User Driven Strategies

Ten Years of Carsharing UX: Lessons Learned, Lessons Ignored

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1. Background

Car sharing services (also known as “car clubs”) offer hourly or daily rental of vehicles in various formats. Two of the more popular ways of making carshare vehicles available to potential customers are via “stations” (located in dedicated street parking or car parks), or via free-floating fleets scattered throughout public roads or car parks.

Car sharing via station-based or free-floating models has existed as a concept for several decades. But automaker/OEM investment in these models accelerated in earnest through the 2010s, due in part to the fear that younger/millennial consumers (combined with the advance of “self-driving” tech) would begin a trend that could end individual car ownership.

The years that followed were littered with new car sharing service concepts, and their unfortunate wreckages, especially in North America.

- **Car2Go** was a Daimler-backed service that operated throughout North America and Europe. After a number of difficulties (including a notorious incident wherein a portion of its Chicago fleet was stolen and used for other crimes), it merged with BMW-backed **DriveNow**, and was later acquired by Stellantis-backed **Free2Move**.

- **ReachNow** was a cousin of DriveNow, operating in 3 US markets at its peak. It faced many problems including low ridership and repeated severe difficulties with its tech platform (most notably cars malfunctioning on ferry boats and blocking traffic). Its luxury ride-hailing experiment “ReachNow Ride” also struggled, with extremely low ridership and challenges sourcing qualified drivers. ReachNow was abruptly shut down with no notice to its users or staff in 2019.

- **Autolib** from Bollore was a fully electric service based in Paris. It shuttered in 2018 after numerous difficulties including low ridership, poor car maintenance, and vandalism.

- **BlueIndy** was Autolib’s American cousin, a small service based in Indianapolis. It was closed in 2020 due to lower ridership.

- **Maven** was a carsharing service from General Motors which, at its peak, served 17 markets across North America. After tech challenges and several pivots including an attempt to become a peer-to-peer rental marketplace, it was shut down in 2020.

- **LimePod** was a carsharing service based in Seattle, meant to compliment Lime’s free-floating bicycle and scooter-sharing programs. It was shut down after less than 1 year due to difficulties finding a partner to convert its fleet of Fiat 500s to BEVs.

- **Waive** was a unique carsharing service in Los Angeles that leveraged car-top advertising to offer 2 hours of free driving for new customers. After investment from Hyundai (who hoped to use the service to encourage sales of its Ioniq EVs), and an appearance on the television show Shark Tank, it was shut down in 2020 due to low ridership and compounding funding difficulties.

- **Gig** was a carsharing service built by the venture arm of the American Automobile Association. Gig operated on in 3 cities on the US west coast, though it also struggled with low ridership and high operating costs, and was shuttered in 2020.

It is certainly notable that several services ended their operations in the USA after the pandemic began in 2020. Waive even specifically mentioned it as a primary reason for its closure. However, the pandemic should not be cited as the main reason, especially as ridership and tech challenges were well-known issues before 2020. The main effect of the pandemic was to hasten each service's inevitable demise.

One notable exception to this trend is **Zipcar**, a station-based service started in 2000. It has since been acquired by Avis Budget Group, and continues to successfully operate in cities across North America, Asia, and Europe.

2. UX Evaluation Background

After over a decade of automaker interest and investment, how healthy are station-based and free-floating car-sharing services today? Were all of those "fail fast" learnings applied in practice to new or revamped services? Has the end-user experience actually improved, with target audiences well-defined, or are investors still indiscriminately throwing ideas against the wall to see what sticks?

To explore these research questions, User Driven Strategies evaluated (as a surface-level "tear-down") the user experience of 3 car sharing services operating in Q2 2025. Two of the services evaluated were in North America, and one was in continental Europe.

Each service was examined across 5 key aspects of the renter's experience:

- Registration
- Trip planning and vehicle reservation
- Vehicle access
- In-rental experience
- Ending a reservation

The overarching goals of these collective efforts were twofold:

- Examine the service's usability and usefulness from a traveler's perspective.
- Identify the learnings/changes/improvements services have made across 2 decades in key markets.

3. Evo Car Share

While Gig Car Share failed in the US in 2020, its Canadian cousin Evo Car Share (founded in 2015 by the British Columbia Automobile Association) lives on in Vancouver and Victoria.

The present evaluation was conducted in Vancouver Canada in April of 2025.

3.1 User Experience Teardown

Registering with Evo Car Share requires that the customer be at least 18 years old, plus the following:

- A mobile number
- A mailing/physical address
- An email address
- A selfie photo for identity verification
- A driver's license
- A copy of the customer's 2-year driving record, from the jurisdiction their driver's license is from
- A valid credit card (for a one-time registration fee, then to pay any rental fees once registered)

Registration may be completed entirely within the mobile app, with the exception of acquiring and sending a driving record to Evo. And customers are given the option to chat with an agent at any time through the onboarding process.

Though the request for a driving record is novel for registering with a carsharing service, and certainly adds friction to the onboarding process, Evo provides explanations, instructions, and relevant links to get the customer started (both in the onboarding flow, as well as in a linked PDF).

