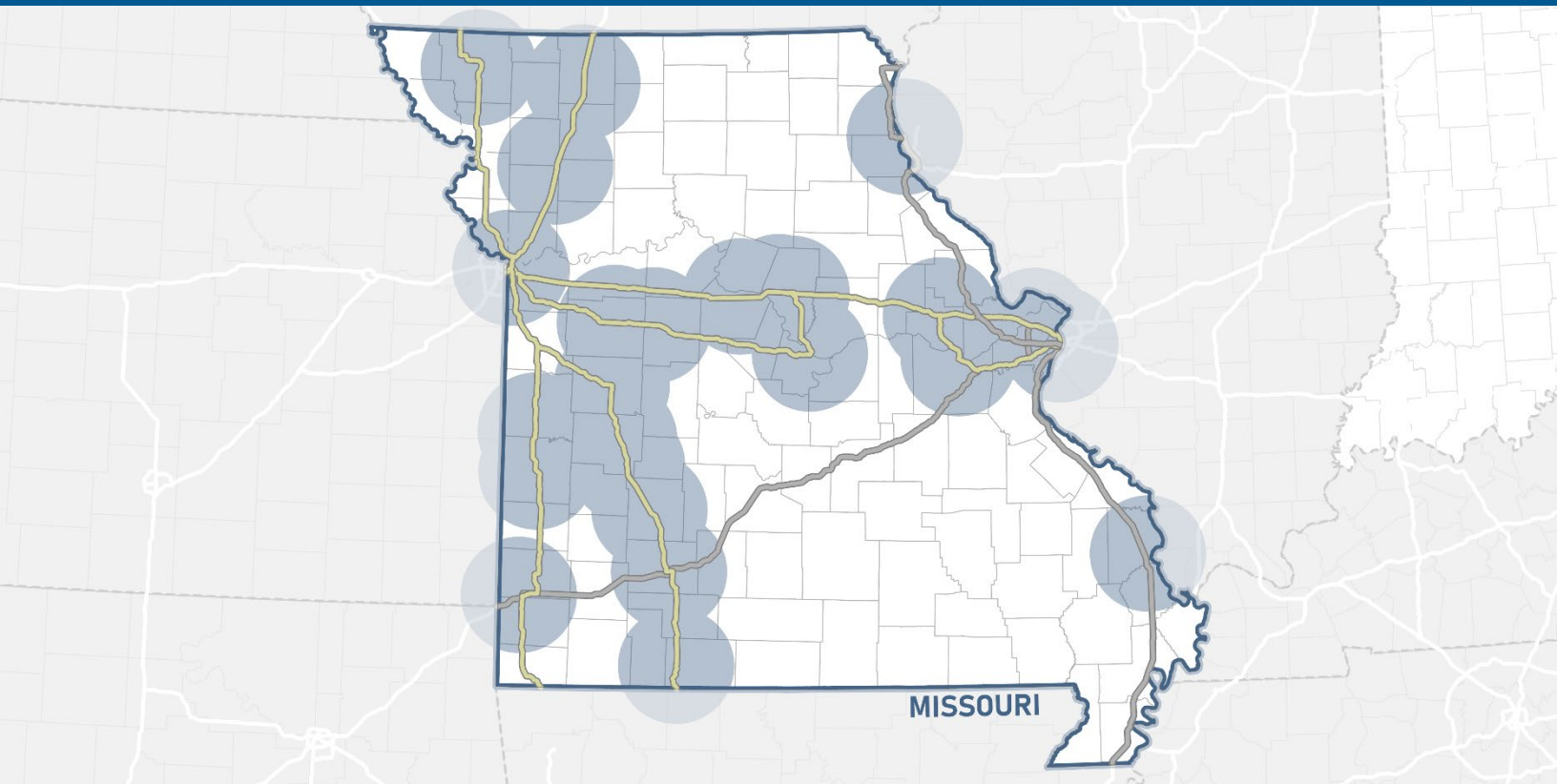




2026 Missouri Intercity Bus Needs Assessment

August 2026

Prepared for:



Prepared by:



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1. Executive Summary

The 2026 Missouri Intercity Bus Needs Assessment was prepared to support the Missouri Department of Transportation's administration of the Section 5311(f) Intercity Bus Program and to satisfy applicable Federal Transit Administration (FTA) requirements. The assessment follows the guidance set forth in FTA Circular 9040.1H, which requires states to carry out a program to develop and support intercity bus transportation. This report evaluates the current conditions of Missouri's intercity bus network, identifies gaps and unmet needs, and establishes a framework for future program investments.

Over the past two decades, intercity bus service in Missouri has undergone substantial change. Route consolidations, service reductions, and the exit of providers from Missouri have reduced geographic coverage and service frequency in many parts of the state, even as demand for long-distance travel among certain populations has remained strong. At the same time, rising operating costs, fleet replacement needs, and fluctuating state and federal funding levels have increased financial pressure on both private carriers and public transit providers involved in intercity travel. These dynamics underscore the importance of periodically assessing the current state of intercity bus service, funding commitments, and unmet needs.

This assessment reviewed existing intercity bus service, including an inventory of existing intercity bus and local public transit services, a demographic and trip generator analysis, and public and stakeholder engagement. Together, these activities provided a baseline understanding of how intercity bus service currently functions in Missouri and where additional connectivity may be needed within the state. The analysis considered fixed-route intercity bus services operated by Greyhound Lines and Jefferson Lines, intercity public transit services provided by Operating Above the Standard Transit (OATS) and Southeast Missouri Transportation Service (SMTS), local fixed-route and demand-response services, and paratransit connections that may support access to the statewide intercity bus network.

While much of Missouri is within easy reach of an existing intercity bus stop, many communities still face challenges accessing service. The assessment identified communities with major destinations located outside of those existing catchment areas. Notable gaps appear in south-central and southeastern Missouri and along corridors such as I-44, US-60, US-63, and US-67, where demographic need and trip-generating destinations suggest opportunities to strengthen intercity bus access and local connections.

The ICB assessment included a robust engagement process with providers, stakeholders, and the public that reinforced the technical findings. Participants emphasized the importance of intercity bus service for rural mobility and access to essential destinations, while also identifying challenges related to limited service frequency, schedule coordination, local transit connections, stop amenities, public information, and funding. Local fixed-route, demand-response, and paratransit providers support mobility within their service areas, but many are not structured to provide reliable or convenient connections to intercity bus service due to their small service areas and limited service hours.

Based on these findings, the assessment establishes a program vision, goals, and recommendations for strengthening Missouri's intercity bus program. The recommendations focus on maintaining existing service where it continues to meet statewide mobility needs, improving coordination between intercity bus carriers and local transit providers, addressing gaps in corridors and communities with demonstrated need, improving access to stops and passenger information, and using available funding strategically to support both near-term service reliability and long-term network development. Figure 1-1 below shows specific stops and their corresponding service areas where reintroduction of intercity bus service should be prioritized.

The assessment finds that unmet intercity bus needs remain in Missouri, particularly in rural areas, along corridors with discontinued service, and in communities with higher transit propensity or major trip generators outside existing catchment areas. Continued use of Section 5311(f) funding is recommended to preserve and improve intercity bus services, support connections between rural communities and regional hubs, and advance targeted improvements that respond to documented needs. These investments will support MoDOT in maintaining a more connected, accessible, and resilient statewide transportation network.

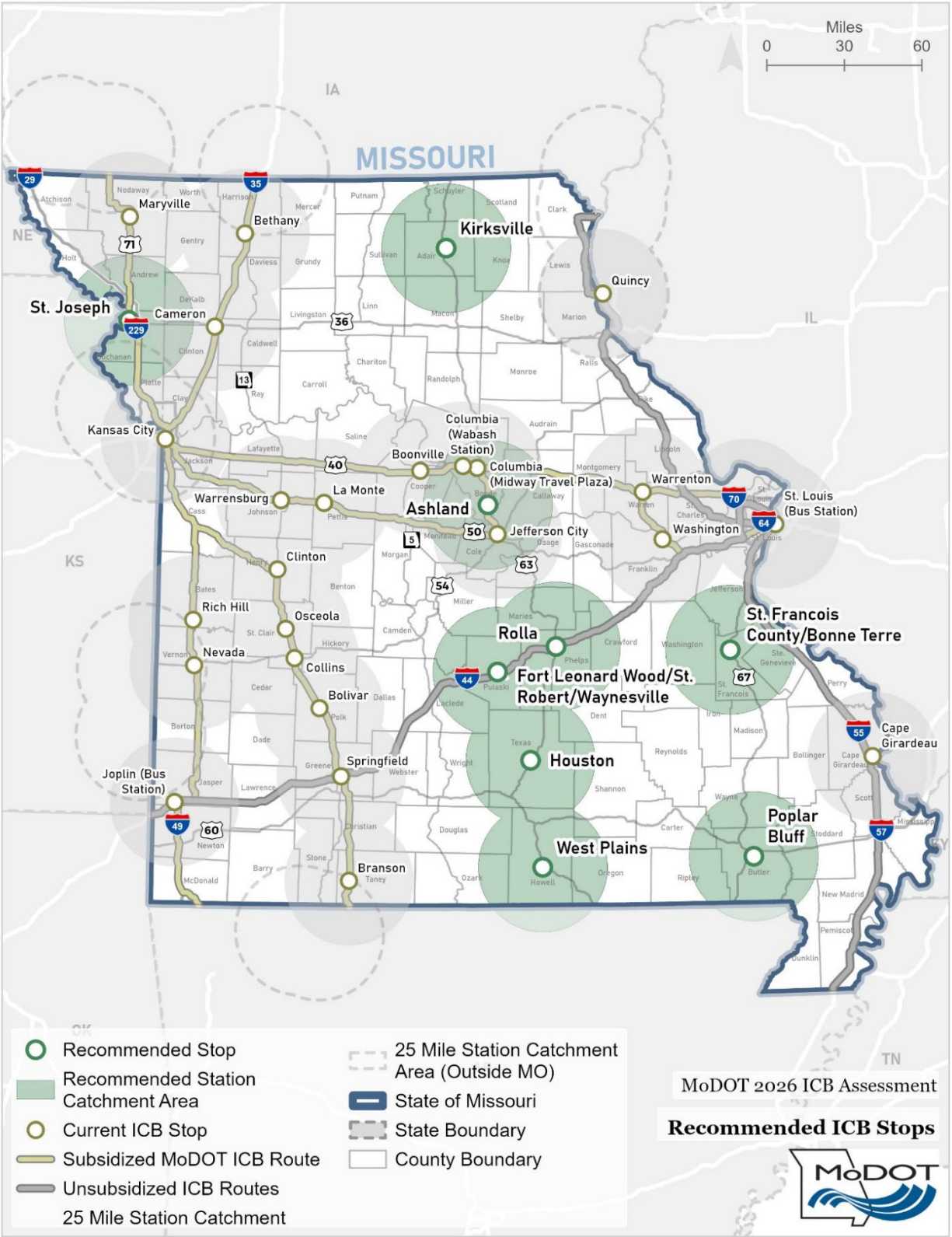


Figure 1-1: Recommended ICB Stops

2. Introduction

2.1. Project Overview

The Missouri Department of Transportation (MoDOT) is planning for the future of its intercity bus program. Intercity bus service plays a critical role in Missouri's transportation system by providing affordable, long-distance travel options that connect rural communities to regional and national destinations. Local transit, passenger rail, and air travel complement intercity bus service, creating a connected and resilient statewide mobility network.

