Arrive

Urban Mobility Compass 2026

What’s next for urban mobility?

We’re on a journey. Our mission is to be the leading global mobility platform, easing movement in cities to make them more livable. This is our North Star. It guides everything we do, bringing clarity, direction, and purpose as we look ahead to what 2026 will mean for mobility.

In 2025, an exciting new chapter began as some of the world’s leading mobility companies came together as Arrive. Our combined expertise gives us a unique understanding of how mobility is shaped and changing, putting us in a strong position to forecast what’s coming next. That’s why we’re sharing our outlook for 2026, guided by experts across our global organization who live and breathe mobility and use their deep industry knowledge to anticipate the trends, opportunities, and challenges that will transform the way cities move.

From the evolution of the Open Market to advances in parking, transport, data, payments, automotive, AI, and cybersecurity, these insights show what will shape the next era of urban mobility. And as these changes gain momentum, we’re ready to harness them, using smarter, integrated solutions to help cities and operators create systems that are inclusive, efficient, and built to last. So we’re not just imagining the future, we’re leading it.

Together, we make cities more livable.

Arrive in numbers

Countries	90+
Cities	20K+
Yearly active app users	65M+
Years' experience	70+

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Parking accelerates toward greater integration

Parking will continue its shift from a local activity to something far more connected. As digital systems expand across cities and countries, drivers expect a consistent experience wherever they travel. The parking landscape will become more scalable, reliable, and easier to navigate. At the same time, drivers will increasingly choose time-saving solutions like app favourites and License Plate Recognition (LPR) technology that make parking simpler and more seamless. All of this will redefine how cities manage and modernize their parking services.

Cities will move away from fragmented systems toward unified parking management. More municipalities will seek an integrated solution for mobile payments and pay stations, with tariffs, pricing rules, reporting, and compliance managed in one place. With fewer systems to oversee, cities will be able to operate more efficiently and access more consistent data across their parking operations.

This drive for greater integration will help transform parking data into strategic insights, providing real-time and predictive visibility into how people move, and turning complex information into actionable intelligence. Cities are recognizing that better analysis leads to more informed planning and policy decisions around parking infrastructure, curbside use, traffic management, EV rollout, and multimodal planning – helping shape more sustainable mobility networks.

While much of the focus over the coming year will be on increased digitization, there will also be growing recognition that the basics still matter. Cities are rediscovering the importance of clear, consistent, well-placed signage as a core part of the parking experience. And not everyone wants or is able to use an app, so the availability of pay stations will help ensure parking is accessible, regardless of digital confidence. When signs are intuitive and payment is simple, there's less confusion, higher compliance, and the whole system works better.

> “Cities will move away from fragmented systems toward unified parking management”

Scott Booker
General Manager, Parking

Insights steer smarter city decisions

Johannes Mark
Head of Global
Parking Insights

Data is the cornerstone of every good decision. Throughout 2026, cities will prioritize digitization to gain a clearer view of the mobility patterns behind daily fluctuations. By capturing more comprehensive, longitudinal data, they will be better equipped to establish demand over time.

To achieve this, municipalities will focus on breaking down long-standing data silos. By bringing together previously isolated datasets, they can create a unified historical baseline that unlocks cross-sectional insights into how the city moves.

With clearer, connected datasets, cities will be able to make more data-driven decisions. This will strengthen their ability to use aggregated, trend-based insights to develop policies around long-term mobility patterns rather than temporary spikes.

As AI becomes more powerful and widely used, the demand for accurate, representative data will continue to grow. This will allow city planners to model the long-term impact of policy changes in a controlled, reliable environment before they are introduced in the real world.

In 2026, unified mobility data will give cities a clearer, more actionable view of how supply and demand interact across their networks. With support from partners like Arrive, they can use these insights effectively to ensure that policy changes create a balanced, sustainable mobility ecosystem.

Cities will:

