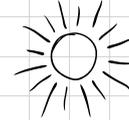
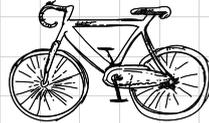
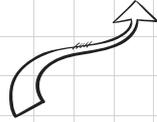
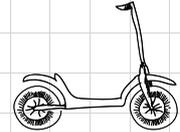


Osservatorio Nazionale

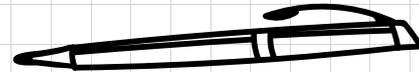
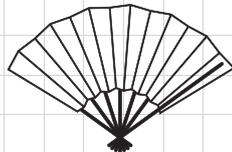
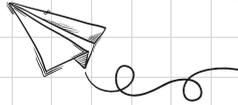
SHARING MOBILITY



Sharing



notes



## THE ITALIAN NATIONAL PLATFORM FOR SHARED MOBILITY IS PROMOTED BY



### **Sharing Notes**

Edited by the Italian National Platform for Shared Mobility

### **Working Group**

Sofia Asperti, Massimo Ciuffini, Valeria Gentili, Davide Grossi, Delia Milioni, Raimondo Orsini,  
Lorenzo Soprano, Luca Refrigeri

### **Sincere thanks to all operators members of the Italian National Platform for Shared Mobility**

Osservatorio Nazionale sulla sharing mobility  
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osservatoriosharingmobility@susdef.it  
www.osservatoriosharingmobility.it

The full report is available on the shared mobility platform web site  
Printed in june 2019 on FSC certified paper

How is the italian  
shared mobility doing?

Great, thanks!



Shared Mobility in Italy: a growing phenomenon



Increasingly lighter and more electric



Free-floating carsharing: more efficient, more effective



Station-based carsharing: a useful service everywhere



Bikesharing: constantly evolving ...



Company carpooling and extra-urban carpooling continues to grow



A new digital taxi service

P2P

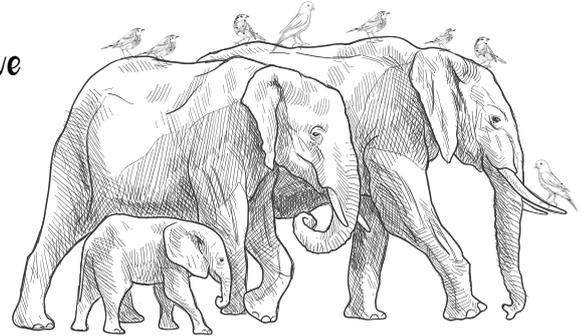
P2P takes its first steps in Italy

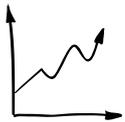


JP and aggregators: more cities and more integrated services



Mobility as a shared service: MaaS and the power of idealization

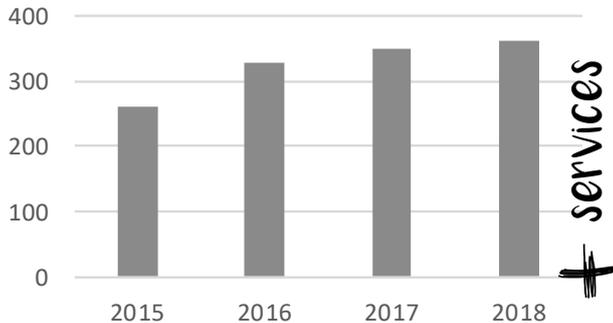




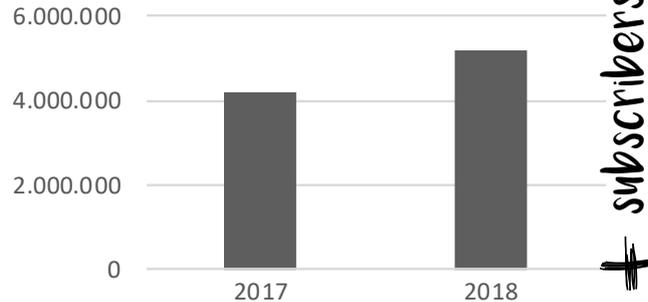
# SHARED MOBILITY IN ITALY: A GROWING PHENOMENON



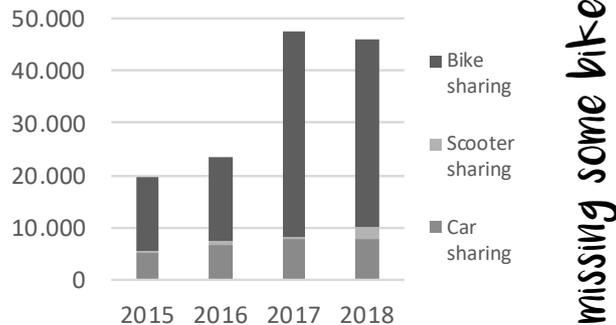
### N. of services



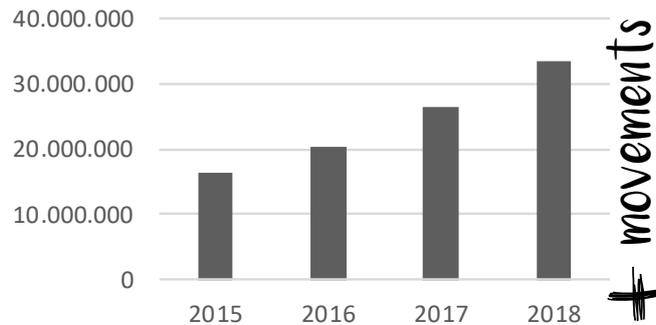
### N. of subscribers



### N. of vehicles



### N. of movements

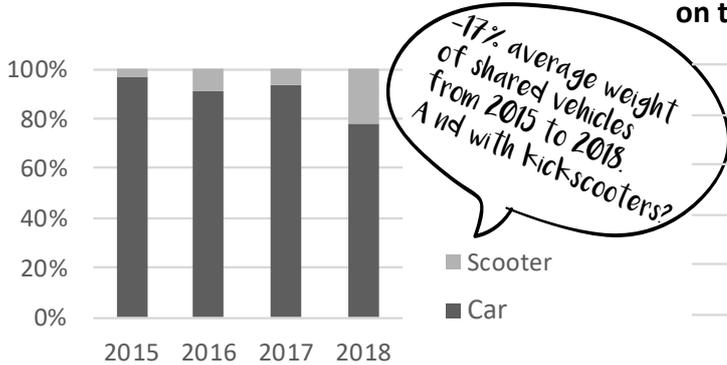


missing some bikes

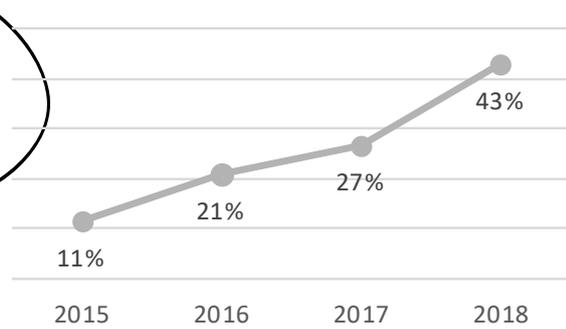
# INCREASINGLY LIGHTER AND MORE ELECTRIC



Motor vehicles fleets composition (%)



