
 Km percorsi 2023: 21,7 (+8%)  
 Km percorsi 2024\*: 18,7 (-13%)

#domanda #percordanze

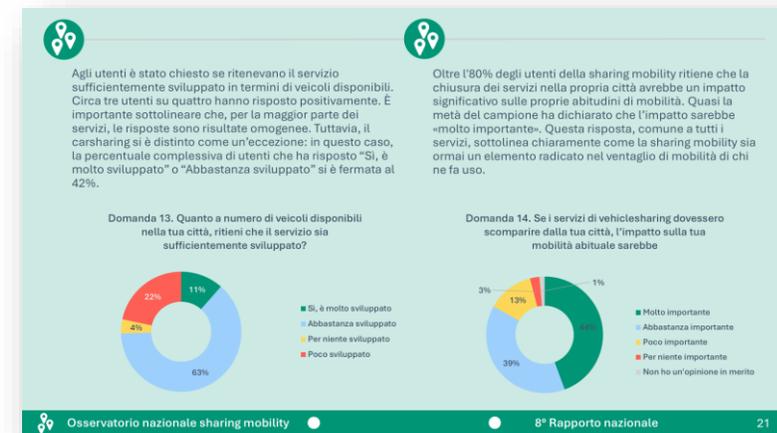


# Nell'8° Rapporto Nazionale sulla Sharing Mobility si parla anche di...

## 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

**Sofia Asperti**

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aspersi@susdef.it*