

# Walking and alternative modes of transport

A usage and attitude study focusing on the population of Dubai

LIMITLESS  
A Dubai World Company  
9/28/2009

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LIMITLESS 

# Research background

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## RESEARCH OBJECTIVES

Provide knowledge about:

- + **Current walking habits** in Dubai
- + Usage of and attitudes towards **alternative modes of transportation** such as public transport and bicycles.

## MARKETING PURPOSE

To create a **credible platform**:

- + That adds to the **positioning** of Limitless
- + To communicate the implementation in **DJA and Arabian Canal**

## URBAN DESIGN AND PLANNING

- + Bring tangible data for design policy guidelines



# Five clusters for sampling...



Cluster	Areas recommended to covered	Sample coverage
New Dubai Area	Marina, Tecom, Greens, Arabian Ranches etc.	95
Sheikh Zayed Road & Jumeirah	Jumeirah, Umm Suqueim, Barsha, Sheikh Zayed Road	169
Bur Dubai	Satwa, Mankhool, Golden Sands, Karama, Musallah	171
Deira	Naif, Rigga, Murraqabat, Rashidiya	111
Ghusais	Ghusais, Al Twar, Muhaisnah, Mirdif	79
	<b>Total</b>	<b>625</b>

## Measuring walking

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Of the 625 interviewees **200** were given a ***pedometer***

### Q. WHAT IS A PEDOMETER?

The pedometer **counts the steps** a person is taking

### Q. HOW WAS IT USED?

- Used for **one week**
- **Store data** for 7 days
- Data collected from **188 users**
- The research company continuously sent out **reminders**
- The users **kept diaries** recording:
  - where
  - time of day
  - exercise of 20 minutes or more



## Research outcome: walking activity

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### THE RESEARCH CONTRASTS TWO MAIN GROUPS

- **Passive Walkers:** average of <3000 steps per day
- **Active Walkers:** average of >5000 steps per day

### Q. HOW MUCH IS <3000 STEPS, HOW MUCH IS >5000 STEPS?

<b>As measured by pedometer:</b>	
Normal day at the office, with no additional walking	Less than 3000 steps
Day at the office + a brief walk in the evening	About 6.000 steps
Day at the office + exercise walking for more than an hour	About 12.000 steps
Walking in the mall for half a day	About 11.000 steps

### Q. HOW MANY STEPS PER DAY SHOULD YOU TAKE?

- A common international guideline is **10,000 steps per day** to gain health benefits

# Walkable neighbourhoods are getting more attention



Walkable Neighborhoods | Why Walk? | Walkability | How It Works | How It Doesn't Work | Real Estate Services | Blog

Type an address to get your Walk Score™

Address:

## Most walkable US cities

1. San Francisco
2. New York
3. Boston

## Least walkable US cities

1. Jacksonville
2. Nashville
3. Charlotte

## Q. HOW IS THE SCORE CALCULATED?

- Based on proximity to amenities on a graded scale:  
**<0.25 mile: full score** ↔ **>1 mile: no points**
- Does not take into account type of streets, accessibility, public transport, weather, etc.



# High walking communities contribute to a more sustainable society

## Economic benefits



**£ 8.2 billion**  
The 2004 cost  
of physical  
inactivity in  
England

*\*English Cabinet Office*



**Benefits of  
walkable  
communities**

## Social benefits

**Less frequent  
neighbour  
contacts\***  
next to higher  
speed roads

*\*Paper: The contribution of good public spaces to social integration in urban neighbourhoods; Swiss National Science Foundation*

## Environmental benefits

**50%\***  
of CO2  
emissions  
come from cars  
in LA, the no 1  
source

*\*The City of Los Angeles  
Mayor Antonio R. Villaraigosa*

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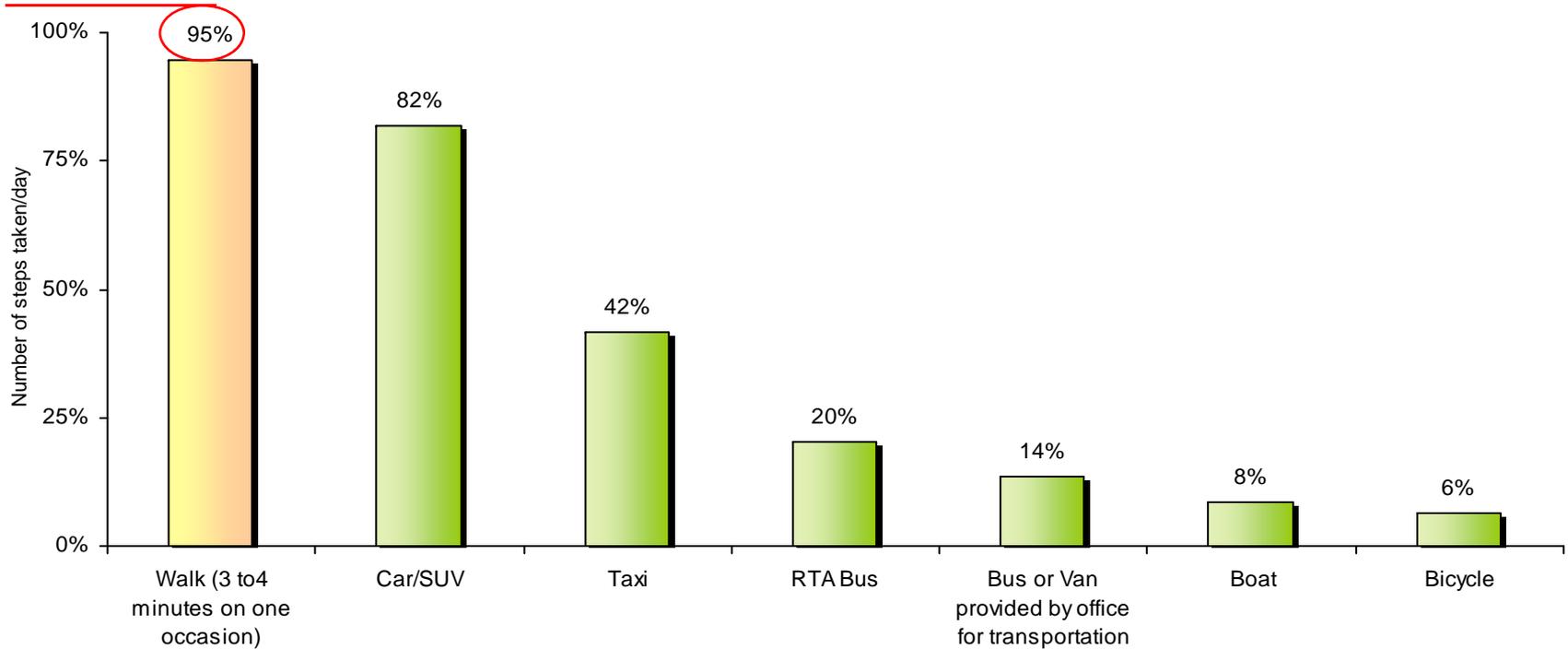
# Mode of transport in Dubai