Over the past two decades, intercity bus service in Missouri has undergone substantial change. Route consolidations, service reductions, and the exit of providers have reduced geographic coverage and service frequency in many parts of the state, even as demand for long-distance travel among certain populations has remained strong. At the same time, rising operating costs, fleet replacement needs, and fluctuating state and federal funding levels have increased financial pressure on both private carriers and public transit providers operating intercity service. These dynamics underscore the importance of periodically assessing the current state of intercity bus service, unmet needs, and how to address them.

To evaluate how intercity buses can better serve Missourians, MoDOT conducted the 2026 Missouri Intercity Bus Assessment, which was composed of technical analysis, public and stakeholder outreach, and a visioning and goal-setting process. These processes and their respective results are documented in the following:

- **Current State of Intercity Bus Memo:** Documents the current state of intercity bus service in Missouri.
- **Gaps and Needs Assessment:** Identifies where specific service gaps and needs exist.
- **Public Engagement Summary:** Summarizes the stakeholder and public engagement process and results.
- **Aging in Place White Paper & Executive Summary:** Describes how intercity bus service can be tailored to support aging in place by older adults.

Each of these documents is referenced in the Appendix to this report.

2.2. Report Purpose

This report brings together the primary findings from the analysis and engagement processes for the 2026 Missouri Intercity Bus Assessment, providing a baseline understanding of Missouri's intercity bus service. Based on this understanding, this report

establishes a vision for Missouri’s intercity bus program, along with goals and recommendations to achieve it.

The 2026 Missouri Intercity Bus Assessment process followed the guidelines set forth in Federal Transit Administration (FTA) Circular 9040.1H and satisfies the requirement that states “carry out a program to develop and support intercity bus transportation.” MoDOT uses the FTA definition of intercity bus in its program administration and in this report: “Regularly scheduled bus service for the general public that operates with stops in rural areas over fixed routes connecting two or more urbanized areas not in close proximity, has the capacity for transporting baggage carried by passengers, and makes meaningful connections with scheduled intercity bus service to more distant points, if such service is available.”

3. Previous and Related Plan Review

A review of prior planning efforts provides context for how intercity bus (ICB) service in Missouri has evolved and how current conditions have been shaped. The plans considered include standalone intercity bus studies, statewide transportation plans, and broader multimodal and transit planning efforts developed over the past two decades. While these documents vary in scope and level of detail, they collectively document changes in service and highlight considerations relevant to evaluating existing conditions and needs.

3.1. Missouri Plans

Missouri-specific planning efforts include both dedicated intercity bus studies and broader statewide and multimodal plans that address intercity travel. These documents reflect how intercity bus service has been considered within different planning contexts and over time, ranging from detailed system assessments to high-level policy guidance.

3.1.1. Early Studies (2006–2010)

Early studies conducted by MoDOT were largely in response to reductions in privately operated intercity bus service, including route eliminations and a decrease in the number of stops statewide. These efforts evaluated ridership, stop conditions, and system performance.

Key themes identified include:

- **Urban vs. rural access:** Access to intercity bus service was stronger in urban areas, where stops were often co-located with local transit and included more passenger amenities. Rural stops had comparatively limited access and infrastructure.
- **Key user groups:** Studies identified several population groups that use intercity bus service, including students, older adults, individuals with limited incomes, and individuals traveling for medical, employment, or personal needs.
- **Coordination challenges:** Difficulties coordinating service between intercity bus providers and rural transit systems were documented, including schedule mismatches and differences between fixed-route and demand-response operations.
- **Service limitations:** Rural transit availability, late-night service timing, and limited frequency reduced the usability of the system in some areas.

Recommendations from these studies emphasized improving coordination, enhancing stops and stations, supporting vehicle investments, and maintaining connections between rural and urban areas.

3.1.2. Long Range Transportation Plans (2014 and 2018)

Intercity bus service is referenced in MoDOT's Long Range Transportation Plans (LRTPs) as part of the broader multimodal transportation system. These plans focus on overall system performance, including state of good repair, safety, economic development, and travel choice.

Key themes identified include:

- **Role of transit:** Public transportation, including intercity bus, is recognized as an important component of providing mobility options statewide.
- **Funding constraints:** Both plans note challenges related to declining or limited state transit funding and increasing costs to maintain existing services.
- **Limited emphasis on ICB:** Intercity bus service is not the primary focus of these plans and is discussed only at a high level.

Recommendations generally focus on maintaining and modernizing transit assets and supporting multimodal transportation options.

3.1.3. Recent Planning Efforts (2022–2025)

Recent statewide planning efforts provide additional context for intercity bus service, particularly related to multimodal connectivity and broader transit needs.

Key themes identified include:

- **Multimodal connectivity:** The 2022 State Freight and Rail Plan emphasizes coordination between passenger rail and other modes, including intercity bus.
- **Funding challenges:** Passenger rail and transit services continue to face funding limitations and lack dedicated funding sources.
- **Unmet transit demand:** The Missouri Statewide Transit Needs Assessments (2022 and 2025) identify significant unmet demand for transit services, particularly in rural areas.
- **Geographic gaps:** The 2025 update highlights areas of unmet demand in central and southern Missouri.
- **State of good repair needs:** Many transit providers operate aging vehicle fleets and require additional investment to maintain service quality.

3.1.4. Summary of Key Themes

Across all plans reviewed, several consistent themes emerge:

- **Service reductions:** Intercity bus service in Missouri has declined over time, with fewer routes, stops, and service frequency.

- **Rural access challenges:** Rural areas experience more limited access to intercity bus service and fewer supporting amenities.
- **Reliance on ICB:** Certain populations continue to depend on intercity bus for essential travel.
- **Coordination gaps:** Coordination between intercity bus providers and local or rural transit systems remains limited.
- **Funding constraints:** A lack of dedicated state funding and limited resources affect the ability to maintain and expand service.
- **Need for improvements:** Plans consistently identify a need for improved facilities, better coordination, and enhanced public information.

These findings provide a foundation for evaluating current conditions and identifying opportunities to improve intercity bus service in Missouri.

4. Existing Conditions

4.1. Intercity Transit Service

4.1.1. Fixed-Route Intercity Bus Service

Current Level of Service and Stop Locations

Fixed-route intercity bus service in Missouri is provided by two private carriers - Greyhound Lines and Jefferson Lines. These services connect communities across the state to regional and national destinations, with routes primarily operating along major interstate highways and U.S. routes.

Figure 4-1 shows the location of existing intercity bus stops and the weekly number of arrivals and departures at each stop. Service is concentrated in larger cities and along major travel corridors, with higher frequencies observed at primary hubs.

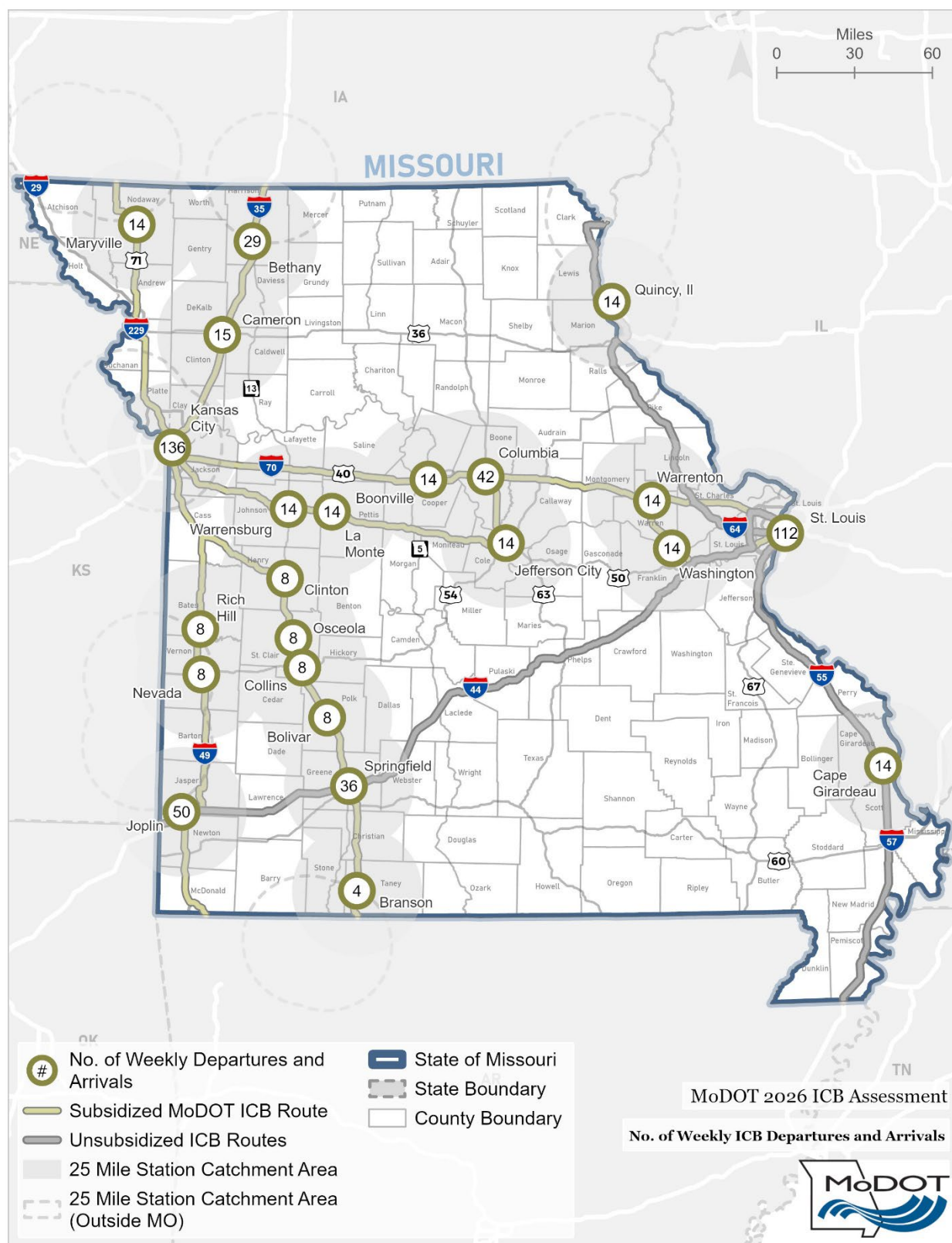


Figure 4-1: Existing ICB Stop Locations and Weekly No. of Departures/Arrivals

There are currently 27 intercity bus stops serving 25 cities across Missouri. Major hubs include Kansas City, St. Louis, Columbia, Joplin, and Springfield, which function as key transfer locations and have the highest levels of service. Kansas City and St. Louis have the highest numbers of weekly arrivals and departures and serve as primary hubs for connecting routes and providers.

In total, there are approximately 602 weekly arrivals and departures across the system, with Greyhound operating 378 and Jefferson Lines operating 224. Service levels vary significantly by location, with urban stops receiving more frequent service and rural stops typically served by fewer trips.

