Older Adult Transportation in Rural Communities: Results of an Agency Survey

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Abstract

The proportion of people over age 65 is higher in U.S. rural and small communities than in urban or suburban areas. When older adults who reside in these communities retire from driving, they may need to rely on alternative transportation options that exist in urban settings but that might not be provided, might be less accessible, or might be available in a different form in their communities. This paper uses a survey of service providers to identify the types of public transportation options available to older adults residing in these communities, as well as the strategies employed to finance, operate, and/or market these services. The survey results highlight a need for more careful investigation of the nature of service partnerships, the effectiveness of service strategies, and the actual use of services by older adults.

Keywords: *Public transportation, older adults, rural and small communities, finance*

Introduction

The older adult (aged 65 or older) population in the United States is projected to increase by half in the next 25 years, from 14.1% of the population in 2014 to 21% by 2040 (U.S. Census Bureau 2014). Recent studies have shown that the proportion of people (approximately one in five) over age 65 is higher in rural and small communities than in urban or suburban areas, and is expected to grow significantly over the next decade (Baernholdt et al 2012; Bennet et al 2013). For the purposes of this project, rural and small communities are those defined by the Federal Transit Administration (FTA) as having a population less than 50,000 (FTA 2015a).

The growth in the older adult population of these communities can be attributed to two distinct yet interrelated factors. First, the sheer number of Americans over the age of 65 is increasing due to advances in medical care, greater longevity overall, and the impending transition of a major birth cohort—the Baby Boomers—into this age range (Blanton and Bowen 2013; Glasgow and Brown 2012; Myers and Sung-Ho 2008).

Second, older adults are becoming an increasingly large proportion of those areas' total population, due to a host of economic and migration factors. As explored in the literature review, "aging in place" is a dominant force in aging policy, and many older adults are encouraged (or compelled by financial constraints) to remain in their homes even as other age cohorts leave rural and small communities (Morken and Warner 2012). These communities also tend to suffer from "brain drain" forces that compel young people to more urban areas for higher education or better career opportunities (Carr and Kefalas, 2010; Scales et al. 2013), leaving behind a disproportionate number of older residents who continue to age in that setting.

Like the rest of the adult population, older adults living in rural and small communities rely on the personal automobile as a primary means of mobility (AARP 2012). However, when they cease driving, they may need to rely on alternative transportation options that exist in urban settings but that might not be provided, might be less accessible, or might be available in a starkly different form in rural and small communities (Kerschner 2006). Given the pending growth of older adults living in rural and small communities, more information about the kinds of transportation services currently available in these communities is needed.

This paper examines the state of rural and small community transportation programs from an administrative and operations perspective to better understand how such programs, particularly those serving older adults, provide services and perceive their role in the broader transportation and human-service environment. Using a survey, the authors found that service providers in rural and small communities offer a diverse array of transportation options for older adults and frequently partner with social services, government, and other entities to finance, operate, and/or market services. The survey results also indicate that providers in rural and small communities perceive themselves to have been successful in marketing services, building trust, and leveraging resources in an environment that presents a unique set of challenges for transit providers and policymakers. The findings suggest a need for more careful investigation of the nature of service partnerships, the effectiveness of service strategies, and the actual use of services by older adults.

Literature Review

The unique transportation needs of older adults have been explored at length in recent years, often through the lens of aging in place initiatives. The focus is often on the promotion of transportation as a means of maintaining independence for older adults who wish to maintain community ties while remaining in their own homes (AARP 2012; Rosenbloom 2003, 2004), though other streams of analysis have focused on the availability and structure of existing alternatives to driving in rural and suburban areas (KFH Group 2001, 2004, 2008). Commonly-cited destinations popular among the 65 and older population include shopping centers, medical offices, places of worship, and community centers, but in rural and small community settings, such destinations often are inaccessible by transit. This compels older adults living in such areas to rely on the personal automobile to a greater degree than their urban counterparts (Giuliano 2004; Rosenbloom 2004).

As such, the need for reliable alternative transportation options becomes particularly pronounced once older adults voluntarily or involuntarily cease driving (Safe Mobility for Life Coalition 2011; AARP Public Policy Institute 2011). In recent years, the gerontological literature has focused on the physiological and cognitive impairments that often accompany aging and how these can have a deleterious effect on driving (Alsnih and Hensher 2003; McKnight 2003). Policies designed to help older adults transition from driving to using specialized transportation are limited, but the emergence of these topics in the literature suggests the need for studies such as this one that may help to bridge the knowledge gap to aid practitioners in using such policies to increase ridership and accessibility of older adults.