Percentage of electric vehicles on the total (car + scooter)



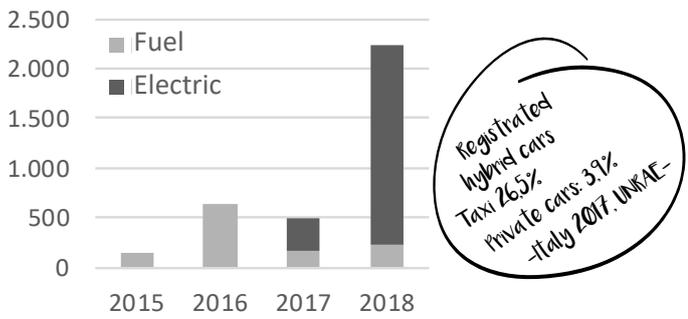
↑ electric vehicles

☞ Scootersharing 2017 --> 2018  
members: +230% and rentals: +285%

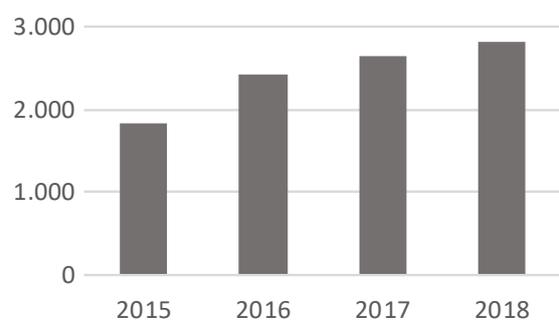


1.000.000 rentals 2018

N. of scooters per power supply



N. of E-bikes

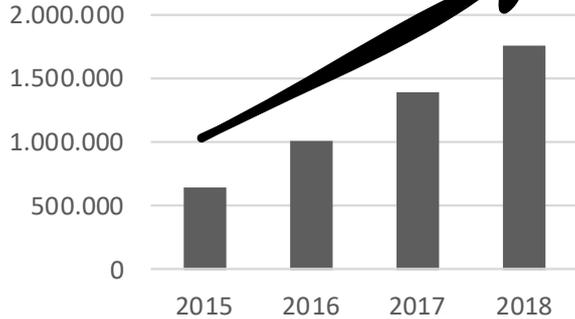


↑ E-bikes

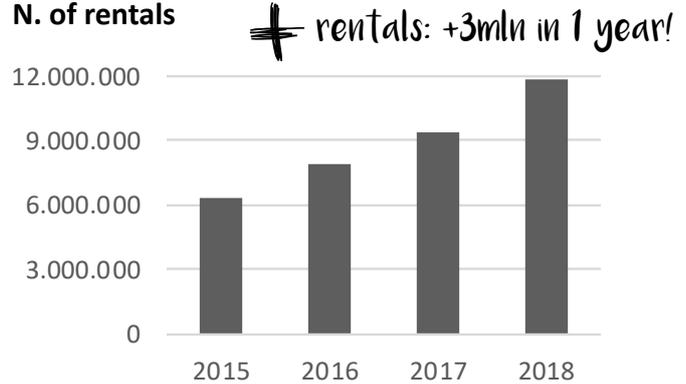


# FREE-FLOATING CARSHARING: MORE EFFICIENT, MORE EFFECTIVE

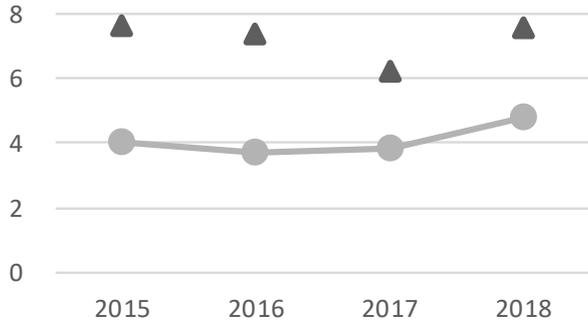
### N. of subscribers



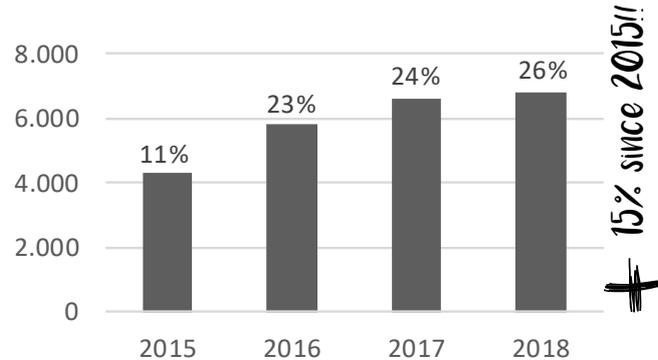
### N. of rentals



### N. of withdrawals per car/day (average and max value)



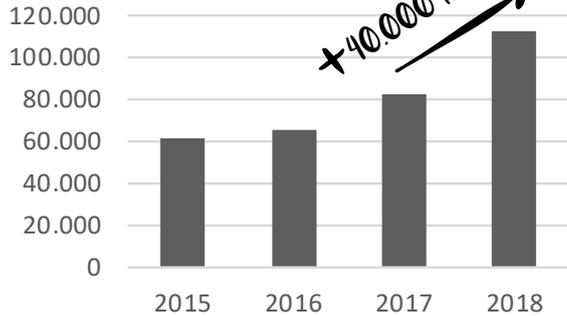
### N. of vehicles and % of BEV



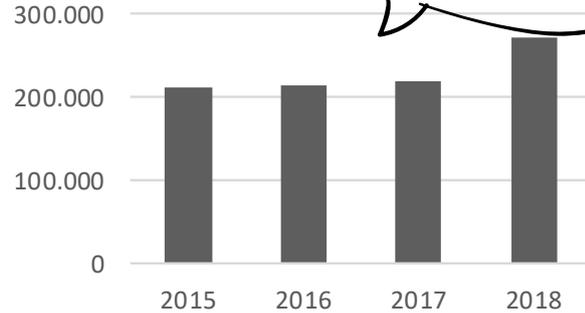


## STATION-BASED CARSHARING: A USEFUL SERVICE EVERYWHERE

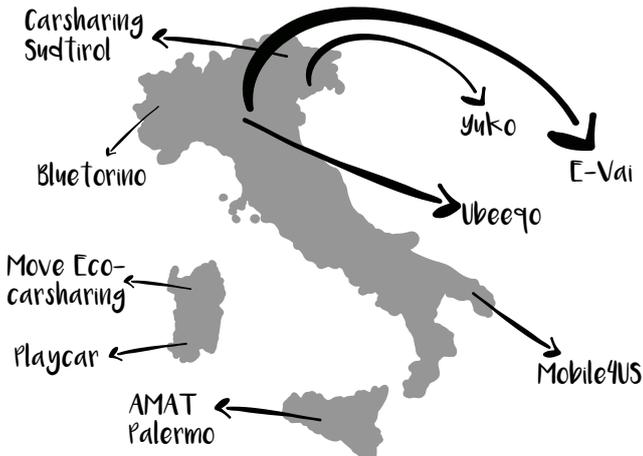
### N. of subscribers



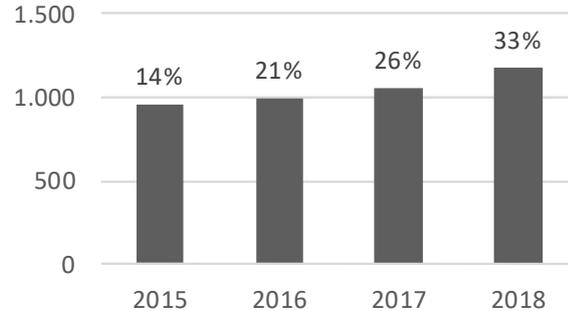
### N. of rentals



Great for Ubeeqo, Bluetorino and Playcar!  
From 2017 to 2018 +80%  
+121% e +70% respectively



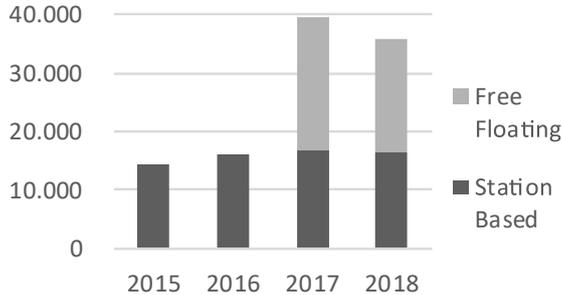
### N. of vehicles and % BEV





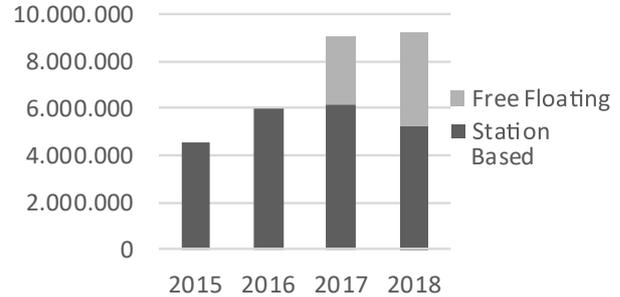