Service availability is generally consistent along several major corridors, including I-70, US-61, I-49, US-71, and I-35, where stop spacing and frequency provide relatively continuous access. However, there are notable gaps in other areas of the state. Along I-44, there is a significant gap in service between Springfield and St. Louis, and portions of I-55 also have limited rural access to intercity bus service. Rural stops typically experience lower service levels, and they generally do not function as transfer hubs.

Historic Service Changes

The intercity bus network in Missouri has undergone substantial changes over the past 15 years. Since 2010, the number of stops has decreased from 57 to 27, representing a net loss of 30 stops statewide. These changes reflect broader trends in the intercity bus industry, including route consolidation and provider restructuring. Figure 4-2 and Table 4-1 compare the locations of current ICB stops with stops that have been discontinued since 2010:

- Greyhound Lines:
 - Discontinued Stops: Anderson, Bethany, Bolivar, Bowling Green, Butler, Cameron, Clinton, Collins, Ft. Leonard Wood, Hannibal, Harrisonville, Humansville, Lebanon, Nevada, Osceola, Peculiar, Quincy (Illinois), Rich Hill, Rock Port, Rolla, Sikeston, St. Joseph
 - Added Stops: Boonville, Jefferson City, La Monte, Quincy (Illinois), Warrensburg, Warrenton
- Jefferson Lines:
 - Discontinued Stops: Anderson, Bowling Green, Butler, Canton, Hannibal, Harrisonville, Humansville, Peculiar, Rock Port, St. Joseph, Troy Warrensburg
 - Added Stops: Bethany, Branson, Cameron, Maryville, St. Louis
- Burlington Trailways: Missouri operations ceased completely
- Megabus: Missouri operations ceased completely

The following stops have lost service completely since 2010: Anderson, Canton, Ft. Leonard Wood, Hannibal, Harrisonville, Humansville, Lebanon, Peculiar, Rock Port, Rolla, Sikeston, St. Joseph, Troy, and Wentzville.

Burlington Trailways and Megabus have ceased operations in the state, with current service now limited to Greyhound and Jefferson Lines. Both remaining providers have since discontinued and added stops. Greyhound has eliminated service at multiple locations, particularly in smaller and rural communities, while adding a limited number of new stops along existing corridors. Jefferson Lines has also adjusted its network, including discontinuing some stops and expanding service to new communities.

Although many routes have maintained the same alignment, some communities have lost direct access to intercity bus service as stops have been removed. In many cases, nearby stops remain available; however, this has increased travel distances for some users. One notable exception is the I-44 corridor, where the removal of stops in Lebanon, Fort Leonard Wood, and Rolla has created an approximately 200-mile gap in intercity bus service between Springfield and St. Louis.

Overall, fixed-route intercity bus service in Missouri continues to provide important connections between major population centers, but reductions in stops and uneven service distribution have affected access in rural areas and along certain corridors.

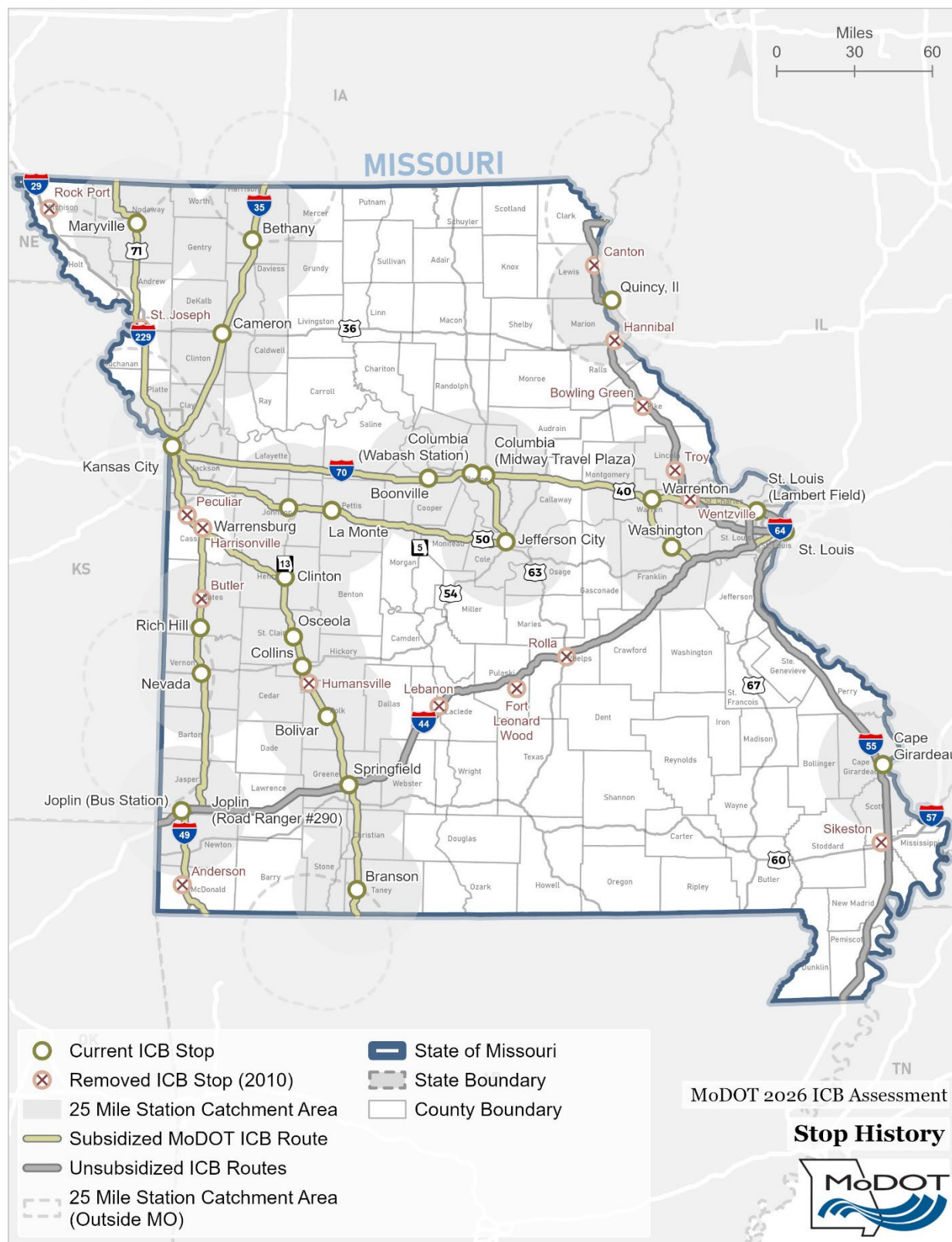


Figure 4-2: Existing ICB Stop and Removed ICB Stops since 2010

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Table 4-1: Bus Stop Comparison by Provider, 2010 vs. 2026

Stop	Served in 2010				Served in 2026	
	Greyhound	Jefferson	Burlington	Megabus	Greyhound	Jefferson
Anderson*						
Bethany						
Bolivar						
Boonville						
Bowling Green*						
Branson						
Butler*						
Cameron						
Canton*						
Cape Girardeau						
Clinton						
Collins						
Columbia						
Ft. Leonard Wood*						
Hannibal*						
Harrisonville*						
Humansville*						
Jefferson City						
Joplin						
Kansas City						
La Monte						
Lebanon*						
Maryville						
Nevada						
Osceola						
Peculiar*						
Quincy, IL						
Rich Hill						
Rock Port*						
Rolla*						
Sikeston*						
Springfield						
St. Joseph*						
St. Louis						
Troy*						
Warrensburg						
Warrenton						
Washington						
Wentzville*						
Total Stops, by Provider	30	17	7	3	13	14
Total Stops, all Providers	57				27	

Served by Greyhound	Served by Jefferson	Served by Burlington	Served by Megabus
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* Stop lost intercity bus service completely since 2010

4.1.2. Intercity Public Transit Service

Intercity public transit service in Missouri is primarily provided by Operating Above The Standard (OATS) Transit and Southeast Missouri Transportation Services (SMTS). These providers connect rural communities to larger regional destinations and serve as an important complement to private intercity bus service.

Operating Above The Standard (OATS) Transit

OATS Transit is a nonprofit provider that serves 87 counties across Missouri through a network of deviated fixed routes. These intercity services operate on scheduled days and connect rural communities to larger cities, including St. Louis, Kansas City, Columbia, Springfield, Joplin, and Kirksville.

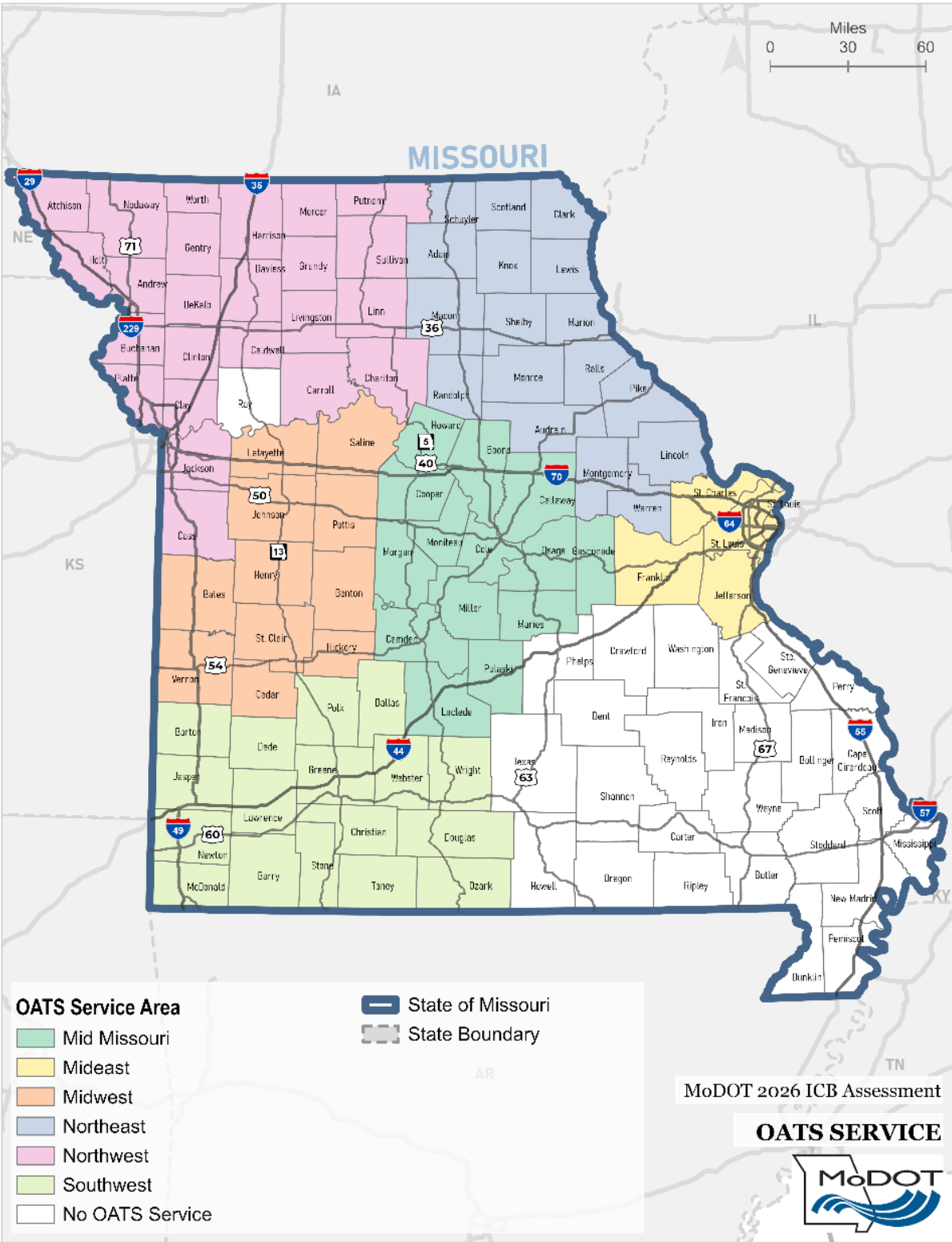


Figure 4-3: OATS Service Area

Service is provided on a reservation basis, with passengers typically required to schedule trips in advance. Routes allow for limited deviations from a defined corridor, enabling a hybrid model that supports both fixed-route travel and door-to-door service within a specified distance.