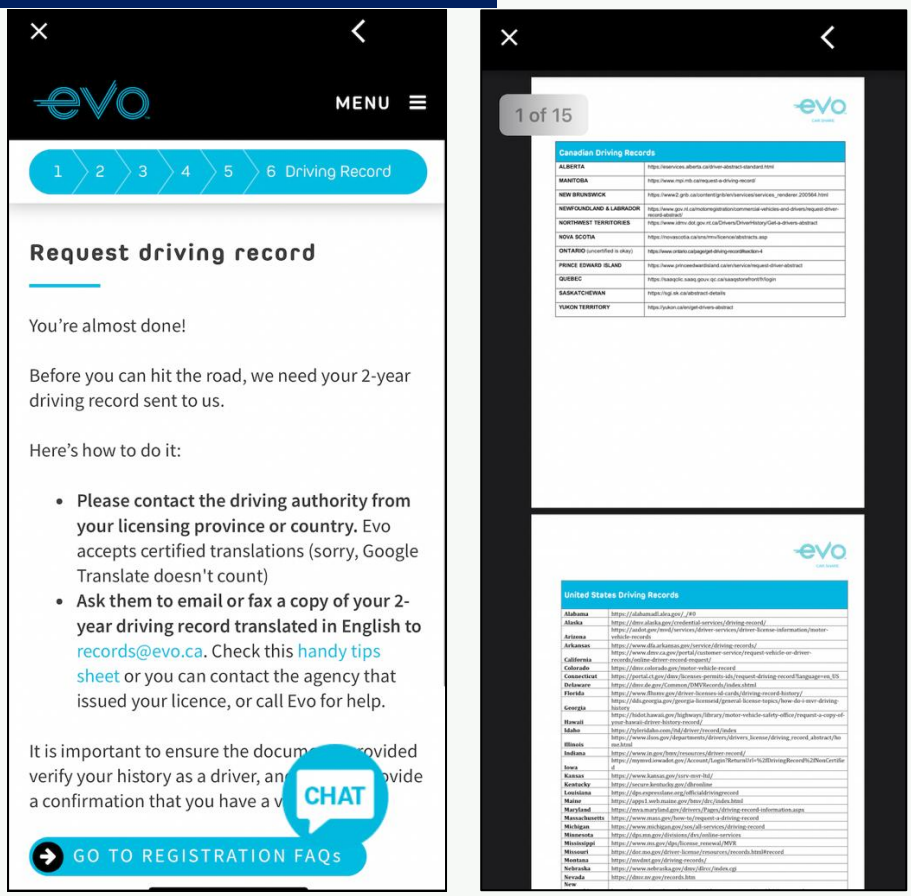

Figure 1: Driving record request in Evo registration flow

The Evo mobile app is required to find and reserve a vehicle with Evo Car Share. The app provides 2 options for rentals:

- "Evo" allows for vehicle pick up and drop off anywhere in the rental zone
- "Evo Return" is closer to a "station-based" model, wherein a member picks up and drops off a vehicle at specified locations.

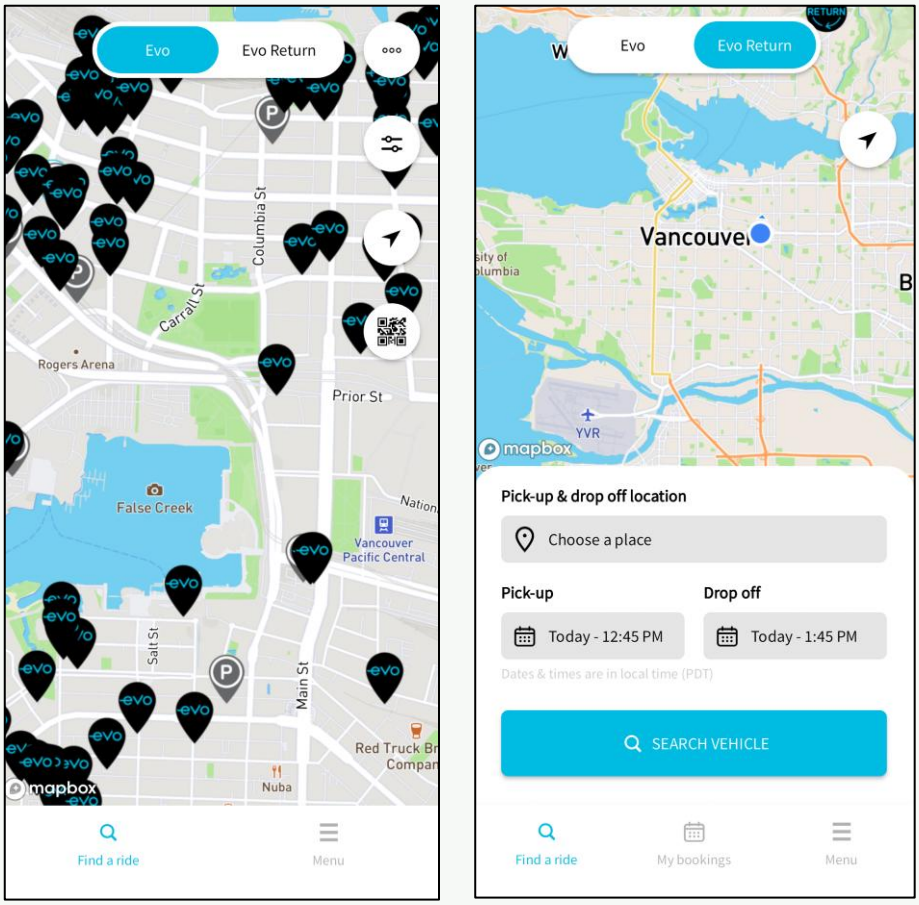

Figure 2: Finding a vehicle in Evo (left) and Evo Return (right)

One challenge in Evo Return is that nearby vehicles/stations are not shown on the map, so it is not immediately apparent in map view how close the nearest station is to the member's location, or another location of interest.