It is surprising to note that more than 5% of the residents of Dubai did not even walk once of more than 4 minutes over last 7 days!

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The same as 5%  
didn't walk the  
last 7 days

### Mode of transport used in last 7 days by residents of Dubai

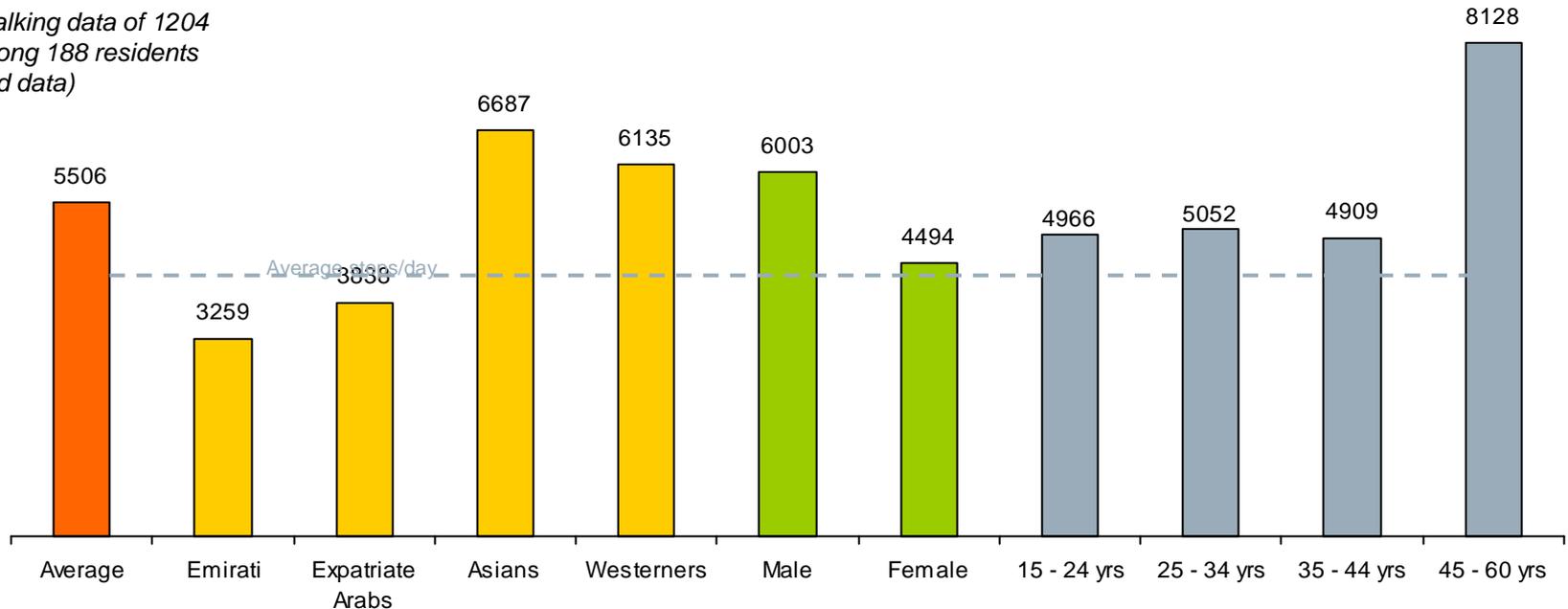


- It is clear that most of the residents are dependent of private car
- Taxi has a higher usage than RTA buses

At about 5500 steps/day Dubai residents walk a little more than half of what experts would consider adequate to prevent weight gain or assist weight loss