The OATS network provides broad geographic coverage and serves as a primary means of regional travel for many rural residents. However, service is generally limited to specific days of the week and does not operate as frequently as traditional fixed-route intercity bus services.

Southeast Missouri Transportation Services (SMTS)

SMTS provides intercity and local transit services across 21 counties in southeastern Missouri. The system primarily operates demand-response services, supplemented by limited fixed-route circulators in select communities. Figure 4-4 graphically summarizes SMTS' service area. SMTS intercity services connect rural areas to larger destinations, including St. Louis, Cape Girardeau, Springfield, Sikeston, and Poplar Bluff. Similar to OATS, these services are typically reservation-based and provide door-to-door transportation within designated service areas. Service availability varies by county and is often limited to specific days and times, which can affect coordination with other intercity travel options.

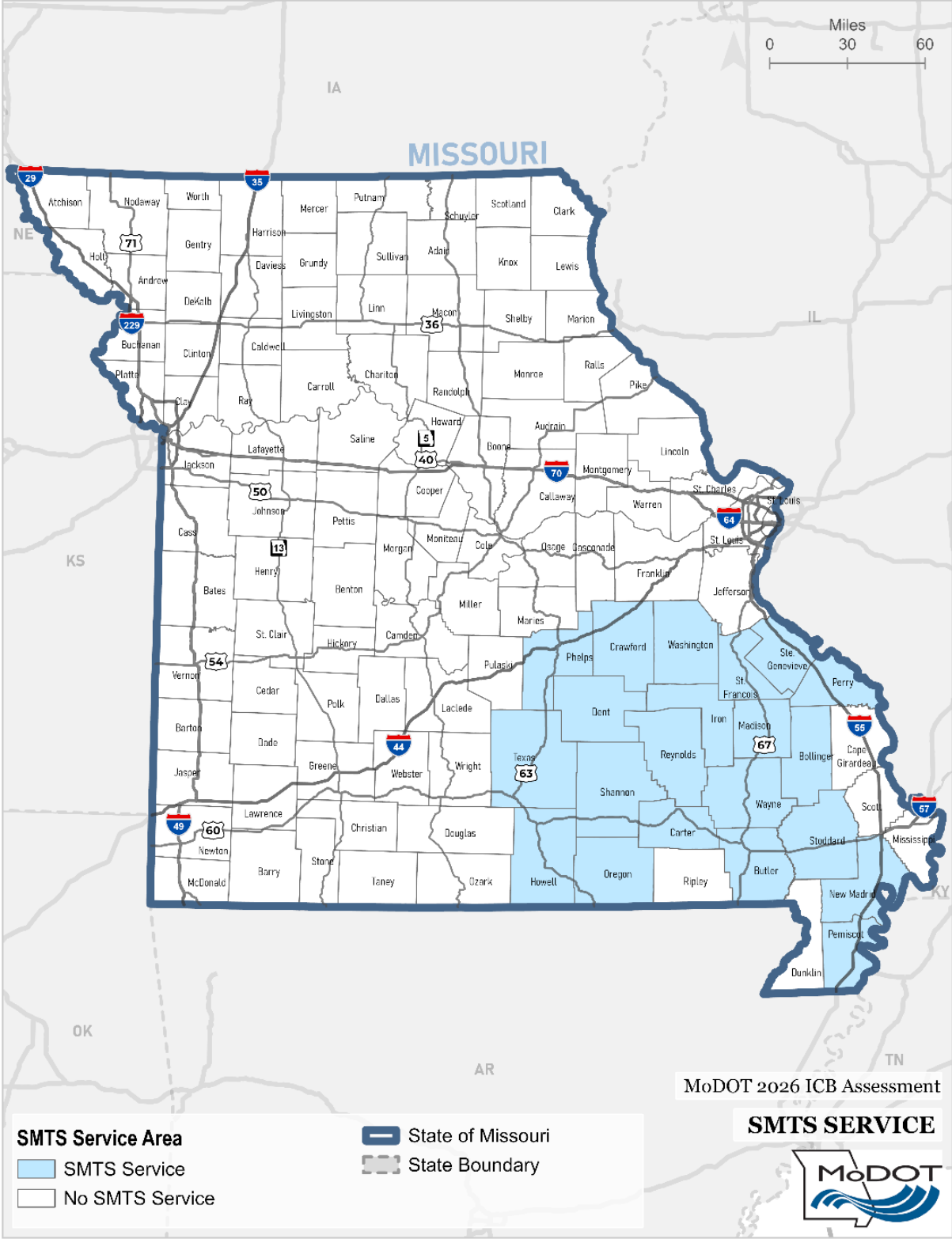


Figure 4-4: SMTS Service Area

4.2. Local Public Transit Connections

4.2.1. Other Demand-Response Services

In addition to OATS and SMTS, 14 transit providers offer demand-response service across Missouri (Table 4-2). These services generally operate within defined service areas and provide flexible transportation based on user requests.

Table 4-2: Demand-Response Providers, Service Area, and Intercity Bus Stop Connectivity

Provider Name	Service Area	Service Area Includes an Intercity Bus Stop?
Via Metro STL (Bi-State Development)	West, South, and North St. Louis County	No
Cape Girardeau County Transit Authority	Cape Girardeau County	Yes (Greyhound)
The City of Carthage	Carthage	No
The City of Clinton Area Transportation Service	Clinton	Yes (Jefferson)
The City of El Dorado Springs	El Dorado	No
The City of Houston	Houston	No
The City of Mount Vernon	Mount Vernon	No
The City of Nevada	Nevada	Yes (Jefferson)
St. Joseph Transit	St. Joseph	No
West Plains Transit System	West Plains	No
Dunklin County Transit	Dunklin County	No
Mississippi County Transit System	Mississippi County	No
Direct Transit (Ray County Transportation, Inc.)	Ray County	No
Scott County Transit System	Scott County	No

Only three providers' service areas - Cape Girardeau County Transit Authority, Clinton Area Transportation Service, and the City of Nevada - include an intercity bus stop. Most other demand-response providers do not directly connect to intercity bus services.

Demand-response services are typically limited in geographic coverage and operate within individual communities or counties. As a result, many service areas lack access to intercity bus stops or major transportation corridors.

Operating schedules also constrain service availability. Many providers operate only on weekdays or on selected days of the week, which may not align with intercity bus arrival and departure times. In locations with intercity bus stops, these constraints can make transfers difficult or impractical.

While demand-response services provide essential mobility within their service areas, their ability to support consistent connections to the intercity bus network is limited.

4.2.2. Fixed-Route Services

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Missouri has 11 public transit providers that operate fixed-route service, primarily in urbanized areas (Table 4-3). These systems provide scheduled service along established routes and are generally better positioned to serve intercity bus stops.

Table 4-3: Transfer Assessment Between Public Transit Providers and Intercity Bus Providers in Missouri

Provider Name	Service Area	Mode(s)	Share a Stop with an Intercity Bus Stop?
Metro Transit (Bi-State Development)	St. Louis Metropolitan Statistical Area	Bus and Light Rail	Greyhound: Yes Jefferson: Yes
Cape Girardeau County Transit Authority	Cape Girardeau County	Bus	No
Go COMO	Columbia	Bus	Greyhound: Yes Jefferson: No stop within service area
The City of Excelsior Springs	Excelsior Springs	Bus	No stop within service area
The City of Houston	Houston	Bus	No stop within service area
JEFFTRAN (Jefferson City Transit Division)	Jefferson City	Bus	Greyhound: Yes Jefferson: No stop within service area
The City of Joplin	Joplin	Bus	Greyhound: Yes Jefferson: No
St. Joseph Transit	St. Joseph	Bus	No stop within service area
City Utilities of Springfield	Springfield	Bus	Greyhound: Yes Jefferson: Yes
Kansas City Area Transportation Authority	Kansas City Metropolitan Statistical Area	Bus	Greyhound: Yes Jefferson: Yes
Kansas City Streetcar Authority	Kansas City	Streetcar	No

Six fixed-route systems share a stop with Greyhound or Jefferson Lines, allowing for direct transfers between local transit and intercity bus services. These connections are concentrated in larger metropolitan areas, including St. Louis, Kansas City, and Springfield.

Fixed-route providers may connect to only one intercity bus operator despite having two intercity bus operators in their area or may not have an intercity bus stop within their service area. This variation affects the availability and convenience of transfers across the state.

Operating hours also affect connectivity. Several systems, including JEFFTRAN and Go COMO, end service in the early evening, which can limit access to late-night or early-morning intercity bus trips.

In smaller cities, fixed-route service may be available without a corresponding intercity bus stop, removing these systems' ability to function as connectors to the intercity network.

4.2.3. Paratransit Services

Eight paratransit providers operate in Missouri, offering specialized transportation services for individuals with disabilities and others with mobility limitations (Table 4-4). These services are generally available in urban areas and operate under provider-specific policies and requirements.

Table 4-4: Transfer Assessment Between Paratransit Providers and Intercity Bus Providers in Missouri

Provider Name	Service Area	Service Area Includes an Intercity Bus Stop?	Relevant Policies and Procedures
Metro Call-A-Ride (Bi-State Development)	St. Louis Metropolitan Statistical Area	Yes	- Trip may be scheduled up to one hour after the requested pick-up time. - Individuals who live outside of the service area can use Call-A-Ride while visiting if they qualify for ADA service and submit an application before use.
Handi-Wheels (Jefferson City Transit Division)	Jefferson City	Yes	- Certain conditions at pick-up or drop-off locations may make curb-to-curb service impossible, including unsafe loading area or an area that requires the paratransit vehicle to back up. In such cases, riders must choose an alternative location. - If a passenger needs additional help beyond entering or exiting the bus, i.e. boarding an intercity bus, Handi-Wheels will provide transportation for an attendant (provided by the passenger). - Service ends at 5:20 P.M. Monday through Friday and does not operate on the weekends.
Go COMO	Columbia	Yes	Service ends at 6:25 P.M. Monday through Saturday and there is no service on Sundays.
The City of Joplin	Joplin	Yes	The service covers a ¾ mile corridor on each side of the Fixed Bus Route so riders would be able to access the Jefferson intercity stop, but not the Greyhound intercity stop.
Access Express Paratransit (City Utilities of Springfield)	Springfield	Yes	- Service ends at 10:00PM Monday through Saturday and 5:00PM on Sundays. - Users are allowed to bring a personal care attendant or a guest. A personal care attendant is allowed to ride for free. A guest is required to pay the fare.
RideKC Freedom (Kansas City Transportation Authority)	Kansas City	Yes	- Users are allowed to bring an attendant or companion. - Service ends at 4:30PM on select federal holidays.
Serve Inc.	Callaway County (Origin) Boone, Cole, and Audrain Counties (Destination)	Yes	Transportation is only provided for medical appointments.

