

EMERGING TECHNOLOGIES

WHITE PAPER



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SANDAG

Table of Contents

Introduction	1
Technology and Societal Trends Impacting Transportation	3
Mobility as a Service.....	4
Public transit.....	5
Micromobility.....	7
Ridehail.....	9
Carshare.....	11
Rideshare.....	13
Microtransit.....	14
Last mile delivery.....	16
MaaS in Action.....	18
Vehicle Technologies.....	20
Electric and Other Zero-Emission Vehicles.....	20
Automated Driver Assistance Systems.....	23
Fully Autonomous Driverless Vehicles.....	24
Vehicle Telematics and Cloud Connectivity.....	26
Connected Vehicles.....	26
Smart Cities and Transportation Systems.....	31
Policy Considerations	36
Appendix A – Summary of Technology Maturity, Challenges, and Risks of Vehicular Technologies	40
Appendix B – COVID-19 Considerations	43
Endnotes	45

Figures

- Figure 1.....1
- Figure 2..... 4
- Figure 3..... 4
- Figure 4.....6
- Figure 5.....6
- Figure 6..... 8
- Figure 7.....10
- Figure 8.....12
- Figure 9.....13
- Figure 10.....15
- Figure 11.....21
- Figure 12.....22
- Figure 13.....23
- Figure 14.....24
- Figure 15.....27
- Figure 16.....31
- Figure 17.....32
- Figure 18.....32
- Figure 19.....33
- Figure 20.....34

Introduction

The pace of technology is moving more rapidly than anyone could have predicted. In the early 20th century, it took nearly 75 years for technologies such as the telephone and household stove to reach market penetration (Figure 1). Today, consumer electronics are being adopted by the market at a far quicker rate. As of 2019, 96% of Americans owned a cell phone, and the share of Americans that own smartphones experienced an increase of 81% in less than 10 years.¹ This rapid adoption of technology has transformed transportation over the last decade enabling the proliferation of on-demand mobility services like Uber, Lyft, bike and scootershare, and fueling growth in e-commerce and the delivery of goods.

Technology Adoption in the U.S.

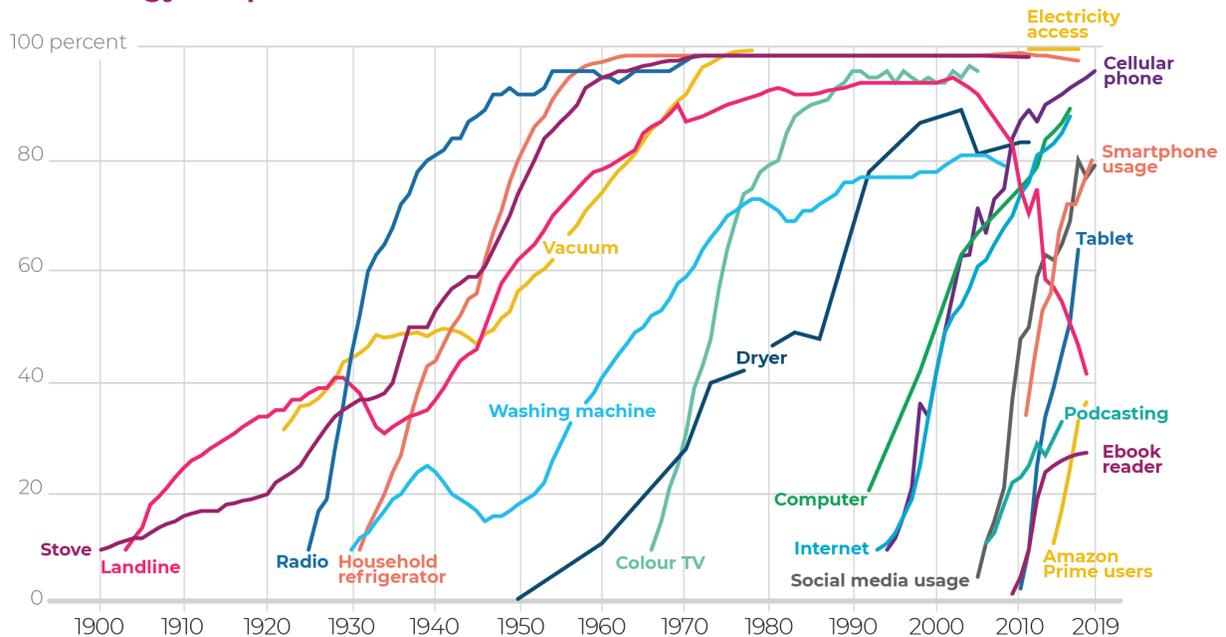


Figure 1: Technology adoption has rapidly increased over the last several decades
(Sources: Comin and Hobijn (2004) and others OurWorldInData.org/technology-adoption/)

The objective of this white paper is to present technological and societal trends that have the potential to radically change how the region's transportation system is used in the future, and to outline policy considerations that will enable the region to harness the benefits and reduce negative aspects of these trends. The SANDAG 5 Big Moves and the Vision for the 2021 Regional Plan capitalizes on technology to advance a transportation future that is fast, fair, and clean. However, without forward thinking planning and policy interventions, these technologies could move the region away from its objectives.

This white paper contains two sections:

1. Technology and Societal Trends Impacting Transportation

This section explores the rapid change in the transportation sector brought about by advancements in Information and Communications Technology (ICT) and vehicle technologies that have made way for several key mobility trends:

- a. Mobility as a Service (MaaS)
- b. Zero Emission, Autonomous, and Connected Vehicles
- c. Smart Cities and Transportation Systems

Although each trend is described separately, they are interrelated and their combined impact is significant, so it is critical to consider how they work together. For example, ICT is the backbone for MaaS and Smart Cities, which both rely on better connectivity and “Big Data.” Shared vehicle fleets that are electric, connected, and automated offer significant opportunities for mobility, safety, and sustainability. Smart Cities and intelligent transportation systems (ITS) provide the connected infrastructure, which ultimately supports the efficiency of a shared, electric, and autonomous transportation future.

2. Policy Considerations

This section explores the planning, policy, and investment considerations that can leverage these trends in support of the region’s goals. Technology is rapidly changing transportation, so policies and infrastructure investments will need to keep pace, requiring new ways of conducting business in partnership with the private sector. It is important to understand technology development and commercialization timeline so that planning and policy can keep pace. The appendix of this white paper includes a technology maturity matrix based on the best information available today.

Technology and Societal Trends Impacting Transportation

In recent years, nothing has had a more profound impact on transportation than advancements in ICT. The expansion of the internet and improvements in computing and wireless communications have made virtual activities a viable alternative to many physical activities, which have changed travel demand patterns. On one hand, ICT is reducing certain types of trips by enabling telework and social engagement online and by providing access to remote services like online education and healthcare. On the other hand, ICT has led to a significant increase in e-commerce, which may reduce some types of shopping related trips, but induces other types of trips – mainly freight and delivery. According to the U.S. Census Bureau, e-commerce sales accounted for 14% of all sales in 2020, up 3% from 2019.² In response to this shift in preference, traditional brick and mortar retailers are transitioning to an online presence, offering free shipping and next-day delivery to meet the growing demands of their customers. High volumes of goods and expedited delivery can lead to an increase in traffic volumes if done without consolidation and, by 2045, it is expected that freight volume will increase by more than 40%.³

New models for the delivery of goods are emerging. For example, Walmart partnered with Instacart for delivery, and Amazon Flex hires independent contractors to deliver packages in their personal vehicles.⁴ Similarly, online food delivery is also contributing to changes in travel demand. Third-party delivery platforms like GrubHub and UberEATS allow grocery stores and restaurants to increase their distribution. As demand for online goods and services continues to grow, companies are contemplating entirely new production and delivery methods that could improve logistics, like drones, delivery robots, and 3-D printing.

ICT has also provided a platform for the sharing economy to flourish, with innovative companies such as Airbnb fundamentally transforming the way consumers discover and purchase services. This is most notable in the transportation sector, where innovation is resulting in new shared mobility services that are being rapidly adopted in the market. In cities across the world, it is possible to rent shared cars, shared bikes, shared scooters, or shared rides on-demand through a mobile application. These innovative shared mobility services are providing communities with more travel choices and their popularity is beginning to challenge long held beliefs about the need to own a vehicle to attain personal mobility. The degree to which sharing a ride will trump individual automobile ownership awaits to be seen, but this paper contemplates the trend toward a future where mobility is used as a service.

Perhaps the greatest impact that ICT will have on the future of transportation is the Internet of Things (IoT). IoT is a term that refers to a network of ordinary objects, like household appliances, cars, streetlights, and traffic signals, that are embedded with internet-connected electronics, sensors, or software that can capture, exchange, and receive data.⁵ The rapidly increasing number of connected devices and systems present significant opportunities for transportation. Data and connectivity enable Smart Cities and ITS that offer a host of benefits such as reliability, operational efficiency, cost effectiveness, safety, and improved asset-management and planning, all of which are discussed in the “Smart Cities and Transportation Systems” section of this paper.

Mobility as a Service

Mobility as a Service (MaaS) enables a transition from the current paradigm, where vehicle ownership is all but required, to a new mobility paradigm, where people have access to an array of transportation services, and mobility can be purchased as needed.⁶ This new model would be competitive with the private automobile providing convenient options for all trip types without the cost and burden of car ownership. Proponents of MaaS imagine an ecosystem where public and private operators cooperate and where consumers have access to all options in a single application. Rather than having to locate, book, and pay for each mode of transportation separately, an integrated mobile application aggregates and coordinates data from all service providers so users can simply plan and book door-to-door trips based on real-time conditions and user preferences (e.g., time, convenience, cost) (Figure 2). While shared mobility is not a new concept (e.g., transit, carpool, vanpool), technology has allowed for an explosive growth and variance in business models, blurring the line between public and private transportation.

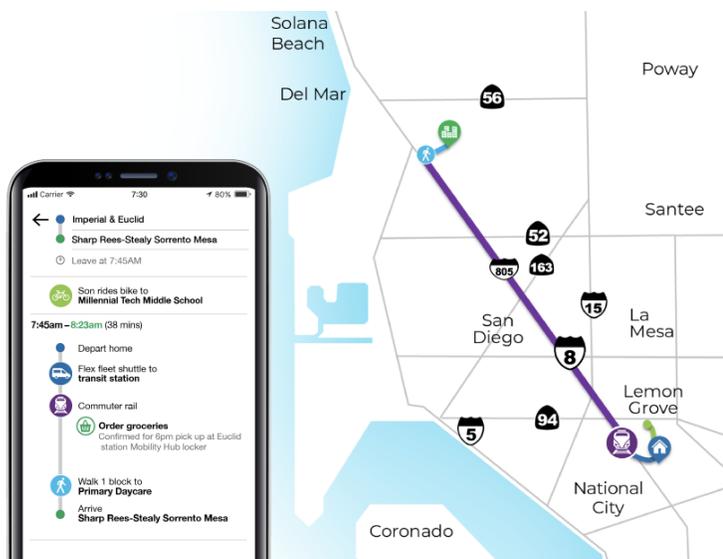


Figure 2: MaaS provides an integrated platform for trip planning and booking across modes

The SANDAG vision for the 2021 Regional Plan leverages advancements in technology and innovation to improve the efficiency and resiliency of the transportation system. A part of this new vision, SANDAG anticipates the deployment of Flexible Fleets which are on-demand, shared mobility services that provide a spectrum of mobility options and vehicles for all types of trips, reducing the need to own a car (Figure 3). Flexible Fleets provide a last-mile connection or fulfill a complete trip.



Micromobility

Small, low-speed vehicles like bikes, scooters, and other rideables



Ridehailing and carshare

On-demand rides that can be requested from a driver or as a short-term vehicle rental



Rideshare

Shared rides between passengers with similar origins and destinations



Microtransit

On-demand shuttle services that provide shared trips from door-to-door



Last mile delivery

Delivery of a range of goods using new approaches like e-bikes, drones, and automated vehicles

Figure 3: Flexible Fleets



Public transit

Public transit, the original shared mobility service, is the backbone of MaaS. High-frequency transit continues to be the workhorse and the most efficient way to move many people along popular routes from common origins and destinations. Other shared mobility services can complement public transit by serving different trip types and needs. Research conducted by the American Public Transportation Association (APTA) shows that the more people use shared modes of transportation, the more likely they are to use public transit, own fewer cars, and spend less on transportation overall.⁷

Public transit systems across the country are experiencing a technological revolution that is resulting in improved operations and user experience. Leading agencies are using ICT to improve fare collection, scheduling, and routing of transit services. Agencies can track the location of their buses and trains, as well as how many people are riding a particular route in real-time. This information can be utilized to better predict how many transit vehicles, or the size of transit vehicle needed on given routes at different times of the day to meet demand. Real-time information enabled by ICT also improves the user experience by providing riders with accurate information to support trip planning and trip reliability (Figure 4). The post-COVID-19 environment is proving the importance of the flexibility that technology and new service models provide.

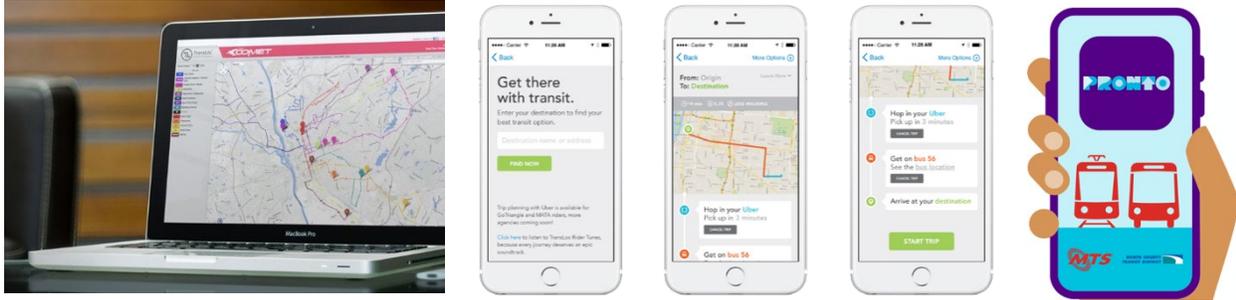


Figure 4: Technology improves transit operations and the customer experience
(Sources: TransLoc, San Diego Metropolitan Transit System)

The spectrum of public transportation vehicles and features also is changing as a result of technology – for example, the implementation of demand-responsive transit with smaller vehicles along less-traveled routes where high-frequency transit is not warranted or is too costly to operate (Figure 5). Several transit operators are exploring the integration of on-demand transit services, or microtransit, to help serve areas that are hard to reach through traditional fixed-route services and reach new markets of riders.