### Average number of steps taken by residents of Dubai

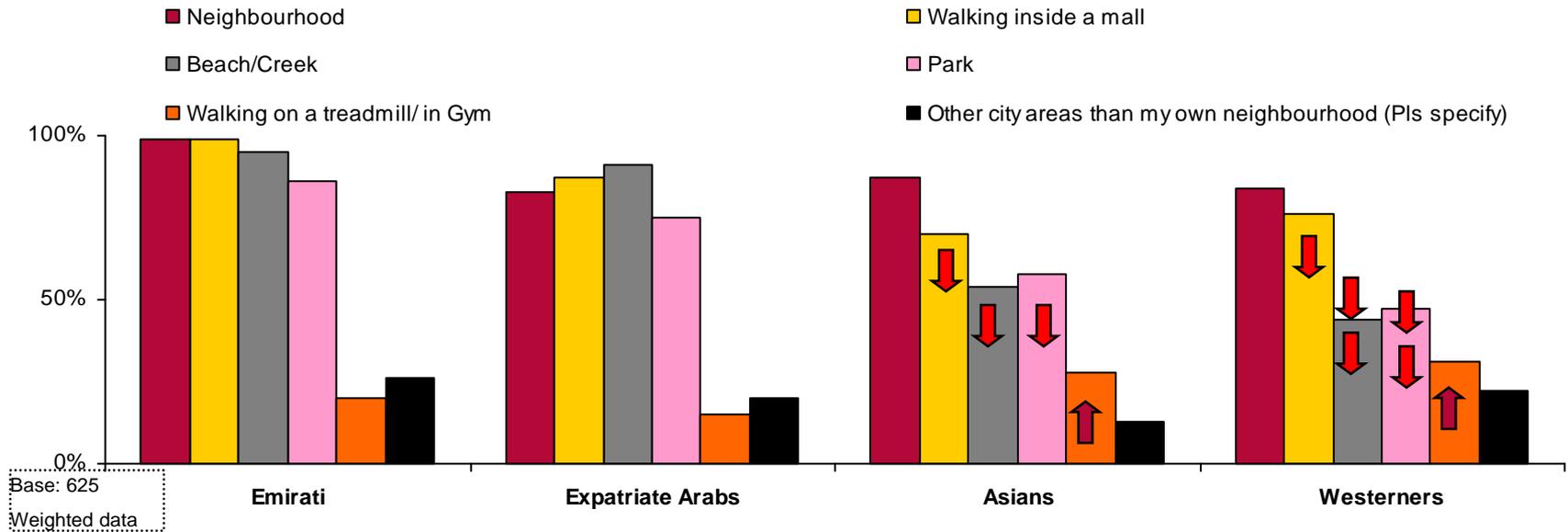
**Base:** walking data of 1204 days among 188 residents (weighted data)



- Local Emiratis and Expat Arabs walk the least, about half as much as Asians and Westerners
- It is interesting to note that older population (above 45 years) walk much more than the younger legs which seems to be because of two reasons
  - + Half of them have work place close (up to 10 minutes walk) to their residence and
  - + Approximately 1/3 of all people in 45-60 age bracket walk to their work place regularly

## Besides in the neighbourhood, the city malls are where people tend to be walking

### Areas for walking (% of people)



### **Walking inside a mall is much higher among Arabs**

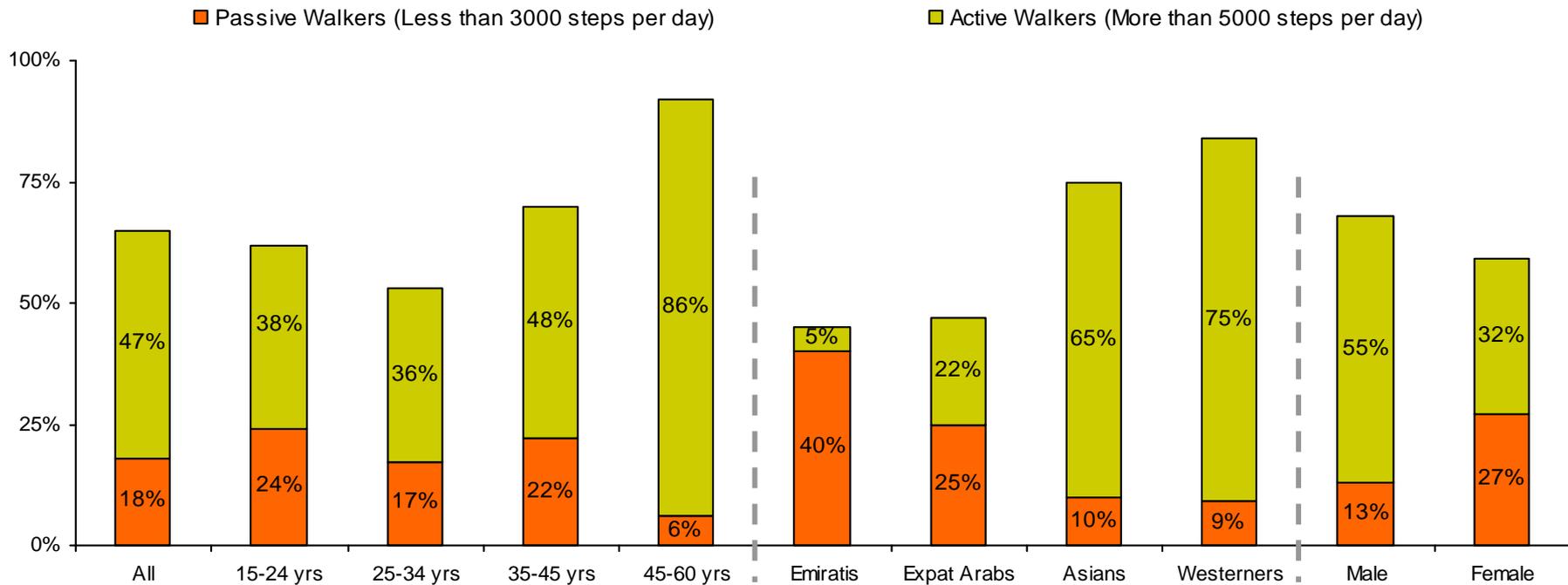
- On average people spend just over an hour while visiting malls (*not shown in graph above*)
- It was also observed that Emiratis and Expat Arabs visit wider destinations such as Wadis when compared to Asians and Westerners (*not shown in graph above*)
- Not only higher proportion of Asians and Westerners use treadmill, they also use on average 21 days and 14 days respectively in a month as compared to Arabs who use it for about 10 days a month (*not shown in graph above*)<sup>11</sup>