Most paratransit providers serve areas that include intercity bus stops, particularly in larger metropolitan regions. However, the ability to connect to intercity bus service varies depending on service hours, policies, and operating practices.

Many paratransit services operate only during weekday business hours and do not provide service in the evenings or on weekends. These limitations may prevent users from accessing intercity bus routes outside of standard operating times. Additional constraints include advanced reservation requirements, service area boundaries, and eligibility criteria, which can affect the ability to coordinate trips and make timely transfers.

Service characteristics vary by provider. In larger cities, some systems offer extended hours or allow attendants and companions, while in smaller communities, service may be more limited in both scope and availability. Paratransit services provide critical mobility for specific populations but are not structured to reliably connect passengers to the intercity bus network.

4.3. Demographic Indicators

Demand for intercity bus is influenced by a variety of factors including demographic composition and settlement patterns. Demographic information was sourced from the 2024 American Community Survey (ACS 5-Year Estimates, 2020-2024) from the U.S. Census Bureau. Demographic data for the state of Missouri was summarized at the census tract level.

4.3.1. Total Population

Missouri's population is 6,191,814, which is most concentrated in major urban centers such as Columbia, Kansas City, Springfield, and St. Louis, each of which hosts at least one intercity (Figure 4-5). Additional population clusters that are not captured by the existing intercity bus catchment areas are found along major corridors such as I-44, I-229, and I-55. Approximately 4.8 million (78 percent of the total population) live within a 25-mile catchment area surrounding an intercity bus stop.

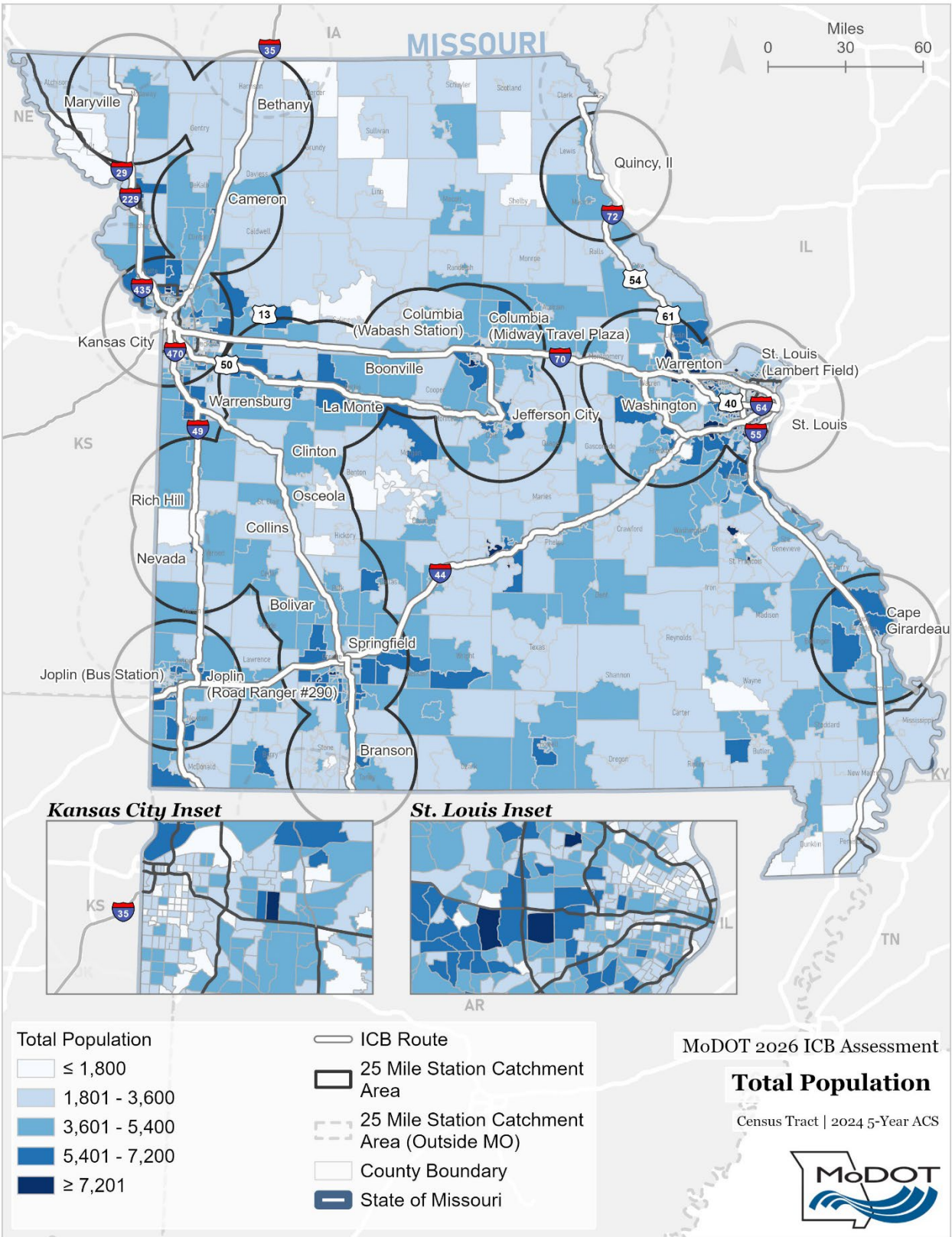


Figure 4-5: Population by Census Tract

4.3.2. Transit Propensity

Transit propensity identifies concentrations of individuals or groups who tend to use public transit more frequently than the general public, including intercity bus service. Areas with higher propensity for intercity bus service and ridership tend to be larger population centers, areas with significant numbers of those living below the poverty line, seniors, college students, people with disabilities, minority populations¹, and households with limited or no vehicles.

Unserved areas with high transit propensity are primarily located in the south-central and southeastern portions of the state, including the counties of Barry, Butler, McDonald, Pulaski, Texas, and Wright, as shown in Figure 4-6.

¹ Defined as any person who is not white alone and does not identify as Hispanic or Latino

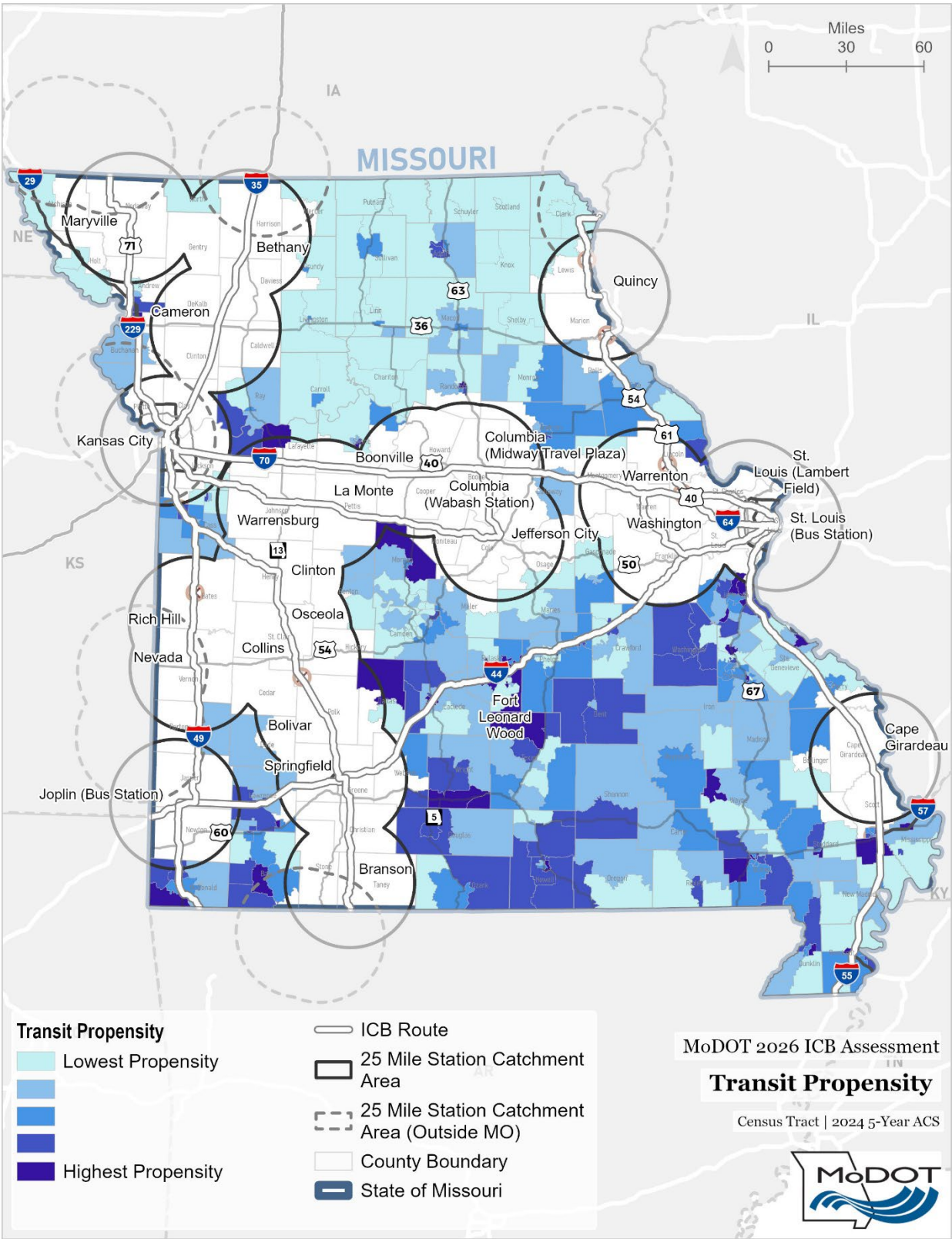


Figure 4-6: Transit Propensity by Census Tract

4.4. Trip Generators

Trip generators inform where intercity travel demand is likely to be concentrated beyond demographic patterns. Trip generators such as medical facilities, colleges and universities, correctional institutions, military installations, ticketed passenger airports, stadiums, and museums play a critical role in shaping demand for intercity bus travel. These destinations support long-distance travel for health care, education, visitation, employment, military duty, and tourism.

Approximately 660 trip generators were identified across Missouri, approximately 76 percent (500) of which are located within an established intercity bus 25-mile catchment area.

Trip generators are distributed widely throughout Missouri, with concentrations near the state's largest population centers, including Kansas City, St. Louis, Columbia, Springfield, and Joplin. Figure 4-7 and Table 4-5 identify the top 15 cities with the greatest number of trip generators located outside the 25-mile catchment areas of existing intercity bus stops. The county names and populations are also shown in Table 4-5 to identify potential markets for intercity bus service in terms of population without regard for municipal boundaries.