# BIKESHARING: CONSTANTLY EVOLVING ...

### N. of bikes

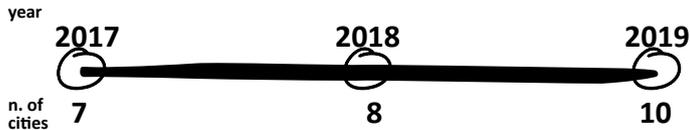


→ Some free-floating services left the market.  
 → in particular those located in Milan, Turin and Rome.

### N. of bikesharing rentals in Milan, Turin and Bergamo

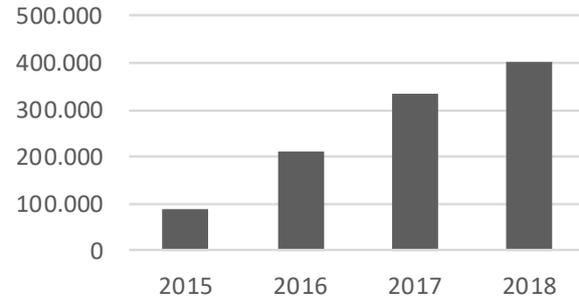


### N. of cities with Free-Floating Bikesharing



Mobike arrives in medium-small cities with developed cycling: Pesaro, Reggio Emilia, Mantova and Bologna FF with parking areas !!

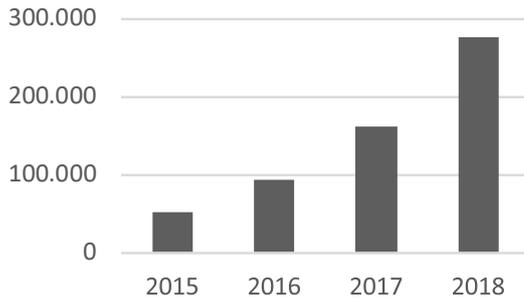
### N. of Station-Based Bikesharing subscribers in Milan, Turin and Bergamo





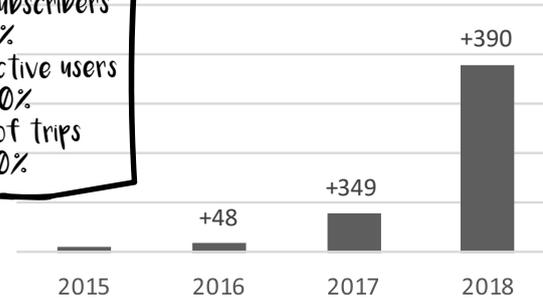
# COMPANY CARPOOLING AND EXTRA-URBAN CARPOOL CONTINUES TO GROW

N. of subscribers - Company Carpooling

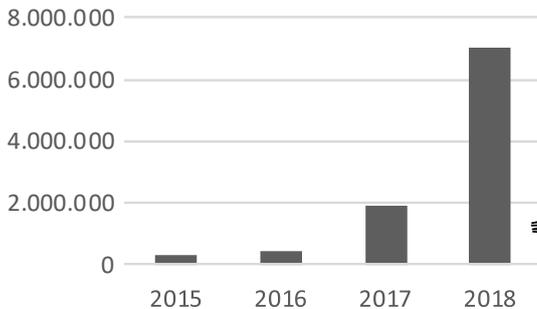


Annual travel increase Company Carpooling

Max number of subscribers  
Jojob 85%  
Max number of active users  
BePooler 40%  
Max increase of trips  
Up2Go 800%

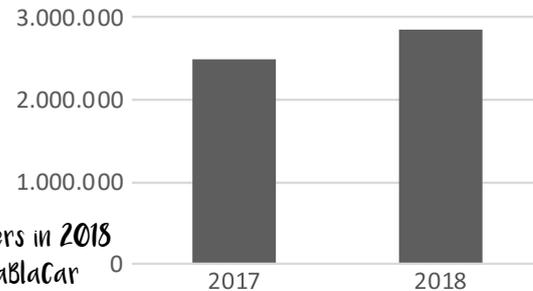


N. of km traveled - Company Carpooling



N. of subscribers - Extra-urban carpool

+15% members in 2018  
for BlaBlaCar



400,000 of which offered at least one ride for a total of 1.5 million rides offered in 2018.



