THE UNIVERSITY OF MEMPHIS | Center for Applied Earth Science and Engineering Research

FREIGHT STAKEHOLDER SURVEY

DECEMBER 2025

Memphis MPO
METROPOLITAN PLANNING ORGANIZATION

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Introduction

The Memphis Urban Area Metropolitan Planning Organization (MPO) serves as the regional agency that coordinates and oversees long-range transportation planning across multiple jurisdictions in the Memphis region. Its planning area includes all of Shelby County, TN, and DeSoto County, MS, along with the western portion of Fayette County, TN, and the northwestern portion of Marshall County, MS (see Figure 1).

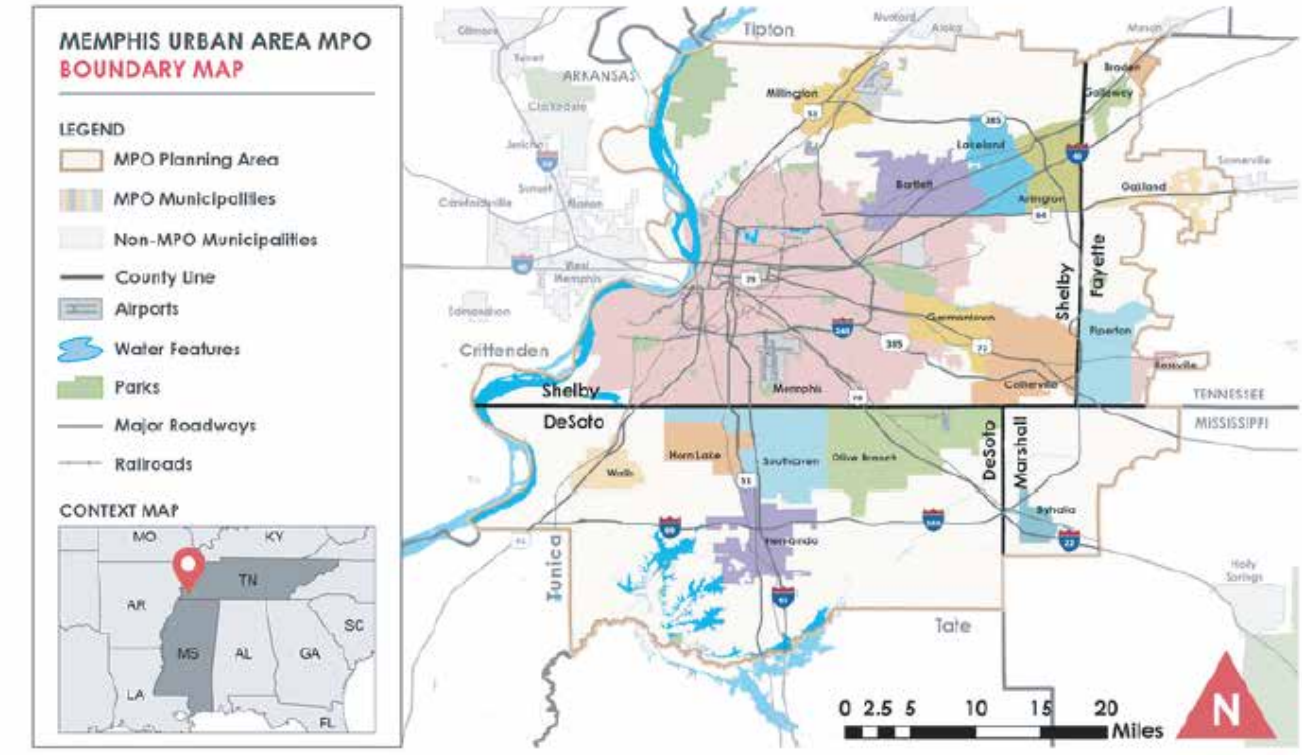

Figure 1. Memphis Urban Area Metropolitan Planning Organization Boundary, 2025 (Memphis MPO, 2025)

On behalf of the Memphis Urban Area MPO, the Center for Applied Earth Science and Engineering Research, Division of Transportation and Logistics (CAESAR DTL) conducted a survey of regional freight stakeholders. The survey was distributed to participants within the Memphis MPO boundary in Shelby and Fayette Counties in Tennessee, DeSoto and Marshall Counties in Mississippi, and Crittenden County in Arkansas, as shown in Figure 1. This 2025 survey serves as a follow-up to the 2020 Freight Stakeholder Survey, enabling analysis of how freight industry challenges and stakeholder priorities have evolved over the five-year period. The survey gathered feedback on recent shifts within the freight industry and emerging issues related to infrastructure conditions and needs, workforce challenges, and advancing technologies. The resulting information will be used for the update of the MPO Freight Plan and future Regional Plan updates.

