

# Marketing Rural Transit Among Senior Populations

MARY KIHIL

Transportation systems designed to respond to the needs of older residents are frequently underutilized. The reasons are related to the quality of the system itself or to the level of senior involvement in the design. One aspect that is frequently overlooked is the way the availability of the system is communicated to senior residents. This study focuses on developing responsive rural transportation systems and targeting their appeal to senior residents. Strategies developed by marketing analysts will be reviewed as will perspectives on senior attitudes offered by gerontologists. On the basis of these reviews, the study proceeds to propose strategies appropriate for conveying transportation innovations to the heterogeneous rural senior population.

Many western societies are experiencing the rapid growth of the proportion of residents over 65. For the United States, census projections estimate that this group will make up 13 percent of the total population in the year 2000, and half of these seniors are projected to be over 75. The number of older residents living in rural areas has increased disproportionately. Given changing life-styles, an increasing number live alone. They rely on driving their own cars to access goods and services and, generally, to retain their independence. Over the years drivers' licenses have helped define a life-style built on expectations of continued mobility, in which travel distances were less significant than access to desired goods and services (1). For many, particularly those in rural areas, driving is perceived as a necessity, since there are limited forms of alternative transportation. Consequently, most elderly residents continue to drive even if their reflexes are no longer sharp enough to respond to critical driving cues (2).

In an effort to provide alternatives to the personal automobile for this elderly but decidedly independent segment of society, transportation planners have expanded on the concept of rural public transportation by introducing shared-ride systems. Yet the proportion of older residents responding has been disappointing. Where available, specialized transportation systems are often well used but involve only a small segment of the eligible population (3).

There are no doubt many reasons for this lack of responsiveness. Some may be an indictment of the quality of existing systems. Analysts have noted the lack of responsiveness of existing rural systems in terms of dependability and destinations served. Another factor is the negative image that the elderly associate with publicly provided services.

This study reflects on a related but different dimension of the problem—the apparent limited perception of individual differences on the part of both those designing rural transportation systems and those presenting them to potential ri-

ders. Perspectives on senior attitudes offered by gerontologists will be reviewed and strategies developed by marketing analysts assessed. On the basis of these reviews, the study proposes strategy specific to developing and marketing alternative rural transportation systems. The premise is that thoughtful integration of planning and marketing can assure a more broad-based ridership.

## APPEALING TO THE SENIOR MARKET

Market analysts note that those over 65 are far from being a single cohort. They differ markedly in attitude, activity patterns, consumption, and media selection, much as any other age group does (4). In fact, transportation planners have identified as many as seven different life-style groups among those over 65 (5). Most older residents have retirement in common, but even this is changing because of age discrimination laws. Many continue to work until at least 70, and some even longer.

In assessing social activities and patterns of those over the rather arbitrary age of 65, market analysts generally subscribe to the sociological theory known as the activity theory, which holds that seniors do not disengage from the fast-paced world, but rather carry over into old age the activity patterns typical of middle age (6). Although physical deterioration makes the complete carryover idealistic, an overwhelming number of seniors perceive themselves as being in an extension of middle age (about 10 to 15 years younger than their chronological age), and act and respond accordingly (7). Consequently, older residents react negatively to products and programs presented as exclusively associated with "the elderly" (8). An overwhelming majority of older individuals will not associate themselves with a product modeled by someone who appears to be their chronological age or older (9).

With the effort to move away from stereotypes and toward perceiving older persons as a heterogeneous group, analysts have presented several different approaches to the elderly market. Since consumers typically perceive themselves to be at least 10 years younger than their chronological age, some advertisers have suggested beaming the appeal at the perceived or "cognitive" age, rather than the chronological age of the consumer. Barak and Schiffman found that as the chronological age of the respondent increased, the more likely he or she was to identify with a younger group. Although 60 percent of those with chronological ages in the fifties perceived themselves to be in their forties, 76 percent of those with a chronological age in the eighties emerged with a cognitive age in the seventies (10).

As applied to rural transit, it is difficult to encourage an individual with a chronological age of 75 and a cognitive age of 60 to take advantage of a social service vehicle perceived to be "for old people." However, it may be possible to attract her or him to an alternative mode billed as a "new concept in rural transportation"—a shared-ride rural taxi, for example.

Another team of product researchers (11) go beyond the cognitive age studies and distinguish seniors at any age in terms of life-style. They suggest that there are two major groups of seniors: the "self-sufficient" and the "persuadables." Although the self-sufficient group reflects an internal locus of control and will engage in risk taking, the persuadables are susceptible and generally unwilling to take risks. These persuadables are advice seekers, with limited confidence in their own opinions. Within the self-sufficient group there are two subgroups. These are categorized, as shown in Figure 1, as the "active integrated" and the "routinized."