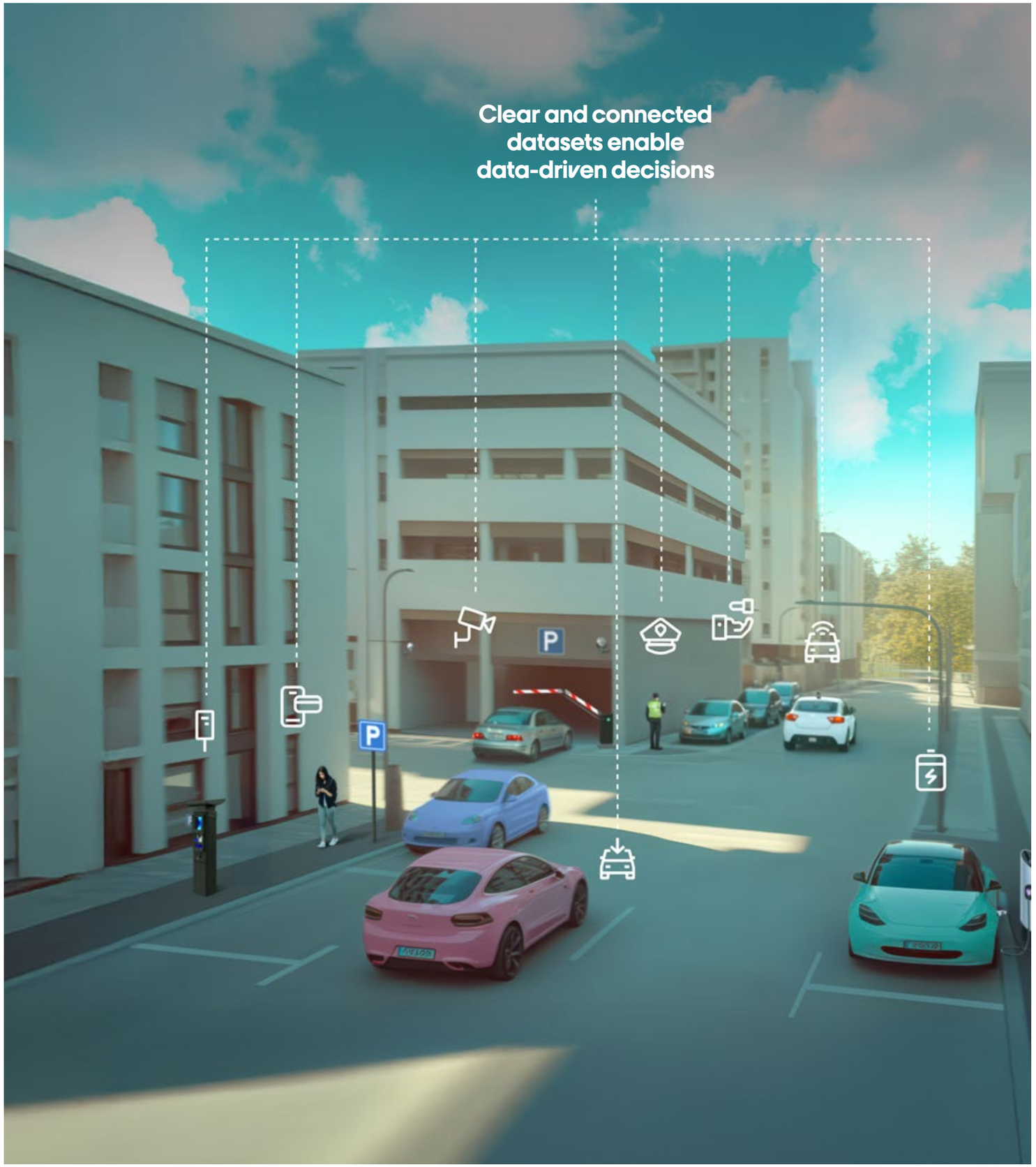
Track long-term trends
Collect longitudinal data to understand demand patterns over time.

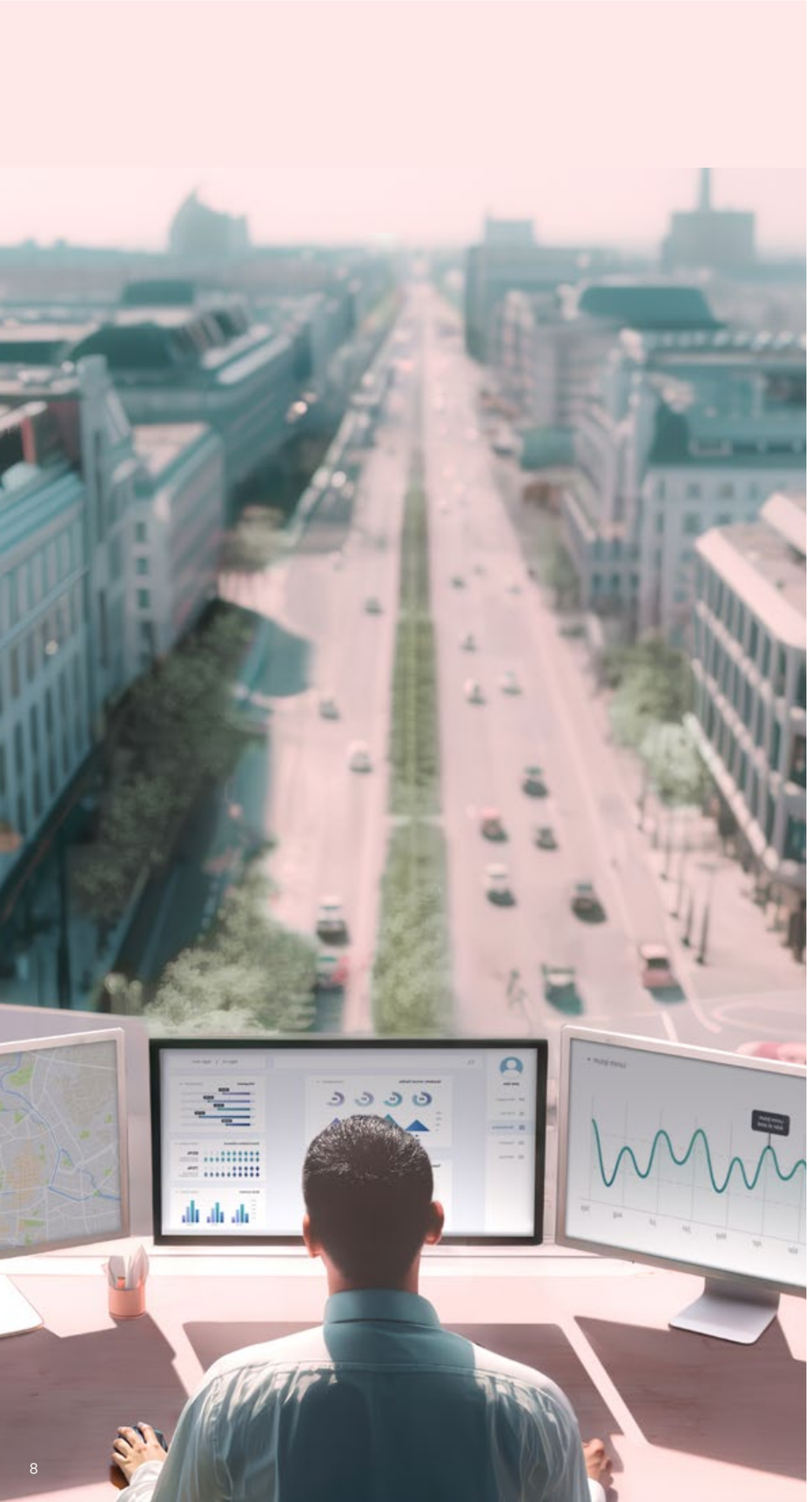
Connect the data
Break down data silos and bring information together for a citywide view of mobility.