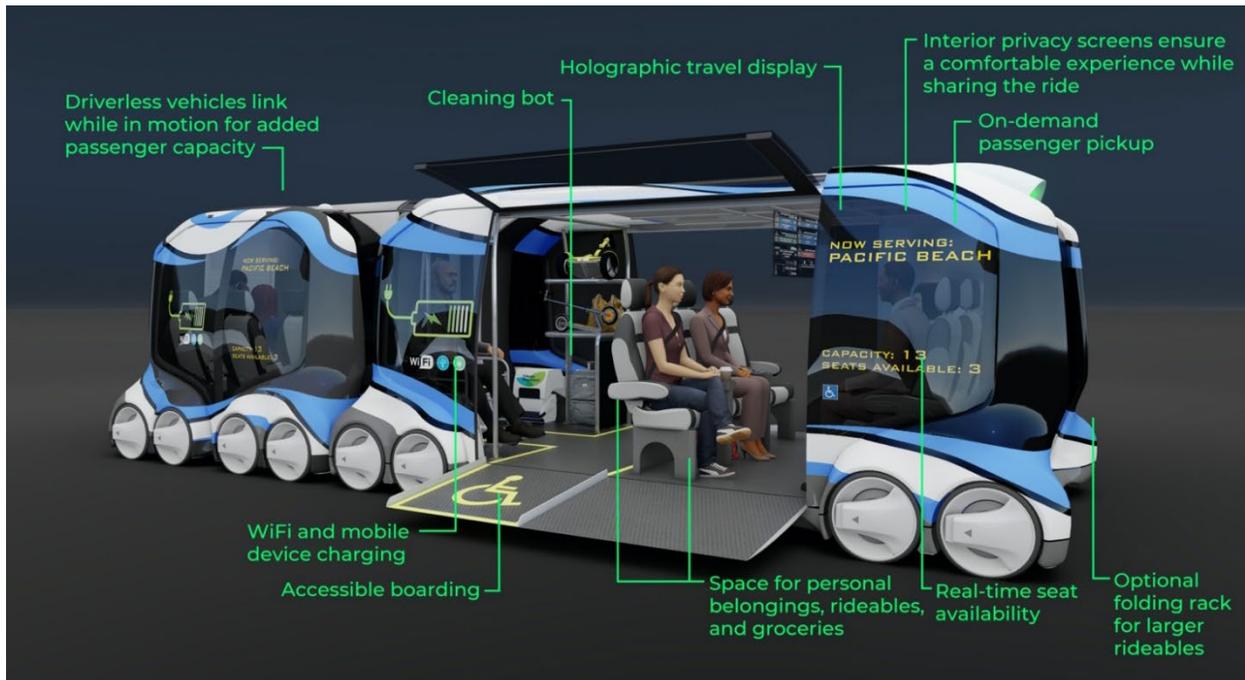
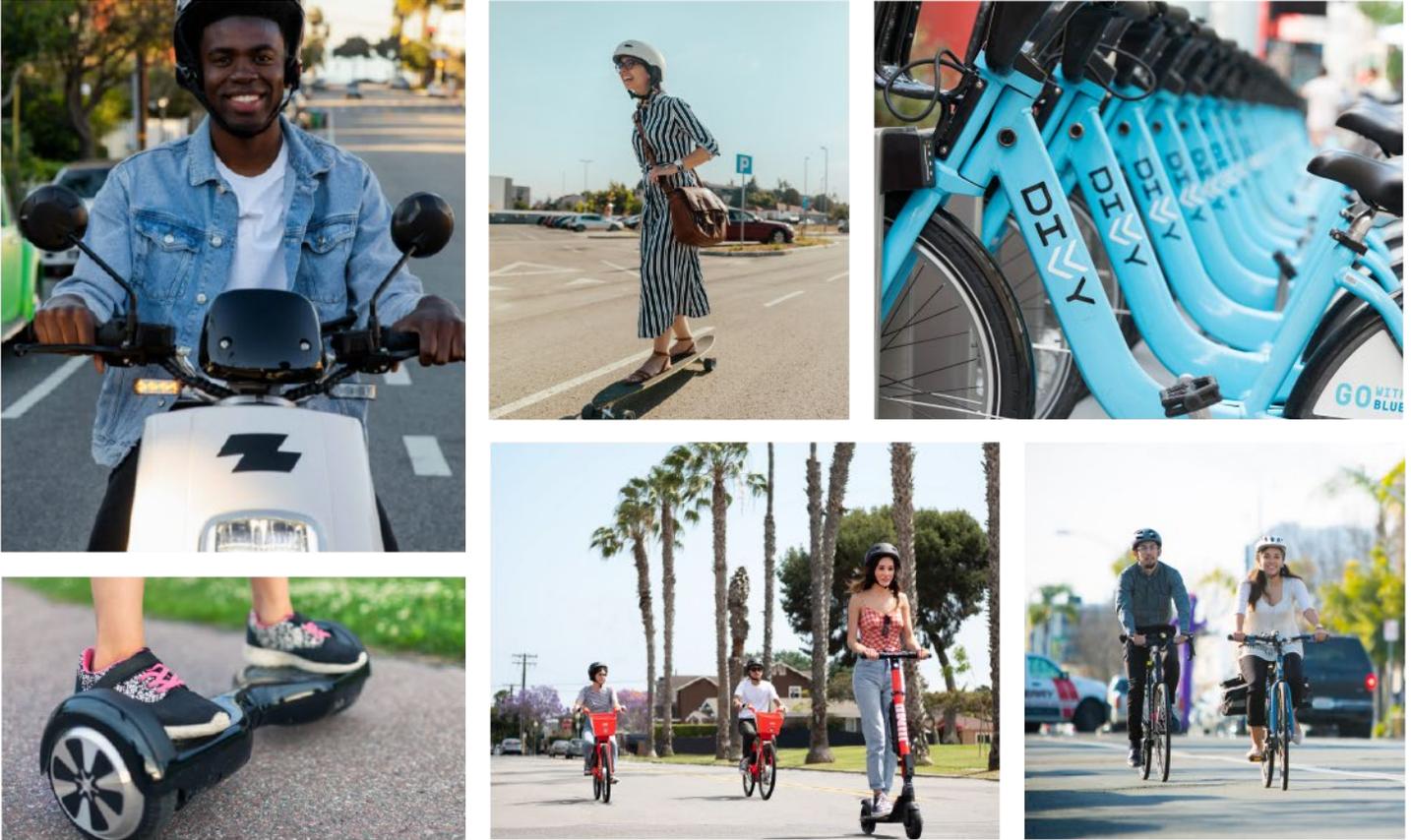


Figure 5: Smaller, right-sized vehicles will integrate with bus and rail service to provide on-demand trips



Micromobility

Micromobility services utilize small, low-speed vehicles to provide a healthy and sustainable alternative to driving. Micromobility devices can be personally owned or part of a shared fleet and can include bikes, scooters, and other rideables. Micromobility services are generally best suited for short trips around a community. Although, electric-operated services make it much easier to travel longer distances and tackle challenging terrain. The most commonly used shared micromobility services are bikeshare and scootershare. The National Association of City Transportation Officials (NACTO) estimates that people took 136 million trips on shared bikes and scooters in 2019, a 60% increase from 2018 (Figure 6).⁸

Shared moped scooters have been operating in Europe for years, companies like Scoot and Revel now offer on-demand access to shared electric mopeds in some U.S. cities. Monthly subscription-based options like Zebra provide the reliability of a personally owned moped without any of the maintenance hassle. In the future, we anticipate micromobility services may evolve to include autonomous single-user pods, hoverboards, and more.

Shared Micromobility Ridership Growth from 2010–2019, In Millions of Trips

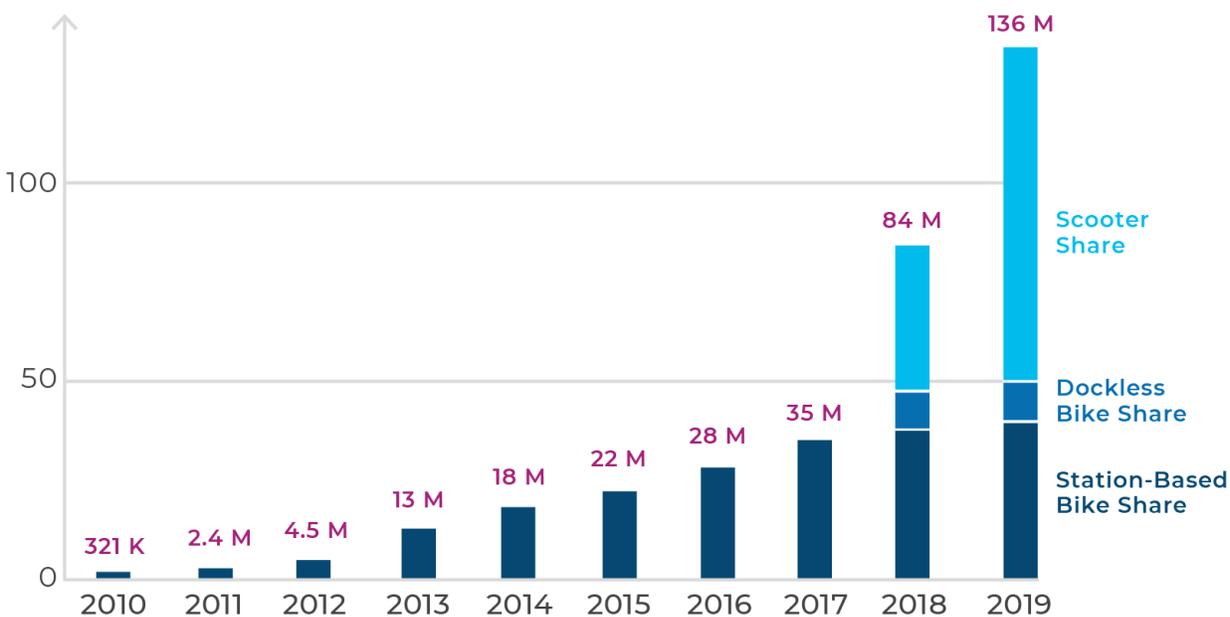


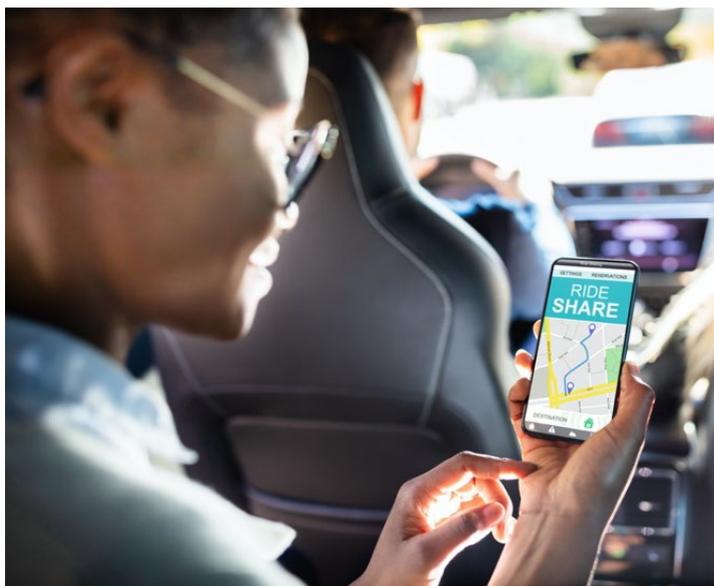
Figure 6: Shared micromobility ridership growth from 2010 – 2019 (Source: NACTO)

Personally Owned Electric Bikes and Rideables

While bikeshare companies, such as JUMP, introduced San Diego and other U.S. cities to electric-assist cycling, there has been a remarkable increase in personally owned electric bike (e-bike) activity during the COVID-19 pandemic as people have sought ways to increase the cycling “reach” of recreational trips. E-bike sales boomed in 2020, with manufacturers struggling to keep up with demand. E-bike owners have been found to bike more frequently and for longer distances than conventional cyclists.⁹ A scoping review of recent research conducted between 2017 and 2019 across 42 studies examining the impact of e-bike use on other travel modes revealed that the proportion of car trips substituted after people bought e-bikes ranged from 20% to as high as 86%.¹⁰ E-bike adoption can contribute at some level to reducing vehicle miles traveled (VMT) and greenhouse gas (GHG) emissions while making physical activity much more approachable, particularly to seniors or health patients needing exercise as prescribed as a necessary part of disease recovery.

Electric rideables, also known as personal transporters, offer people a convenient way to travel locally at speeds of up to 16 mph. Vehicle options include electric skateboards, one-wheeled boards, and self-balancing unicycles. The compact nature of the devices makes them easier to carry aboard transit or stow away at home, work, or school. However, dedicated infrastructure is needed to support safe operations of new electrified modes.

Ridehail



Ridehail services allow users to request a ride in real-time using a mobile application. The service links passengers with available drivers based on trip origin and destination, identifying the quickest route and facilitating trip payment.

Ridehailing services (e.g., Lyft and Uber) allow users to request rides from a hired driver. They are distinctly different from taxis in that they must be “e-hailed.” In California, these services are classified as Transportation Network Companies (TNCs). Ridehailing service offerings are changing rapidly (Figure 7). In the San Diego region, passengers can hail

discounted shared rides (commonly referred to as “pooled” rides), solo rides, luxury vehicle rides, or a shuttle style service where the user walks to a particular corner and is dropped at a spot nearby their destination. Uber and Lyft have also introduced monthly subscription services in some markets, which function similarly to monthly transit passes.

In less than a decade, Uber established operations in 10,000 cities globally providing over 18.7 million rides per day in 2019.¹¹ However, to date, there’s insufficient evidence to indicate how widely available and equitable ridehailing services really are. To better understand the impact of TNCs on California cities, SANDAG partnered with the Southern California Association of Governments (SCAG), Metropolitan Transportation Commission (MTC), and San Francisco County Transportation Authority (SFCTA) to conduct a travel survey of TNC users in 2019. The study found that TNC trips make up an average of 1% of all trips occurring in the three regions studied. In the San Diego region, almost 70% of users reported being white indicating less adoption of TNC users by minority groups, particularly those of Black and Asian ethnicity. However, higher TNC use was reported by low-income users in the San Diego region suggesting that ridehailing services are filling a gap in the transportation system.