The trip-generator density map displays numerous clusters of high activity outside the 25-mile intercity bus catchment areas, particularly along major travel corridors such as (Figure 4-7):

- I-44: Rolla, Fort Leonard Wood, St. Robert/Waynesville,
- US-60: West Plains, Poplar Bluff
- US-63: Houston, Rolla
- US-67: Bonne Terre, Poplar Bluff

These regional hubs include hospitals, universities, museums, correctional facilities, and other major destinations, which generate steady intercity travel demand year-round.

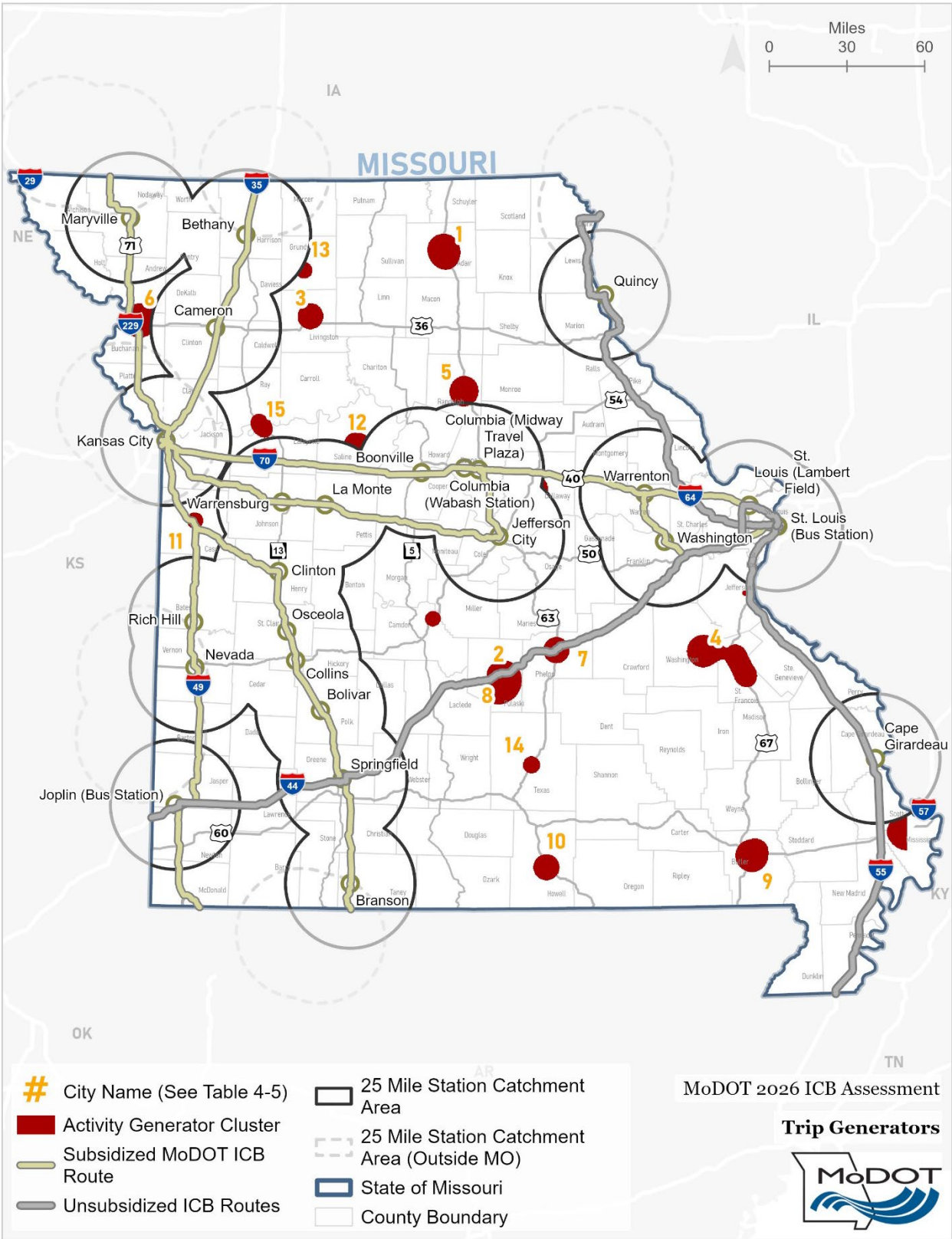


Figure 4-7: Trip Generator Density Analysis

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Highlighted counties indicate areas where the county is only partially covered by the 25-mile catchment area. As shown in the table, many of these partially covered counties rank highly in terms of trip generation, indicating that significant travel demand remains within practical reach of an intercity bus stop. This suggests opportunities for targeted public transit service, local access improvements, or schedule coordination to better capture this demand and address remaining coverage gaps.

Table 4-5: Top 15 Cities by Number of Trip Generators

City	County	County Population	Trip Generator						
			Stadium	Military Base	Correctional Institution	Museum	Hospital	College or University	Airport
(1) Kirksville	Adair	25,660				X	X	X	X
(2) Waynesville	Pulaski	53,964				X	X	X	X
(3) Chillicothe	Livingston	14,658					X	X	
(4) Bonne Terre	St. Francois	67,503			X	X	X		
(5) Moberly	Randolph	24,077				X	X	X	
(6) St. Joseph	Buchanan	83,568		X		X	X		
(7) Rolla	Phelps	45,672			X	X	X	X	
(8) Fort Leonard Wood	Pulaski	53,964	X	X			X		
(9) Poplar Bluff	Butler	42,020				X	X	X	
(10) West Plains	Howell	40,762				X	X	X	
(11) Harrisonville	Cass	113,873					X	X	
(12) Marshall	Saline	23,231					X	X	
(13) Trenton	Grundy	9,766					X	X	
(14) Houston	Texas	25,715					X	X	
(15) Lexington	Lafayette	33,115					X	X	

5. Provider and Stakeholder Engagement

5.1. Provider and Public Meetings

An element of public engagement involves holding formal meetings where stakeholders from diverse backgrounds can share their opinions in an open discussion. As part of the public engagement process for this assessment, one intercity bus/public transit provider and one stakeholder/general public meeting were held.

5.1.1. Intercity Bus and Transit Provider Consultation Meeting

The intercity bus and public transit provider consultation meeting was held on January 22, 2026, from 12:00 PM to 2:00 PM Central Time. The meeting was held virtually on Microsoft Teams and was recorded. Invitations were sent to intercity bus providers, rural transit agencies, and urban transit agencies. Representatives from MoDOT and the study team also attended.

There was robust discussion among participants regarding the challenges and opportunities of delivering intercity bus service in Missouri, which centered on several key issues: funding, access to facilities, coordination with local transit agencies, service reliability, customer information dissemination, and gaps in existing coverage.

- **Funding:** Greyhound and Jefferson Lines both highlighted funding and cost barriers, citing high costs of operating rural routes as significant barriers to delivering more service. The lack of local match required for FTA §5311(f) funds was also cited as a challenge.
- **Facility access:** Greyhound and Jefferson Lines have both had difficulties in finding and maintaining suitable stop locations, particularly in rural areas where transit centers do not exist. Intercity bus providers must coordinate with local businesses, such as truck stops, gas stations, and convenience stores, to provide stop locations in such cases. Access at particularly early or late hours can also be challenging.
- **Coordination with local transit agencies:** There was consensus among the group that coordination between intercity bus and local transit agencies could be improved, but that lack of staffing resources and established communication channels hinders these efforts.
- **Service reliability:** New routes take time to build a ridership base, and it is critical that new routes maintain a certain level of service to help build that base.
- **Customer information:** It is often challenging for intercity bus providers to post information about schedules and/or ticketing at corporate-owned stops where the

provider does not have ownership, including truck stops, gas stations, and convenience stores.

- **Gaps in coverage:** Many areas of Missouri lack intercity bus service completely, and residents rely on rural transportation providers for service.

5.1.2. General Public and Stakeholder Meeting

The general public and stakeholder meeting was held on February 9, 2026, from 11:00 AM to 1:00 PM Central Time. The meeting was held virtually on Microsoft Teams and was recorded. An invitation went out to a list of stakeholders developed for the public survey discussed below. This included elected officials, city managers, chambers of commerce, intermodal connections, 5310 subrecipients (typically not-for-profit agencies), and private citizens. The Missouri Public Transit Association (MPTA) and the Missouri Association of Councils of Government (MACOG) also helped the project team circulate meeting information to stakeholders. Additionally, representatives from various public transit agencies, intercity bus operators, and study team members were in attendance.

The meeting was well attended, and there was a robust discussion among participants and the project team. Several key themes emerged from these discussions, including connectivity/access, rural service gaps, employment and medical travel, first- and last-mile challenges, and information and awareness.

- **Connectivity/access:** Multiple stakeholders noted limited connections between intercity bus and other modes of transit, including Amtrak, airports, and local transit systems.
- **Rural service gaps:** Multiple regions of Missouri lack intercity bus service completely, and filling those transportation gaps often falls to rural transit providers. Other areas of the state, including those along I-44 between Springfield and St. Louis, have intercity bus service but lack stops to access it.
- **Employment and medical travel:** Some areas of the state see residents using intercity bus services to commute to/from their place of work. Medical transportation also remains a critical need for Missouri residents.
- **Information and awareness:** Many participants are unaware and/or are unable to access information about intercity bus services. Some services are not listed in common trip-planning tools, and there is no centralized repository of information.

5.2. Surveys

Offering stakeholders and service providers multiple avenues for input is critical to a well-rounded public engagement process, as schedules and other personal factors frequently

limit individuals' ability to attend meetings. Surveys provide a standardized way to collect input, data, and written responses, complementing formal meetings.

Two surveys were conducted as part of the public engagement process of this study: an Intercity Bus and Public Provider Survey and a Stakeholder and General Public Survey. Both surveys were primarily online. The surveys both focused on the same core set of themes: existing/unmet demand for intercity bus, planned/desired service improvements, challenges faced by providers/customers, and accessibility to intercity bus stops. Both surveys were available for seven weeks, from December 19, 2025, to February 6, 2026.

The following sections further detail how each of these surveys was conducted and the results obtained.

5.2.1. Intercity Bus and Transit Provider Survey

The Intercity Bus and Transit Provider Survey collected input from intercity bus, rural transit, and urban transit providers. There was a total of 28 survey responses. Of the 28 responses, 18 were from rural transit providers, 10 from urban transit providers, and 2 from intercity bus providers. Similar key themes arose when analyzing urban, rural, and intercity bus survey responses, which include:

- **Lack of intercity bus service:** Twenty-four survey respondents stated that their community does not have intercity bus service available at all, making access to intercity bus services difficult or impossible.
- **Limited funding:** Providers cited a lack of funding as a major impediment to providing additional transit service.
- **Aging population:** Many providers noted that, because of the aging population located in rural areas, the demand for their services continues to increase. Providing transportation to these individuals through rural transportation services is typically very expensive, and costs could be reduced if intercity bus services were available as an alternative.
- **Coordination challenges:** Many rural and urban agencies cited challenges with coordinating with intercity bus providers. Specifically, rural and urban agencies find it difficult to coordinate with intercity bus providers on stop locations and on schedules.