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# Active and passive walkers

# Proportion of Active and Passive Walkers in each age group, ethnic group and gender

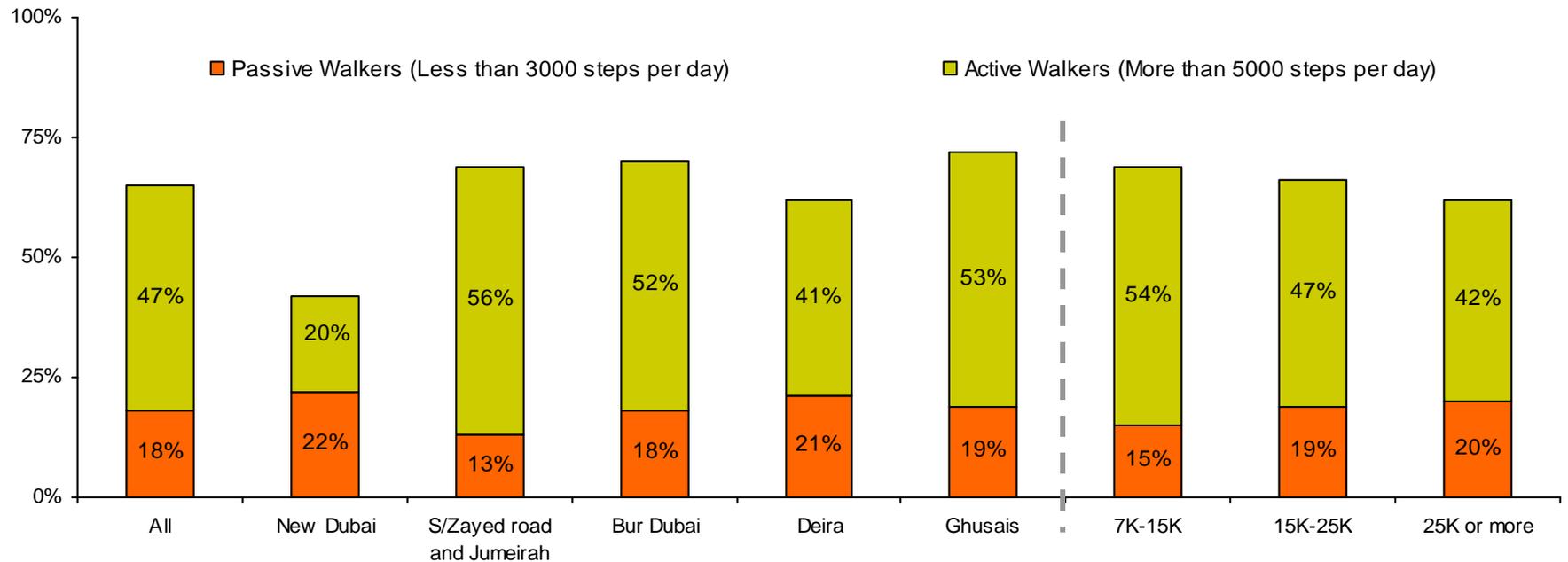
## Active and Passive Walkers (% of people\*)



\* Note: Rest of the population not shown in the graph above are average walkers (walking 3001-5000 steps per day)

# Proportion of Active and Passive Walkers in each geographical cluster and HH income group

## Active and Passive Walkers (% of people \*)



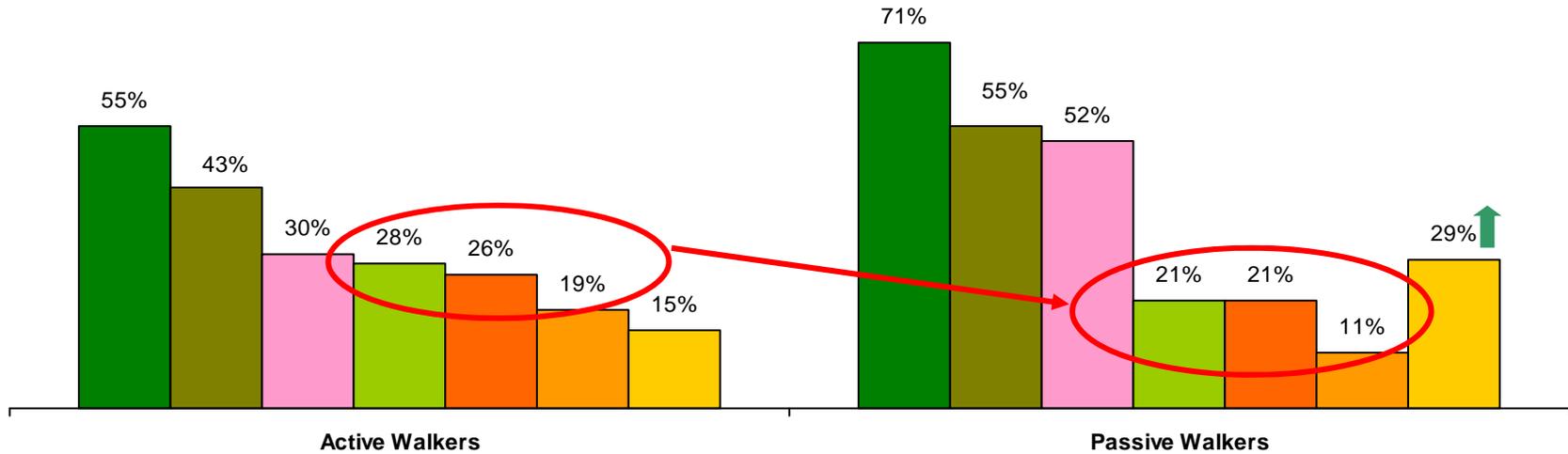
\* Note: Rest of the population not shown in the graph above are Average Walkers (walking 3001-5000 steps per day)