For both Evo and Evo Return, available cars may be filtered by model (Kia Niro EV, Prius, Corolla, or Prius C), and engine type (electric or hybrid).

Evo members can unlock a vehicle using the Evo app, or a dedicated NFC key card that a member can request from Evo.

The mobile app is very responsive, with unlocking signals typically executed in less than 1 second. However, an active internet connection is required for unlocking vehicles, beginning a reservation, and ending a reservation via the mobile app.

Figure 3: Exterior of Evo Car Share Toyota Prius + NFC card reader and availability indicator

3.2 Summary

- **Pro:** The Evo mobile app is very responsive to vehicle-related commands.
- **Pro:** Evo follows best practice by allowing its members to access vehicles without a mobile app, via a key card. (Though the member must request it directly with Evo.)
- **Pro:** The Evo mobile app makes it easy for a member to filter vehicle search by car type.

- **Con:** Evo's registration process is slightly cumbersome, requiring the prospective user to get a 2-year driving record from their local licensing authority.
- **Con:** Evo Return does not show nearest stations by default.

4. Corktown Carshare

Corktown Carshare is a boutique concept with a service area in Detroit USA. It is built and operated jointly by Sway Mobility (a “carsharing-as-a-service” platform), and Mapless AI (a Pittsburgh-based remote teleoperator).

The renter-facing portion of Corktown Carshare is delivered via the MOQO mobile app, designed ostensibly for fleet sharing of cars, bikes, and scooters from a variety of services worldwide. At launch in early 2025, Corktown Carshare promised a unique concept that incorporates teleoperators in order to deliver the car to the renter no matter where they are in the service area.

However, at the time of the present evaluation (June of 2025), renters could only access a single in-service vehicle by traveling to its home “station” (a sidewalk between the Newlab building and Michigan Central Station, in Detroit’s Corktown neighborhood).

4.1 User Experience Teardown

Registering with Corktown Carshare requires the following via the MOQO app, which points directly to the MOQO web portal:

- Personal details including mailing/physical address
- A valid email address
- A valid driver’s license
- A valid credit card (for a one-time registration fee, then to pay any rental fees once registered)

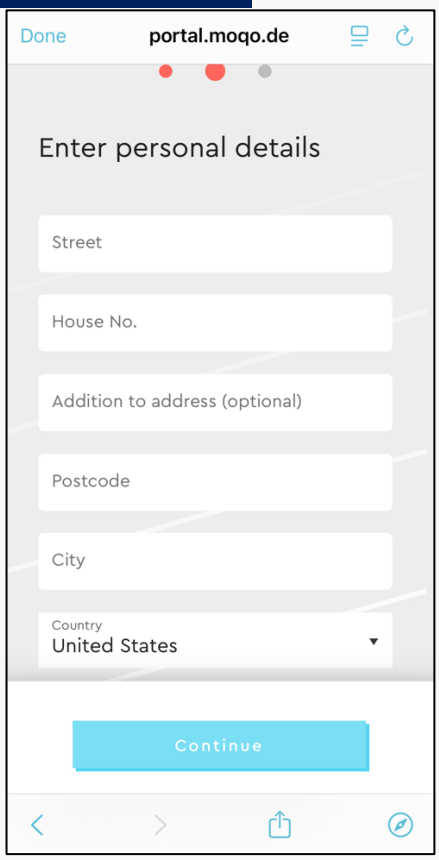

Figure 4: Registering for Corktown Carshare in the MOQO app, European address convention

The MOQO portal uses central European (German) conventions for mailing/physical addresses, which certainly made sense for MOQO's designers and engineers, but is not best practice for Corktown Carshare's market in the USA.

The MOQO mobile app is required to find and reserve a vehicle with Corktown Carshare. Cars must be reserved in advance (they cannot be accessed on demand).

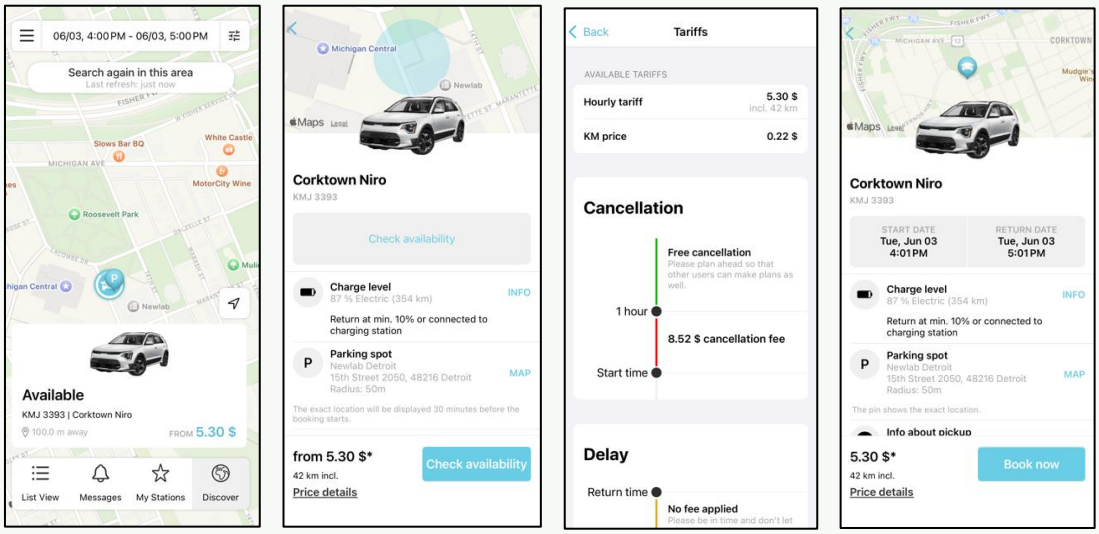

Figure 5: Reserving a Corktown Carshare vehicle in the MOQO app

Figure 6: Kia Niro EV in the Corktown Carshare fleet

During an active reservation, customers can unlock the vehicle when they are in close proximity to it using the MOQO app. Upon arrival to their reserved vehicle, customers must self-report a cleanliness and damage check, though some German vocabulary slipped through into the UI (e.g. “Innen” for car interior).