The active integrated are economically self-sufficient, well-educated, and self-motivated; they are opinion leaders who give, rather than request information. In retirement they physically enjoy life and are very agreeable about trying new products. In contrast, the routinized live within a more limited income and are less active. Nevertheless, they are self-confident and adjust well to changes caused by aging and retirement. Although they are not social isolates, they are self-directed and more interested in their daily routine. However, they do keep up with world events (11).

In sharp contrast, the two subgroups among the persuadables are the "homebodies" and the "groupers." The homebodies show a resignation to life that approaches apathy. They make minimal new social contacts and make their home the center of their lives. They retain long-established behavioral patterns and are unlikely to try anything new. In contrast, the groupers are very sociable and seek acceptance. They have financial means to satisfy their desires, but lack self-confidence in following through on the actions required to fulfill those desires. They fear becoming homebound and

are preoccupied with their health. They continue a high activity level in order to ward off incapacity due to aging (11). This is the group most often found in senior centers.

Given these widely diverse groups, advertisers are urged to perceive a complex market. Different messages are needed to appeal to each of these groups. The distinctions among the groups are also reflected in their choices of media. Whereas the self-sufficient, active-integrated group are heavy readers of magazines and will most likely watch public television, the routinized are more likely to watch the evening news. In general, the persuadables read few magazines. The homebodies are best reached through television or daily local newspapers, and rarely listen to the radio. In contrast, the groupers read the daily newspaper, and also watch public television and listen to classical music on the radio (11). Davis and French (4) suggest that advertisers unable to target a specific group should put primary emphasis on newspapers, because they are used highly by almost all groups. A study by Schreiber and Boyd found that 30 to 50 percent of all seniors in all educational groups surveyed regarded newspapers to be the most credible source of advertising. Television was a distant second, with radio being far less appealing to seniors at all educational levels (12).

The traditional wisdom is that seniors rely on internal, personal, informal sources of information (13,14). However, there is a sizable segment of the senior population that can be reached by formal external information sources, such as those provided by advertisements. A national study by Lumpkin and Festervand (14) found that older consumers use independent sources of information such as mass media in planning purchases. However, they rely heavily on salespeople for recommendations and verification. This verification probably replaces the reinforcement they no longer receive at home (15).

A serious factual approach in advertising is most appropriate for attracting the self-sufficient, active-integrated seniors. Testimonials from credible sources can be useful (4). Perhaps even more effective would be small trial packages, discount coupons, or product demonstrations, which would allow seniors to make their own decisions without a heavy personal investment (16). The need is to overcome seniors' lack of innovativeness while avoiding any indication of condescension (17).

In summary, to present a product to a broad range of citizens over age 65 is a far more complex assignment than initially perceived. In fact, differences in orientation and life-style may require a variety of approaches. This process becomes even more complex in the development and marketing of a public service.

## DEVELOPING ALTERNATIVE TRANSPORTATION SYSTEMS

For rural transportation specialists, the need is to design or redesign systems so they will appeal to a diverse senior population. Then they must be presented in such a way that encourages a broad group of seniors to use them. Unfortunately, system developers have too often overlooked the diversity of the senior population both in planning and in information dissemination. Too often systems are instituted because a similar system operates in a nearby area, and they

SELF SUFFICIENT	PERSUADABLE
<u>Active Integrated</u>	<u>Homebodies</u>
<ul style="list-style-type: none"> <li>* self confident</li> <li>* influential in dealing with others</li> <li>* satisfied with respect to financial status</li> <li>* enjoy shopping</li> <li>* watch "60 Minutes" and PBS</li> <li>* read magazines</li> <li>* entertain at home</li> </ul>	<ul style="list-style-type: none"> <li>* emotionally dependent</li> <li>* conservative, traditional, risk-averse</li> <li>* don't adjust to change</li> <li>* stay at home</li> <li>* watch comedies, gameshows, soap operas</li> <li>* limited social contact</li> <li>* read local newspapers</li> </ul>
<u>Routinized</u>	<u>Groupers</u>
<ul style="list-style-type: none"> <li>* self confident</li> <li>* limited income</li> <li>* well adjusted</li> <li>* interested in daily routine</li> <li>* entertain at home</li> <li>* read books</li> <li>* watch evening news and news interview shows</li> <li>* read newspapers</li> </ul>	<ul style="list-style-type: none"> <li>* highly social</li> <li>* seek acceptance</li> <li>* limited self confidence</li> <li>* fear being home bound</li> <li>* concerned about health</li> <li>* highly involved</li> <li>* achievement oriented</li> <li>* watch family TV</li> <li>* read newspapers</li> </ul>

FIGURE 1 Characteristics of the four senior citizen market segments [based on data by Day et al. (11); category labels simplified].

are not designed for the individuals who might be willing to use them.