Make smarter decisions
Develop policies based on aggregated, trend-based insights instead of guesswork.

Leverage AI
Use AI to model the impact of policy changes before they are introduced in the real world.

Balance their ecosystems
Get a clearer view of how supply and demand interact across their networks.





The Open Market drives choice and competition

Morten Hother Sørensen
Head of Parking, Europe & UK

The trend toward an Open Market for parking will continue throughout 2026, ending the era of single-app suppliers and allowing multiple providers to operate side by side. It's a major shift in mobility that unleashes competition and drives innovation. For parking operators, the model reduces implementation and operating costs, removes the complex tender process, and enables better, more consistent access to data, unlocking new insights to inform parking policy. For drivers, it offers greater choice and convenience, allowing them to use the app that best suits their needs without having to download new ones for different locations.

The Open Market is already transforming parking across the UK. In 2025, the National Parking Platform (NPP) went live nationwide after a successful four-year pilot in selected cities. To join the NPP, each parking app must meet strict service and regulatory standards to ensure councils and drivers receive a reliable, high-quality, and secure service. With more local authorities preparing to join in 2026, the NPP is rapidly expanding. Each new city that comes on board will help build a more connected parking network that works better for everyone.

A similar shift is happening across Europe, and it shows no signs of slowing down. Many countries are either using a national parking hub or adopting an authorization model where a municipality (or other authorizing body) sets clear requirements that apps must meet to offer parking services in a city. As the Open Market expands, drivers will be able to use their preferred app across a much wider range of locations. This increased interoperability will make parking simpler for users and more efficient for operators.

In 2026, there will continue to be no single blueprint for implementing an Open Market. The model can be tailored to the needs of any location, whether through a national hub, city-level authorization model, or another framework shaped by local priorities. The aim is the same: creating flexible, future-ready ecosystems that support smarter mobility.

David Holler
***V*ice President Sales, North *A*merica**

In North America, the Open Market will continue to gain interest and acceptance in 2026. More locations will move away from the traditional tender cycle for appointing a single parking app provider and explore a more flexible multi-vendor setup. This approach is already proving successful in several major cities that adopted the concept in 2025.

Smart parking hubs will play an essential role in this evolution. By connecting data from multiple apps, they provide the infrastructure needed to create a true Open Market, and give operators and cities clearer insights to develop more responsive, data-driven parking strategies.

As interest in the Open Market grows, consumer choice is emerging as a key driver. When people can use the parking app they prefer, the experience is simpler and more consistent. This push for greater freedom is strengthening support for the Open Market model.

These trends point toward a more open, interoperable future for parking in North America that delivers better outcomes for operators, cities, and drivers.

Unified technology advances the in-car experience

> “Drivers expect *every*thing in the car to *w*ork together, and that’s *w*here mobility *i*s heading ”

Today, many vehicle-related services, such as parking, charging, tolling, payments, and navigation, are spread between separate apps or across older in-car features that have been added over time. But drivers increasingly expect everything to work together, from automatic payments and real-time availability to personalized recommendations and automated compliance. These expectations will continue pushing carmakers to move from today’s fragmented digital services toward a single, seamless in-car experience.