Ridehail

Ridehailing has expanded rapidly within the U.S. — Uber and Lyft are now available in over 900 cities compared to 37 in 2012.

UBER AND LYFT
COMBINED

103 million

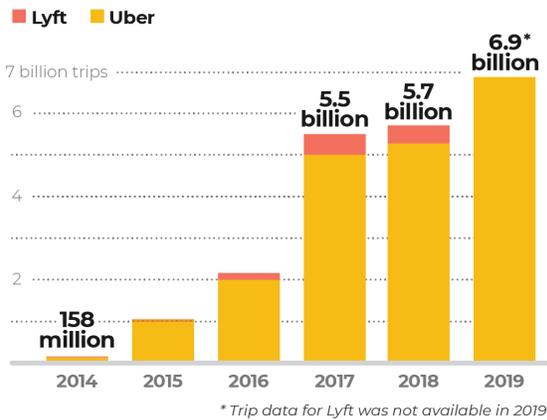
global users
2019 estimates

4.3 billion

miles in California
as of 2018

Rapid growth in rides

For every trip taken in 2014, about 44 trips were taken in 2019

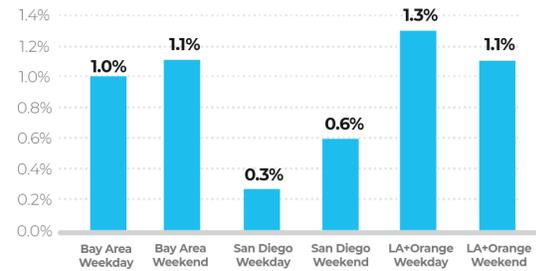


Based on global user trends, ridehailing is projected to increase from **35.6 million users** in 2016 to **72.4 million users** in 2022

Ridehailing in California

Ridehailing is widely available in California. The 2019 Transportation Study found that ridehailing trips account for approximately 1% of all trips happening in the San Diego, Los Angeles, and Bay Area regions.

TNC Mode Share



Sources: Business of Apps, Business Insider, CA Air Resources Board, Curbed San Francisco, Forbes, GeekWire, Lyft, MacRumors, McKinsey & Company, Palo Alto Online, Statista, TechCrunch, Transportation Reliability Sustainability Center, Uber

Figure 7: On-demand ridesharing is growing rapidly in the United States

Carshare

Carshare provides access to vehicles as short-term rentals 24 hours a day, seven days a week. Vehicles can be found within a specified service area, at transit stations, or other locations, and are accessible through a smartphone app or the provider's website. Rental rates generally include insurance,



parking, and fuel or vehicle charging costs. Different carshare models exist. **Round-trip** carshare services allow users to reserve and return a vehicle to the same designated parking spot (e.g., Zipcar). Alternatively, **one-way** carshare allows users to pick up a vehicle from one designated parking location and return it to another designated carshare parking spot. Depending on a city's carshare regulations, parking locations may be on or off-street (e.g., Zipcar, Gig). **Free-floating** carshare services allow members to pick up and park a vehicle anywhere within a designated service area. Lastly, **peer-to-peer** carshare services such as Getaround and Turo allow private vehicle owners to rent their car by the hour or day to others within their community, adding another mode to the supply side of the transportation system. In San Diego, Daimler shuttered their car2Go carsharing service and only roundtrip and peer-to-peer carshare services are available in the region via Zipcar, Getaround, and Turo.

Carshare providers are being encouraged to electrify their fleets in order to support cities with their sustainability goals. For example, BlueLA is an all-electric carshare service, consisting of one self-service kiosk and five parking spots, each with an electric charger, where members collect and drop off vehicles.¹² Community CarShare in Sacramento is a free, membership-based service that residents can use to run errands, travel to appointments, and take local trips. Residents can use the zero-emission vehicles free of charge for up to 3 hours per day.

Globally, the carsharing market is much more popular in Asia and Europe although the market in the United States has grown steadily since 2006 with well over 2.1 million carshare members as of 2018.¹³ Most recently, several carshare providers have faced increasing competition from other shared modes like on-demand rideshare and shared micromobility, which has resulted in several companies scaling back their operations in major cities throughout the United States, favoring markets abroad. As a result, carshare service operators are looking for ways to increase the use of vehicles, which is leading to innovative dual-use service models. For example, Green Commuter, a Los Angeles-based operator, offers a fleet of electric vehicles to be used for commuter vanpooling during commute hours, and then reserved as carshare vehicles or used as corporate fleet vehicles during the off-peak period. Alternatively, Zipcar is now targeting commuters by offering monthly leases on its fleet of shared vehicles for weekly access between 5 a.m. Monday and 7 p.m. Friday, which come with free maintenance, gas, and parking.

 **Carshare**

In 2006, more than 11,000 vehicles were shared worldwide by nearly 350,000 members. By 2018, carsharing was operating in 47 countries, 6 continents with approximately 32 million members.

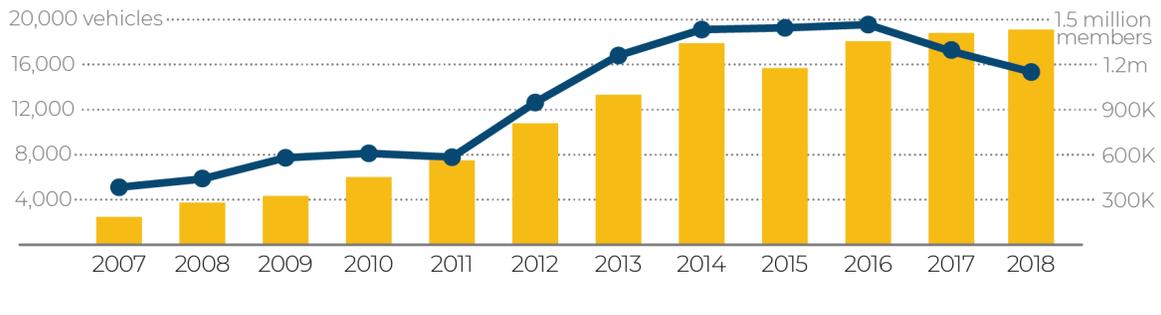
IN THE U.S.
as of January 2018

15,224
available carshare vehicles

1.44 million
total carshare members

Steady growth in the U.S. for a decade

● Carshare vehicles ■ Carshare members



1 carshare vehicle replaces up to 13 private vehicles 

Sources: Boston Consulting Group, Innovative Mobility Carsharing Outlook, Transportation Sustainability Research Center

Figure 8: Carshare growth is helping to replace personal vehicle use

Rideshare



Rideshare services link drivers and passengers that are headed in a similar direction and can share the ride in a vehicle. Traditional rideshare programs include carpool and vanpool services that rely on acquaintance-based or organization-based ridematching. These types of services focus on ridesharing among commuters to reduce congestion during peak travel hours and reduce parking demands at employer sites. In FY 2019, SANDAG's Regional Vanpool Program contributed to VMT reduction of approximately 93 million miles.

In recent years, technology has enabled the use of app-enabled rideshare services like dynamic carpooling and pooled ridehailing or TNC services. This technology enables passengers to conveniently and readily match with a driver headed to a similar destination at any time of the day, helping to expand the ridesharing market beyond traditional commute trips. **Dynamic Carpooling** is an application-enabled service that conveniently matches drivers and passengers in real time, filling empty seats and reducing congestion and auto emissions. Dynamic carpooling applications facilitate cost sharing among travelers but prohibit drivers from making a profit. Examples of dynamic carpool services that are becoming popular in California are Scoop and Waze Carpool.

In 2017, TNC companies Uber and Lyft started providing shared rides, otherwise known as pooled ridehailing. **Pooled ridehailing** services, like uberPOOL and Lyft Shared, match multiple passengers with similar origins and destinations with the same driver. To incentivize pooled ridehailing, TNC services offer shared rides at discounted rate compared to the cost of a regular ridehailing trip. While recent research has indicated that ridehailing has led to increased congestion, VMT, and greenhouse gas emissions in major metropolitan areas, this form of ridehailing may lead to increased vehicle occupancies that may mitigate some of the negative impacts of ridehailing trips.¹⁴ The 2019 Transportation Study found that opportunities exist to increase the rideshare market in the San Diego region with just over 20% of all ridehailing trips taken using the pooled ridehailing option (Figure 9).

Ridehailing Activity in California

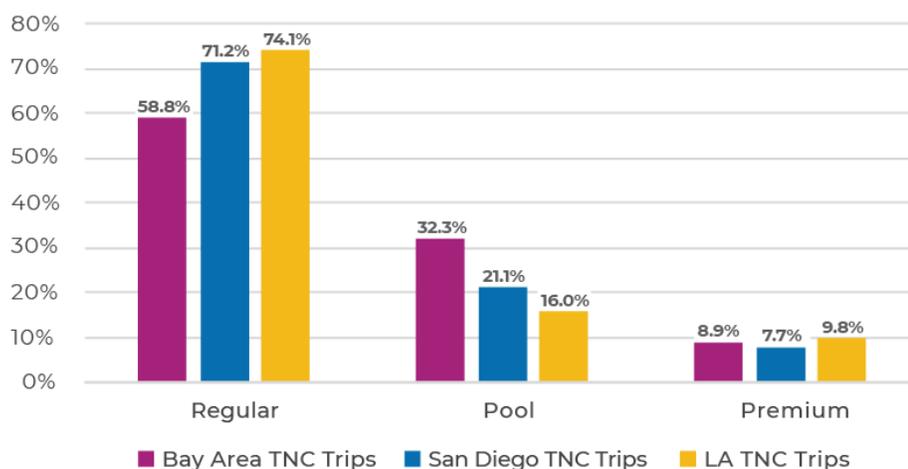


Figure 9: 2019 Pooled trips account for a small portion of TNC trips ridehailing trends in the San Diego, Bay Area, and Los Angeles

Microtransit

One new mobility option that is being widely integrated into public transportation systems is microtransit. Microtransit is an on-demand shuttle service that carries between 5 and 12 passengers and typically operates along a dynamically generated route or within a defined service area. This technology-enabled service allows users to reserve a ride ahead of time or on-demand and may be ideal for ex-urban and suburban settings where there isn't sufficient demand for a fixed-route service. In communities across the globe, microtransit has successfully replaced underperforming transit routes with a convenient option that provides a high level of service to users.

Microtransit services vary in their business models and offer different solutions based on need. TransLoc, a subsidiary of Ford Mobility, offers on-demand technology software to optimize existing transit services to enhance vehicle routing; fleet management; and on-demand reservations. Via, on the other hand, is an example of a mobility service provider that directly partners with public agencies to plan and implement a turnkey on-demand solution within a community. Via partners with cities, organizations, and transit agencies to integrate their on-demand technology and directly operates a fleet of microtransit vehicles. This enables agencies that do not already have a fleet of existing vehicles to test and pilot on-demand pilots in their communities.

In August 2019, SANDAG partnered with the North County Transit District and the City of Carlsbad to pilot the first microtransit pilot of its kind in the region. The Carlsbad Connector offered an on-demand shuttle connection for commuters traveling between the Carlsbad Poinsettia COASTER station and the Carlsbad Palomar employment center. The pilot provided weekday shuttle service for commuters between August 2019 and July 2020. The pilot was placed on hold during the pandemic due to low ridership, but the service is expected to return later in 2021 as employees return to work.



Carlsbad Connector was a microtransit pilot deployed by the City of Carlsbad, North County Transit District, and SANDAG to provide on-demand connections between Carlsbad-Palomar employment center and the COASTER rail service.

Some microtransit service providers are fulfilling short-distance trips within smaller service areas using six-passenger Polaris GEM **neighborhood electric vehicles (NEVs)** that can be hailed using a mobile app or by waving down a vehicle within the fleet's operating area. In 2019, the City of Oceanside partnered with Ford X to launch HOOT Rides, a NEV shuttle proof of concept. The all-electric shuttles served a three-mile service area around Downtown Oceanside, providing residents and visitors with an affordable and convenient connection to the nearby Oceanside Transit Center and community events such as the Sunset Market street fair. The Free Ride Everywhere Downtown (FRED) has been operated by Circuit in San Diego since 2016. FRED is typically used to fulfill trips under two miles and reported serving over 150,000 riders per year in 2019. A recent case study reported that nearly one in three respondents used FRED to connect to public transit.¹⁵

Today, there are more than 100 microtransit deployments across 35 states in America.¹⁶ In 2021, Arlington, Texas expanded its microtransit deployment to city-wide service with 70 vehicles. The City of Austin put forward the first transit ballot measure in the nation to specifically fund microtransit and expand its microtransit service to 15 neighborhoods.

A study by Frost & Sullivan predicts that microtransit shuttles will account for 50% of the global shared mobility market by 2030.¹⁷ Although much of this growth is focused on Europe and China, significant growth is predicted in the United States as well.



Figure 10: Microtransit comprises some of the shared mobility service pilots being deployed across the United States



Last mile delivery

Last mile delivery refers to the direct connection between regional freight distribution centers and local destinations such as households, package delivery lockers, among other locations. About 80% of Americans now shop online and customers have come to expect prompt delivery times and high-quality service.¹⁸ Growth in e-commerce has led to an increased demand on companies that provide last mile delivery services. Third-party delivery platforms like GrubHub, PostMates, and Uber Eats enable grocery stores and restaurants to increase their distribution by delivering goods in smaller vehicles or on bikes to a customer's home, work, or smart locker. Some last mile delivery services can consolidate trips by carrying passengers and goods at the same time.

Companies are also integrating the use of autonomous solutions like delivery bots, autonomous vehicles, and aerial vehicles as a cost-effective and low-emission option. Ford recently tested autonomous pizza delivery with Domino's Pizza and is now testing package delivery with a bot named Digit. Robotics company, Nuro, offers autonomous grocery delivery service in Houston, Texas, and recently received the required permits to operate in the state of California.