## A NEW DIGITAL TAXI SERVICE



2018: 3.1 mln\* trips  
booked through the App

\* Data available only for MyTaxi, WeTaxi, itTaxi

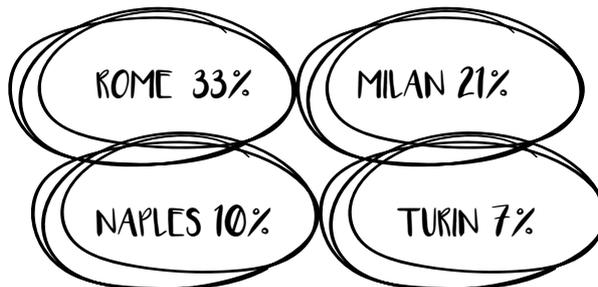


### Intermodality in MyTaxi:

11% ↔ airports

15% ↔ railway stations

23,083 taxi licenses in 2016 in the  
provincial capitals, including

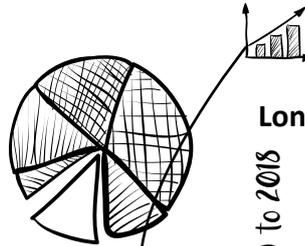


PLATFORM	N° OF TAXI	CITY (2019)	PLATFORM TYPE
MyTaxi	4.000	4	taxi platform
WeTaxi	2.200	19	taxi cooperatives platform
appTaxi	5.000	21	cooperative consortia platform
inTaxi	3.000	6	
itTaxi	12.000	70	

# PEER-2-PEER TAKES ITS FIRST STEPS IN ITALY

P2P

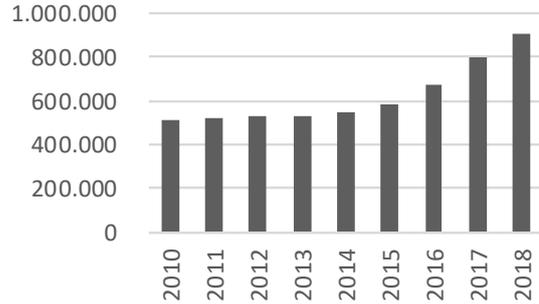
peer-2-peer vehicle-sharing is a promising sector of Italian Sharing Mobility with a significant growth potential looking at the EU market.



±75% from 2010 to 2018

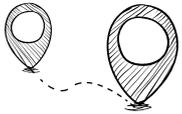
Long term rentals:  
24/48/60 months.

Long term rental fleet in Italy



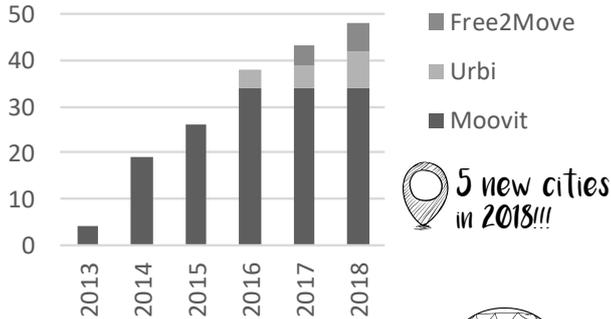
P2P carsharing	Italy	EU leader operator
Subscribers	17.000	2.500.000
Car	1.600	55.000
Rentals	4.150	-

Very interesting synergies are emerging between long term rental and P2P platforms

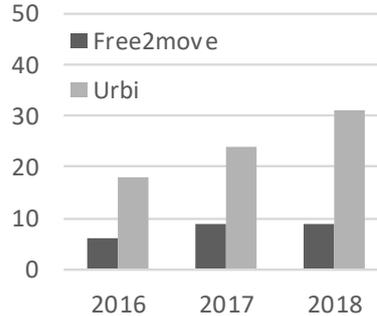


# JP AND AGGREGATORS: MORE CITIES AND MORE INTEGRATED SERVICES

N. of cities reached by services

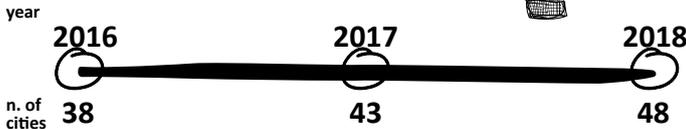


N. of aggregate services



URBI: Kick-scooter services are already implemented in Florence and Milan!

N. of cities



Maas: among the pioneer cities: Helsinki, Vienna, Manchester, Los Angeles, Singapore, Sydney and.... in Italy?

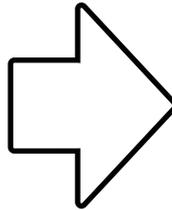
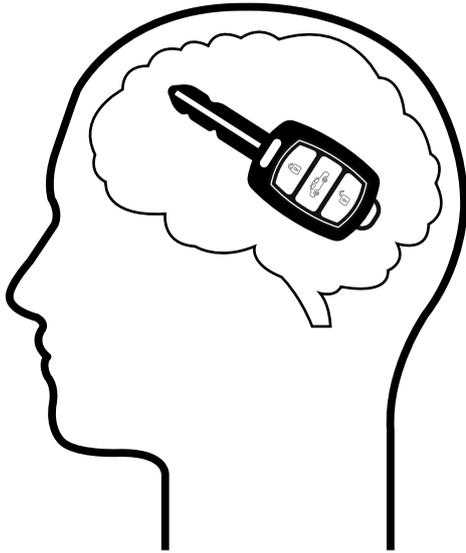
Living Lab Maas