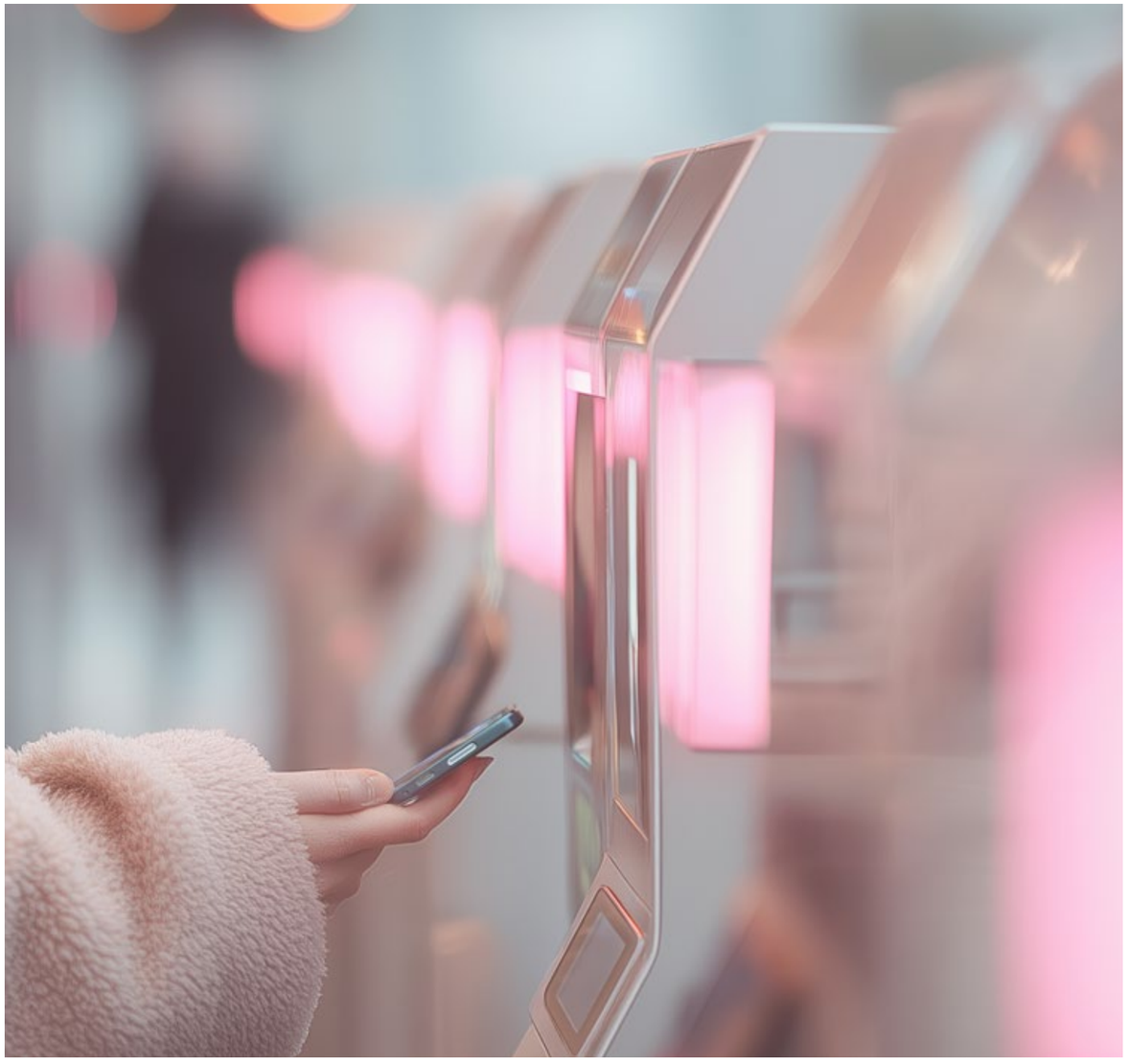
This change is already underway. Manufacturers are exploring new ways to connect mobility services and address customer frustration. Pressure from technology leaders like Tesla, Apple CarPlay, and Google Automotive Services is also accelerating the shift to more integrated digital ecosystems, where services no longer operate in isolation. For Arrive, this creates a significant opportunity to help carmakers unify mobility services inside their vehicles, bringing real-time availability, seamless payments, and reliable global data together in one connected experience for drivers.

Fleet operators, particularly EV and delivery fleets, will continue to set the pace for the industry. Fleet adoption has always been a strong indicator of broader mobility trends, and when operators embrace automation and data-driven services, they influence what all drivers will expect in the years ahead. With rising cost pressures and growing demand for efficiency and time savings, fleets will seek tools that automate payments and compliance, provide predictive access to curbs, optimize charging, and support real-time route adjustments. As fleet electrification targets accelerate across Europe and the US, these capabilities will help keep vehicles moving even as charging infrastructure comes under greater strain.

Whatever fleet operators and carmakers choose to advance next, Arrive is ready to support this transition with solutions that make operations smarter and easier to scale, and help unify the in-car digital experience.

Eugene Tsyrklevich
General Manager, *A*utomotive & Data

Digital ticketing unlocks multimodal travel



> “Cities will continue to invest in integrated Mobility-as-a-Service solutions that connect services and create a smoother end-to-end journey ”

David Thompson
General Manager, Transport

Several factors across the transport sector are pushing ticketing toward increased digitization. One of the most significant is the growing budget pressure facing transit authorities. With fare revenues declining, they are prioritizing low-maintenance, scalable ticketing technologies that reduce operating costs while improving the passenger experience.

This drive for efficiency will also reinforce the growing importance of data in how transport networks are managed. Digital validation data will enable real-time analytics that help operators optimize services and support AI-assisted fraud detection. And as operations become more data-driven, transit authorities will be better equipped to spot trends, monitor performance, and reduce costs.

Smart ticketing will experience strong growth as more cities move away from paper tickets, with the market expected to reach $25.3 billion by 2026. This growth is being driven by digital cards, mobile apps, and account-based systems that make paying for travel faster and more convenient for passengers.

The shift toward digital-first ticketing will also accelerate the mass adoption of Open Payment. Tap-and-go payment using bank cards, mobile wallets, and wearables is becoming the standard on public transport networks, particularly for occasional riders and tourists who want a seamless way to pay without creating an account or downloading an app.

In places where Open Payment is not ready to be adopted, pay-as-you-go and best-fare pricing will also gain momentum in 2026. As account-based ticketing expands, passengers will benefit from automatic fare capping that ensures they always get the best price across different modes of transport, without needing to understand complex fare structures.