## What attracts active and passive walkers?

Walking is mostly associated with health related reasons, but more so for Passive walkers.

**Reasons for walking by Walkers (% of people)**

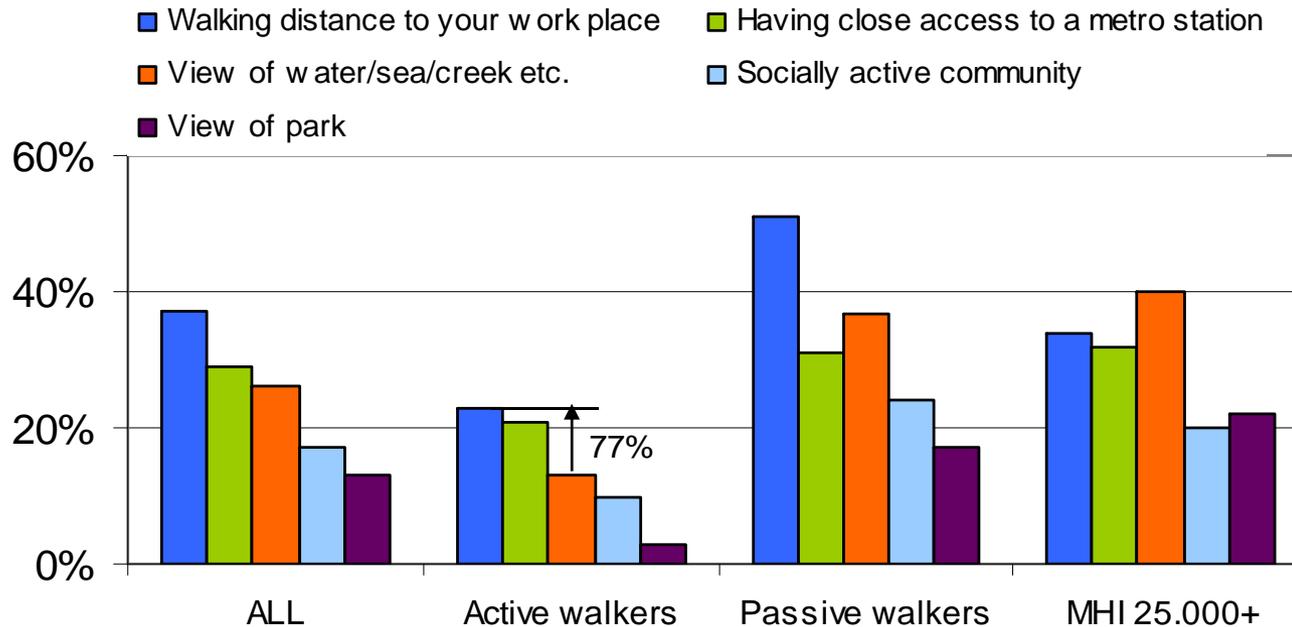
- To improve health/ healthy life style/ exercise etc
- To breath fresh air
- To loose weight
- Prefer walking if possible to avoid parking problems
- To fill transportation needs (walking as a mode of transport)
- Lack of public transport forces me to walk
- Like to be a part of the street life



- Higher proportion of Active Walkers use walking to fill their needs such as transportation needs and lack of public transport