There is a need to be more aware of both cognitive age considerations and life-style differences in the development of alternative transportation systems. An important first step is to define the target audience. Does the potential rider pool consist exclusively of those among the frail elderly population who value the association with the other regular riders as much as the trip itself? In contrast, does the pool include independent-minded individuals who find their mobility threatened when increasing physical disabilities limit their ability to drive? Although the former group would be content with a special service van, the latter, much larger group might be better served by some type of shared-ride automobile or minivan service.

A shared-ride automobile, a rural jitney service, would be designed to appeal to seniors who wish to retain their active life-style but who for varying reasons are now reluctant to drive. It would operate on a demand-responsive basis and would be available for any trip purpose.

In household telephone surveys and follow-up trip logs in rural Iowa and Missouri completed by seniors in 1990 an overwhelming preference for automobile transportation was found. Ninety-one percent of all trips were made in a private automobile, a proportion slightly higher than the approximately 85 percent reported as a national average for rural Americans in the Nationwide Personal Transportation Study (18).

If unable or hesitant to drive themselves, these automobile-oriented senior respondents would ride with a friend or relative, but at the same time, many indicated that they did not wish to impose on another person's schedule. A flexible automobile-based shared-ride system seemed to respond to these needs. When the respondents to a survey conducted in western Illinois were asked whether they would be interested in using such a system, 41 percent replied with enthusiasm. They envisioned using such a service for visiting, shopping, and recreation, as well as for trips to the doctor (19).

The cognitive age of individuals who would be most likely to use such a shared-ride system would be in the upper sixties, whereas their chronological age would most likely be over 75. Respondents in their sixties typically felt "too young" for such a service, and a number of those in their nineties felt that they were "too old to travel around independently" in such a service. Those giving their chronological age between 75 and 85 were very enthusiastic (19).

In terms of life-style, those expressing interest in a shared-ride system saw it as an extension of their independence: "That would mean that I won't have to rely on my nephew or impose on my neighbors." "That would mean that I could go shopping whenever I wished, rather than waiting for my daughter-in-law to get time off from work." Such individuals would be more likely to be numbered among the "self-sufficient" than among the "persuadable groupers." These are the individuals who typically do not attend congregated meals at the senior centers. In fact, only 16 percent of these respondents indicated that they would like to travel to senior centers.

Current travelers in the more typical rural public transit van generally have higher cognitive ages, even though their chronological ages are similar to the more independent shared-

ride enthusiasts (20). In terms of the life-styles suggested above, these van riders can best be described as groupers. They are social and positive, enjoy interaction, have limited self-confidence, and enjoy television programs. They are very concerned about their health and the possible consequences of being homebound. These are the types of individuals who enjoy preestablished programs and the sociability of interacting with friends in these programs. These are regular participants in programs at the senior centers, and enthusiastically participate in group events such as "Senior Fairs." At one such fair in northern Iowa health booths are very popular, but most people come for dancing and a common meal. The typical age of the participants is 75 to 85, with hardly anyone under the age of 75 attending.

There are no doubt a number of variations on both the shared-ride automobile and the van or minibus systems. However, these concepts provide a fairly strong contrast. To develop a system that will have broad appeal in a particular setting, full involvement of the senior residents in an area is essential. Planning committees need to reflect a wide variety of perspectives. The input for service alternatives cannot come exclusively from ridership surveys and frequent rider advisory groups, because these sources generally suggest tinkering with the existing system rather than recognizing a need for a different system. Household surveys and discussions with senior members in a wide variety of organizations, library patrons, local cafe or convenience store patrons, church groups, and clinic outpatients will generate a far more complete view of unmet needs and suggestions for new service design. It might be that a system needs to provide both a van for group travel and shared-ride automobiles for individual trips.

Once the concept has been developed, new approaches will be needed to attract a broad base of the population. Professional marketing experts agree that the appeal must not play to the negative connotations associated with "old" or "elderly." Pictures of older people being assisted onto a van may be reassuring to a few who know they need help, but, such photographs would turn aside a sizable number of potential riders who could benefit from an alternative to the automobile. They already think of rural public transit as "for old people" and connect it with nutrition sites rather than personal transportation needs. Announcements need to be upbeat, and stress the benefit of continued independence. Spokespeople should be carefully selected to reinforce this active, upbeat image.