5.2.2. Public and Stakeholder Survey

The Stakeholder and Public Survey gathered input from a wide range of stakeholders, including elected officials, city managers, chambers of commerce, intermodal connections, 5310 subrecipients, and private citizens. The MPTA and the MACOG also

helped the project team circulate surveys to stakeholders and the general public. Contacts were asked to either complete the survey on their clients' or constituents' behalf or distribute it directly to them. A total of 291 responses were received, with the majority from private citizens (242). See Figure 5-1 for a breakdown of respondents.

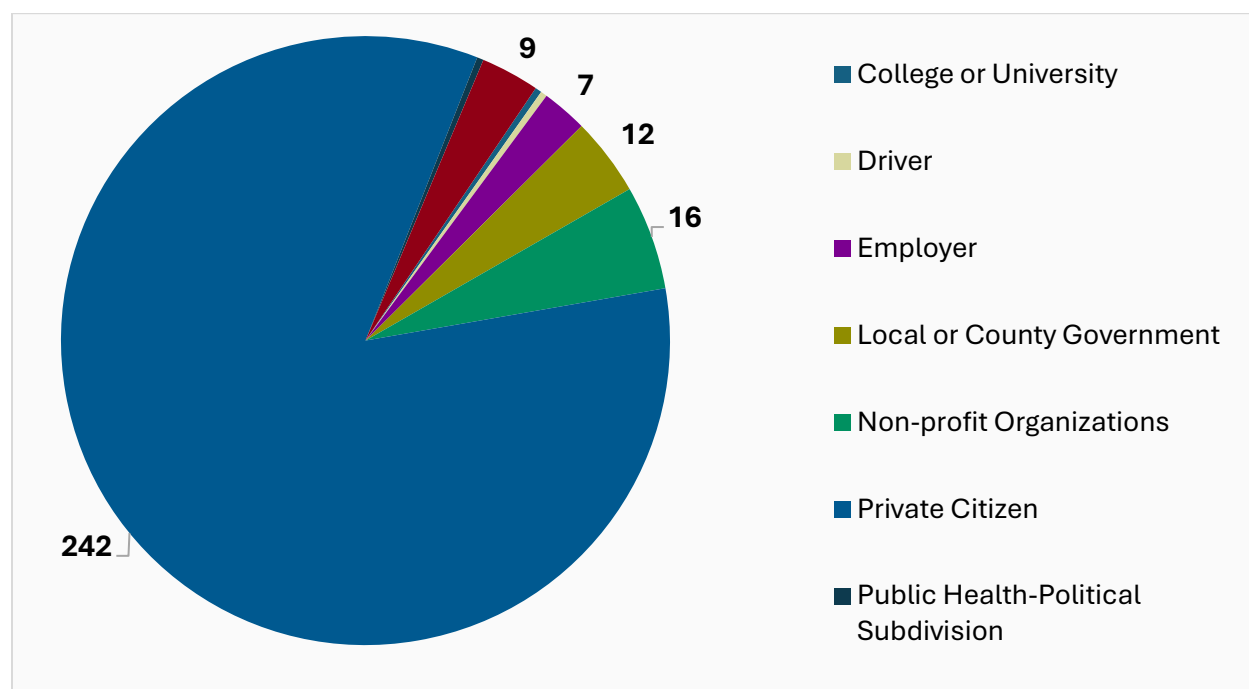


Figure 5-1: Public and Stakeholder Survey Respondents

Several key themes arose when analyzing survey responses:

- **Lack of intercity bus service:** Many respondents indicated a lack of intercity bus service altogether as a major barrier to using the service, and that they would use intercity bus service if it existed. When asked why respondents were unable to complete a trip via intercity bus, “service did not exist” was by far the most common reason (140 respondents).
- **Intercity bus schedules:** Another major issue identified by the public is that intercity bus schedules do not align with the needs of potential riders. This was the second most common reason respondents cited for not being able to complete a trip via intercity bus (80 respondents).
- **Improved connections:** Survey respondents indicated several priority areas for improved intercity bus frequency:
 - **Columbia and Jefferson City:** Columbia and Jefferson City were the two most requested cities for improved intercity bus service. While the two cities are only about a half-hour drive apart, only one bus per day (Greyhound) runs

between them in each direction. Survey respondents requested more frequent service between the two cities.

- **Kansas City and St Louis:** I-70 acts as the primary artery across Missouri, connecting Kansas City and St Louis, with Columbia located between the two. Four trips in each direction exist today, provided by Greyhound. The corridor would likely support additional bus service, given that both Kansas City and St Louis are major population centers.
- **Rural Missouri:** Many respondents cited the complete lack of intercity bus service in many parts of the state as the main barrier to using the service. More connections to major destinations would enhance their ability to use the intercity bus system.

6. Vision, Goals, and Recommendations

MoDOT developed a framework to guide future funding and intercity bus program decisions, composed of the following:

- **Program Vision:** An overarching vision containing key principles upon which MoDOT's intercity bus program should be based
- **Goals:** Measurable goals for MoDOT's intercity bus program that follow the principles set out in the Program Vision
- **Recommendations:** Specific actions that MoDOT can take to achieve the goals it has defined for its intercity bus program

MoDOT recognizes that economic, political, and other considerations will affect the implementation of MoDOT's recommendations for its intercity bus program. Periodically revisiting the program vision, goals, and recommendations will be critical to the effectiveness and sustainability of MoDOT's intercity bus program.

6.1. Program Vision

Intercity bus can be the go-to method for Missourians to travel to, from, and within Missouri. It is an affordable alternative to driving, providing vital mobility to rural and urban communities alike. When coordinated with local and intercity transit service, intercity buses greatly expand access to services and opportunities for all. MoDOT developed the following Program Vision to reflect its desire for the future intercity bus in Missouri:

Program Vision: We envision a more connected ICB system that provides safe, reliable, and accessible transportation to all Missourians, expanding opportunity and improving quality of life for rural and urban communities.

6.2. Goals

The established MoDOT intercity bus program goals reflect a consensus in the desired progress and outcome for the program. The goals establish actionable and measurable outcomes to fulfill the previously identified program vision. The goals identified address the following focus areas for the department's program:

- Access
- Coordination
- Education & Marketing
- Funding
- Leadership
- Safety & Security
- Reliability
- Ridership

These goals translate into recommendations that identify specific actions MoDOT can take to advance the intercity bus program vision. The recommendations were developed from the goals established through the assessment process, the existing conditions analysis, and feedback and challenges identified through public and stakeholder engagement. Input from the intercity bus providers, public transit agencies, and other state transportation departments that administer intercity bus programs also helped shape the recommendations by highlighting challenges, experiences from intercity bus users, and existing practices of other state-ran ICB services. The recommendations reflect the identified needs that are focused on achievable steps to improve intercity bus service in Missouri.

Goal 1: By 2030, implement a competitive solicitation process for intercity bus services that results in the cost-efficient use of available funds by minimizing state subsidy per passenger mile.

Missouri should include cost-efficiency as a metric of evaluation in a competitive solicitation process. By doing so, applicants will be incentivized to demonstrate cost-efficient operations as part of their applications. MoDOT can also track cost-efficiency as part of the documentation that grantees provide to MoDOT, allowing MoDOT to compare applications with real-world results.

Goal 2: By 2030, increase the percentage of Missourians within 25 miles of an ICB stop from 78% to 85%

The cities of Rolla and St. Joseph, alongside many rural areas, were identified as critical gaps in Missouri's ICB system. As such, adding stops in these locations would greatly enhance overall access to ICB stops, as well as close major gaps in urban and rural areas alike.

Goal 3: By 2028, establish quarterly ICB-focused meetings between MoDOT, ICB providers, and public transit agencies to address challenges, share ideas, and enhance coordination.

Increased coordination will promote greater alignment between MoDOT's goals and the practices of ICB providers. These coordination meetings could be held virtually, supporting collaboration between all stakeholders and helping MoDOT achieve not only this goal, but other goals identified as part of this plan as well.

Goal 4: Develop and distribute a program management plan (PMP) outlining provider responsibilities and expectations regarding safety, reliability, and service.

This Program Management Plan should act as the guidebook for intercity bus in Missouri, setting expectations for providers and identifying how MoDOT will distribute intercity bus funding. It also should specify what Missouri's priorities are and how MoDOT anticipates meeting them.

Goal 5: Develop and implement a process for leading negotiations between ICB providers, transit agencies, and local municipalities for siting and co-locating safe, secure stops and facilities.

The Program Management Plan will provide the framework for a MoDOT-led process for identifying and overcoming siting challenges. The regular meetings identified in Goal 3 will provide a forum for identifying these issues and establishing an understanding of the challenges provider are facing. MoDOT can then strategize, alongside relevant stakeholders, on how to address specific issues.

Goal 6: Develop and implement a formal intercity bus marketing and outreach program to increase awareness of intercity bus among the public, stakeholders, and potential service providers.

The program will establish a consistent statewide brand and communications strategy, promote service availability and connectivity, and provide targeted outreach to underserved communities and key partner organizations. Through coordinated marketing, education, and stakeholder engagement efforts, the program will increase ridership, strengthen support for intercity bus investment, and encourage participation from existing

and potential transportation providers to expand service opportunities throughout the state.

6.3. Recommendations

The recommendations presented in this report build upon the findings from the existing conditions assessment, stakeholder engagement, gaps and needs assessment, and peer review conducted as part of the study. They provide a roadmap for strengthening Missouri's intercity bus network by improving connectivity, addressing service gaps, enhancing coordination among transportation providers, and better aligning services with the mobility needs of residents throughout the state.

Recommendations focus on both immediate operational and programmatic improvements and on the long-term vision of a connected, customer-focused, and data-driven statewide intercity transportation system. Together, these recommendations are intended to help MoDOT maximize the value of available resources, improve access to essential destinations, and position the ICB program for sustainable growth and success in the years ahead.

1. Establish a Strategic, State-Led ICB Program Framework

Discussions with MoDOT staff highlighted the need for greater MoDOT direction of Missouri's intercity bus service. Transitioning from a largely reactive funding approach to a more proactive and strategic program approach would allow MoDOT to leverage its discretion over funding decisions to shape Missouri's intercity bus service to better meet the State's needs. Components could include defining priority corridors, service expectations, and performance outcomes.

- Define a statewide intercity bus network concept (core corridors + feeder connections).
- Establish clear criteria for funding routes, such as through prioritizing performance, connectivity, and existing unmet needs.
- Consider competitive procurement or contracting models for key routes to improve accountability and service quality.

2. Prioritize Rural Connectivity and Feeder Service Integration

The most consistent finding across engagement, needs analysis, and system reviews is the lack of strong connections between rural areas and the intercity network. Many communities (especially in southern and central Missouri) lack direct service and rely on

indirect or infrequent connections. Rural transit providers often face coordination challenges with ICB services, including schedules and stop locations.

- Improve schedule alignment and transfer coordination between rural transit and ICB routes.

3. Address Geographic Service Gaps and Strengthen Key Corridors

Missouri's ICB network has experienced long-term reductions in stops, routes, and frequency, resulting in notable geographic gaps. The system has declined from 57 stops to 31 across providers, with entire corridors experiencing reduced access and frequency. Significant population clusters and trip generators remain outside the 25-mile service catchment area.