Pilot project - Turin municipality

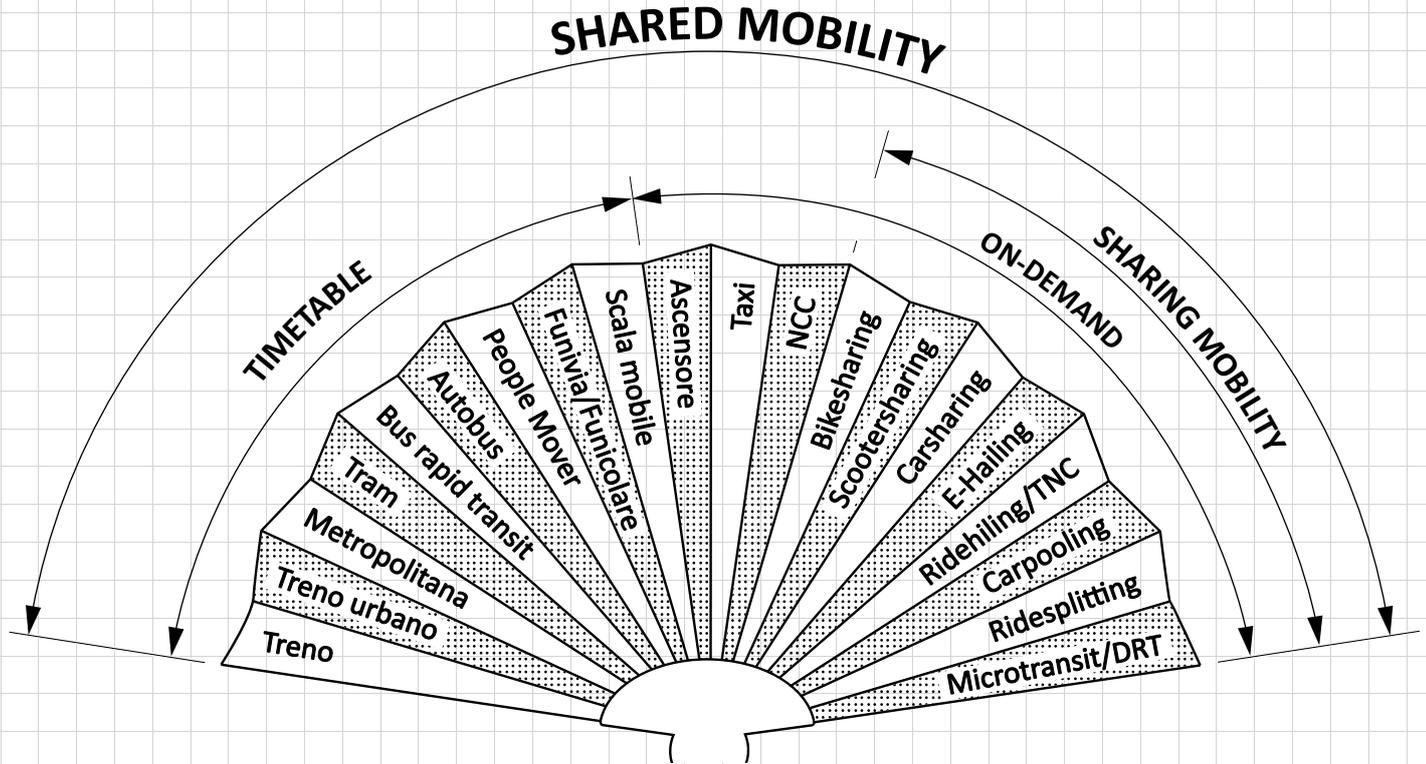


- Gruppo torinese trasporti - TPL
- Tobike - Bikesharing
- Mimoto - Scootersharing
- WeTaxi - E-Hail