Given the variety of life-styles indicated in the marketing literature, it is important not to rely on just one approach or avenue of information sharing. Relying on senior centers to disseminate information about a new transportation service may not be appropriate unless the plan is to introduce modifications to an existing service.

A television news story featuring a ribbon-cutting on a new shared-ride system might capture the interest of the self-sufficient group. Ideally, the news story would feature interviews with individuals who appear to be upper-middle-aged discussing plans to use the new service to go shopping or to the bank. But even the self-sufficient would be unlikely to perceive the concept as relating to them without reinforcement from newspapers, public service announcements, and fliers readily available in neutral sources such as libraries, banks, or pharmacies.

Restaurants or fast-food shops offering senior discounts are potential locations for succinctly worded fliers that contain a recognizable logo and familiar slogan, such as "RIDES for safe, reliable transportation," or "RIDES will get you there." The fliers should include a boldly printed telephone number for information.

Feature articles or discussions in newspapers would capture the interest of some of the persuadables, as long as articles appeared more than once, and preferably in different sections of the paper. Perhaps an initial news story could be followed by a letter to the editor giving personal testimony.

To be fully effective in translating information into action, however, announcements would need to be reinforced by endorsements from friends or associates. This is particularly true for the persuadable, homebodies and groupers. Most older residents have about 15 friends who provide companionship, support, and information, and these friends not only serve as sources of information, but they also sift and validate information coming from other sources (21). Therefore, it would be an effective marketing strategy to attract a core group of well-respected senior residents who could serve as a volunteer advisory board for the new system. They would not only provide essential citizen participation and feedback, but also serve as ambassadors for the system. This approach served very effectively for OATS, a nonprofit transportation system operating across most of Missouri (22). Announcements in church newsletters would help, as would opportunities to discuss the service in clubs, service groups, or church settings. For the persuadable groupers radio call-in shows might also be of help.

This strategy of multiple appeals is particularly important in relating to older adults, because the ability to recall declines with age. A study by Stephens and Warrens found that product recognition was greatly increased by repeated exposure (23). Full recall is essential if an individual is to make the effort to voluntarily get involved in a program or take advantage of a new service.

Key marketing strategies that would appeal to a broad range of the senior residents of a community are summarized below.

- Set up an advisory group broadly representative of the senior population, and encourage members to solicit riders personally as well as in presentations to groups.
- Present an image that is not associated directly with age or the elderly.
- Get program introduction and milestone coverage on local television news.
- Provide news stories in a variety of local and regional newspapers. Repeat news features and repeat display of number to call in association with the upbeat image of the system.
- Encourage letters to the editor or other unofficial endorsements, such as on call-in radio shows.
- Place announcements in church newspapers, cafes, libraries, pharmacies, doctors' offices, and restaurants with senior discounts.

Once instituted, the system could promote itself by establishing a single dedicated telephone number, preferably one that can easily be associated with the service, such as 788-RIDE. The number should be answered personally at all times, and having a dedicated line would limit confusion, facilitate

scheduling, and provide quick professional, yet personalized, responses to concerns (24).

Once the system has been launched, follow-up would be critical, especially for those seniors who need to be convinced that the system really works before committing to it. News briefs and testimonials are helpful. Personal contact with doctors, physical therapists, and clergymen, who can in turn recommend the system to clients or parishioners, can help considerably. Awards for bringing along a friend or an acquaintance can encourage persuadables.

## CONCLUSION

Successful program development is associated with successful marketing. Unless the needs of a targeted public are reflected in a program, no amount of marketing can entice them to take advantage of it. On the other hand, unless a broad range of citizens is aware of the program, it will quickly become the province of the few, and substantial need will go unaddressed. This is particularly clear in addressing the transportation needs of senior populations. It is easy for planners to grasp one concept and present it as a solution and then wonder why so few become involved. A sufficient variety of transportation alternatives is needed to appeal to the different life-styles represented by the senior population. They need to be effective in meeting not only the needs of nondrivers, but those of concerned, insecure older drivers as well.

It is essential not to stereotype seniors by attributing to them any single set of characteristics. In fact, it is the traditional negative stereotype of seniors that they themselves react against. To be successful, any alternative transportation system will have to be sensitive to the wide array of characteristics and vastly different life-styles. A rural transit system will need to offer services to appeal to both the self-sufficient and the persuadable categories of senior residents.

Market analysts are determined not to end up with an inventory they cannot sell. By the same token, transportation planners must certainly be determined that the rural transportation systems they develop will have a strong appeal to the diverse senior population.

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