# How much premium are you willing to pay?

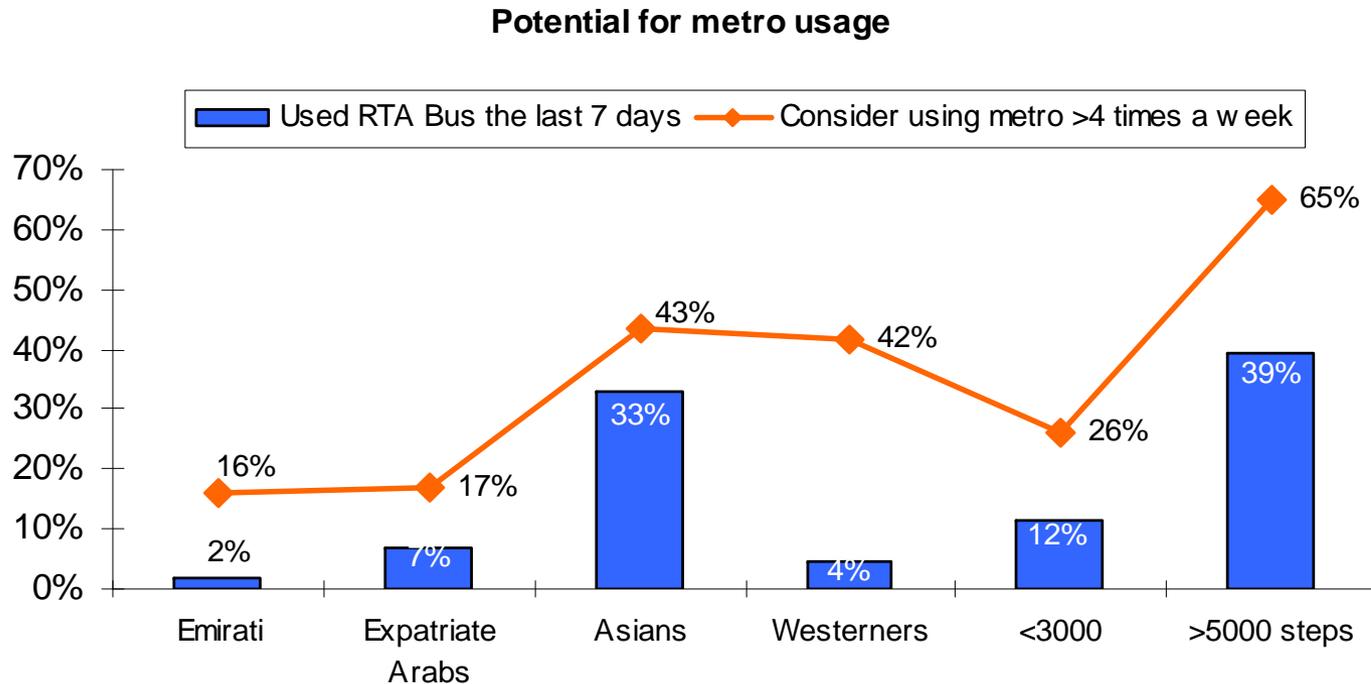
Willingness to pay at least 5% premium



- The research shows that the **highest valued amenity** is to have the **work place within walking distance**.
- This is followed by **close access to metro station**
- **Of active walkers**, there are **77%** more saying they prefer walking distance to work over view of water.

**20% of Expat Arabs and 16% of Emiratis are willing to pay more than 10% premium for accommodation within walking distance to their workplace.**

# Potential for transit oriented communities



- As seen before, **20%** of the population are **bus users** (have used the bus the last 7 days)
- **Westerners** are the second most **car dependent** nationality (after Emiratis)
- But **Westerners** show the **greatest potential** to become a new group of **users of public transport**
- Correlation between **steps taken and usage of public transport**

## Summary so far: Profile of the Active Walkers

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- The Asian and Western populations have proportionally the most active walkers
- The active walkers show more practical reasons for walking – it's integrated as a mode of transport
- Asians already use public transport the most, and westerners show the greatest potential if new modes of transport are introduced
- A substantial number of passive walkers also wish they had closer access to their work place – as indicated by the high numbers willing to put a premium on this

### Conclusion:

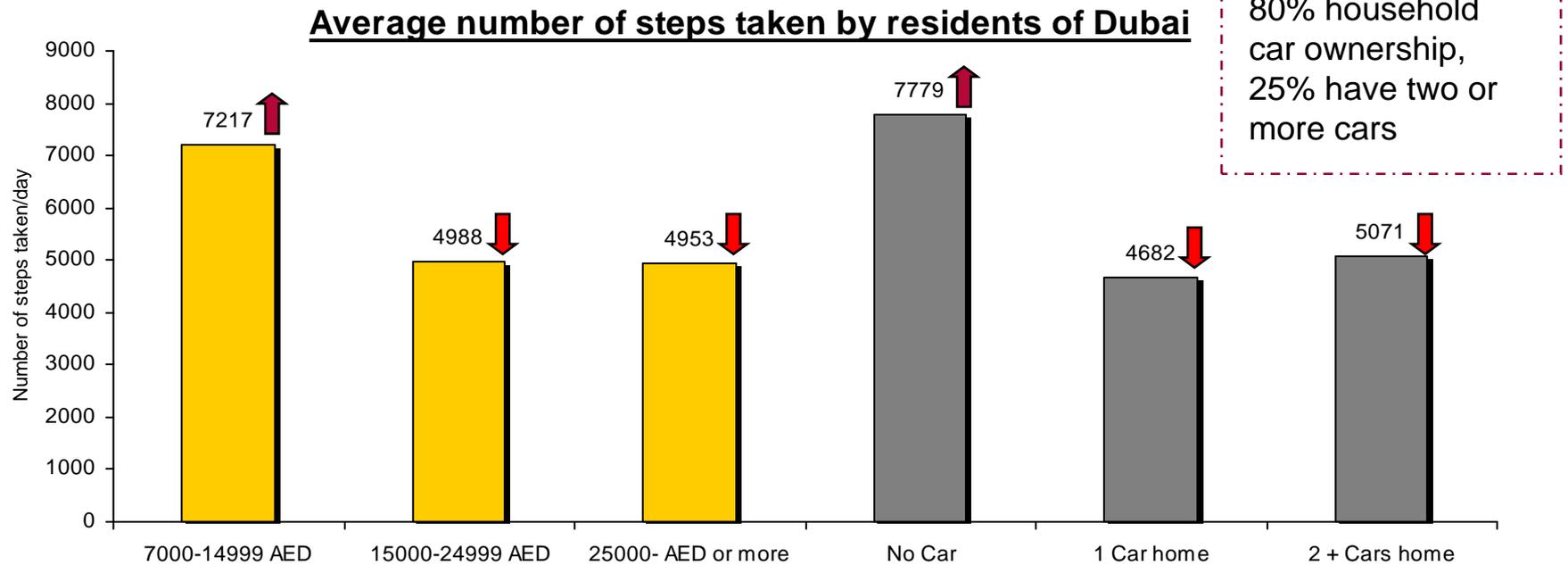
Active Walkers is a target group susceptible for messaging of having close access to work in a transit oriented community. This message will also appeal to current passive, but aspiring, walkers.