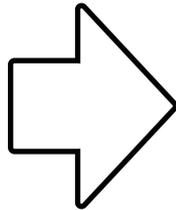
# MAAS AND THE POWER OF IDEALISATION



# Shared mobility services range

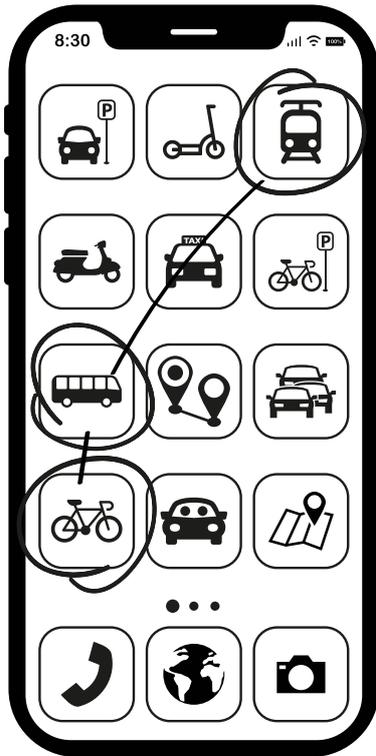


# MOBILITY AS A SHARED SERVICE



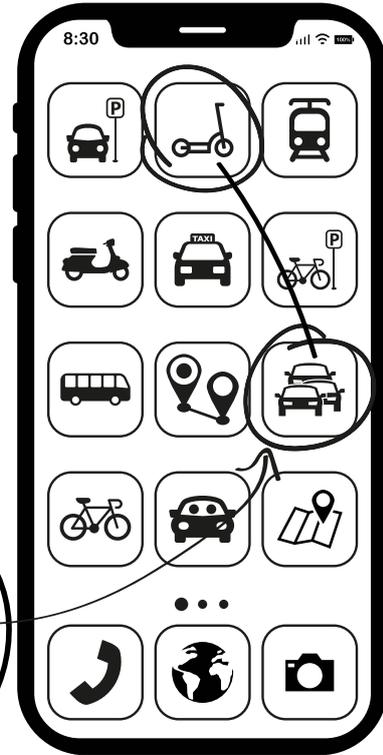
# INTERMODALITY

## Mobility services combination along a route -D2D-

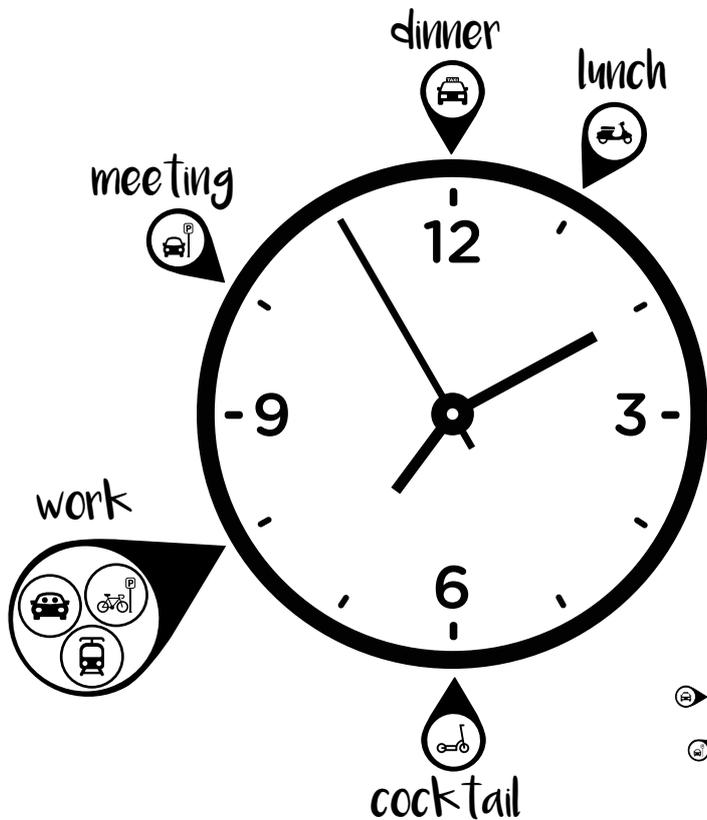


8 am home  
┆  
train  
┆  
bus  
┆  
bikesharing  
┆  
9 am work

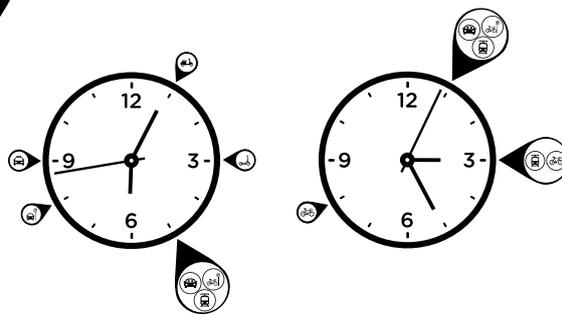
6 pm work  
┆  
carsharing  
┆  
scootersharing  
┆  
6.30 pm cocktail



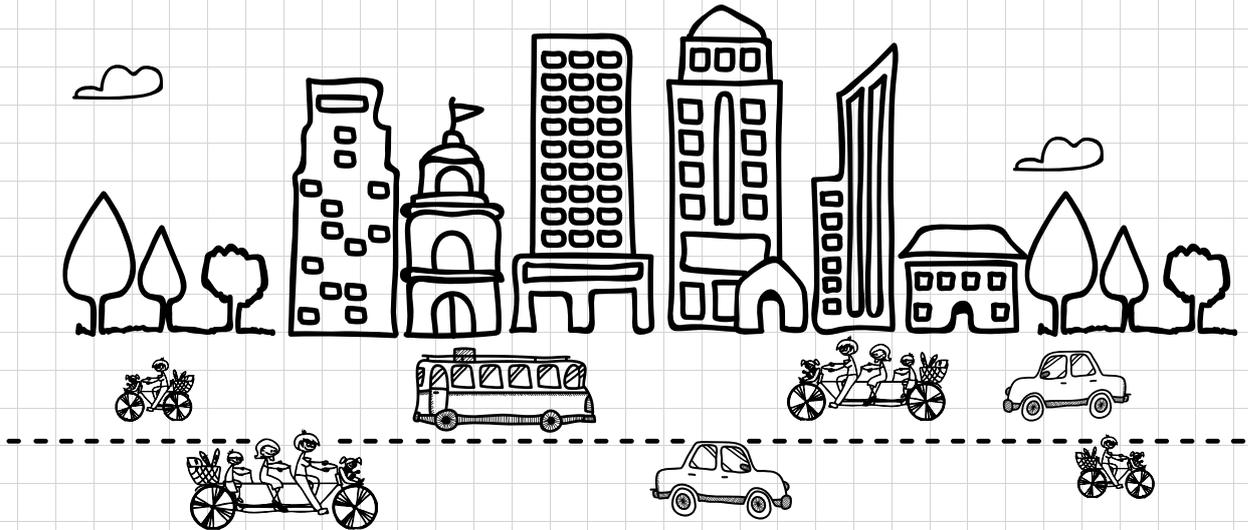
# MULTIMODALITY



Mobility services  
combination over time:  
one day, one week ...

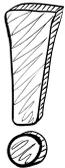
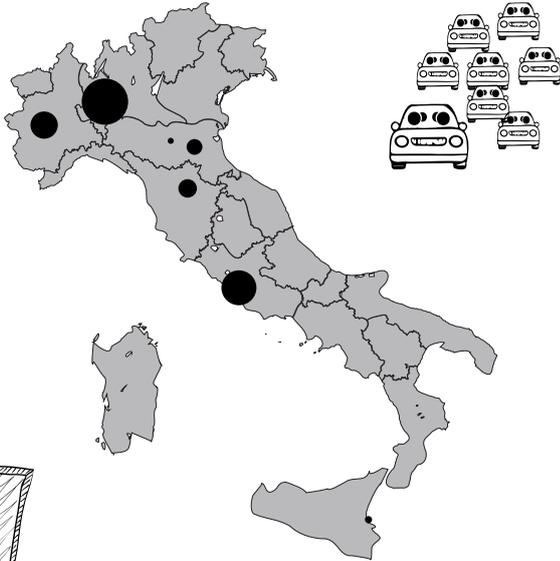


# The cities of Shared Mobility



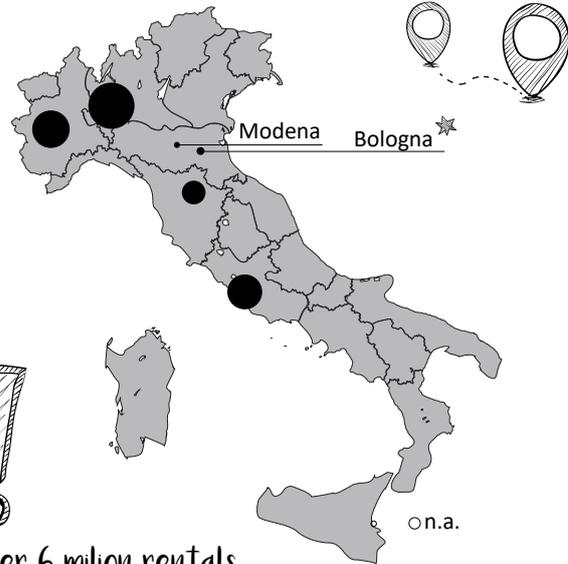
# FREE-FLOATING CARSHARING

- Fleets -



NB - In Catania Enjoy service closes in 2019  
-> no free-floating services in Southern Italy