Methodology

Survey Instrument

A survey instrument, largely based on the 2020 Freight Stakeholder Survey (Memphis MPO, 2020), was developed collaboratively between the research team and MPO staff for this study. The survey questionnaire included 21 items, 19 of which were replicated from the 2020 questionnaire with only minor revisions or updates to facilitate comparisons between survey events. Updates were informed by a literature review focused on relevant freight planning documents published since the 2020 report was completed as well as specific interests of the MPO (ATRI, 2025; ARDOT, 2022; FHWA, n.d., Memphis MPO, 2025; MDOT, 2022; TDOT, 2023; USGAO, 2023). Two questions were added to provide better understanding of the impacts of current and anticipated infrastructure and development projects in the region. The questionnaire topics included:

- Company information (location, industry type, mode, size, years in operation)
- Factors influencing business location decisions
- Transportation infrastructure ratings
- Barriers to efficient freight operations
- Impacts of local infrastructure projects
- Need for infrastructure improvements
- Desired focus areas for the future planning and investments

Questions were designed to be quick for participants to answer, with most in a multiple choice, Likert scale, or ranking format. Two questions provided opportunities for participants to provide open-ended responses. The survey was developed and administered through the Qualtrics® XM survey development platform.

Recipients

A regional freight stakeholder database was developed by CAESER that included over 200 representatives from a range of modes, industry types, and all counties within the Memphis MPO service area. The survey was distributed by email invitation to stakeholders on September 26, 2025, with follow-up email reminders on October 7, 14, 23, and 30. The initial closing date of October 17 was extended to November 7 due to slow response rates. Additional outreach was conducted using LinkedIn posts, direct LinkedIn messaging, and distribution via email lists or websites of relevant state and municipal organizations. To increase participation and representation from all areas within the service region, CAESER staff conducted additional outreach to stakeholders by individual email and phone, targeted to locations underrepresented in response rates, and completed several participant surveys by interview. An example LinkedIn post from CAESER and a calendar post by the Mississippi Department of Transportation is provided in Figure 2. The LinkedIn post image was redacted to remove names of individual respondents.