The types of public transportation services available in rural and small communities vary widely from place to place, but may consist of ordinary automobiles rather than large buses, operations that make individualized trips via appointment rather than on a scheduled fixed route, and/or shuttle-like services to specific destinations such as major medical complexes (KFH Group 2004). Service providers that operate rural- and small-community-focused transportation programs in the U.S. receive funding from federal authorities to provide transportation. In FY2014, FTA devoted more than \$600 million to rural-area programs under the §5311 Formula Grants for Other than Urbanized Areas Program (FTA 2015b). Some providers also receive funding through the §5310 Transportation for Elderly Persons and Persons with Disabilities Grant Program that funds services for older adults and individuals with disabilities (FTA 2015a). Although there is no funding program specifically geared toward serving older adults in rural and small communities, the agencies that receive funding under both FTA programs most likely provide services for both constituencies in tandem. In fact, the set of funding recipients for the two programs often overlaps considerably, which suggests that providers have easily been able to secure funding for one, or both, priorities.

Rural and small communities tend to have smaller tax bases as a consequence of the decreased economic opportunities and lower living standards of their communities as compared to their urban counterparts. These smaller tax bases typically produce insufficient local government fiscal resources to support a permanent public transportation program (The White House 2010). Because of these resource challenges, service providers have been said to exist in a “culture of innovation” (KFH Group 2001). The economic circumstances of many rural service areas requires providers in that setting to be creative and adopt unique funding streams, institutional partnerships, or other strategies related to service delivery, management, and administration (Hosen and Powell 2011; Koffman 2004). The desire to gain more knowledge about the purpose and extent of these strategies was a primary motivation for this research.

Research Design and Case Selection

This study examined two questions: What kinds of transportation services are available to older adults living in rural and small communities? How are these transportation services organized and delivered by transportation service providers?

To answer these questions, the authors designed a survey distributed to administrators of 108 agencies that serve older adults living in rural and small communities. The survey used a web-based platform with open-ended questions and was administered in the spring and summer of 2015. The survey respondents were drawn from the 2014 National Transit Database (NTD) of transit agencies that received some combination of funding designed to service older adults and/or persons with disabilities (\$5310 funds) and individuals living in non-urbanized areas (\$5311 funds) (FTA 2015c). The authors used the combined (urban and rural) NTD as a survey pool and focused on agencies that applied grant monies to operational and/or capital expenses, with preference given to agencies using the funds for operating expenses. This allowed the authors to communicate specifically with rural and small community-serving organizations that devoted at least some resources to serving older adults. Because this was a targeted and non-random survey, responses were not anonymous. As discussed in the results below, responses were received from a national distribution of agencies, roughly two-thirds of which were public transportation or aging-related agencies. The remaining third were private non-profit organizations, most of which identified a primary focus on aging-related issues. Survey materials were addressed to administrators or those individuals within the organization who could best discuss the issues identified.

The authors asked respondents a set of 13 questions that ranged from general topics such as organization, location, and communities served to more administrative-focused topics such as agency mission, results of ridership surveys, and noteworthy opportunities or challenges to future growth of the older adult rider market. A copy of the survey is included as Appendix A. The general-topic questions helped to establish the context in which these programs operate. The administrative questions shed light on issues more directly related to service provision by allowing respondents to explain how their organization works with older clients as well as how their agency's stated mission connects with its current and long-range activities.

The survey responses fit into a few broad categories, from which some general points of consensus emerged regarding the operation and growth potential for transit providers in rural areas and small communities. For example, nearly all respondents identified either inadequate funding or the difficulties in communicating effectively with independent older adults as their organization's single greatest challenge. Nearly all respondents identified either financial or collaboration/ partnership ties with government agencies and/or local non-profit organizations, usually those organizations related to healthcare or education services. The survey also revealed that even though a large number of respondents stated that their organization explicitly targets older adults and/or receives funding to serve their needs, the language of the agencies' published mission statements was far less likely to contain references to older adults or their needs.

Survey Results

In total, 40 responses were received from agencies located throughout the United States, with a large number of respondents from the Pacific Northwest (see Figure 1). Although the number of responses may appear small for a national survey, these 40

were from the aforementioned list of 108 agencies that received both \$5310 and \$5311 funds, indicating a response rate of just under 40%. This is a reasonable response rate for this kind of survey.

FIGURE 1.
Geographic distribution of
survey respondents

Of the 40 individuals who completed the survey, 38 occupied a position of senior management, such as executive director, mobility manager, transportation director, or a similar title. One respondent self-identified as a dispatcher, and one identified as a service specialist. Most responding agencies were formed or administered by a local government body, as opposed to being non-profit organizations or private companies. The discussion that follows focuses on eight key survey questions about service provision (see Appendix A for the full question set).