Tying this all together is the push to improve interoperability between mobility systems. Passengers now expect their tickets to work across buses, trams, trains, and increasingly on bikes and shared mobility. Cities will continue to invest in integrated Mobility-as-a-Service (MaaS) solutions that connect services and create a smoother end-to-end journey, built on a strong foundation of digitization.

In 2026, the smart ticketing market is set to reach

$25.3B

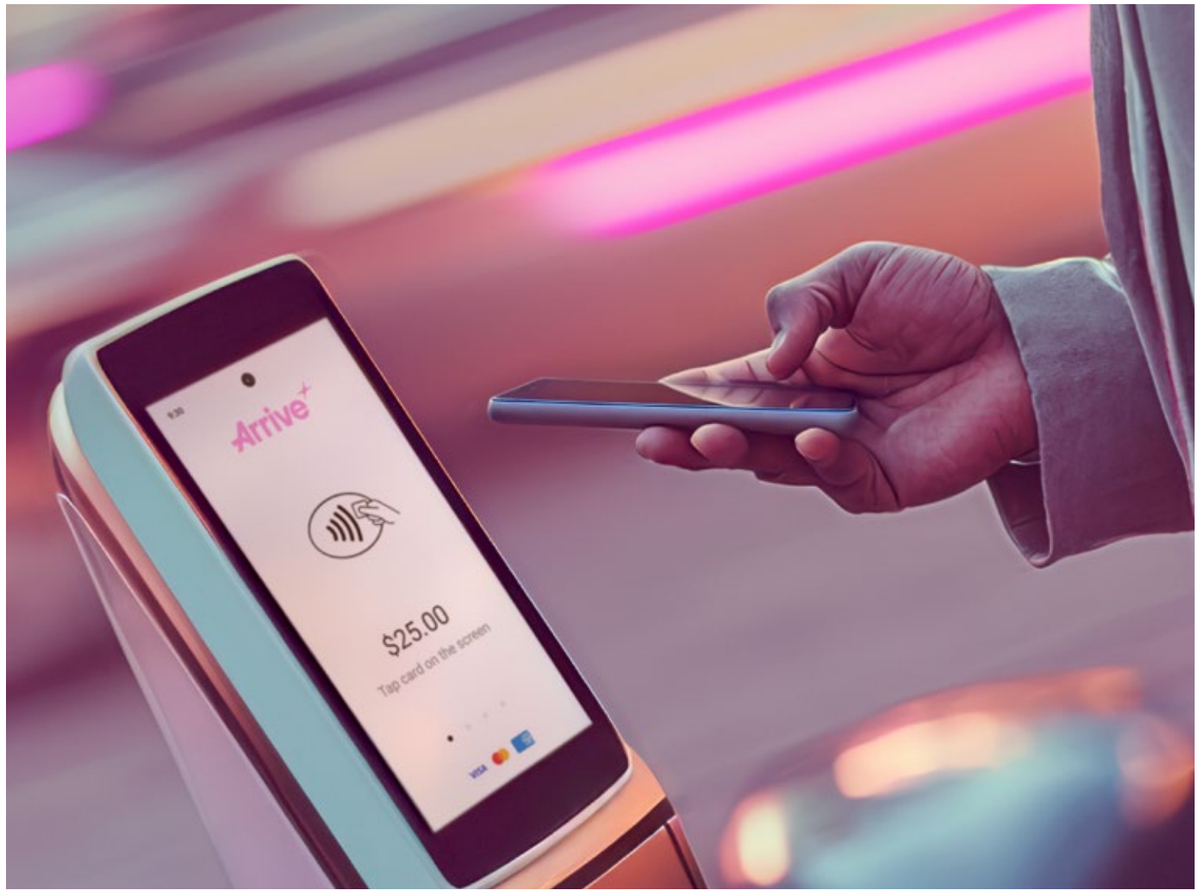
Payments power more connected journeys

Deborah Guerra
General Manager,
Payments

In 2026, payments will become more intelligent, connected, and integrated across the entire mobility journey. Mobile payments will continue to rise, with growing demand for Apple Pay and Google Pay. At the same time, alternate payment options will expand as customers look for more flexible and convenient ways to pay. And payments will be spread across different devices, with wearables, in-car systems, and biometric authentication offering new options for people to pay as they move.

Looking ahead, AI will play a bigger role in payments orchestration, helping to route transactions in ways that improve authorization rates, reduce costs, and speed up the payment process, as well as take advantage of evolving agentic commerce. Meanwhile, tokenization will move beyond security, becoming a way to link payment credentials to a customer's identity, enabling more personalized interactions across different mobility services.

Demand will grow for new pricing models, such as distance-based charging and demand pricing, which must support accurate reconciliation and settlement across all partners involved in delivering a mobility service. Fraud will continue to pose a threat, with fraudsters using increasingly sophisticated tools. AI will play a vital role in identifying trusted users, detecting suspicious patterns, and keeping services secure.



> "A single token paves the way for effortless payments across the city with every service provider, helping people move with more freedom and less friction, and benefit from personalized experiences, loyalty offers, and potentially discounts"

Identity will become central to payments. Service providers will need to know who or what is authorized to park, charge, pass a tollway, or use an autonomous vehicle. They must also ensure the right pricing, discounts, or permits are applied to eligible groups. A single payment token could follow a person across their entire journey, combining parking with public transportation or micromobility, and enabling a seamless experience even when the trip spans several merchants or service providers.