The U.S. Census Bureau of the Department of Commerce estimates that the e-commerce retail market has steadily grown between 10 – 15% annually. This growth in e-commerce has led to increased demand on last mile delivery services, in particular the use of autonomous solutions like drones as a cost-effective and low-emission option. Advanced air mobility (AAM) refers to the use of aerial drones or unmanned air vehicles (UAVs) to transport people and goods. AAM vehicles use GPS and sensors to fly autonomously, providing a new transportation option in both rural and urban environments. This industry is rapidly growing with well over 70 manufacturers worldwide including Boeing, Airbus, and Bell Helicopters. NASA's Urban Air Mobility Market Study indicates that over a \$1 billion investment has been made in the advanced air mobility industry as of 2018, resulting in a market that may likely be commercially viable as early as 2028. Market research firms estimate that the autonomous last mile delivery market in the U.S. is projected to grow at an annual rate of almost 25%, valued at \$40 billion by 2030.¹⁹

While use cases for drones vary widely, transportation and logistics companies, such as Amazon, Walmart, and UPS, have taken interest in AAM as a cost-effective and sustainable way to transport goods. In 2019, FedEx launched a small package, small drone delivery pilot program for last mile delivery in Tennessee. Walmart recently announced a partnership with Flytrex to deliver grocery and household essential items using automated drones. Many of these innovations also are happening in our region. As part of the Federal Aviation Administration's Integrated Pilot Program, the City of San Diego partnered with the Chula Vista Police Department to use drones to respond to 911 calls and provide situational awareness for arriving police officers. The City of San Diego also partnered with Uber Eats and local medical organizations to test delivery of food and medical supplies.



The growth of e-commerce has led to **increased demand** on last mile delivery



The autonomous delivery industry is projected to be valued at **\$40 billion** by 2030



The autonomous delivery market is growing rapidly at an annual rate of **24%**



Advanced air mobility is estimated to be commercially viable by **2028**

MaaS in Action

The influx of public-private partnerships (P3s) and the convergence of shared mobility services make MaaS more of a reality. Some estimates project that MaaS could reduce auto sales by more than 30% by 2030 and many major auto manufacturers are pivoting to become mobility service providers.²⁰ Ford Mobility LLC was developed in 2016 to expand Ford's business model

and invest in new mobility and technology. In recent years, Ford has acquired several technology companies that will enable MaaS offerings such as on-demand technology provided by TransLoc, Autonomic's transportation mobility cloud platform, and a partnership with autonomous vehicle technology provider Argo AI. Hyundai also recently announced Strategy 2025, a new roadmap to guide the company's transition to becoming a smart mobility provider. Hyundai's roadmap includes plans for a wide range of products beyond vehicle manufacturing such as UAVs, robotics, and last-mile delivery.



SANDAG Oceanside Mobility Hub Concept portrays a MaaS landscape

MaaS Opportunities and Challenges

Shift from one commute mode to multiple: The surge in app-enabled mobility services has created expectations for more personalized transportation on demand. This growing comfort with using different modes of transportation for different types of trips provides a significant opportunity for MaaS. However, a fully integrated transportation system will require operators to share information with one another and with users which is not occurring widely today.

Decreased vehicle ownership: Shared mobility user surveys indicate that access to these services decreases their likelihood of purchasing a vehicle and increases their likelihood of selling a vehicle.

Decreased demand for parking; increased demand for curb space: Fewer privately-owned vehicles means less demand for traditional parking. However, these services are impacting curb space. Cities are rethinking how curb space is used and considering opportunities for using data and technology to manage the curb flexibly to meet changing demands for both passengers and commercial deliveries throughout the day and night.

Limited access for the unbanked, those without smartphones and people with disabilities: MaaS requires credit/debit for payment and a smartphone for accessing the service, which presents limitations for the unbanked and those without a smartphone. Not all privately operated mobility services offer accessible vehicles for people with disabilities. Further, most private mobility service providers are not sharing data about how their services are used so it is unknown if disadvantaged communities are benefiting from these services. Opportunities exist to provide accessible trip planning kiosks in mobility hubs to make MaaS available to everyone. Public-private partnerships can bring more accessible mobility on demand services to people with disabilities.

Shared mobility trips are replacing other types of trips: Shared mobility services tend to concentrate in urban areas, and research shows that these services can replace transit, bike, and pedestrian trips, and they can induce demand for trips that would not have been taken if the service wasn't available. The SANDAG 2019 Transportation Study found that almost 8% of TNC trips in the San Diego region would not have occurred if TNCs were not readily available, and TNC trips are largely replacing trips that would have occurred using active transportation and taxis. The study also found that the ridehailing services in the Los Angeles and Bay Area are replacing trips that would have otherwise been taken on transit.

VMT impacts of some shared vehicle services are unclear, and pricing will be an important lever to achieve reductions: Data access restrictions make it challenging to understand the impacts of shared mobility on overall VMT. Studies from the University of California, Davis and the APTA link ridehailing services to declining transit ridership, as well as increases in VMT and congestion.²¹ The 2019 Transportation Study found that ridehailing services are rarely used to connect to transit services and could be contributing to higher VMT in the region. Data from TNC drivers in the San Diego region implies that over 40% of their VMT is attributed to deadheading, the period of time in which there are no passengers in the vehicles.²²

Transition to zero emission vehicles (EVs): As MaaS continues to build momentum, the use of EVs for all motorized mobility services will be necessary to reduce GHG emissions. To address this, the California Air Resources Board has established the Clean Miles Standard to reduce GHGs from TNCs and transition to 100% EVs by 2030.

Pricing policies and mechanisms should be updated and integrated: People are growing accustomed to using shared modes of transportation and are more comfortable sharing a ride for the right price. This cultural shift could lead to an increase in ridesharing with the right incentives and disincentives in place. Encouraging more pooled trips that reduce VMT will require an integrated and dynamic pricing system. Fare policies should maximize road-usage by moving the most people with minimal roadway impact and incorporate strategies to improve equity. This includes providing monetary incentives to transfer to higher-capacity modes at high-demand times.

Numerous P3s: the line between public and private transportation has blurred and across the world, a mix of publicly and privately operated mobility services are demonstrating how providers can come together to better meet the needs of consumers and provide equitable service. Flexible microtransit service is now operating in 35 states in the U.S providing service to areas that are difficult to serve with traditional fixed-route public transit. Auto manufacturers are getting into the mobility business preparing to offer mobility as a service in the future.

Uncertainty about service provider participation: Mobility service providers have been reluctant to share data and integrate into apps along with competitors. Many private mobility providers currently offer a closed-system and encourage customer loyalty, a barrier to seamlessly integrating multiple providers to offer MaaS.²³ The reality of a single platform to locate, book, and pay for trips across multiple branded services remains elusive.

Vehicle Technologies



*Zero Emission Bus in San Diego's Barrio Logan community and NEV shuttles in Downtown San Diego
(Sources: San Diego Metropolitan Transit System and Circuit)*

Vehicle technologies are rapidly advancing, with vehicles becoming increasingly safer, lighter, and more fuel efficient. New and diverse vehicle types are emerging in the market that meet the needs of specific types of trips, such as longer-distance commuting with multiple passengers, very compact alternatives for solo trips and last mile delivery that are shorter distance. This section of the paper explores the trend toward vehicles that are zero-emission, autonomous, and connected. These technologies are addressed independently, given their unique applications, market forces, and policy considerations, although their futures are predicted to be intertwined given the synergies and benefits of combined application. For example, electric, automated, and connected vehicles can be smaller and lighter, requiring less space for parking. This trend enables cities to rethink the way in which the public's right-of-way for streets, sidewalks, and curb spaces are allocated, and can potentially help to facilitate a more comprehensive implementation of local Complete Corridors that provide safe space for everyone and every mode.

Electric and Other Zero-Emission Vehicles

Zero-emission vehicles (EVs), like plug-in electric vehicles (PEVs) and hydrogen fuel cell electric vehicles, play a big role in how countries, states, and local governments plan to cut GHG emissions and improve air quality.²⁴ Technology innovations are underway across all vehicle types from passenger vehicles and vans to buses and trucks.

PEVs have gained the most traction amongst consumers and businesses so far, though it is still a nascent market. Major auto manufacturers released their first EV models in 2010, as of 2021 there are over 66 EV models available in California, and 70 more models are planned by automakers in the next few years. The welcomed expansion of EV infrastructure has led California to be the state with the most EVs and EV charging stations. As a result of these new and improving technologies, Veloz reports that in 2019, California was home to nearly 150,000 EVs, comprising about 7% of the approximately 2.1 million EVs nationwide.^{25 26 27}

This growing EV market is creating a massive need for new charging infrastructure and hydrogen fueling stations across the transportation network. Governments at all levels are taking steps to ensure the success of EV markets.²⁸ More recently, Governor Newsom set an additional goal that the state must have 100% of new car (light duty) sales be EVs by 2035.^{29 30} The California Air Resources Board called for an increase in EVs statewide by issuing the Innovative Clean Transit Regulation, which requires transit agencies in California to transition to 100%.^{31 32}

Regionally, SANDAG and other public agencies have ramped up efforts to increase adoption of EVs to exceed the region's fair share of the goals set by the State. According to the DMV Data Portal, in 2019, San Diego County had 44,168 EVs and 2,152 public EV chargers.³³ Figure 11 shows vehicle and infrastructure progress towards meeting the region's share of the 2025 and 2030 state goals.

SANDAG is implementing an EV charger incentive program in partnership with the California Energy Commission, San Diego County Air Pollution Control District (APCD), and Center for Sustainable Energy known as CALeVIP. To complement this and further reduce GHG emission, SANDAG has proposed expanding the EV charger incentive program and adding an EV incentive program in the 2021 Regional Plan. Combined, these EV programs would support the installation of about 33,000 EV chargers and 100,000 EVs by 2035. Also, SANDAG has partnered with SDG&E, APCD, and other EV stakeholders to establish the Accelerate to Zero Emissions Collaboration (A2Z) to reduce barriers to EV adoption, increase private investment, and generally accelerate EV adoption and EV infrastructure deployment within the region.

In the U.S., the multi-state ZEV Memorandum of Understanding was signed by nine governors (California, Connecticut, Maryland, Massachusetts, New York, New Jersey, Oregon, Rhode Island, and Vermont), which commits to having 3.3 million EVs on the road by 2025.³⁴ Together, these states represent about 30% of all new vehicle sales in the U.S.³⁵ Additionally, governments in many countries – including China, France, Germany, Italy, Japan, Norway, South Korea, Spain, Sweden, the United Kingdom, and the United States – have enacted policies encouraging PEV sales.³⁶

Concurrent with government action, vehicle manufacturers have taken notice of government

commitments and are positioning themselves as future market leaders in EV transportation.

Globally, the private industry has invested \$460 billion into EVs.³⁷

Most recently, GM announced that it will only sell EVs starting in 2035 and beyond.³⁸ Volvo has committed to

produce a zero-emission version of each of its models by 2030.³⁹

Volkswagen has committed \$40 billion by 2022 to PEVs, AVs, and new mobility services.⁴⁰

Daimler AG is spending more than \$11 billion to bring at least ten new PEVs to market under its new Mercedes-Benz EQ sub-brand by 2022.⁴¹

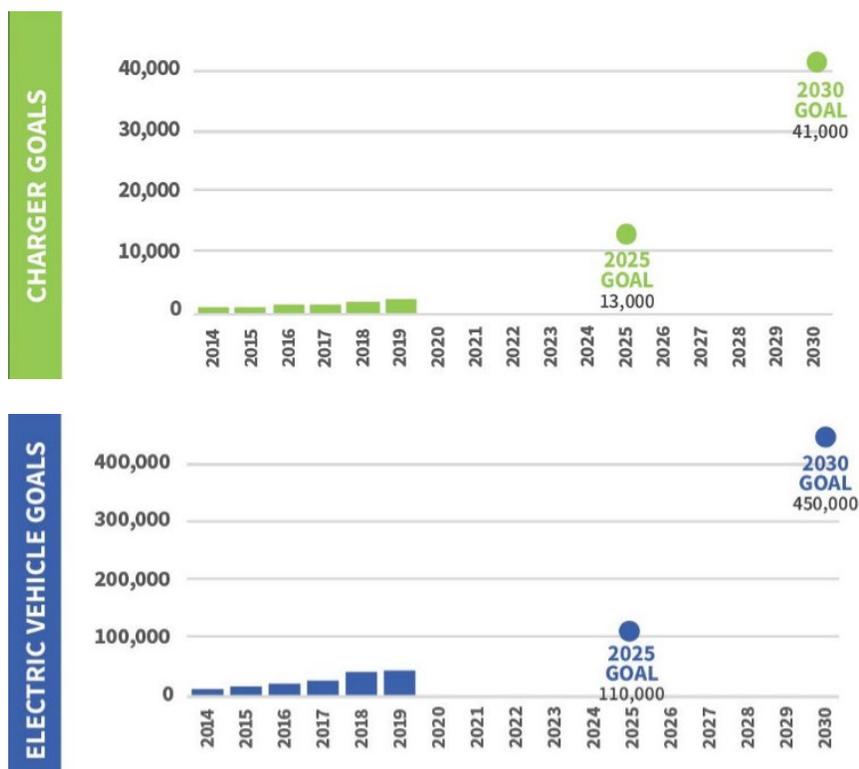


Figure 11: Electric Vehicle Progress and Charging Station Progress



Figure 12: In-Road Inductive Charging and Static Inductive Charging (Sources: ElectReon and Momentum Dynamics)

Public and private investment is necessary to provide adequate charging and hydrogen-fueling infrastructure. Beyond the infrastructure needs for light duty EVs, transit and goods movement operators will need to consider how to address range issues and provide EV charging or hydrogen fuel for zero-emission transit buses and trucks. One such technology that addresses this issue is inductive charging, where a vehicle can recharge batteries by simply remaining over an inductive charging system embedded in the road or parking spot. Inductive charging will also be critical for AVs, particularly those AVs that are part of a shared fleet. Examples of inductive or wireless charging are ElectReon's technology and Momentum Dynamics technology (Figure 12). ElectReon has deployed two in-road dynamic wireless pilots: an urban transit bus pilot in Tel Aviv and a long-haul goods movement pilot in Sweden, to showcase proof of concept by use case.⁴² Momentum Dynamics has deployed a static wireless pilot with Link Transit in Washington.⁴³

Local electric utilities play an essential role in the build-out of EV infrastructure to meet the growing demand associated with the addition of grid-connected charging stations – whether at homes, businesses, or public sites. Utilities must work with private and public entities to ensure that no localized grid impacts occur, especially with the addition of the electrification of medium and heavy-duty vehicles. As the electricity grid transitions away from fossil fuels, utilities must work to ensure clean and renewable



Chevy Volt plugged into a renewable, portable charging station

energy sources are available to provide a balanced and resilient grid. As battery storage becomes more efficient, excess energy produced during the middle of the day can be stored and used during periods when renewables are not available. Vehicle-to-grid (V2G) technology is one emerging technology that may play a key role in the transition to clean energy and widespread adoption of EVs. V2G technology enables electric vehicles to plug in and supply power back to the grid in times of need. As this technology becomes more available, utilities, government, and private sectors will need to collaborate to provide affordable electricity and ensure a resilient grid in the event of natural disasters or emergency events.