Mission Statement Language Rarely Matches Day-to-day Operations

The authors asked respondents whether their organization has a specific mission related to transportation service provision. From the 33 agency mission statements supplied by respondents, it was found that general terms such as “transportation,” “provide,” and “service” appeared more frequently in the statements (30, 28, and 17 appearances, respectively) than aging-oriented terms such as “independence,” “seniors,” and “safe,” (7, 5, and 4 appearances, respectively). This was observed despite the fact that every agency surveyed received some funding from FTA to provide services specifically for older adults and individuals living with disabilities. Although the terminology used in mission statements is not generally required to match an organization’s daily operations, the fact that many agencies received federal dollars to serve these two groups, yet maintained mission statements that generally did not contain explicit references to them, may indicate either an outdated set of guidance documents or a functional disconnect between formal policy and daily operations.

Surveyed Organizations Provide a Diverse Range of Services

Respondents were asked to list the specific transportation services their agencies provide to client populations. Given the wide range of terms used to describe agency services, the responses were reviewed and classified into a number of basic service categories, as is shown in Table 1.

TABLE 1.
General Categories of
Transportation Service
Provided

Service or Related Program	Frequency
Demand-response	39
Fixed-route public transportation	14
Medical/Medicaid transportation	14
Paratransit/ADA-compliant service	12
Route deviation service	8
Commuter/workforce transportation	5
Subscription/membership route	3
System connection/intercity route	3
Older adult nutrition/socialization	2
Bus rental/for-hire program	2
Rideshare service	1
Child services	1

Nearly every respondent listed multiple service types, but the most common, by far, was demand-response or “curb-to-curb” service. A majority of respondents stated that they offer an on-call or demand-responsive service, and a smaller number reported providing traditional fixed-route services such as those that accept or discharge passengers at predetermined stops or operate on a set schedule. This finding mirrors what the literature has noted regarding rural areas with dispersed populations—many rural transit riders use these services only for medical or infrequent trips (Kerschner 2006; National Rural Health Association 2013). Whereas all 40 responding agencies accepted §5310 monies to serve passengers living with mobility impairments as classified by the terms of the Americans with Disabilities Act (ADA), 12 respondents reported providing ADA-specialized service on a regular basis. They distinguished this from “demand-response service,” as discussed in the next paragraph. According to federal regulation, transit agencies that operate fixed-route services are required to offer ADA-compliant paratransit services within a set distance of their routes to meet the needs of individuals with disabilities who might be unable to use the fixed-route services. The §5310 program is intended to provide paratransit services as a supplement to fixed-route service for those agencies that operate fixed routes. Since the agencies surveyed also received §5311 funds, meaning they serve rural and small communities, most do not operate fixed-route transit within their service areas. Overall, this suggests that the 12 responding agencies that explicitly mentioned providing ADA-compliant service operate some level of fixed-route service and are accustomed to the service-supplementing requirements of the §5310 program, which was confirmed in a post-survey review of responding agencies.

One issue that arose in coding and interpreting the survey results was that of terminology. Numerous terms are used within the industry to describe the services listed in Table 1, and some definitions overlap. For example, whereas some respondents explicitly distinguished between “paratransit service” and “demand-response service,” it is not clear from the data that all respondents made a distinction between the two services when they answered the survey question. Given this issue, the results did not easily indicate the degree to which individual agencies focus on passengers with disabilities versus older-adult passengers. This overlap in service-provision is made more difficult by the fact that \$5310 monies are disbursed to serve both older adults (those age 65 and older) and individuals with disabilities (of all ages). A deeper examination of the issue may bear more solid findings on the specific makeup of \$5310 funds allotted to each agency’s various services, but for this analysis, respondents’ statements were clear that demand-response services dominate the programming of rural and small community transportation providers.

Observed Organizations Partner with a Vast Array of Government or Non-profit Agencies

Respondents were asked if they partner with other organizations when providing services, and if so, to list those partners and to explain the purpose(s) for such partnerships. The responses, once categorized into the simple tally of partner types shown in Table 2, produced two central findings.