- Rentals -

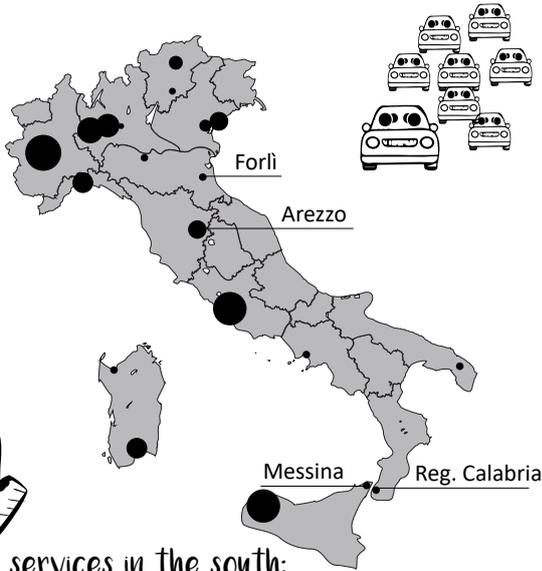


Over 6 milion rentals  
In Milan! Great!

★ both services active in Bologna  
did not operate throughout 2018

# STATION BASED CARSHARING

## - Fleets -



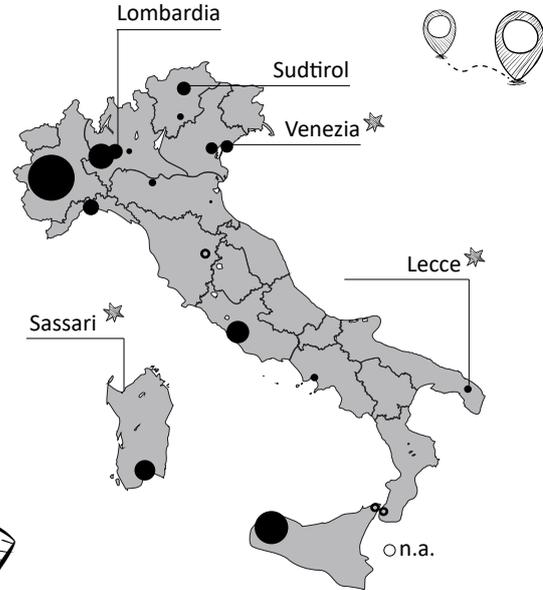
New services in the south:  
Naples, Lecce, Messina, Reg-  
gio Calabria, Sassari



PLAYCAR:

1<sup>st</sup> station based carsharing in Italy by number  
of cars per inhabitant

## - Rentals -



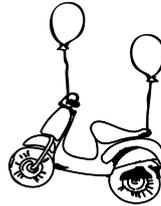
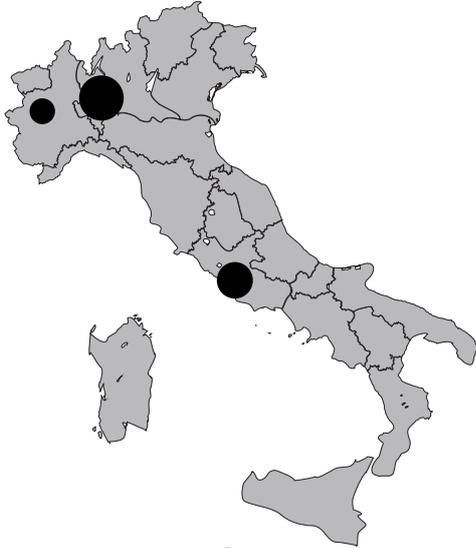
BLUETORINO:

1<sup>st</sup> station based carsharing in Italy by rentals!

\*Yuko – Venezia active from June 2018, Mobile4us from July  
2018, Move Ecarsharing from August 2018

# SCOOTERSHARING

- Fleets -



- Rentals -



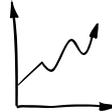
Milano

o.n.a.

⚡ Electric go-go!!



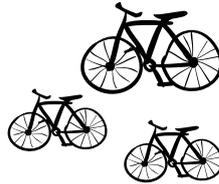
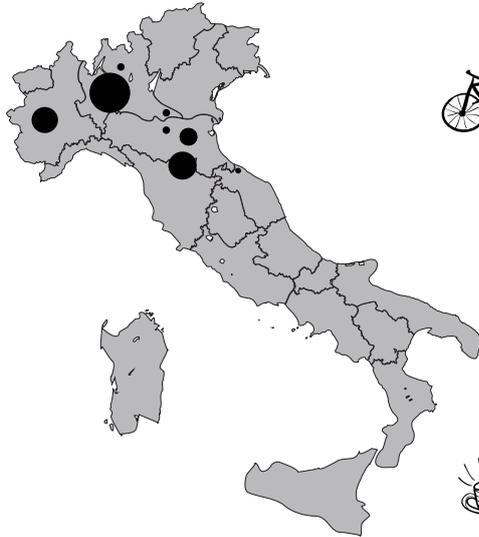
service started  
very well in Rome,  
Milan and Turin

We expect a growing trend  
for all 2019 

\*GoVolt started in October 2018, Ecoltra in March 2018 and Zigzag in April 2018.

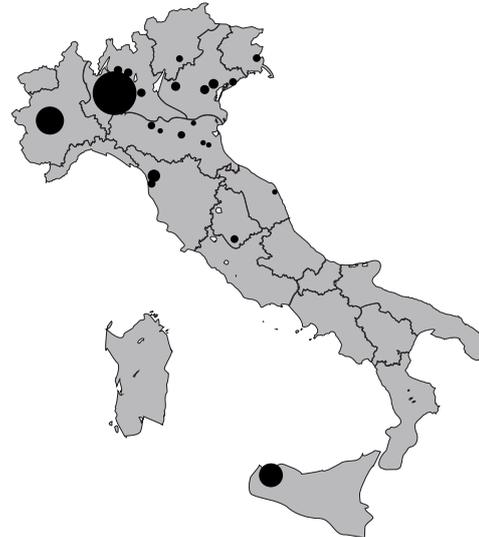
# BIKESHARING

- FF fleets -



Milan

- SB<sup>\*</sup> fleets -



Very deep distinction between North and South for both free-floating and station-based

<sup>\*</sup> Systems with more than 100 bikes

## 34 CITIES COMPARED ON SHARED MOBILITY



### North

Milano  
Torino  
Genova  
Bologna  
Venezia  
Verona  
Padova  
Trieste  
Brescia  
Parma  
Modena  
R. Emilia  
Ravenna  
Trento  
Aosta