Since the transition to EVs in the medium and heavy-duty sectors will not happen overnight, low emission fuels known as alternative fuels, are being used as an interim alternative to help reduce GHG emissions. Biofuels, such as renewable compressed natural gas and biodiesel, are one of the largest sources of alternative fuels in use today, and they help the San Diego region drastically lower carbon emissions. The majority of MTS busses run on renewable compressed natural gas. A local San Diego company, New Leaf Biofuel, devised a process to turn used cooking oil from roughly 2,500 restaurants, hotels, casinos, and other local businesses, into ready-to-use biodiesel fuel. Biodiesel directly displaces diesel fuel usage helping to reduce GHG emissions by 80%.⁴⁴

Automated Driver Assistance Systems



What are Autonomous Vehicles?

Driverless or self-driving cars are computer driven and do not require a human to safely operate the vehicle. Sensors collect data about nearby objects (like size and speed) and categorize these objects (e.g., bike riders, pedestrians, other cars) to determine how the vehicle should react.

AVs have the potential to improve safety and mobility, and to reduce travel times and roadway congestion.

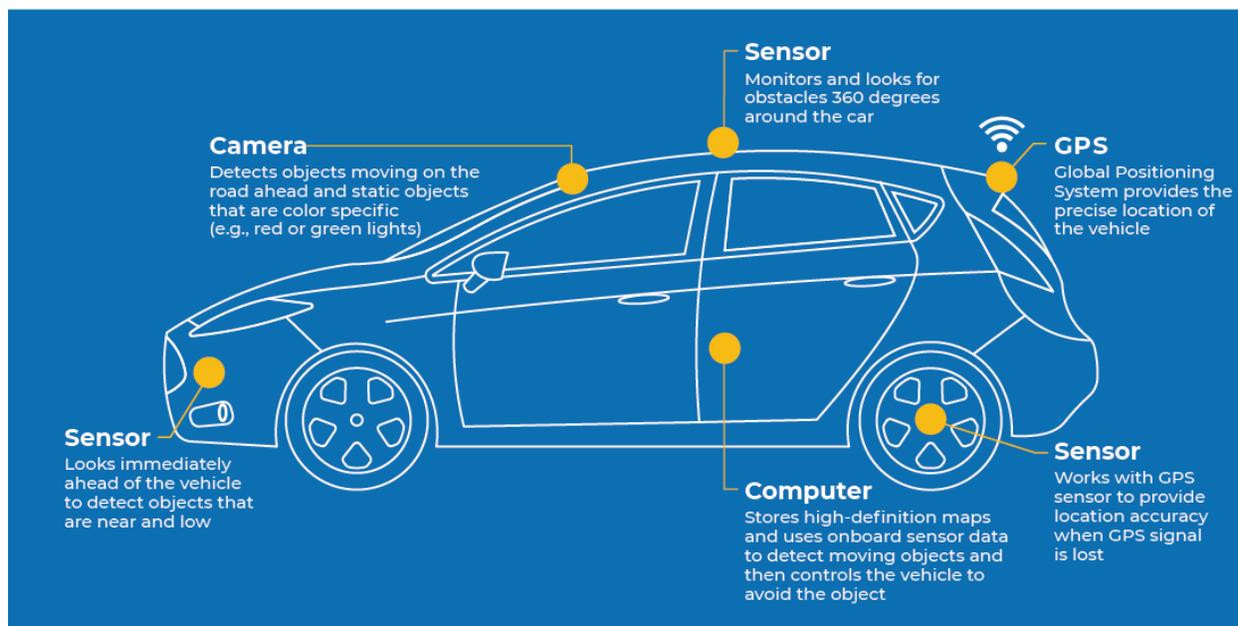


Figure 13: Characteristics of autonomous vehicles

Advanced Driver Assistance Systems (ADAS) features currently available include adaptive cruise control that adjusts to varying speed of traffic on highways, lane departure warning and automated lane keeping, forward collision warning, automated braking and collision avoidance, and even hands-free driving on highways and arterials. Higher-priced vehicle models with these advanced automation features are available today, and we can anticipate continued proliferation into lower-priced models by 2030.

The Society of Automotive Engineers has defined Levels of Automation, which are shown in Figure 14. The industry is rapidly progressing towards commercialization of Levels 2–4. Vehicles are equipped with sensors, cameras, radar, and lidar along with high-precision GPS and high-definition digitized mapping, which create a 360-degree view of the world around the vehicle (Figure 13). Driver assistance features can cover the spectrum from passive, where the vehicle may alert the driver to an incident (e.g., lane departure warning or forward collision warning), to active, where the vehicle may preempt the driver reaction by actively braking to avoid a collision. The combination of sensing technologies far exceeds the capability of human vision, eliminates blind spots, and reduces reaction times, resulting in enhanced safety, reductions in road fatalities, and protection of vulnerable road users, including pedestrians and bicyclists. Most importantly, we do not have to wait for widespread commercialization of fully autonomous (Level 5) vehicles before these safety benefits become widely available in our drive towards Vision Zero—zero fatalities on our roads.

Fully Autonomous Driverless Vehicles

Level 5 vehicles will take much longer to come to market. Several years ago, companies were proclaiming that driverless ridehailing services would be commonplace in urban areas by today. In actuality, we have seen slow progress with a handful of controlled, local pilot projects in a few cities. Waymo is currently leading the charge. After several years of testing an autonomous fleet in Phoenix, Waymo started offering driverless rides to paying passengers in late 2020. In the next ten years, we anticipate slow expansion of controlled driverless ridehail operations and continued investment in detailed mapping and training miles by companies invested in autonomous vehicle (AV) technology like Cruise (GM), Argo.ai (Ford), and Zoox.

AVs will likely come to market as part of a MaaS model as opposed to individual ownership. Companies like Uber and Lyft are expected to be early adopters because industry analysis shows that the cost of the driver is the dominant operational cost for the ridehail business. Although fully autonomous vehicles are twice as expensive as vehicles with Level 4 ADAS features, these companies could reduce the cost of each ride by as much as three-quarters with autonomous vehicles, turning ridehailing into a profitable enterprise. Lyft lost \$911 million in 2018 alone, which raises the question of whether it can survive the years it will take before AV fleets are functional.⁴⁵

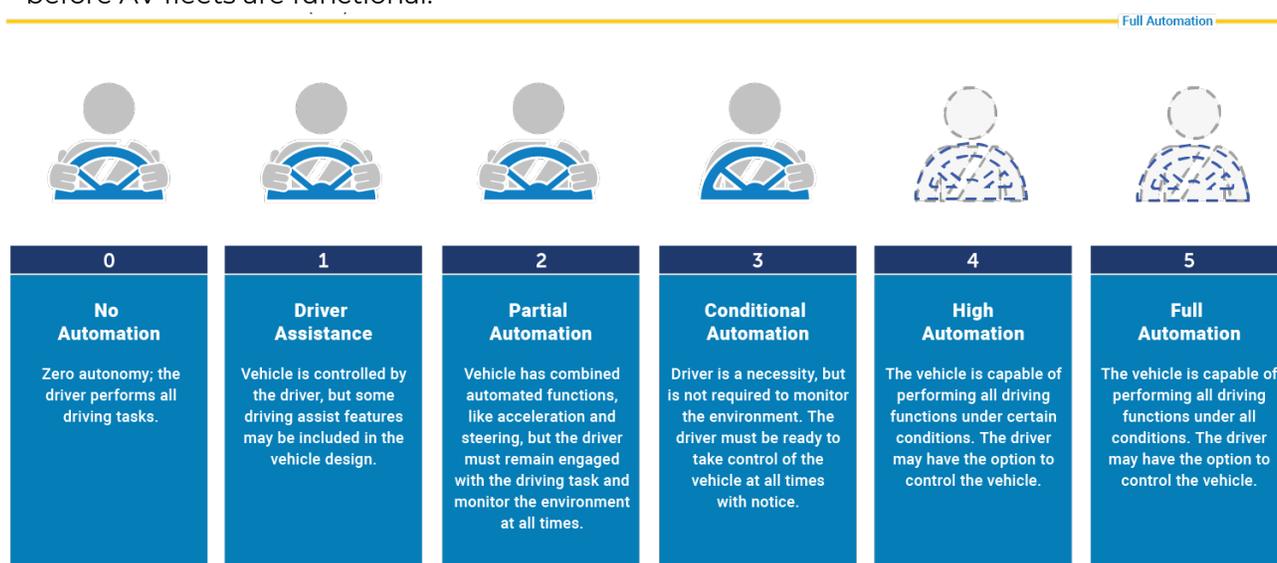


Figure 14: Levels of vehicle automation (Source: NHTSA)



Dozens of city employees in Chandler, Arizona, use self-driving vehicles at work in partnership with Waymo, an autonomous vehicle company (Source: Waymo)

If guided by good planning and policy, AVs could increase mobility for the elderly, the disabled, and the transit-dependent; revolutionize delivery services and logistics; and almost eliminate the need for concentrated parking facilities. AVs could substantially reduce traffic accidents and vehicle fatalities. According to the National Safety Council, 42,060 people died in car crashes in 2020. The rate of death between 2019–2020 represents the largest jump in 96 years. An estimated 94% of crashes are caused by human error. AVs could significantly reduce the severity and frequency of crashes. By some estimates, as penetration of fully autonomous vehicles increases, freeway capacity could increase by 10% to 25% by 2050, while estimates for the capacity for a full AV fleet (which will take a lot longer) range are as high as a five-fold increase.⁴⁶ However, without effective planning and policy intervention, AVs are just as likely to lead to an increase in total VMT, exacerbate urban sprawl, increase energy consumption and GHG emissions, and provide little to no benefit to the disadvantaged communities that should benefit most from this technology.

Until a consistent regulatory road map for AV commercialization exists, it is difficult to predict when AVs will come to market. Federal and state governments are struggling to keep pace with private-sector innovation and develop uniform policy that will ensure that common safety standards are adopted and applied in terms of vehicle design and operation in public right-of-way. Across the U.S., states are handling AV regulations differently. California has taken a very proactive role in developing regulations for testing and deployment, while other states have elected to take a hands-off approach and welcome testing and deployment without government intervention. Local and regional agencies are trying to understand how to prepare for AVs and what types of investments they should be making in the transportation system to prepare for the autonomous future. Some infrastructure improvements may be needed to support AVs, although these needs are not yet well understood. For example, faded or inconsistent lane markings and damaged or inconsistent signage or lights might make it difficult for AVs to navigate. In May 2017, Caltrans issued a policy that will lead to a new state standard that makes roadway lane striping more visible to AVs; going forward, Caltrans will apply a six-inch-wide painted pavement stripe and will minimize the use of Botts' dots (raised, non-reflective pavement markers). Ultimately, systematic deployment will require federal guidance, much more collaboration, and a standard approach for AV planning and policy across all levels of government and with the private sector.

Vehicle Telematics and Cloud Connectivity

Vehicles are increasingly getting connected to the cloud, be it for infotainment, on-the-go map updates, or mission-critical over-the-air software or security updates to computing modules in the automotive control systems. One of the earliest such cloud connectivity services was OnStar from GM. Recently, Tesla has been pushing major software updates over the air to their vehicles. Vehicle telematics are also used to monitor the operation of the engine and components and periodically report back to the vehicle manufacturer.

Vehicle telematics can also monitor hard acceleration and braking during vehicle operation as well as speed, miles traveled, fueling, and electric charging. Application of this information have included preemptive vehicle maintenance, as well as insurance rating and discounts, referred to as Usage-Based Insurance, that rewards good driving by monitoring hard acceleration and braking, sharp cornering, or other unsafe driving behavior. Wejo has developed a platform that can allow cities to utilize telematics data to monitor congestion on roadways to inform planning, operations, and even real-time control of traffic signal timing.^{47 48}

Connected Vehicles

Connected vehicles (CVs) can communicate with each other through in-vehicle and wireless technology (Figure 15). CVs communicate position, direction, and speed to give the driver or the vehicle the situational awareness to react to incidents, thus reducing the number of accidents and smoothing traffic flow. CVs also can communicate with smart infrastructure and other connected devices like smartphones or wearable technology, further improving safety across modes and smoothing transportation system operations.



What are Connected Vehicles?

In-vehicle and wireless technology enables connected vehicle (CV) communication:

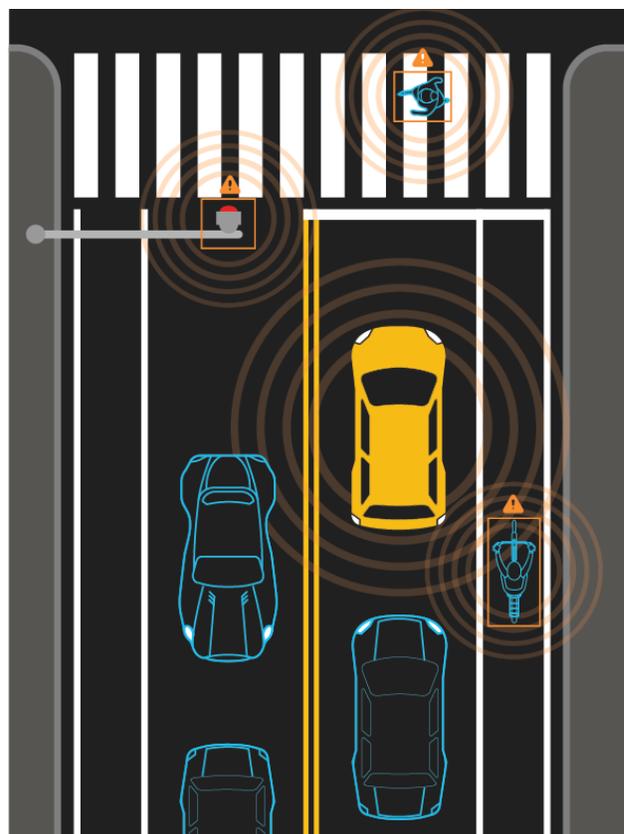
	vehicle to vehicle (V2V)
	vehicle to infrastructure (V2I)
	vehicle to everything (V2X)

CVs give the car and driver advanced information and warnings to inform safer driving decisions, such as when a car ahead brakes suddenly, or if there is an accident that causes traffic to slow or reroute. CVs can share data about the vehicle with the driver ten times per second, such as if tires are slipping due to water on the road. These wireless communications are shared between vehicles (V2V) to improve road safety.