The vehicle can be locked in the same manner via the mobile app during starts-and-stops during an active reservation.

If a customer wishes to end an active reservation early, they must indicate that in the app, and report any new damage.

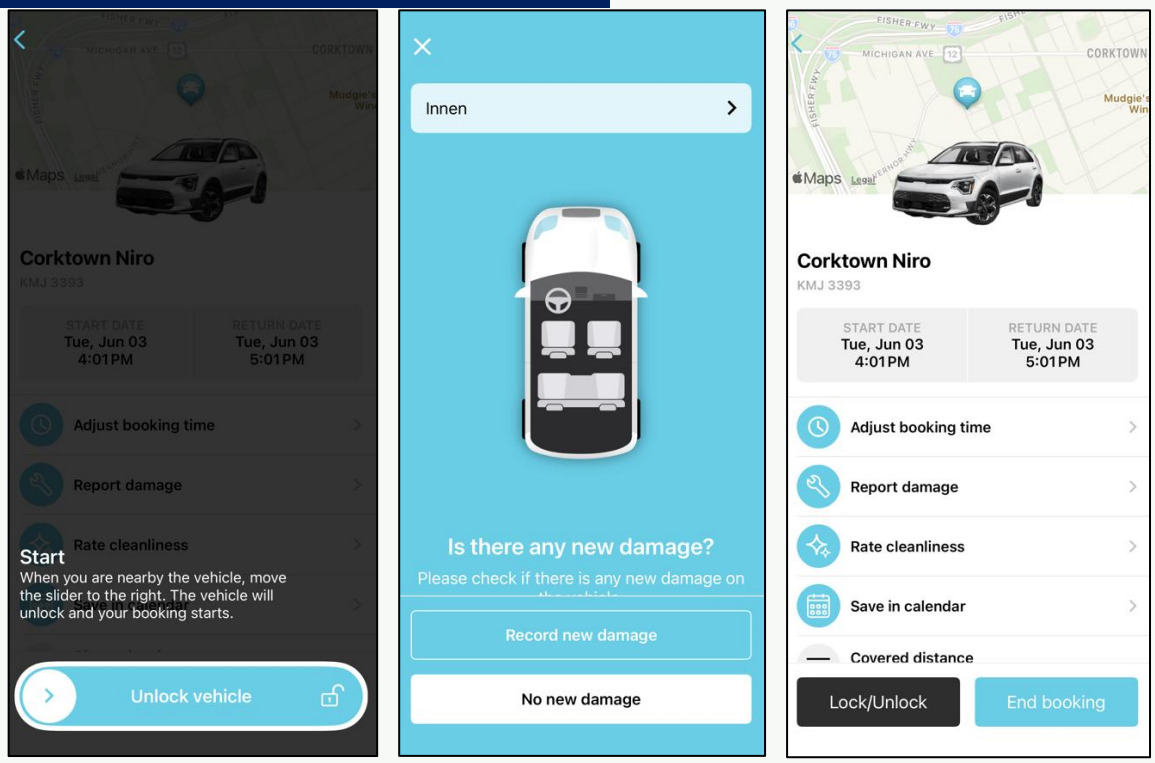

Figure 7: Select screenshots of MOQO app before and during an active reservation

4.2 Summary

- **Pro:** Corktown Carshare's strategy of starting small and limiting range within a city was likely intended to shrink the initial geofence for remote delivery and establish a minimum viable product for such a service. By doing so, they (intentionally or accidentally) followed best launch practice for urban car-sharing.
    - Far too many carshare services make the mistake at launch of attempting to scatter vehicles across a city to grasp for the widest range of potential customers. This requires a great deal of human power at the start for maintenance and positioning, which can be a risky and money-losing maneuver if the service isn't clear on the value proposition of the service in that market.
    - Starting very small, aiming toward a very targeted demographic, and greatly limiting service area, allows vehicles to be serviced and repositioned far more easily and with far less human power at launch.

- **Con:** For all of the flashy marketing Corktown Carshare pushed to media in March at service launch, 3 months later there was no clear indicator in the app of how to have a vehicle delivered via teleoperator.

- **Con:** Corktown Carshare's app UI was clearly an afterthought from MOQO. It was clearly designed in Germany and localized for a central European audience (via address entry conventions, use of kilometers instead of miles, etc.).

5. Free2Move

Free2Move was built from the remnants of mobility services from Daimler, BMW, and PSA. This "Frankenstein's monster" includes a car-sharing service which operates in 16 cities across continental Europe and the USA. The present evaluation of Free2Move's car-sharing service was conducted in June of 2025, in Berlin Germany.