TABLE 2.
Partners for Rural and Small
Community Transportation
Service Providers

Partner Agency Type	Frequency
Local government	20
State government	16
Older adult service organizations	16
Health facilities	12
Education and workforce	11
Human service nonprofit	8
Private transportation companies	3
Veterans’ care organizations	2
Tribal transportation	1

In total, 34 respondents (85%) reported that they partner with at least one local, regional, or statewide entity to provide transportation services. Such intergovernmental partnerships are common among public transit agencies (KFH Group 2004). Local-government ties were more frequently reported than statewide ties. Most of these intergovernmental partnerships were of the sort defined by formal and/or financial arrangements such as contracted service, government grants, and pass-through monies. Locally-oriented human service non-profit organizations, particularly those related to older adult services and health, tend to dominate these working relationships. Assisted-living facilities, adult day-care facilities, and medical facilities were listed as the most frequent non-governmental partners. Many respondents also reported collaborating with school districts, local colleges, job-training nonprofits, and a few private companies

to provide transportation to students and workers. Overall, the survey results suggest that transportation service providers are well-connected and in a unique position to provide clients with access to a vast array of services.

Despite being directly asked to discuss the nature of agency partnerships in the survey, only 14 out of 40 explicitly stated the purpose for the inter-agency partnerships in which their employer was engaged. The respondents that did explain the purpose(s) behind these partnerships described rationales such as fee-for-service contracts, state-required inter-agency coordination, or simply to share costs among local human-service agencies.

Informal Marketing and Word-of-Mouth are the Most Common Tools Used by Providers

Respondents were asked to assess the degree to which their agencies marketed transportation services to older adults, as well as the specific ways in which they did so. A total of 31 respondents reported that their agency targets older adults as a client population and devotes resources to marketing services to that population; 21 of those work directly with older-adult housing facilities and medical professionals to market transportation services at those locations and to educate potential riders of the benefits of said services.

Regarding the marketing of services, 24 out of 40 respondents stated that their agency's outreach efforts depend to a large degree on informal recommendations and/or word-of-mouth communication among clients, due to a commonly-held belief among these providers that personal recommendations are the most effective marketing tools when working with older adults in smaller communities. Although traditional marketing and education tools such as advertisements and pamphlets were used by 25 respondents, the consensus among them was that informal marketing is vital to operational success. Many made the direct assertion that informal marketing is as common and as useful to their organization as formal marketing platforms. This indicates that a communicative and socially-oriented marketing approach is likely to be equally, if not more, successful at growing and retaining older adult ridership than traditional marketing formats such as printed or multimedia advertising.

Customer Surveys are Common, and Conducted for a Variety of Purposes

Respondents were asked whether they conducted surveys or other assessments to measure the effectiveness of their agency's services in meeting older adult transportation needs, and if so, to discuss the results of such assessments. A total of 22 respondents stated that they conducted formal surveys, with most being for general customer-service or customer needs-assessment purposes. Of the 22, 3 claimed to conducted formal surveys as part of a comprehensive-plan update or as a legal/contract stipulation, 4 surveyed clients informally—for example, through in-person conversations with a client during or after a trip—and the remaining 13 respondents did not survey clients at all. Of the agencies conducting formal surveys, one stated that their agency does so solely as a requirement for receiving federal funding. As a whole, the survey responses indicate a client-oriented culture in many of these organizations, given their focus on gauging customer satisfaction and customer needs.

Overcoming Clients' Fears and Securing Program Funding Represent Major Challenges

Respondents were asked what they perceived to be the greatest challenge(s) to encouraging greater older adult usage of transportation services. Responses were organized into a handful of broad but logically-grouped categories, as shown in Table 3.

TABLE 3.
Greatest Challenges and
Opportunities to Future
Success

	Frequency
Challenges to Encouraging Older Adult Use	
Inadequate funding/staff/vehicles	12
Maintaining older adults' independence as they transition from driving to transit	11
Overcoming older adults' fears and building trust	8
Limited schedules and dispersed clientele	4
Inadequate marketing of services	2
Opportunities for More Older Adult Use	
Expansion of existing service	8
Marketing/education for older riders	7
Strong ties to older adult services	7
Word-of-mouth among existing users	5
Popularity of service among older riders	2
Miscellaneous or unrelated response	7

The most common challenge identified by respondents was the set of issues related to funding for operations, equipment, and staffing. The second and third most frequent responses were actually more noteworthy for this project, as they related to respondents' views about more effectively engaging older adult riders. Nearly one third of respondents stated that their agency's greatest challenge was helping auto-dependent older adults transition from driving to transit. One-fifth of respondents reported that building trust and helping older adults overcome their fear of transit represented their greatest obstacle to success. Taken together, these responses show that nearly half of the respondents consider their agency's interactions with older adults to be the single greatest challenge facing them. The remaining respondents felt their organization's greatest challenge was either program-related (limited schedules and dispersed clientele) or a generally inadequate marketing of services. Thus, from the respondents' perspective, issues of limited fiscal resources and the need for more effective older adult outreach and engagement are the biggest obstacles to future success.