CVs can receive notifications from vulnerable road users (V2X) – like pedestrians, bike riders, and road workers – to alert drivers to use caution.

CVs also can communicate with traffic control infrastructure (V2I) like traffic signals, ramp meters, toll and parking payment systems, which could improve traffic flow and reduce emissions.

The National Highway Safety Administration reports that, when fully deployed, CVs could address 80% of unimpaired accidents.



Connected Vehicles are not autonomous, however Autonomous Vehicles can be connected.

Figure 15: Characteristics of connected vehicle technology

Over the last 20 years, the communications and automotive industry has invested in standardization, research, experiments, pilots, and data collection. All this research is widely available. Nevertheless, commercial adoption of CV technology has lagged as most use cases become valuable only when there is widespread adoption and deployment of connected infrastructure, where investment has been lagging.

By 2030, we anticipate that vehicle-to-infrastructure (V2I) communications will provide congestion relief and greater safety through applications like transit signal priority, freight signal priority, and highway shoulder use. We also anticipate commercialization of truck or transit platooning in this timeframe. CVs enable vehicles to platoon and form “road trains” with decreased following distance. All vehicles in the “train” work cooperatively as one entity. The future could have smaller transit vehicles linked together, which would enable operators to dynamically adjust system capacity to increase or decrease depending on demand. A variety of additional ADAS (safety) use cases where vehicle-to-everything (V2X) communication supplements on-board sensing in vehicles will also proceed to commercialization. Examples include vehicle-to-bicycle and vehicle-to-pedestrian communication.

A connected transportation system has the potential to save many lives, and the federal government has been collaborating with auto manufacturers to advance connected vehicles for many years, but progress has been slow.

In 1999, the Federal Communications Commission allocated 75 MHz of spectrum in the 5.9 GHz band for use by ITS vehicle safety and mobility applications.⁴⁹ In 2006, the U.S. DOT joined a partnership of automotive manufacturers, Crash Avoidance Metrics Partnership (CAMP), to develop and test prototype V2V safety applications. CAMP includes Ford, General

Motors, Honda, Hyundai-Kai, Volkswagen, Mercedes-Benz, and Toyota.⁵⁰ In 2016, the National Highway Traffic Safety Administration issued a Notice of Proposed Rulemaking on V2V communications technology for new light vehicles, which is a major step toward mandating V2V communication systems in vehicles. However, CV infrastructure is not a part of the federal rulemaking, which means that state, regional, and local governments would need to invest in and deploy roadside equipment and applications that would make vehicle-to-infrastructure (V2I) communications possible. Until 2017, the U.S. DOT had committed to Dedicated Short-Range Communications (DSRC) as the primary mechanism for vehicle safety applications. DSRC is a two-way, short- to medium-range wireless communication mechanism that permits very high data transmission critical in communications-based active safety applications.

In November 2020, the FCC ruled to reduce the spectrum allocation for ITS to 30 MHz (from 75 MHz). Systems must now use the newer cellular-vehicle-to-everything (CV2X) technology and transition away from DSRC within one year. While taking away 45 MHz of spectrum from ITS, the FCC stated that the industry had failed to use the spectrum for any meaningful purpose over 20 years. This decision was made over objections from the U.S. Department of Transportation.



Information about this blind pedestrian's location is broadcast to approaching vehicles

(Source: Intelligent Transportation Systems Joint Program Office)

The NW U.S. 33 Corridor Council of Governments in Ohio protested in an FCC filing that after more than \$105 million in public/private investments, their project was “having the proverbial rug pulled out from under it, just as it is to go operational.”⁵¹ Indeed, hundreds of millions of dollars in public funding have been poured into DSRC pilots with some participation from automakers and communications technology providers. Several pilot projects have been federally funded through the Connected Vehicles Pilot Deployment Program. In 2016, the U.S. DOT awarded \$45 million to initiate a Design/Build/Test phase of the Connected Vehicle Pilot Deployment Program in three sites: Wyoming, New York City, and Tampa. The Wyoming Department of Transportation’s Interstate 80 CV pilot uses V2I and V2V connectivity to send alerts and dynamic traffic guidance to 400 equipped trucks along a busy freight corridor. New York City’s Department of Transportation uses V2V and V2I CV technologies to communicate with bus fleets, taxis, delivery trucks, and city vehicles to send out speed warnings and reduce fatalities in high-crash intersections. Tampa’s pilot project focuses on using V2V and V2I to improve safety and traffic conditions in downtown Tampa.⁵²

These pilots have demonstrated technology effectiveness; however, lacking an NHTSA mandate and public funding in CV infrastructure (roadside units), CV technology has not moved from pilots to widespread adoption. If the recent ruling in favor of C-V2X stands, it may result in clarity for the industry and perhaps lead to a worldwide consensus on the use of C-V2X for ITS. Given the 20+ years of slow adoption, the next chapter remains hard to predict.

Vehicle Technology Opportunities and Challenges

Electric vehicle infrastructure is not pacing with demand and policy: More public infrastructure to support PEVs is needed in the near term. To underscore the magnitude, analysts estimate the need for 41,000 publicly accessible electric vehicle charging ports in San Diego County by 2030, whereas currently, about 2,500 are available. AVs will likely be electric, creating demand for wireless or inductive vehicle-charging infrastructure in the long term.⁵³

Hydrogen-powered vehicles will enter the San Diego market: San Diego’s first commercial hydrogen station opened in late 2016, a second station is in development, and three more have been awarded funding in the region. Expect passenger vehicle sales to begin in the next few years and vehicle demonstrations for fuel cell electric trucks and buses to begin in the next decade. Current transit projections show that hydrogen fuel cell buses will be needed to service the longer, more rural routes in the San Diego region.

Shared mobility fleets that are connected, electric, and ultimately autonomous can improve access and mobility for underserved populations: Shared microtransit can provide improved access to underserved populations while reducing VMT and GHG when operated with EVs. In the longer term, these shared microtransit fleets can be AVs, which can further reduce the cost of providing mobility.

ADAS and AV technology will improve safety: Ninety-four percent (94%) of accidents are caused by human error. ADAS and eventually AV technology will dramatically decrease this number. ADAS features are being commercially rolled out by automakers today. Level 5 AV will gradually expand its footprint across different cities. Recent research published by Waymo claims that Level 5 AVs will reduce vehicle fatalities to zero.

AVs could increase VMT and urban sprawl without policy intervention: The ease of travel anticipated with AVs could induce unprecedented demand for vehicle trips and increased VMT. As vehicle fleets become increasingly autonomous, the issue may be exacerbated by the ability to use travel time for non-driving tasks, and consumers may be willing to live farther away and travel longer distances as travel time becomes more productive. Vehicles traveling between trips without occupants is another risk without policy to discourage these unintended consequences.

CVs can reduce congestion and improve safety: CVs can increase roadway capacity through vehicle-following and platooning. However, the bottleneck may just move from the highway to the off-ramp. Other congestion-reduction mechanisms include transit signal priority, freight signal priority, coordinated shoulder, and ramp use. CVs can complement on-board sensors for increasing the safety benefits of ADAS and AVs. Adoption of CV technology in vehicles and investment in CV infrastructure on roadways remains unpredictable.

Decrease in parking, ticketing, and gas tax revenue: Public agencies will need to substitute and/or complement traditional revenue sources with new innovative sources that are more sustainable long-term to support our infrastructure needs and promote a balanced transportation system. The recently completed California Road Charge Pilot Program demonstrated the viability of a road charge model.

The emergence of electric vehicles, AVs, and CVs will impact vehicle form, creating opportunities to rethink roadway design: Smaller, lighter vehicles that can travel closer together create opportunities for highways to handle more vehicles within existing rights-of-way. On local roadways, opportunities include retrofitting roads to accommodate neighborhood electric vehicles and reallocating space so that lanes no longer needed for moving or storing cars can be used for other purposes and modes.

CVs and AVs may require changes to infrastructure investments: AVs rely on clear and consistent pavement delineation and traffic control devices as well as maintenance in a state of good repair, putting pressure on local and state governments to invest in necessary improvements and ongoing maintenance. CV deployments continue to be slowed down because of lack of investments in CV infrastructure, such as intelligent traffic and ramp signals, intelligent highway lane management signs, etc.

Smart Cities and Transportation Systems

Smart Cities use ICT to enhance the quality and performance of public services in order to reduce resource consumption and operate efficiently (Figure 16). The use of technology itself does not make a city smart—rather, it is how the city uses data to improve planning, investment, and operational decisions and engage more directly with the public. Smart cities and transportation systems are responsive to changing conditions. Unlike major capital projects, smart infrastructure adapts to unpredictable changes over time like new technologies, changing transportation demands, or emergencies like a global pandemic or natural disasters.

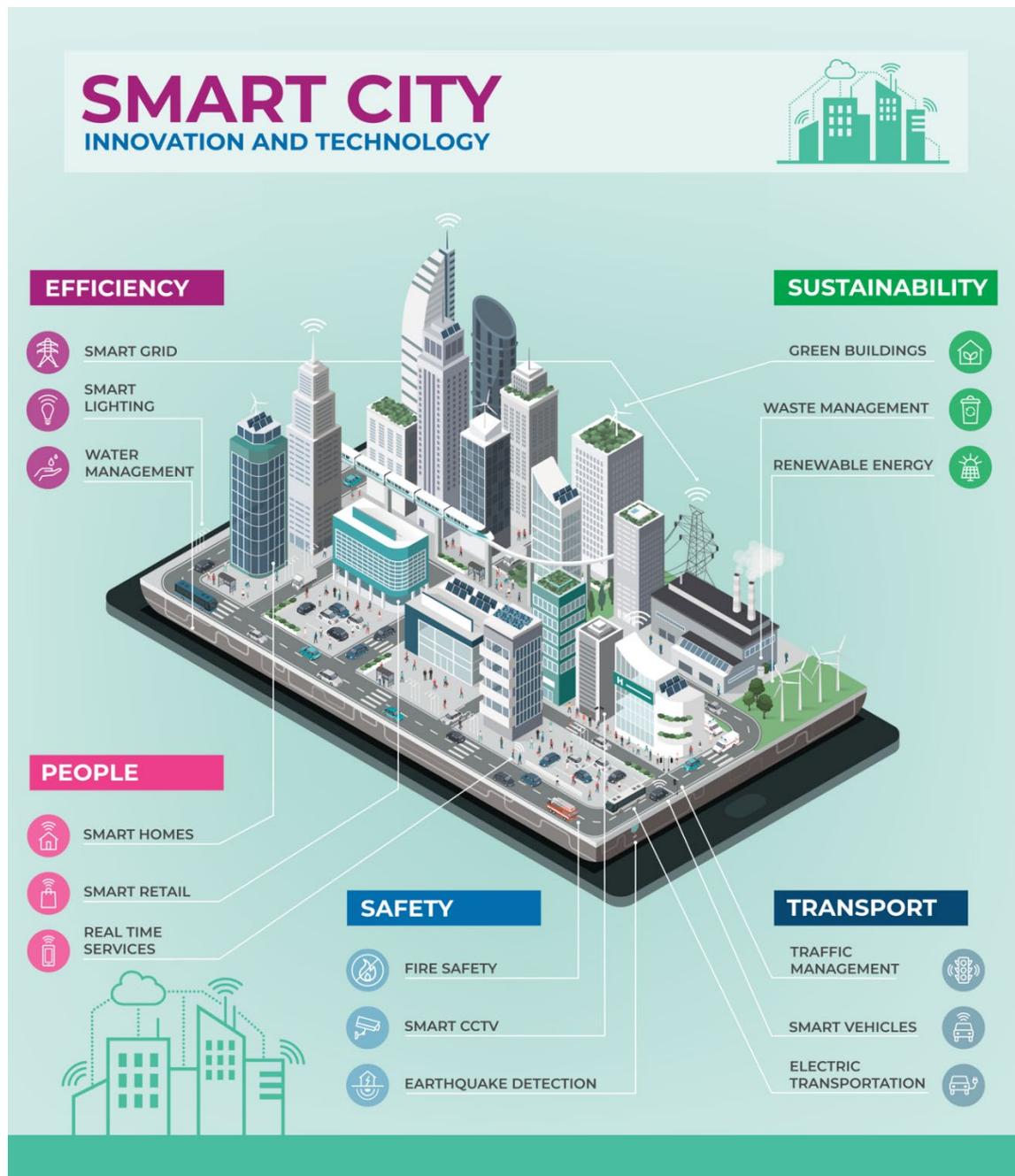


Figure 16: Smart City Concept (Source: elenabs)

In support of Smart Cities, the SANDAG 2021 Regional Plan casts a vision for the Next Operating System (Next OS). The Next OS is a regional digital platform that will use data to make the transportation system smart and allow MaaS to become a reality. The Next OS is not a single piece of technology, but rather a set of multiple technologies that are connected to provide greater value to the traveling public as well as transportation operators, planners, and policymakers.



Figure 17: Next OS

The development of the Next OS will jumpstart the vision of Smart Cities by providing the data exchange platform that will support a wide range of smart city and transportation applications. For example, the Next OS will optimize transit and roadways. Data collected from sensors on transit vehicles can monitor where vehicles are and communicate that information to the transit riders, improving the reliability of transit. Sensors can also alert transit operators when vehicle maintenance is required. Data collected from roadway sensors can be used to improve traffic monitoring and operations and detect unsafe conditions to support planning and infrastructure investments. Smart Intersections improve traffic flow and safety for all modes and reduce fuel consumption and emissions (Figure 18).