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Building Limitless credibility and positioning  
over time

Like also research from other places show, in Dubai income and car ownership is inversely related to the extent of walking

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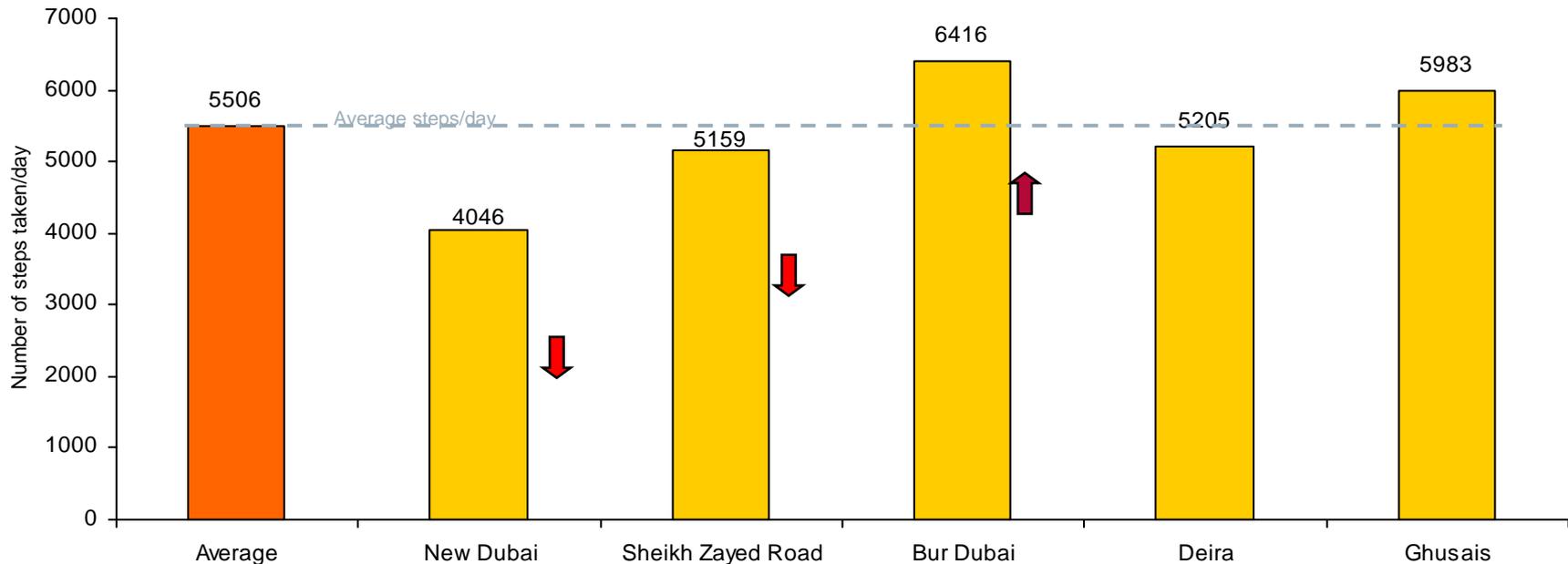
There is a sharp decline in number of steps taken by people owning cars and non car owners

- Those who earn less than 15,000AED walk 31% more than those who earn over 25,000AED
- Those with no car walk 40% more than the 1 car households

## Walking per geographical location

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### Average number of steps taken by residents of Dubai