Agent-initiated payments (where an AI agent makes decisions on behalf of the user) are starting to emerge, booking multimodal routes or choosing the cheapest or greenest EV charging option. Operators can offer invisible payments without requiring someone to tap to pay, supported by automated refunds, audit logs, and policy controls. And as tap-on/tap-off models expand beyond public transportation to cover the full range of commuter activities, including parking, riding, eating, and resting, the lines between in-person and card-not-present payments will blur even more.

Digital wallets will continue to play a central role in urban mobility, making payments easier for regular users and visitors. Whether tapping to pay on a bus, unlocking a scooter with a smartwatch, or making an in-app payment for parking, people now expect every touchpoint to be fast, simple, and secure. For Arrive, this is an opportunity to simplify the payment experience across all modes, making every journey feel connected and more intuitive.

Cybersecurity supports safer urban movement

Mobility platforms are at the heart of city operations, and AI is providing new ways to make them stronger. At Arrive, cybersecurity goes beyond strengthening our defenses. It's an opportunity to elevate the entire customer experience. We're building a future where security is invisible and privacy is respected, fostering trust without adding friction. Customers should not have to choose between a secure experience and convenience. They deserve both.

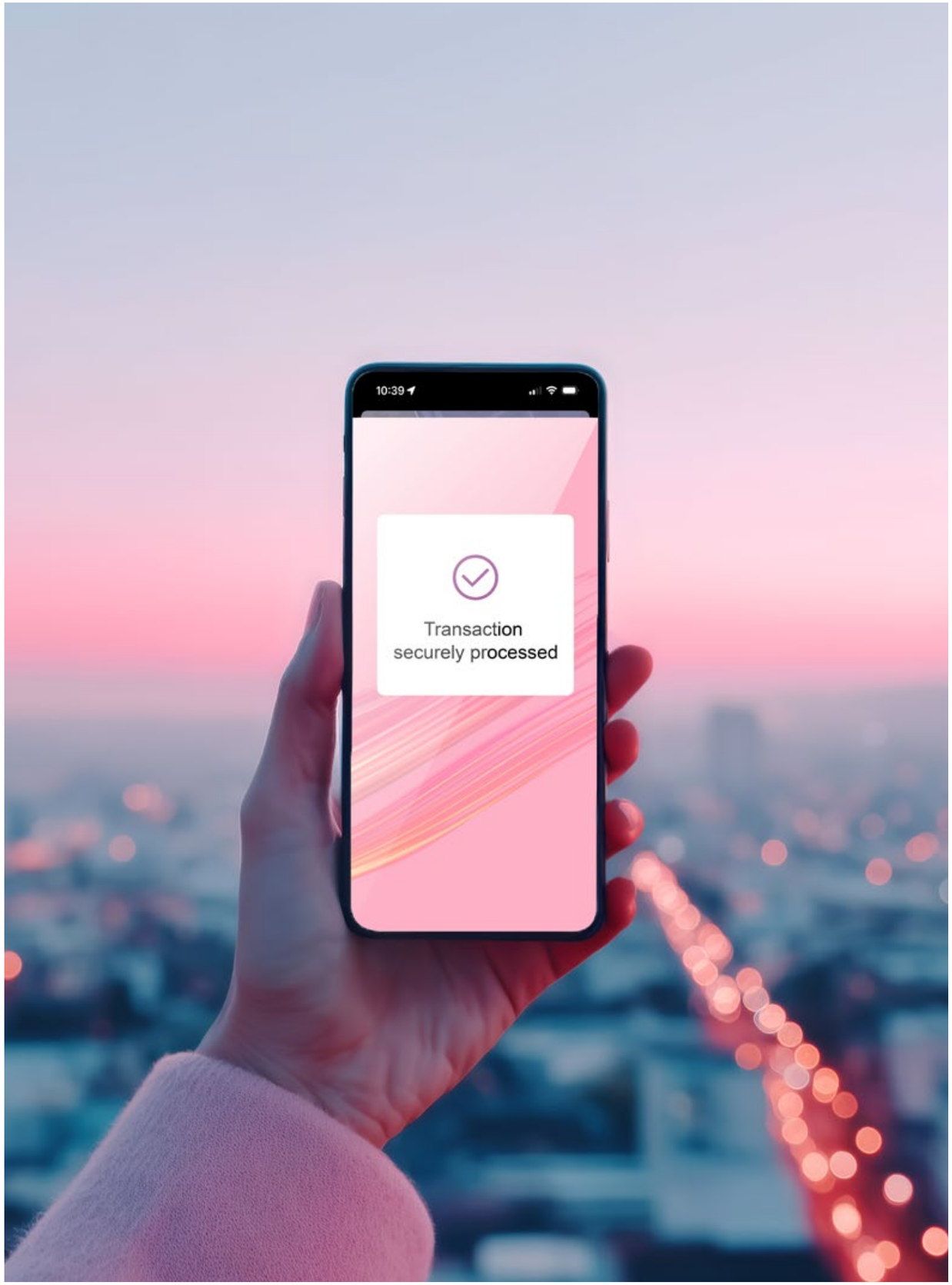
As mobility becomes more digital, new challenges are emerging. We're likely to see AI agents try to instantly reserve parking spaces and EV charging sessions, creating artificial scarcity to resell inventory or manipulate the market. This is not just a technical challenge. It's a question of fairness. Detecting and blocking these ghost bookings ensures parking and charging remain available to people who need them.