5.1 User Experience Teardown

Registering with the Free2Move service in Germany requires the customer to be at least 18 years old, plus the following information:

- A valid email address
- Driver profile information
- A payment method
- A valid and confirmed driving license (confirmation for this evaluation took less than 3 minutes)
- A PIN (used to reserve and start a vehicle)
- A short selfie video for identity verification
- Declaration of a "home" city of registration (this can be changed later)

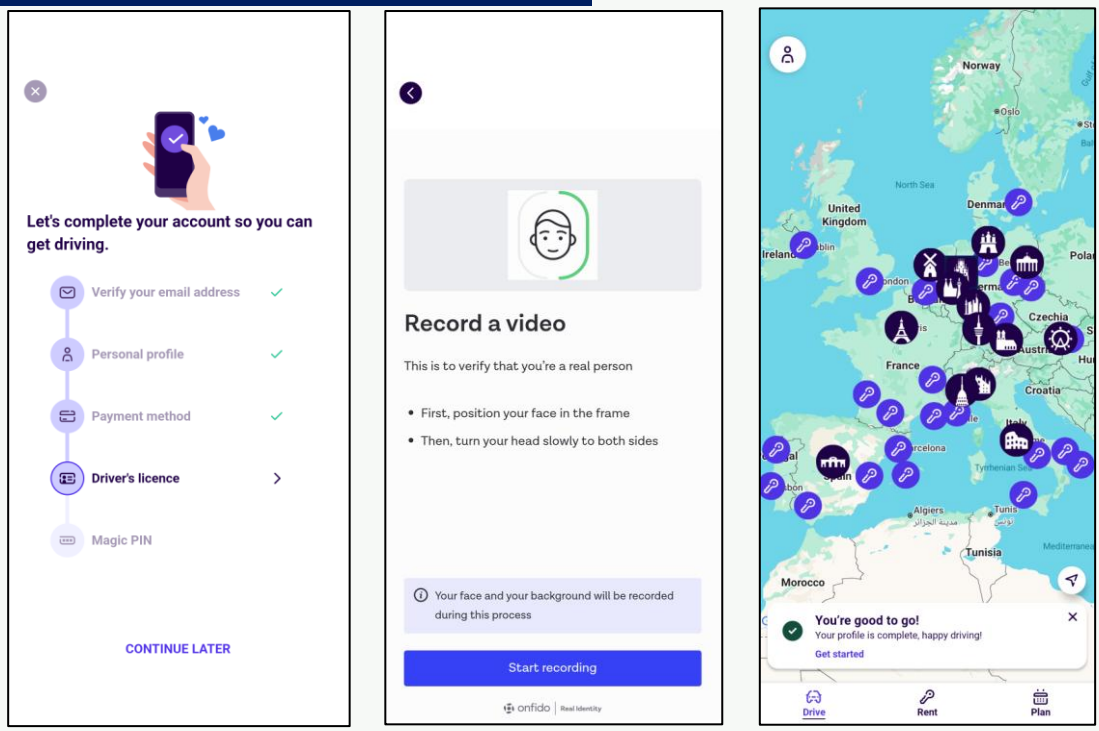

Figure 8: Select portions of Free2Move registration and onboarding flow

In order to find a car for rental, a Free2Move customer must select from a map (though there are options for list view). Available cars may be filtered by brand, number of seats, engine type, and battery or fuel level.

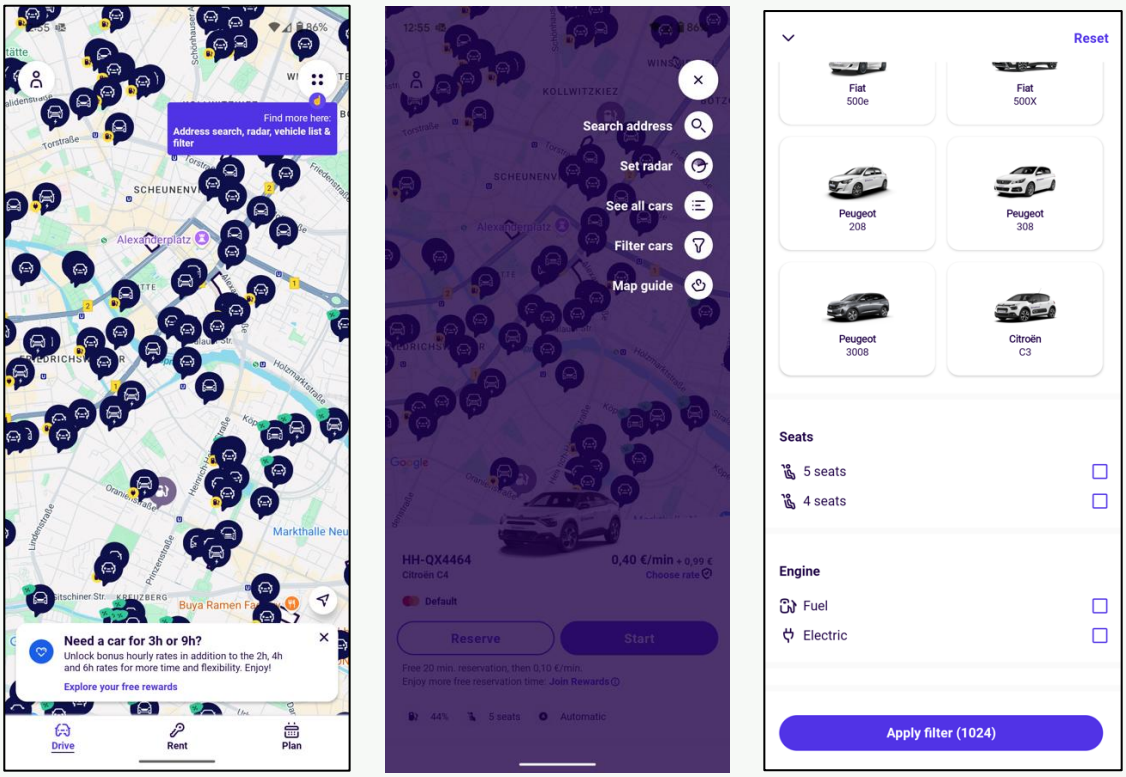

Figure 9: Finding/filtering vehicles in the Free2Move app

Once a vehicle is selected, a Free2Move user may then select the amount of time they wish to rent the vehicle, by the minute. Rates vary starting at a nominal per-minute rate (e.g. 0.21 EUR per minute), with price breaks offered for advance reservations of 1 hour or more.