Building Strong Networks and Ties to Older Adults are Key Opportunities for Growth

To supplement the question regarding challenges, respondents were asked to identify their agency's best opportunities for encouraging greater older adult use of agency services. The responses to this question were grouped into a small number of broad categories, mainly as a means of simplifying the analysis.

First, as indicated in Table 3, respondents identified the expansion of existing services as representing the biggest opportunity for growth. Second, consistent with the

responses related to challenges, many responses were related to agency relationships with the older adult community. A number of respondents perceived opportunities for more marketing and outreach directly to older adults and for more partnerships with organizations serving that population. Many respondents also thought that their agency's generally positive reputation among older riders provided an excellent opportunity for more informal, word-of-mouth marketing opportunities that might promote older adult use of the services. Indeed, some respondents perceived word-of-mouth as the most effective marketing strategy for this population in the rural and small community setting. The fact that nearly all relevant responses were in some way related to either funding/expansion of services or relations with older adult riders indicates that rural and small-town transportation providers understand the tremendous value that transportation services have in meeting the various practical, social, and emotional needs of older adults in rural and small communities.

Discussion

One important finding from the survey is that nearly all survey respondents work closely with a wide range of government and/or community partners to organize, finance, market, and/or deliver transportation services. Although the exact nature of these partnerships and their effectiveness in permitting or encouraging older adult use of transportation services is still to be determined, the importance of these partnerships is unquestioned by respondents and reflects the value of partnerships in overcoming many of the financial, technical, and/or organizational challenges that are especially challenging for providers working in rural and small communities.

A second important finding is the importance that survey respondents assigned to word-of-mouth marketing and direct personal outreach to the older adult population. The managers of these programs seem particularly attuned to the social and/or psychological challenges inherent in building trust with older adults and helping them transition from driving to transit. Their administrative experiences should be valuable for others who work with older adult populations in both rural and urban settings.

Conclusion

This study sought to identify the types of transportation services available in rural and small communities and to determine how these services were organized and delivered. Agencies in rural and small communities offer a diversity of service types, ranging from demand-responsive to fixed-route to highly-specialized services (for example, trips to medical providers). The managers of these programs have found partnerships with other organizations, informal marketing, and personalized contact with older adult populations to be critical to their agency's ability to provide service and meet the transportation needs of older adult riders. These agencies have limited resources available to provide services, but program managers see tremendous potential to increase older adult ridership if they can expand service and enhance their marketing, education, and outreach efforts.

These findings have several important implications for policy, practice, and research. First, the finding that these agencies rely on a range of partners, both as sources of

funding and as co-providers of human services, shows a resilience and entrepreneurial spirit that has helped them to provide much-needed services to passengers in a resource-challenged environment. Second, the degree to which these providers are attuned to the psychological and social needs of transit-hesitant older adults proves they might be an invaluable source of insight for service providers of all sizes in better tailoring their outreach and services to more effectively meet the needs and expectations of older riders. Finally, the significant degree to which these agencies seem to function more based on community ties and local perceptions than broader technical or political concerns suggests that planning transit for rural and small communities is likely to take a different approach from the technically-savvy operations and administration climate in urban transit agencies.

The logical next step is to examine transit in rural and small communities from the perspective of the older adults who use these transportation services. An investigation of how older adults perceive these services and how they perceive the barriers and opportunities to their use would be informative. In addition, further research into how older adults actually use transportation services, why they use them, and in what numbers they use them would provide more insight to planners, policymakers, and scholars concerned about rural and small community transportation and the importance of addressing the transportation needs of America's aging population. Such an investigation would be an invaluable complement to the preliminary findings presented here.

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Appendix A: List of Questions Used in Agency Survey

General Questions

1. What is the name of your organization or agency?
2. Where is your organization or agency located?
3. What is your organization or agency's service area?
4. What is your position in the organization or agency?

Content-Focused Questions

5. Does your organization or agency have a specific mission with respect to the provision of transportation services? If so, what is it?
6. What kinds of transportation services do you provide?

7. Do you partner with any other organization or agency when providing services? If so, what are their names? For what purpose(s) do you partner with those organizations?
8. Are older adults a targeted user market for your programs or services? Why or why not?
9. If they are, how do you market your programs or services to older adults?
10. Have you conducted any assessments of the effectiveness of the services you provide in meeting the transportation needs of older adults? If so, what were the results?
11. What do you see as the greatest challenge(s) to encouraging greater usage of your services by older adults?
12. What do you see as the greatest opportunities for encouraging greater usage of your services by older adults?
13. Do you think your organization or agency would be a good candidate for a more detailed study? Why or why not?

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