The impact goes beyond individual transactions. In some cases, attackers are targeting the systems that keep cities moving. Because mobility platforms connect digital services with physical infrastructure, our role is to help protect that connection. We're reinforcing our defenses so customers can rely on us to get them to their destination safely.

As digital trust becomes more important, customers are demanding higher security standards for peace of mind. At Arrive, meeting global standards is not a bureaucratic process. It reflects the quality and trust built into our platform. Cybersecurity is never treated as a box-ticking exercise. We prioritize it because protecting our customers and their data is the foundation of our relationship.

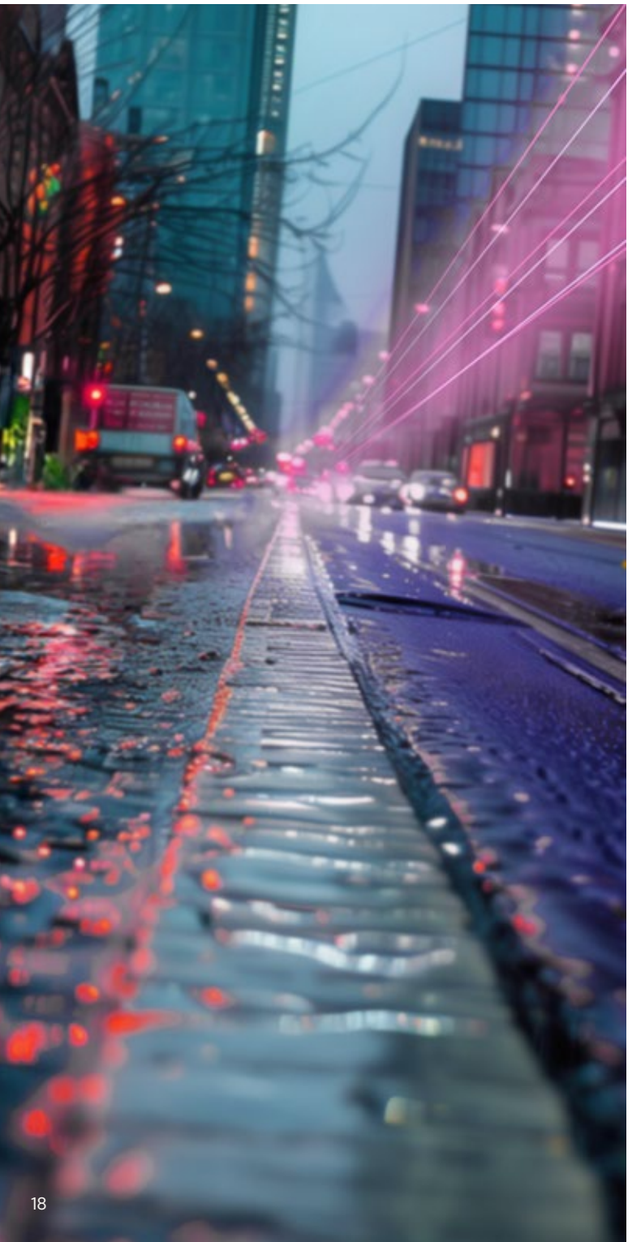
> "As cyber threats evolve within all industries, we will continue strengthening the platforms that keep mobility running safely. Because ultimately, our job is to safeguard the journey"

Ori Fragman
Head of Global Security & Cyber Resilience



AI fuels more intelligent mobility

> "AI will become a core part of how cities, operators, and drivers make decisions across the mobility ecosystem"



AI will continue to transform urban mobility over the next few years, reshaping how people move, cities make decisions, and infrastructure is managed. Much of this change is already underway, and in 2026 AI will become a more integrated part of the mobility ecosystem.

For drivers, AI will shift trip planning and in-car experiences from static instructions to proactive recommendations, offering real-time prompts on when to leave, where to park, and which charger has the lowest queue. As voice-based interfaces become more common, travel will feel more personalized and intuitive. Carmakers are already experimenting with conversational interfaces and agent-based copilots, so the importance of accurate, real-time data will continue to grow.

Some cities are already using AI to improve planning and operations. Instead of relying on historical studies, they are using "digital twins" (live, AI-simulated models that allow real-time policy adjustments, such as changes to zoning or pricing). This helps decision-makers balance requirements such as supply and demand, commerce, sustainability, and livability with greater precision. As these tools mature, cities will depend on trusted partners for high-quality data that supports more informed decisions.

Curb space will transition from static parking spaces to dynamic, AI-managed zones that shift between delivery, pickup, and parking based on demand. As urban density increases and the curb becomes one of the most valuable resources for cities, static signage is no longer enough to manage it effectively. AI-enabled curb management will open new opportunities for cities, parking operators, logistics companies, and mobility providers.

Invisible transactions powered by computer vision will become more common, removing the need for drivers to tap, scan, or manually interact with payment infrastructure. Technologies like License Plate Recognition (LPR) and, in time, biometric vehicle identification will allow payments to occur automatically as part of the journey. These "zero-click" experiences will reduce friction for drivers and increase throughput for operators.

AI will also improve the reliability of physical infrastructure. Instead of being surprised when gates, EV chargers, or ticketing machines fail, operators will use predictive models to spot issues before they occur. This shift from reactive repair to proactive maintenance will reduce downtime, lower operational costs, and keep essential mobility services running.