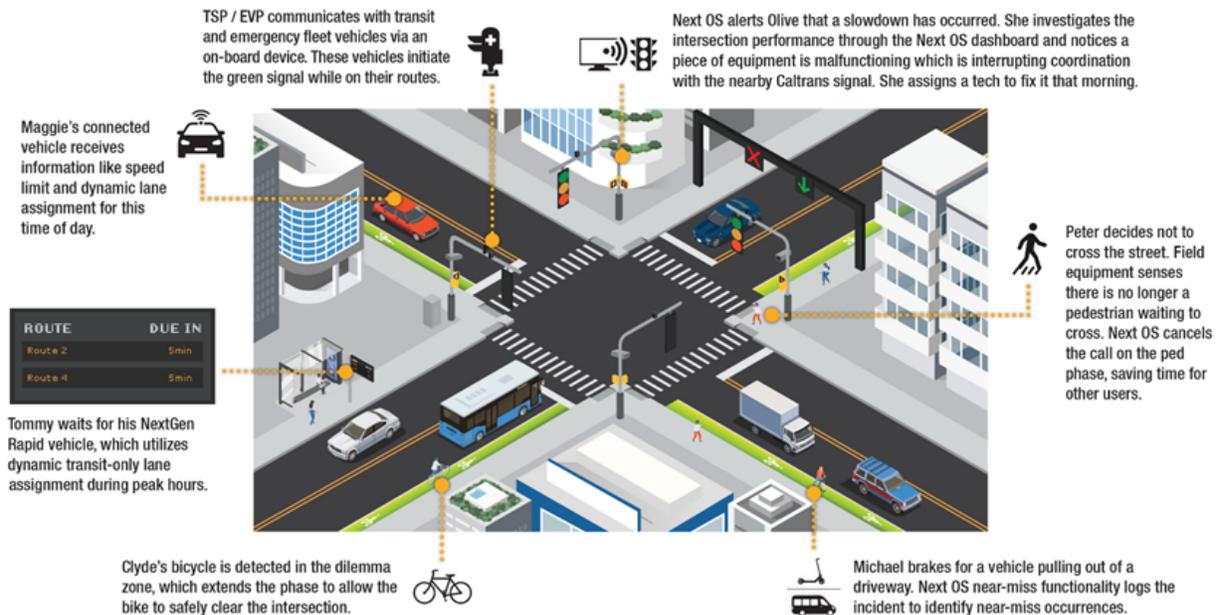


Figure 18: Smart Intersection Systems Concept of Operations

Curb management is another strategy that will be a key component of the Next OS. Curb management is a concept that reimagines the allocation of valuable curb space. As MaaS continues to evolve and the demand for curb space expands, the development of a curb management system provides an opportunity to use data to flexibly manage how the curb is used at different times of day to meet different needs—passenger pick up and drop off, commercial delivery, flex lanes, parking for micromobility devices, wireless inductive charging, and even food trucks or space for outdoor dining (Figure 19). A white paper on the Next OS Concept was developed to provide more information on transportation use cases proposed in the 2021 Regional Plan.⁵⁴

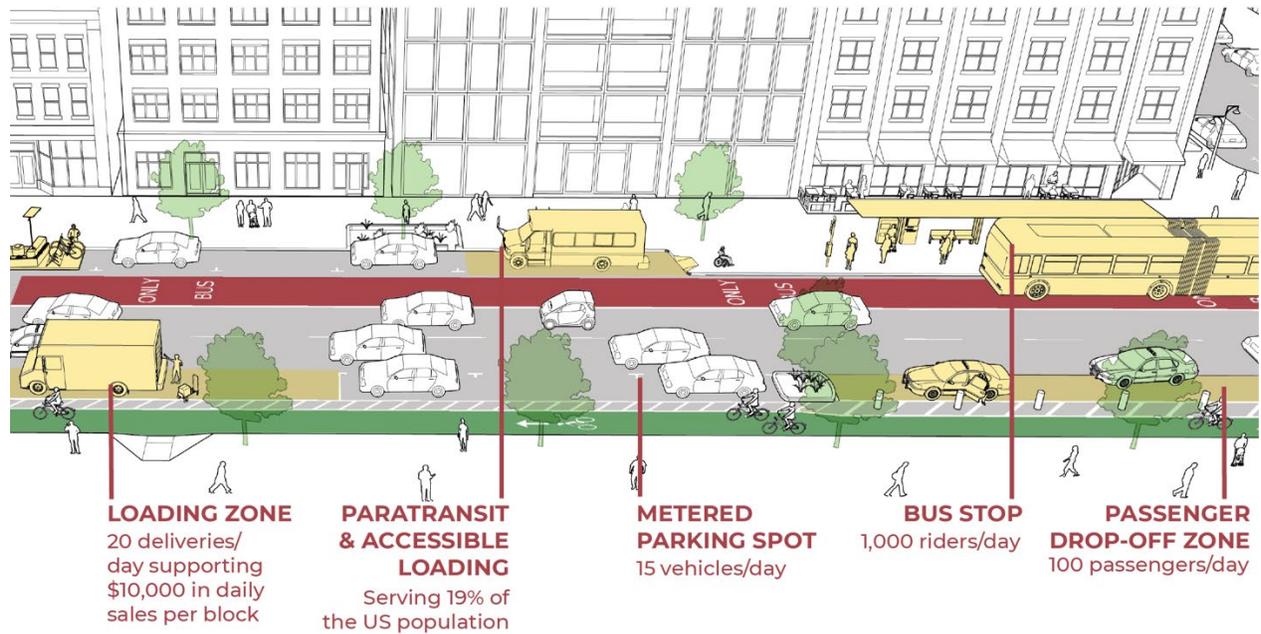


Figure 19: Curbside Management Strategies for Improving Transit Reliability (Source: NACTO)

Smart City applications extend beyond transportation and include energy, water and waste management, and public services. For example, just-in-time waste management uses sensors to make waste collection efficient, reducing impact on the environment and transportation. For water management, sensors detect leaks and pollution and identify when maintenance is needed. A smart grid can detect changes in energy consumption and balance supply and demand (Figure 20). Mobile apps, like the City of San Diego's Get it Done app, allow citizens to report issues to the City and get a quick response.

According to Barclays, Smart Cities globally have the potential to generate \$20 trillion in economic benefits by 2026. Investment in reliable technology and high-speed connectivity is central to Smart City buildout, which is one reason SANDAG is undertaking the development of a Regional Digital Equity Strategy and Action Plan that will identify and address gaps in high-speed connectivity.

Beyond investing in ICT, becoming a smarter region requires a new operational philosophy that is not constrained by jurisdictional boundaries and legacy governance models. Agencies will need to commit to cooperative operations focused on achieving common objectives regarding user experience, system performance, and policies to operate a complete regional network of smart systems through the Next OS. Most importantly, all agency personnel will need to become a part of this culture of data, and agencies will need to establish and adopt data governance principles and provide data governance training for staff. These principles include establishing processes and methods to ensure accuracy and reliability of data; transparency—communicating to the public how data is used, secured, and protected; and developing privacy impact assessments and access controls.

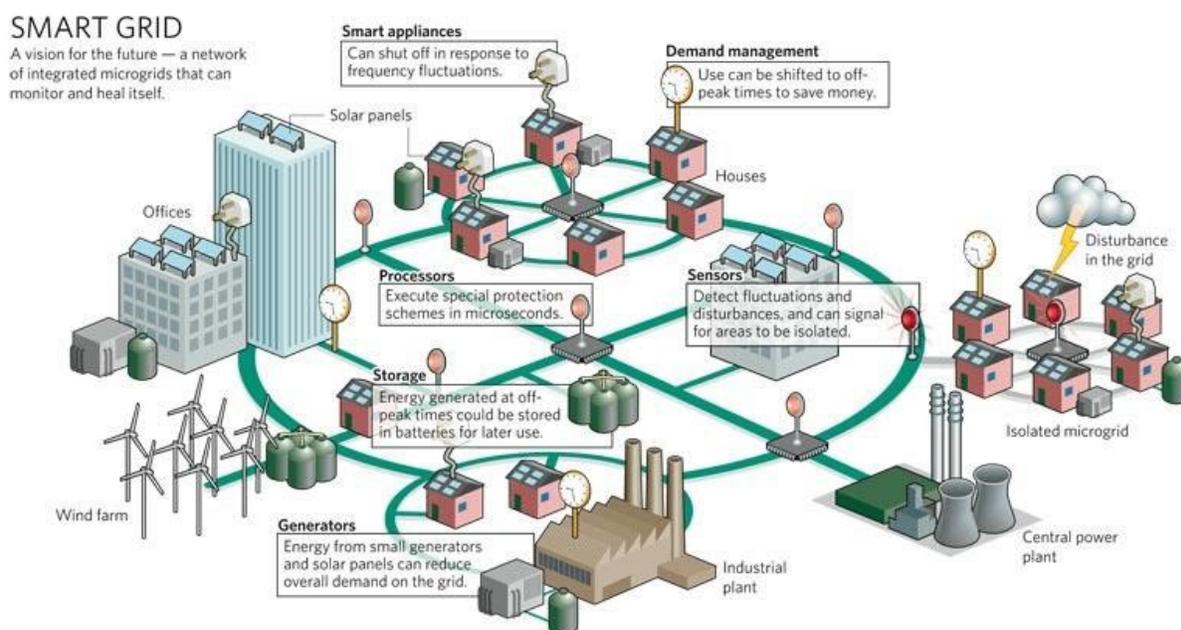


Figure 20: Smart Grid City Network (Source: Smart City Hub)

Smart Cities and Transportation Systems Challenges and Opportunities

Building Smart City capacity: Private companies such as Google and Amazon have used Big Data for many years for product and service planning and personalized marketing. Public agencies are in the early stages of integrating Big Data into their planning and management systems and will need to invest in the skills and tools to effectively use data to inform planning, policy, and operations.

Making more of our existing infrastructure: We can maximize our existing investments and preserve the system through the use of technology and powerful data analytic tools. Investing in smart transportation systems may be a more effective, adaptable, and sustainable investment approach than capacity-increasing projects.

Building a nationwide consortium of Smart Regions: Regional agencies and cities must establish mechanisms to share and leverage public dollars spent on ITS projects across the nation. Smart regions across the nation benefit from sharing technical documents (design documents, ConOps, systems engineering, agreements, RFIs, and RFPs), standards, and software artifacts (data ingestion, extraction, transformation and loading tools, storage, dashboards, ITS control and management).

New role for public agencies in the collection and distribution of data: The private market has and is expected to continue capturing and aggregating data from smartphones and telematics. Agencies are reconsidering their role as providers of transportation information and are taking on new roles as data distributors and/or procurers.⁵⁵ Data governance practices are key to the operation of many public agencies. These procedures help ensure data accuracy and reliability, transparency about how data is used, and data security and protection.

Shift to network thinking demands interagency coordination: Nationally, and within the San Diego region, the trend for all tools and systems is to shift from concentrating on isolated transportation systems to focusing on multimodal performance-management tools that provide transportation choices across multijurisdictional boundaries. This requires coordination and cooperation between agencies to integrate regardless of jurisdictional boundaries, creating a seamless transportation experience for the traveling public.

Regional consistency and collaboration are critical to the success of Smart Cities and Transportation: This includes compliance with national and universally accepted standards while also examining opportunities for cross-cutting protocols that help advance new and innovative technologies like on-demand mobility applications. This effort will ensure that future systems are technically adaptable and viable over time and support advancement and synergies between Smart Cities and Transportation systems.

Policy Considerations

While there is uncertainty about how these technology trends will evolve, there is no doubt they have the potential to provide great benefits for the San Diego region. However, there also are potential risks without proactive planning, policy interventions, and investment decisions that guide the integration of technology and new mobility services toward an equitable and sustainable transportation future. It will also be vital to ensure effective transportation policy shapes our use of technology and not the other way around. The Vision for the 2021 Regional Plan presents a transportation future in the San Diego region that seizes the opportunities and benefits of technology while minimizing the unintended consequences of a passive approach.

Seizing the Opportunity	A Passive Approach
<p>Shared mobility services are integrated with public transit, moving more people with fewer cars. Mobility Hubs are thriving, and more people choose not to drive or own a car because Flexible Fleets and public transit are convenient, affordable, and comfortable. Communities that have been historically underserved have greater personal mobility and access to economic opportunity.</p>	<p>Roadways become more congested due to an increase in private automobile trips. Automated vehicles are not connected or shared, increasing VMT with zero-occupancy vehicles on roadways between rides.</p>
<p>Vehicles are electric, autonomous, and connected, significantly improving safety while reducing congestion and GHG emissions. There is adequate public charging and hydrogen fueling infrastructure to support shared electric fleets.</p>	<p>The lack of charging infrastructure and hydrogen fueling stations prohibits the rapid expansion of zero-emission vehicles, and inefficient AV fleets run on fossil fuels, increasing GHG emissions.</p>
<p>The region leverages the trend toward IoT and maximizes existing capital investments through implementation of the Next OS and smart infrastructure, reducing the need for capacity-increasing capital projects.</p>	<p>Shared mobility services are not well-integrated and compete with public transit; public transit is slow to adapt to technology trends and societal needs. This impacts ridership and fare box revenues, resulting in service reductions and difficulty supporting the transportation needs of low-mobility populations. Shared mobility services struggle to succeed and become less affordable, less accessible, and less desirable.</p>

Seizing the Opportunity	A Passive Approach
<p>High-quality broadband service is available to everyone in the region regardless of income. This level of connectivity allows more people to benefit from online work, learning, remote services, and app-enabled trip-planning and transportation services.</p> <p>Fast and efficient transit and Flexible Fleets enhance mobility for all, including seniors, low-income people, the disabled, and those without access to a privately owned vehicle. The delivery of goods and services is optimized in a connected and autonomous environment.</p> <p>Local Complete Corridor projects become easier to implement with less right-of-way needed for cars. Roads are slower and safer for pedestrians and cyclists, and shared mobility services have designated pick-up and drop-off zones. Less space being needed for parking allows more opportunities for productive uses, like housing.</p>	<p>Complete Corridor projects become more difficult to implement. Ridehailing and commercial vehicles double-park, blocking cyclists, endangering pedestrians, and creating bottlenecks. More space is required to accommodate cars and less space is available for housing, commercial uses, and public spaces. The digital divide limits remote access to services, education, and economic opportunities to those who can afford broadband service and a device, exacerbating social and economic inequities.</p> <p>The increase in online retail activity continues to generate inefficient goods movement activity, leading to freight-related congestion that impacts major corridors and local streets and roads.</p>
<p>Smart Cities infrastructure is widely deployed. Data generated from the transportation system and mobility services significantly improve transportation planning and decision making through the Next OS.</p>	<p>Data infrastructure and management capabilities do not provide for connectivity between cars, infrastructure, and information systems; public services are not adapted. The lack of data sharing hinders mobility hub effectiveness and limits data-driven planning, decision making, and service delivery.</p>

The San Diego region has been a leader in piloting and deploying innovative transportation services and technologies. By continuing this legacy of action and leadership, the region can prepare for a transformative future where everyone benefits from improved mobility choices. The following policy and investment considerations are intended to help guide the discussion by policymakers as they take steps toward adoption of a 2021 Regional Plan.