- Target gap-filling investments in corridors with high unmet demand (e.g., I-44, southwest and southeast Missouri).
- Restore or introduce stops in identified high-demand communities (e.g., Rolla, Fort Leonard Wood, West Plains).
- Strengthen primary corridors between major cities (Kansas City–St Louis, Columbia–Jefferson City), where demand for increased frequency was identified.

Figure 6-1 and Table 6-1 below show the priority cities and locations that MoDOT identified in this assessment.

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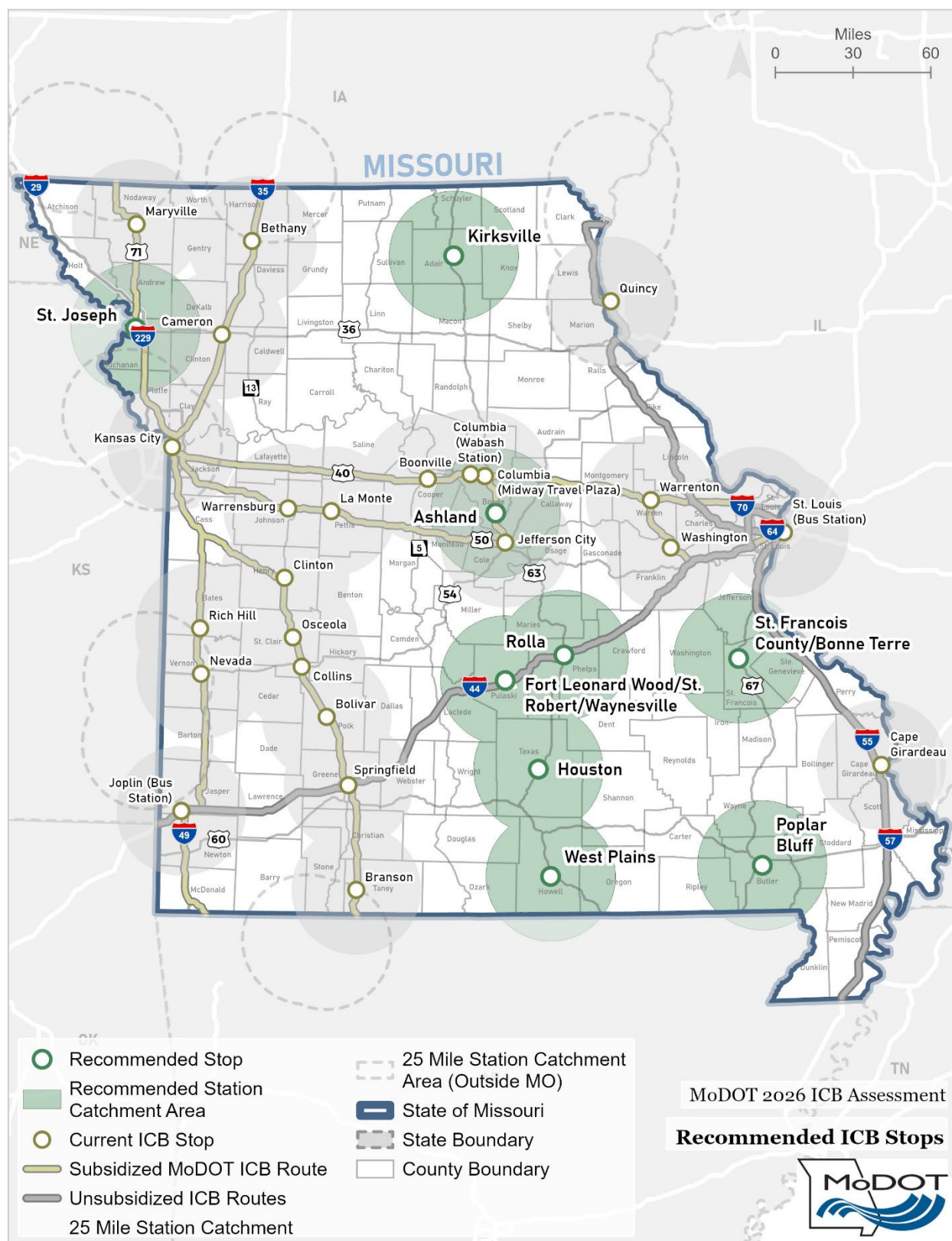


Figure 6-1: Recommended ICB Stops

Table 6-1: Recommended ICB Stops

Location	Demographic and Trip Generator Considerations	Intercity Public Transit Considerations
Ashland (Boone County)	N/A	Identified as potential stop in service connecting Columbia and Jefferson City, as part of the
Houston (Texas County)	High transit propensity; trip generator clusters	Intercity service to Springfield twice per month
Kirkville (Adair County)	High transit propensity; trip generator clusters	Intercity service to Columbia five times per week
Poplar Bluff (Butler County)	High transit propensity; trip generator clusters	Intercity service to Cape Girardeau County once per month
Rolla (Phelps County)	High transit propensity; trip generator clusters	Intercity service to Columbia and St. Louis twice per month
St. Francois County	High transit propensity; Trip generator clusters	Intercity service to St. Louis four times per week
St. Joseph (Buchanan County)	High general population; high transit propensity; trip generator clusters	OATS intercity service provided to St. Joseph between once per month and once per week, depending on route
St. Robert/Waynesville/Fort Leonard Wood (Pulaski County)	College-aged and minority concentrations; military installation	Intercity service to Columbia and St. Louis twice per month
West Plains (Howell County)	Older adult, low-income, and low and no-vehicle household concentrations; trip generator clusters	Intercity service to Springfield twice per month

4. Improve Intermodal Connectivity

Intermodal integration is critical to creating a functional statewide mobility network. Stakeholders highlighted limited connections between ICB, rail, airports, and local transit systems. Past plans and peer states emphasize coordinated transfers and multimodal linkages as core strategies.

- Prioritize direct connections to Amtrak stations, major airports, and transit centers.
- Implement timed transfers and shared facilities, where feasible.
- Coordinate with local agencies to integrate ICB into existing multimodal hubs.

5. Enhance Customer Experience and System Usability

Customer awareness and usability remain barriers to ICB utilization. Many users reported difficulty accessing information, and services are often not visible in trip-planning tools. Stakeholders emphasized the importance of reliability, ease of use, and consistent experience statewide.

- Develop a centralized, statewide ICB information webpage.
- Develop a unified ICB program brand.

- Integrate services into trip planning tools and digital platforms.
- Improve stop amenities, signage, and safety, particularly in rural areas.

6. Align Services with Key User Needs and Trip Purposes

ICB demand is strongly tied to specific trip purposes, especially for underserved populations. High-priority trip purposes include medical access, employment, education, and social connectivity. Older adults and rural populations face increasing mobility challenges, particularly as driving ability declines.

- Prioritize service to medical hubs, colleges, and employment centers.
- Support routes and schedules that provide same-day medical and service trips.
- Incorporate aging-in-place considerations, including accessibility and affordability.

7. Strengthen Performance Monitoring and Data Transparency

Improved data collection and reporting are needed to support decision-making and communicate program value. Current provider documentation is insufficient to fully evaluate performance and effectiveness. Lack of clear performance data limits the ability to justify investments and prioritize funding.

- Establish standardized reporting requirements for all operators.
- Implement performance metrics including ridership, connectivity, and subsidy per trip.
- Utilize data to support investment decisions and stakeholder communication.

8. Clarify Program Purpose and Communicate Value

There is a need to better articulate the purpose and benefits of ICB service. Stakeholders frequently ask why intercity bus service is funded and what value it provides to communities. Historical plans also identified a need for improved communication and awareness.

- Develop a clear, consistent program narrative and value proposition.
- Highlight economic, mobility, and health access benefits.
- Coordinate with partners to improve public understanding and support.

9. Optimize Use of Existing Funding and Explore Supplemental Resources

Missouri's ICB program relies heavily on FTA Section 5311(f) funding. Federal funding serves as the backbone of the system, with no dedicated state funding program. Funding constraints require careful prioritization and efficient resource use.

- Align funding with high-performing and high-need routes.
- Explore opportunities to leverage state or local funding to supplement federal programs.
- Evaluate pilot programs to test new services before full deployment.

10. Establish a Formal Coordination Program Between Transit and Intercity Bus Providers

MoDOT should establish a formal coordination program that brings together intercity bus operators and public transit providers, with MoDOT serving as the central facilitator, to improve connectivity, align services, and enhance system performance.

This program should include a standing coordination forum, provide expectations for active and consistent participation tied to funding, and establish targeted pilot efforts in high-need corridors to improve feeder service integration, schedule alignment, and shared use of facilities. Strengthening coordination will address longstanding challenges related to limited communication, inconsistent connectivity, and first- and last-mile gaps, while supporting a more cohesive and efficient statewide mobility network.

7. Conclusion

This assessment evaluated whether intercity bus needs are being adequately met in Missouri, with respect to requirements established in 49 USC Chapter 53, Section 5311. Based on the analysis and stakeholder engagement conducted, **there are intercity bus needs in Missouri that are not being adequately met, and MoDOT has identified using 5311(f) funding to better meet these needs as a priority.**

MoDOT bases its conclusion regarding unmet needs on the following findings from this assessment:

- Missouri has lost a large number of stops over the past 15 years due to stop consolidation and service reductions, resulting in a considerable loss of access to ICB service both along key corridors and statewide. Since 2010, the number of ICB stops in Missouri has decreased from 57 to 31, a net loss of 26 stops statewide.
- Multiple existing routes have service gaps in population centers that were identified as service needs. Greyhound's service along I-44 between Springfield and St. Louis has no intermediate stops, resulting in a service gap of more than 200 miles. Rolla and Fort Leonard Wood were identified as potential stops on this route. Likewise, Greyhound's service along I-55 to the south of St. Louis has a considerable service gap between St. Louis and Cape Girardeau, with opportunities for a new stop in Saint Francois County. Finally, Jefferson Lines' service from Kansas City north along I-29 currently lacks a stop in St. Joseph, a major missed opportunity to serve a moderate population center.
- A lack of ICB service as well as ICB schedules not aligning with rider needs were consistently highlighted by the public and stakeholders throughout the engagement process as the primary reasons for not using ICB service. Each of these challenges would likely require consistent funding to overcome.
- Intercity bus and transit providers consistently identified several issues as major impediments to providing additional ICB service. Limited funding was highlighted as a primary barrier to providing additional ICB service and maintaining current service levels, with limited funding being a primary factor in past service reductions. Coordination challenges between ICB providers, transit agencies, and cities/towns were also identified as a key driver of past service reductions and issues with maintaining and establishing stops today.

As a result of this assessment, it is recommended that MoDOT continue to use the full 15% set-aside of FTA 5311 annual program funds to support intercity bus operations to accomplish the recommendations of this Intercity Bus Assessment.

8. Appendix

The appendix to this report consists of three documents:

- Current State of ICB Memo
- Gaps and Needs Assessment
- Outreach, Public Transit, and Trip Generator materials, including:
 - Outreach Materials – Stakeholder and Public
 - Outreach Materials – Provider Consultation
 - Stakeholder Lists
 - Southeast Missouri Transportation Service (SMTS) Detailed Service and Schedule Information
 - Operating Above The Standard (OATS) Transit Detailed Service and Schedule Information
 - Trip Generator Tables