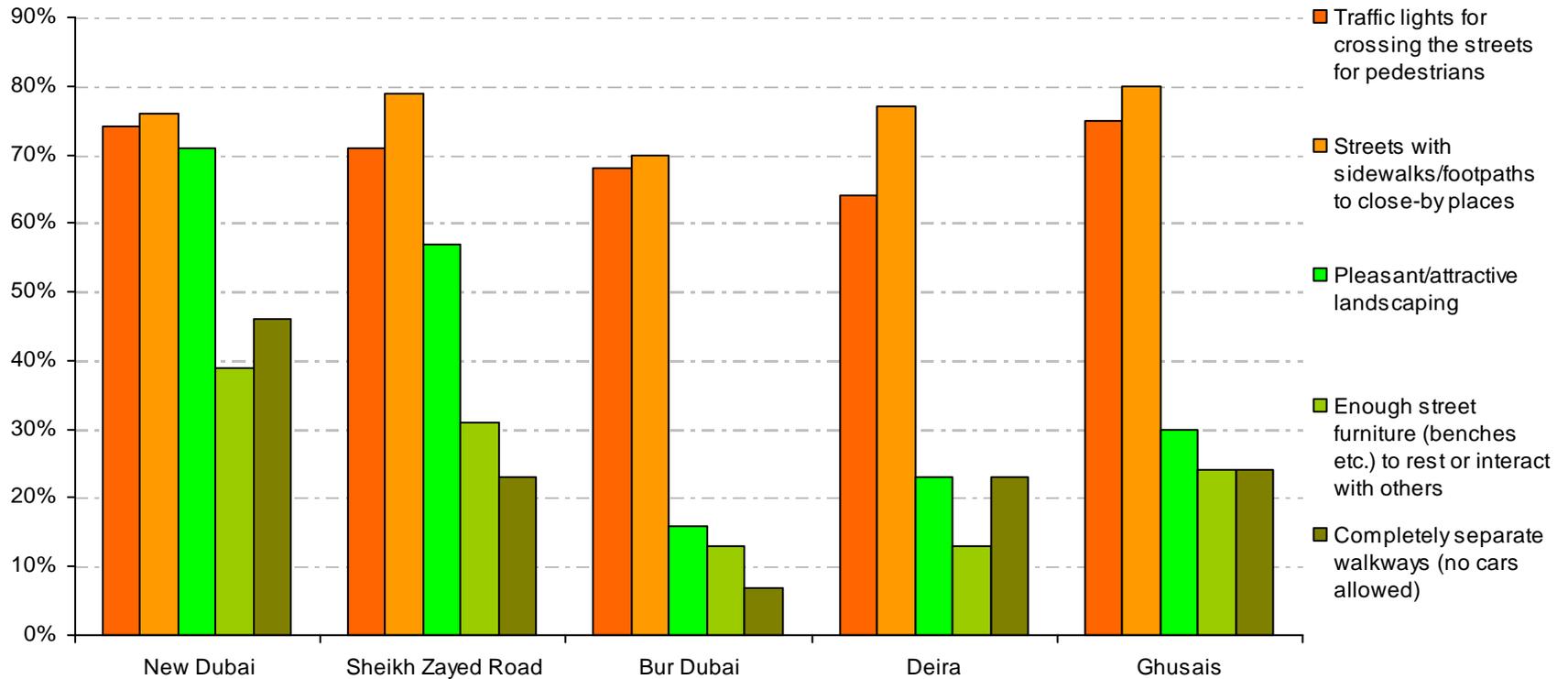


-Bur Dubai has the lowest car usage, 59% use car daily, New Dubai the highest with 93% using car daily

-23% of people in Bur Dubai say they use RTA bus at least 4 times a week, the same figure in Ghusais is 42%

Surprisingly, places with least available street amenities such as Bur Dubai recorded higher walk score!

**Available amenities in each area (% of people)**

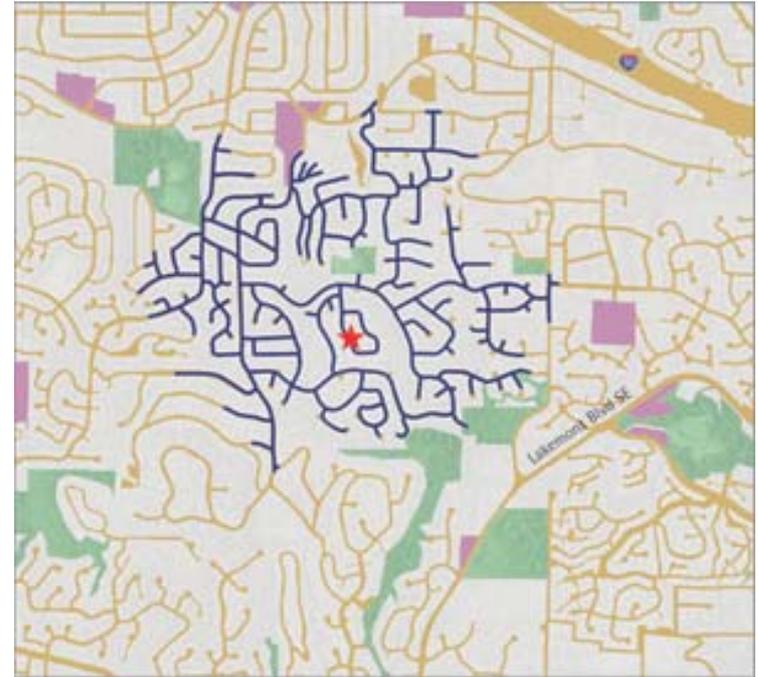
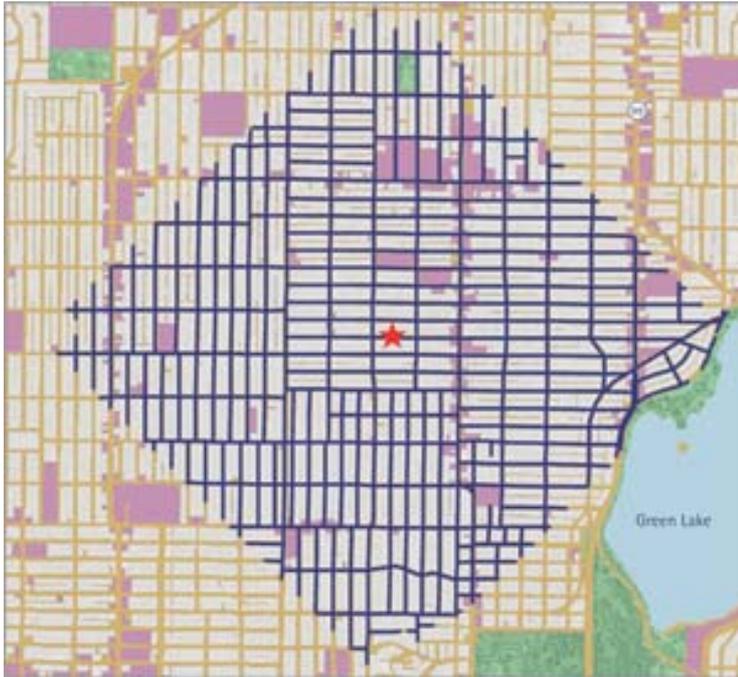


**Are the facilities available in Bur Dubai more important in encouraging people to walk?**

## Comparing the dense urban community with the urban sprawl community

- All the places you can walk to within 1 mile

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- The research shows that for amenities beyond a ten minute walk, people tend to use the car