Policy and Investment Considerations

Next OS and Transportation System Management Operations

Develop staff expertise, tools, and resources for data governance and management. Standardize data-sharing processes and promote open data policies across the region. Design and build data infrastructure so that new services can more easily integrate. Establish a regional forum for cross-agency collaboration, data sharing, and technical research and pilot projects.

Develop a coordinated Next OS roadmap for the region that identifies high-priority transportation applications and accelerates their deployment. This includes smart intersection systems, curb management, next-generation integrated corridor management systems, and a regional border-management system.

Invest in Next OS demonstration projects that build data management and sharing capabilities and lead to operational coordination across jurisdictions. Consider new service delivery models that make more effective use of public resources and enable cities to adapt to changing conditions.

Develop and implement a Digital Equity Strategy and Action Plan that will close gaps in high-quality broadband access that is essential to the future of transportation and advancing equity in the region.

Pricing and Transportation Demand Management (TDM)

Consider equitable pricing mechanisms that include incentive programs that encourage people to consider their travel choices. Design a pricing and revenue strategy that can address congestion and reduce VMT while creating more travel choices, improving equitable access, and increasing safety.

Continue to invest in TDM incentive programs that reduce drive-alone trips through rideshare incentives, vanpool subsidies, Try Transit passes, and bike encouragement programs.

Invest in telework assistance programs that support businesses with expanding remote work to reduce commute trips. Telework assistance programs in conjunction with Digital Equity efforts will ensure more employees can take advantage of teleworking opportunities.

Adopt a regional TDM policy that builds upon the SANDAG iCommute Employer program to reduce drive-alone commute trips.

Enhance regional modeling tools to better account for the impact of technology on transportation demand and travel behavior.

Develop and update technical resources and tools that support local government agencies with planning and preparing for technology and new mobility services, such as updating the [Parking Management](#) Toolbox to account for emerging modes and developing a regional [curb management](#) strategy. Encourage information sharing, coordination, and capacity building.

Mobility Hubs: Land Use and Housing

Invest in **Mobility Hub** and **Flexible Fleet** demonstration projects and supportive policies that improve access for all, ensure equity, and promote safety across modes.

Position the region as a true testbed for pilots and P3s that provide the greatest public benefit. Establish funding programs to incentivize local pilots such as the shared streets concepts or demonstrations of emerging mobility and technology solutions.

Encourage land use and housing policies that focus development within mobility hubs to create well-connected communities that are integrated with public transit and seamlessly connect people between shared modes.

Active Transportation: Bike Network, Vision Zero, and E-Bikes

Invest in safe street designs, slow speeds, and adopt Vision Zero policies that promote safe movement, allowing more people to feel comfortable choosing to walk, bike, and ride micromobility to get around their communities.

Invest in Next OS applications and technology solutions that improve safety and complement Vision Zero policies to protect vulnerable roadway users.

Invest in e-bike incentives to expand the number people of who can use biking as a viable travel option.

Zero-Emission Vehicles: Charging and vehicle incentives, buses and other fleets

Adopt policies and incentive programs that accelerate EV adoption in Mobility Hubs and along Complete Corridors by providing publicly accessible EV charging and hydrogen stations.

Develop policies that encourage Transit Leap and Flexible Fleets services to adopt EVs for transit, passenger, and commercial delivery vehicles.

Optimizing Infrastructure: Climate Resilience and Adaptation, Fix It First

Invest in enhancing critical infrastructure vulnerable to climate change through Climate Resilience and Fix It First strategies, which can help to sustain transportation and technology investments on regional roadways.

Appendix A – Summary of Technology Maturity, Challenges, and Risks of Vehicular Technologies

Quoting from the groundbreaking UC Davis report, *Three Revolutions in Urban Transportation*:

“Our central finding is that while vehicle electrification and automation may produce potentially important benefits, without a corresponding shift toward shared mobility and greater use of transit and active transport, these two revolutions could significantly increase congestion and urban sprawl, while also increasing the likelihood of missing climate change targets.”⁵⁶

The report highlights *Electrification*, *Automation*, and *Shared Mobility* as the three technologies that will revolutionize the future of mobility. Without *shared mobility*, our sustainability and access goals will not be met. The following table summarizes technology maturity, challenges, risks, and how they address the following major goals of the 2021 Regional Plan—Equity and Access, Congestion and Emissions Reduction, and Safety.

Technology Maturity	Challenges and Risks	Alignment with Goals
Shared Vehicles: Carshare		
<p>Now: App-based sharing of personally owned vehicles or fleet vehicles enabled by remote keyless entry using smartphone.</p> <p>Future: New technologies enable access for unbanked and those without smartphones.</p> <p>Complete electrification of carshare fleets by 2030.</p>	<ul style="list-style-type: none"> • Technology gaps make it difficult to provide carshare service to unbanked and those without smartphones. • Lack of policies and incentives to make carshare widely available and accessible to underserved communities. • EV charging infrastructure is needed to support the transition of fleets to EV. 	<ul style="list-style-type: none"> • Improved access and equity by making carshare affordable and available in underserved communities. • Data has shown that carshare members own fewer vehicles which leads to lower VMT and GHG.
Shared Rides: Rideshare and Microtransit Excluding Ridehail ⁵⁷		
<p>Now: App-enabled on-demand rideshare and microransit are already commercially deployed.</p> <p>Future: Scaling up fleet sizes will continue to improve service performance and vehicle occupancy.</p> <p>Complete electrification of rideshare fleets by 2030.</p>	<ul style="list-style-type: none"> • Difficult to provide carshare service to unbanked and those without smartphones. • Lack of policies and incentives to make microtransit and ridesharing more widely available and accessible to underserved communities 	<ul style="list-style-type: none"> • Pooling results in significant reduction in VMT and GHG due to high occupancy rides and all electric fleets • Lower cost, greater coverage footprint, and better level of service than existing fixed-route transit service, results in improved access and equity.

Technology Maturity	Challenges and Risks	Alignment with Goals
Electric Vehicles		
<p>Now: 66 EV models are available in the U.S. in 2021. Battery technology continues to mature. But, EV charging infrastructure lagging (not keeping pace) with the market.</p> <p>Future: UK, California, and China have established aggressive targets for 2035 that are creating scale. Advanced charging infrastructure and improvements in battery technology will address range anxiety.</p>	<ul style="list-style-type: none"> • A dramatic increase in electricity production and build-out of the distribution grid, are needed. Deployment of public charging infrastructure is lagging. • Environmental impact of battery raw material extraction and disposal/recycling/reuse. 	<ul style="list-style-type: none"> • EV adoption will lead to significant GHG reduction and improved air quality.
Telematics and Cloud Connectivity		
<p>Mature: Commercially deployed now in high-end models and coming to all models.</p>	<ul style="list-style-type: none"> • Data is locked into proprietary ownership. 	<ul style="list-style-type: none"> • Data can inform planning for infrastructure improvements, as well as congestion monitoring and corridor management. • Usage-based insurance discounts can promote safety.
Connected Vehicles (CV) V2X		
<p>Now: V2X Technology is available now but no widespread deployments to achieve maturity.</p> <p>Future: We anticipate widespread adoption by 2030. It appears that U.S., China and Europe have settled in favor of C-V2X. With a single technology, adoption can proceed.</p>	<ul style="list-style-type: none"> • Widespread deployment is awaiting valuable use case or government mandate. • Highway congestion reduction from platooning may lead to increased VMT and move the congestion bottleneck to the on- and off-ramps. 	<ul style="list-style-type: none"> • Congestion reduction through transit signal priority, freight signal priority and bus on shoulders, etc. • GHG reduction through commercial vehicle platooning on highways. • V2X can supplement on-board sensing to enhance ADAS safety features being commercialized now.

Technology Maturity	Challenges and Risks	Alignment with Goals
Advanced Driver Assistance Systems (ADAS)		
<p>Now: Convenience and safety features are being commercialized now for high-end vehicle models</p> <p>Future: ADAS features will be available in all new vehicles sold within a decade.</p>	<ul style="list-style-type: none"> • Current cost of sensing and computing of safety technologies limits deployment in mid- and low-end models. 	<ul style="list-style-type: none"> • Significant safety benefits through ADAS features including lane keeping, adaptive cruise control, blind spot elimination, pedestrian and bicycle detection, automated braking, and collision avoidance.
Autonomous Vehicles (AV)		
<p>Now: More than 55 Companies have permits to testing AVs on CA roads. In 2020, Waymo has launched the first commercial service in a 65 square mile region in Phoenix suburbs. Technology is expensive, but the cost of sensors and computing is falling.</p> <p>Future: Widespread deployment is unlikely until 2035, but more and more cities will have AV ridehail and rideshare available in selected geofenced portions of the city.</p>	<ul style="list-style-type: none"> • In the absence of pooling, studies show that AVs will lead to increased congestion and VMT. • Challenges remain to expand to different regions, different weather and lighting conditions, interactions with other drivers and road users. 	<ul style="list-style-type: none"> • Improve safety beyond ADAS features to achieve Vision Zero. • By eliminating the need for a driver, AVs lower the cost of providing ridehail and rideshare to improve access and equity. • Reduced vehicle ownership leads to lower VMT and GHG, but only with increased rideshare and microtransit. In the absence of pooling, AV ridehail will result in increased VMT.

Notably, we would like to highlight near-term technology trends.

1. Technologies are available now to expand rideshare, microtransit, and carsharing. Reduced private car ownership has been shown to result in reduced VMT and reduced household cost for transportation. Policy interventions are necessary to encourage riders and providers to increase pooled rides and vehicle occupancy.
2. Driver assistance and safety features that decrease fatalities of vulnerable road users are being commercialized now, and automakers are expanding these features to all vehicles.
3. EV adoption is accelerating rapidly, assisted by regulators, policy targets, and technology.

In the longer term,

4. Level 5 AVs will offer increased safety benefits and improve the ridehailing business model by eliminating the labor cost of a driver. Without policy intervention, AVs will likely increase VMT and provide little benefit to people who stand to benefit most from automation (disabled people, seniors, and those who rely on transit).

Appendix B – COVID-19 Considerations

COVID-19 drastically changed travel behavior and increased reliance on technology for work, school, and accessing goods, services, and social activities. Whether or not the pandemic will have a lasting effect on how people travel is unknown but teleworking and participating in e-commerce are two behavior changes enabled by technology that will impact transportation well into the future.

The traditional peak-period congestion could become a thing of the past for a portion of the workforce. Prior to the pandemic, 10% of the U.S. labor force worked from home. During the pandemic, an incredible 42% of the U.S. labor force worked from home full-time.⁵⁸ While it is likely that employees will return to the office at some level after a majority of the population is vaccinated, higher rates of remote work are expected to continue. Beyond remote work, other services, like telehealth and online learning, have skyrocketed, and we can expect to see more services accessed remotely in the future.

While telework has the potential to relieve some peak-period congestion in the future, roughly 61% of all occupations in the San Diego region are not conducive to working from home. A common misperception is that teleworkers do not drive much. Data from the SANDAG 2016 Regional Transportation Study demonstrated that while teleworkers may not contribute as much to peak-period congestion, they tend to make more discretionary trips for shopping, leisure, and social purposes. This is supported by data from the U.S. National Household Travel Survey, which found that teleworkers took 11% more non-work trips per day, and on average, those trips were 16% longer. This may explain in part why traffic levels on highways rose as the year progressed and reached close-to-pre-pandemic levels by the end of 2020.

Another big behavioral change that will have long-lasting implications for transportation is online shopping. E-commerce was already impacting transportation prior to the pandemic, with online shopping growing as a percentage of total retail sales from 0.6% at the end of 1999 to 14% in 2020.⁵⁹ The boom in e-commerce has accelerated growth in freight distribution and delivery services.⁶⁰

Shared mobility services across the board experienced a decline in ridership. The use of public transit and privately operated shared mobility services fell sharply and has been slower to recover compared to private automobile travel. However, during the COVID-19 pandemic, shared mobility services have proven their role in ensuring economic opportunity for a significant sector of the workforce comprising primarily low-income and minority employees in the service industries who depend on public transportation. Transit operators implemented germ barriers, rear-door boarding, and cashless no-contact fare payment to help protect both riders and transit operators. In addition, microtransit has enabled cities and transit agencies to offer flexible, on-demand rides for essential workers and those who depend on public transportation. This shift to on-demand transit has allowed transit agencies to provide right-sized service that fills gaps created by reduced transit operations during the pandemic. The shift towards microtransit is a trend that has the potential to proliferate in ensuing years.

Transit ridership should recover as more of the population is vaccinated. In summer 2020, SANDAG surveyed approximately 3,800 households on their travel behavior during the pandemic; 42% of respondents reported that they used transit at some level before COVID-19 and will continue using transit in the future, and 18% of individuals who did not use transit before COVID-19 said they will use transit after a vaccine. Only 4% of people who took transit previously said they will not use transit after the COVID-19 pandemic concludes.

While transit and shared mobility ridership was negatively impacted by the COVID-19 pandemic, biking and walking activity increased across the nation as public health lockdowns led to people finding solace in outdoor recreational activities. Locally, biking volumes were up 42% on average from mid-March to mid-August 2020 compared to the same period in 2019 as measured on the San Diego regional bike network.⁶¹ A SANDAG survey of local residents discovered that 84% of residents surveyed who said they were biking more since the stay-at-home order began said they expect to continue biking.

COVID-19 also brought to light the impacts of the digital divide. Although this is not a new issue, unconnected and under-connected residents suffered greatly during the pandemic when work, school, social and civic activities, and critical services shifted from in-person to online. Up to 40% of students in some school districts in the San Diego region do not have a broadband subscription at home or a device to access the internet; 23% of households in the region earning less than \$50,000 per year do not have broadband service at home. Access to the internet has become essential to our lives, and for this reason, policymakers at all levels of government are scrambling to get every community connected.

Ubiquitous broadband is critical to the future of transportation and the ability to fully benefit from the technology advancements that this white paper addresses. SANDAG is developing a Regional Digital Equity Strategy and Action Plan to ensure everyone in the region has broadband access and the ability to use ICT to improve their lives.

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