As with similar services, users are asked at the start of their reservation time to confirm there is no “severe” damage to the vehicle. Free2Move vehicles are then unlocked/locked via the associated mobile app.

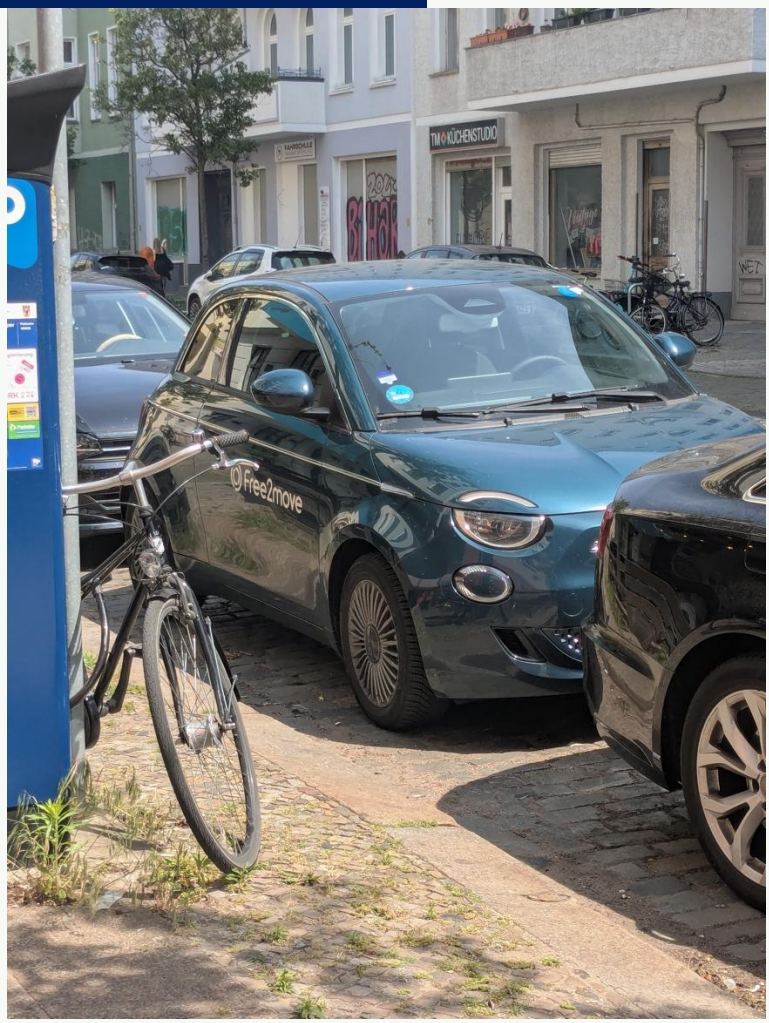

Figure 10: A Free2Move Fiat parked on a street in Berlin

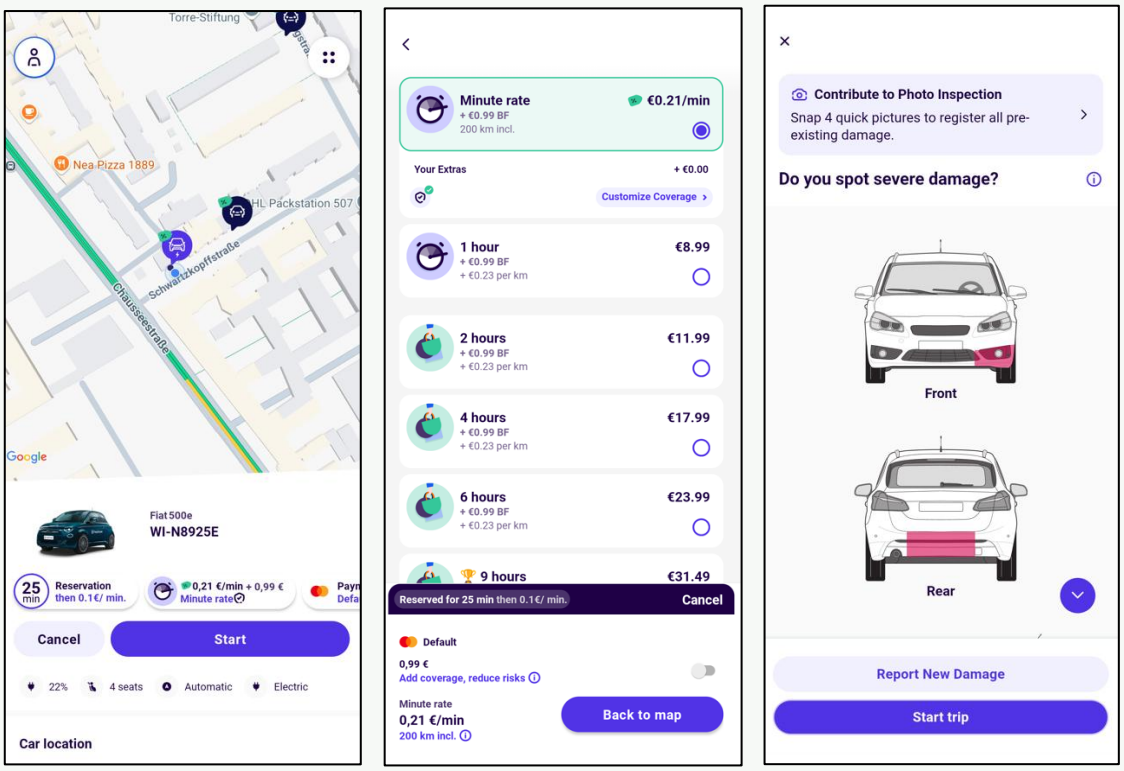

Figure 11: Beginning a trip in the Free2Move app

During an active reservation, Free2Move members can get assistance via the Help/FAQ features in the mobile app. They may also use an in-app chatbot (powered by AI) to get