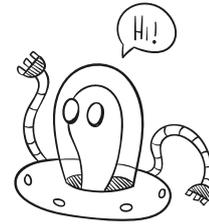
### South

Napoli  
Palermo  
Bari  
Catania  
Messina  
Taranto  
R. Calabria  
Cagliari  
Foggia  
Catanzaro  
Potenza  
Campobasso



### Center

Roma  
Firenze  
Prato  
Perugia  
Livorno  
Ancona  
L'Aquila



### SELECTED SAMPLE:

- Regional capitals
- Metropolitan cities
- Cities over 150,000 inhabitants

		PUBLIC TRANSIT	TAXI	BIKE SHARING SB	BIKE SHARING FF	CAR SHARING SB	CAR SHARING FF	SCOOTER SHARING	MICRO MOBILITY	RIDE SHARING	BUS RESP. NETWORK
NORTH	MI										
	TO										
	GE										
	BO	<i>existing</i>									
	VE										
	VR										
	PD										
	TS										
	BS										
	PR										
	MO										
	RE										
	RA										
TN											
AO											
CENTER	RM										
	FI										
	PO										
	PG										
	LI										
	AN										
SOUTH	AQ										
	NA										
	PA										
	BA										
	CT										
	ME										
	TA										
	RC										
	CA										
	FG										
CZ											
PZ											
CB											

*existing*

*missing*

# PLATFORM NETWORK





MAIN EVENT PARTNER

---

**Deloitte.**

**onugoo**

WITH THE SUPPORT OF

---

 **Clear Channel**

**ING** 

 **mytaxi**  
diventa **FREENOW** 

**VOLKSWAGEN**  
GROUP ITALIA S.P.A.

**Uber**

**voi.**

 **popmove**

**KEY ENERGY**  
THE RENEWABLE ENERGY EXPO

 **ics**  
ITALIA CAR SHARING

 **BicinCittà**

 **ASSTRA**  
ASSOCIAZIONE TRASPORTI

IN COLLABORATION WITH

---

 **Green City**  
Network

Osservatorio Nazionale  
**SHARING MOBILITY**



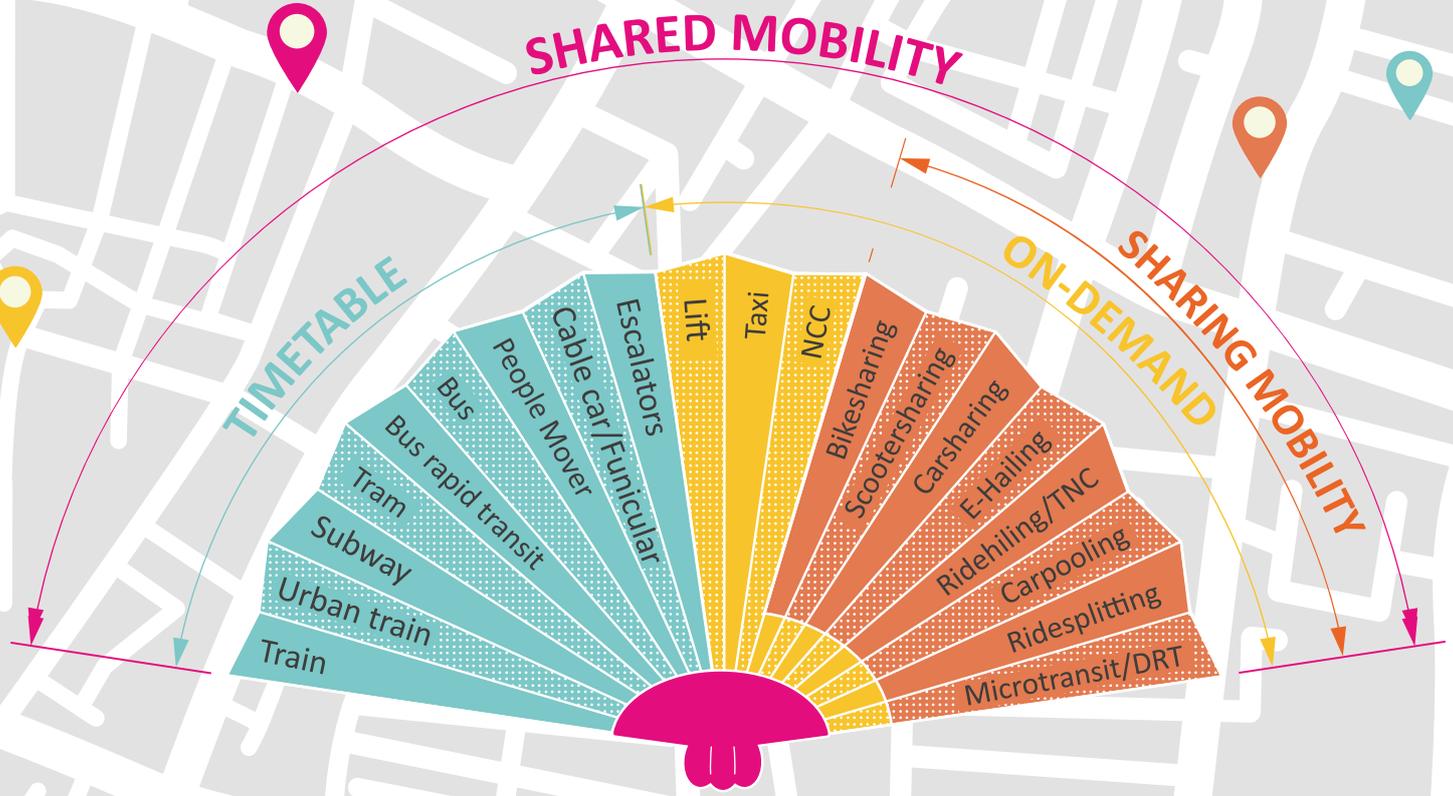
The Italian National Platform Shared Mobility, launched in september 2015, is promoted by the Ministry of Environment, Land and Sea, the Ministry for Infrastructure and Transport and the Sustainable Development Foundation. The Platform is composed by over 90 members, including shared mobility providers, institutions, local authorities and research centers.

The main purpose of the initiative is to create a collaboration platform between public and private institutions, shared mobility services providers, academia and research institutes in order to analyse, encourage and promote the shared mobility phenomenon in Italy. Each year, the Platform collects data and publishes the National Report, disseminating information and best practices.

The Platform organises every year the National Conference on Shared Mobility, which represents the occasion to take stock of the trends of shared mobility in Italy and to engage in a public exchange between institutions, local administrations and members of the Platform on perspectives and opportunities of the sector. During the Conference the Report on Shared Mobility in Italy is presented.



# SHARED MOBILITY



**Italian National Platform Shared Mobility**

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