AI-driven yield management will help operators make more efficient use of scarce mobility resources. Fixed pricing will be replaced by dynamic models that adjust based on real-time demand, similar to what is used in the airline and hotel industries. This approach will maximize revenue for operators during peak periods and increase utilization at quieter times, while giving users clearer incentives to change their travel patterns.

Matthew Fryer
Vice President,
Data & Artificial Intelligence

AI at a glance

Drivers

Trips are proactive
Real-time recommendations

Vehicles respond intelligently
Personalized, intuitive travel

Payments disappear
Journeys flow without friction

Cities

AI guides the system
Beyond static rules

Policy is simulated
Before rollout

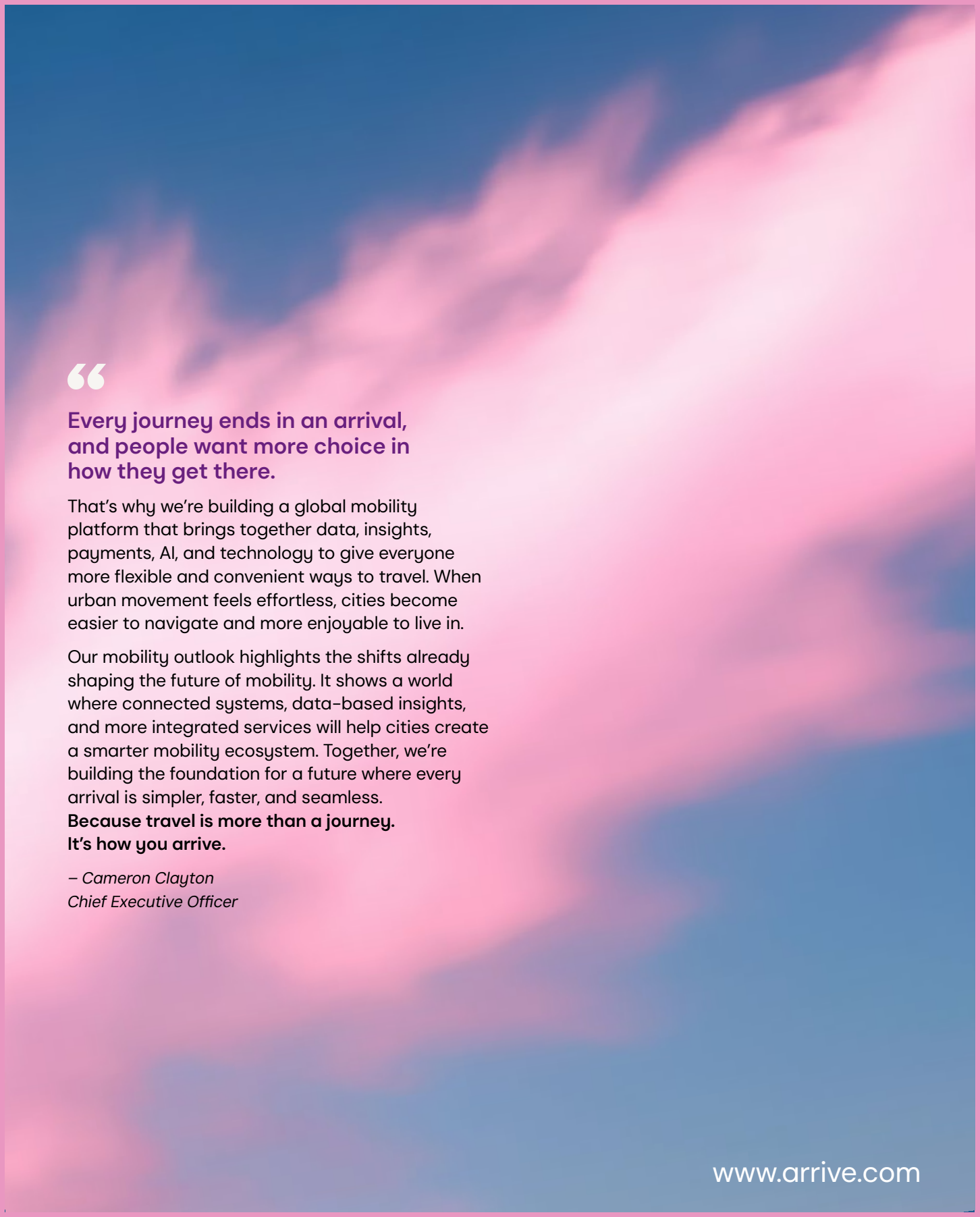
The curb adapts
As demand changes

Operators

Breakdowns are predicted
Resolved before failure

Pricing responds to demand
Dynamic, not fixed

Every asset works harder
Across the network



Every journey ends in an arrival, and people want more choice in how they get there.

That's why we're building a global mobility platform that brings together data, insights, payments, AI, and technology to give everyone more flexible and convenient ways to travel. When urban movement feels effortless, cities become easier to navigate and more enjoyable to live in.

Our mobility outlook highlights the shifts already shaping the future of mobility. It shows a world where connected systems, data-based insights, and more integrated services will help cities create a smarter mobility ecosystem. Together, we're building the foundation for a future where every arrival is simpler, faster, and seamless.
Because travel is more than a journey.
It's how you arrive.

– Cameron Clayton
Chief Executive Officer

www.arrive.com

Together, *we* make cities more livable

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Arrive

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