help. The “Help” chatbot has the capability of automatically switching languages on the fly, a notable and helpful feature especially in European markets.

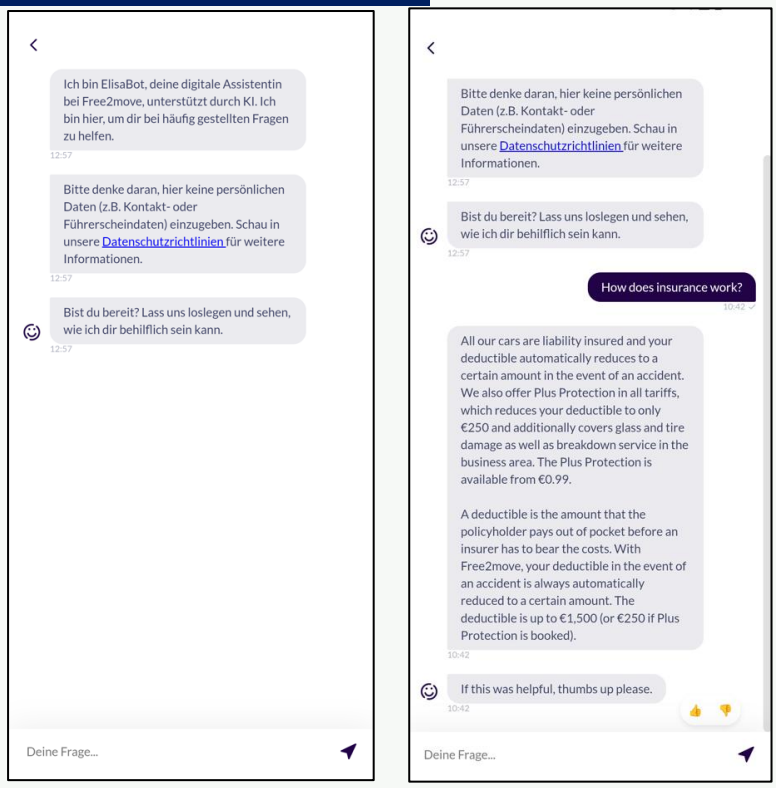

Figure 12: The Free2Move chatbot

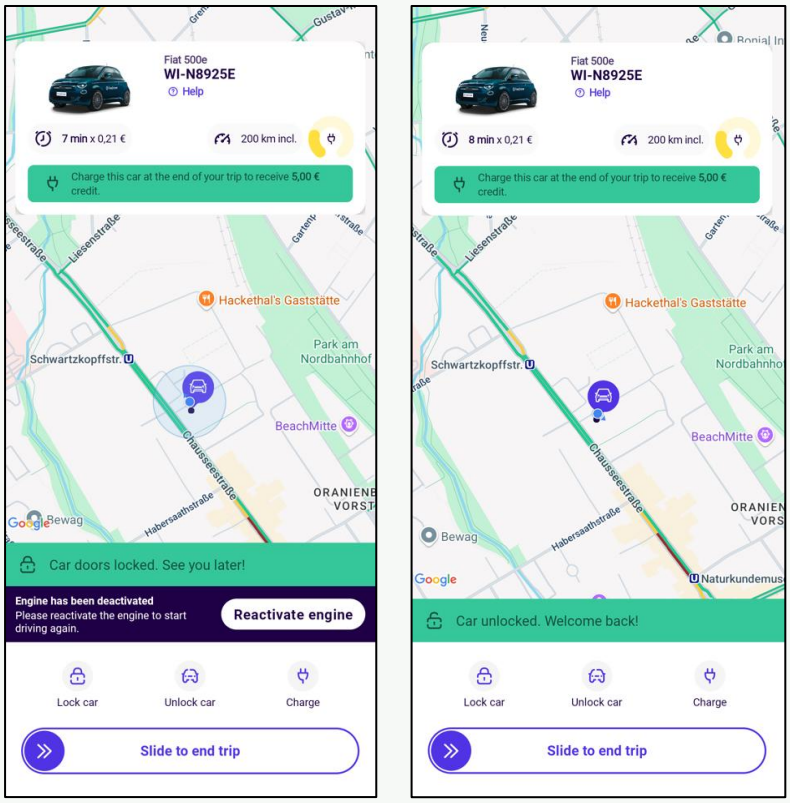

Figure 13: Beginning a trip in the Free2Move app

To end a reservation, Free2Move members must ensure the vehicle is stopped in a proper/legal parking space. Requirements for proper parking are communicated in-app. Once the vehicle is parked, a reservation may be ended using a slider control in the app.

5.6 Summary

- **Pro:** As with Evo and Corktown Carshare, the responsiveness of the app (even for vital functions such as locking and unlocking) was extremely quick and impressive.
- **Pro:** Providing a help agent in the app is certainly best practice, and providing one that is resilient to multiple languages is even better, especially in multi-lingual markets in central Europe.

- **Con:** With an aging fleet of vehicles, maintenance and cleanliness are already challenging for Free2Move.
- **Con:** Though finding a vehicle was relatively easy in the market tested (Berlin), certain use cases were questionable. For example: Free2Move has availability at a parking garage at Berlin airport, but reserving and driving the vehicle from the airport into central Berlin is significantly more expensive than most other modes of transportation for the same trip.
- **Con:** Though help is provided in-app for parking rules, these were still confusing for a naïve visitor.
    - One caveat to this: Free2Move requires that a new member specify their "home market" at registration. Therefore, Free2Move's target audience is likely city-dwellers with a temporary need for a different/additional car, not tourists who are naïve to a city's parking rules.

6. Ten Years of Lessons for Carsharing

6.1 Improvements Made

By their own admission, investors and operators in the carsharing space treated early deployments as "pilot tests" of connected mobile apps, shared fleets on public roads and carparks, and even the short-term rental model itself. While some early efforts fell flat, stakeholders still learned a great deal, and all carsharing service users have benefitted.

One of the most prevalent problems of early on-demand carsharing services was the poor latency of mobile apps used for vehicle reservation and access. When unlocking a vehicle, activation times of 30 seconds to 2 minutes were common. And backup methods for car access (e.g. keycards or key fobs) were not provided, or difficult for customers to acquire. This was problematic because renters having to wait to access vehicles (especially in contexts such as hot or rainy weather, or with large pieces of cargo) is a large pain point that easily leads to negative sentiment and decreased likelihood of repeat usage. The present evaluation is hopefully an indicator that this slow latency issue has been mostly solved. Unlocking or locking a vehicle rarely took more than a couple of seconds for every vehicle tested.

Another common issue for services with multiple vehicle types was difficulty finding and reserving a specific vehicle type from a large fleet. This is an important use case for renters needing a car for specific purposes like transporting large parties, children, or large objects like furniture. Filtering by car type and/or location was a luxury, not table stakes. Thankfully this feature now seems standard in current carsharing services.

Another issue noted in failed car sharing services was the failure to maintain or clean vehicles in fleets. This issue seems to have improved, but will remain an ongoing problem, especially as mobility services pride themselves on running lean/inexpensive operations with minimal human operators on the ground.

6.2 Lessons Left Unlearned

6.2.1 Questionable understanding of target segments in the US

Even after severe contraction in the “mobility-as-a-service” space, Europe remains a healthy market for novel/short-term car-sharing services. This is likely due to a prevailing consumer attitude that is less centered around individual car ownership/usage than among consumers in the US. Improvements could certainly be made, yet still, Europe-based carsharing services are far more mature/on-target from a UX perspective, and European travelers are more resilient to minor UX defects within these services.

But even after decades of attempts to crack the market in the US, new investors and operators still remain ignorant to lessons that have already been learned.

Free2Move presents a case study on missed lessons from prior failures:

In 2021 (after the closure of no less than 5 different carshares across the western US due to poor ridership), Free2Move still chose to hit the streets of Portland with a fleet of cars and a "minimally-viable" app for car sharing. Free2Move then exited Portland 2 years later due to (you guessed it!) poor ridership.

Why would a company launch a service based on an identical concept that had already failed 4 times over in the same/similar markets? Are the "datapoints collected" and "lessons learned on fleet management, insurance, etc." truly worth the millions of dollars spent to field this doomed experiment?

Flooding US streets with cars accessible via a minimally-viable app and bare-bones customer service was never a profitable or worthwhile strategy to begin with. Repeating these efforts without fundamental and traveler-centered changes to this strategy is, in the friendliest of terms, silly.

If sustainable profitability is the goal, investors and operators must take greater care to identify and design for their target region and traveler before (not after) building and launching a mobility service.

6.2.2 Other observations

Cockpits are still afterthoughts

Rented or shared vehicles can offer a uniquely difficult in-car experience, because the renter does not inherently have access to their saved contacts, saved locations, preferred media, or even their desired climate settings. On-demand carsharing has the potential to easily mitigate this, as customers must maintain some sort of profile in order to easily access vehicles at a moment's notice. It is therefore surprising that carsharing services by-and-large have not capitalized on this by offering a few personalized features standard.

Questionable relationship between car sharing and future ownership

One rationale OEMs leaned on to justify their investments in carsharing was the belief that the investment would lead to increased sales of their brands. However, that has not panned out.

This is not to say that carsharing has no effect on future purchases. A Swiss study found that carsharing experience was directly correlated with increased likelihood of considering a BEV for a future purchase. But even within that study, this effect was isolated to those who did not already live in a city.

Hyundai tested the waters with Waive, and left disappointed when Ioniq sales did not immediately spike. OEMs in Western markets must treat carsharing purely as a fleet sales and

management proposition, or as a delayed-long-term (10-year) sales proposition for individual car buyers.

Losing the plot on engine type

In the current market, organizations are certainly mindful of climate change, and certainly want to ensure that EVs are on offer in their rental fleets. But one wonders whether for short term in-region rentals, potential customers truly care whether a vehicle is powered by electricity or gas. Rather than breathlessly hyping their "all-electric" fleets, organizations should spend more time exploring how their target demographic travels especially in urban environments, and how this segment chooses their modes of transit, regardless of how it is powered.

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