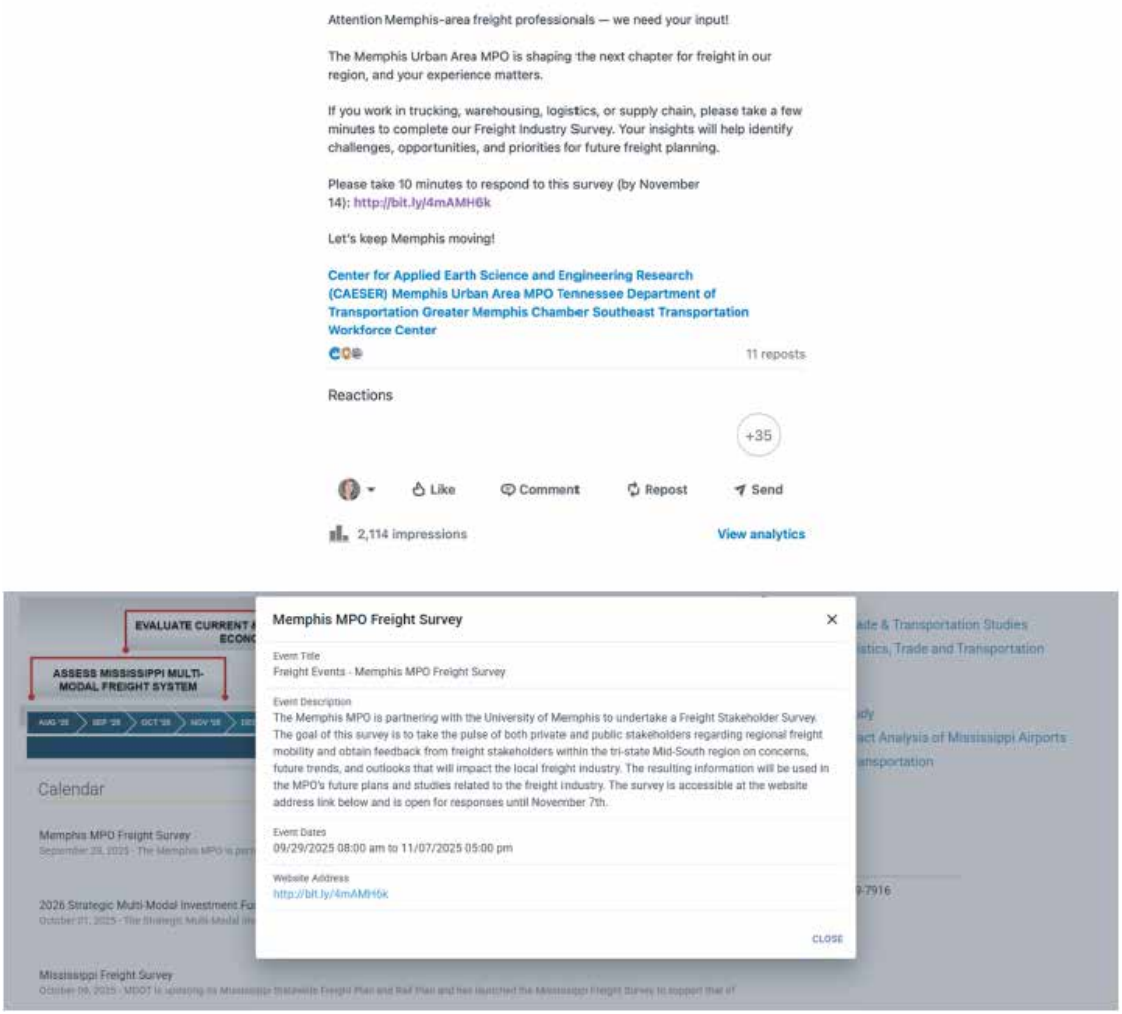

Figure 2. Examples of Outreach Materials Used in the Survey Distribution Process (including a LinkedIn post by CAESER (redacted to remove respondent names) and a calendar announcement by the Mississippi Department of Transportation).

Analysis

Survey responses were analyzed using the statistical and visualization tools available within the Qualtrics® platform, including Stats IQ™. To support additional review, all responses were exported to Excel for supplemental tabulation and cross-analysis. Each survey item was examined independently, and results were evaluated for modal patterns where sample sizes allowed. Due to the smaller number of responses in the 2025 dataset compared to 2020, state-level comparisons were limited; however, modal breakouts and categorical distributions were assessed where sufficient representation was present.

Results

A total of 53 participants completed the survey, with the majority being entered via the survey platform by individual respondents and three being entered by researchers during stakeholder interviews. Because several questions used conditional display logic in Qualtrics and some items allowed multiple selections, not all respondents answered every question. As a result, totals shown in the following tables and figures may vary.

The survey consisted of 21 questions addressing company characteristics, industry trends, operational challenges, infrastructure needs, and future priorities within the Memphis Metropolitan Area. Table 1 provides an overview of the topic area associated with each question.

Table 1. Survey Question Topics

Question	Topic Area
1	Respondent Information
2	Type of Industry
3	Number of Company Employee
4	Company Mode(s)
5	Years of Operation in the Greater Memphis Area
6	Decision to Locate Company
7	Factors in Decision to Locate Company
8	Local Infrastructure Rating
9	Costs to Business - Congestion
10	Technology Use
11	Operational Strategies
12	Safe Truck Parking Availability
13	Locations for Expanded Truck Parking
14	Barriers to Drive Efficiency
15	Effects of COVID-19
16	Effects of Recent Changes
17	Effects of Near Future Changes
18	Locations for Future Emphasis
19	Reasons for Locations for Future Emphasis
20	Topics for Future Emphasis
21	General Recommendations from Respondents

Question 1: Respondent Information

Question 1 was used to gather the following information: respondent name, company name, and company zip code. The only required field was the company's zip code. Figure 3 shows a heat map of the zip codes across the Memphis Metropolitan area and those out of the Memphis boundary.

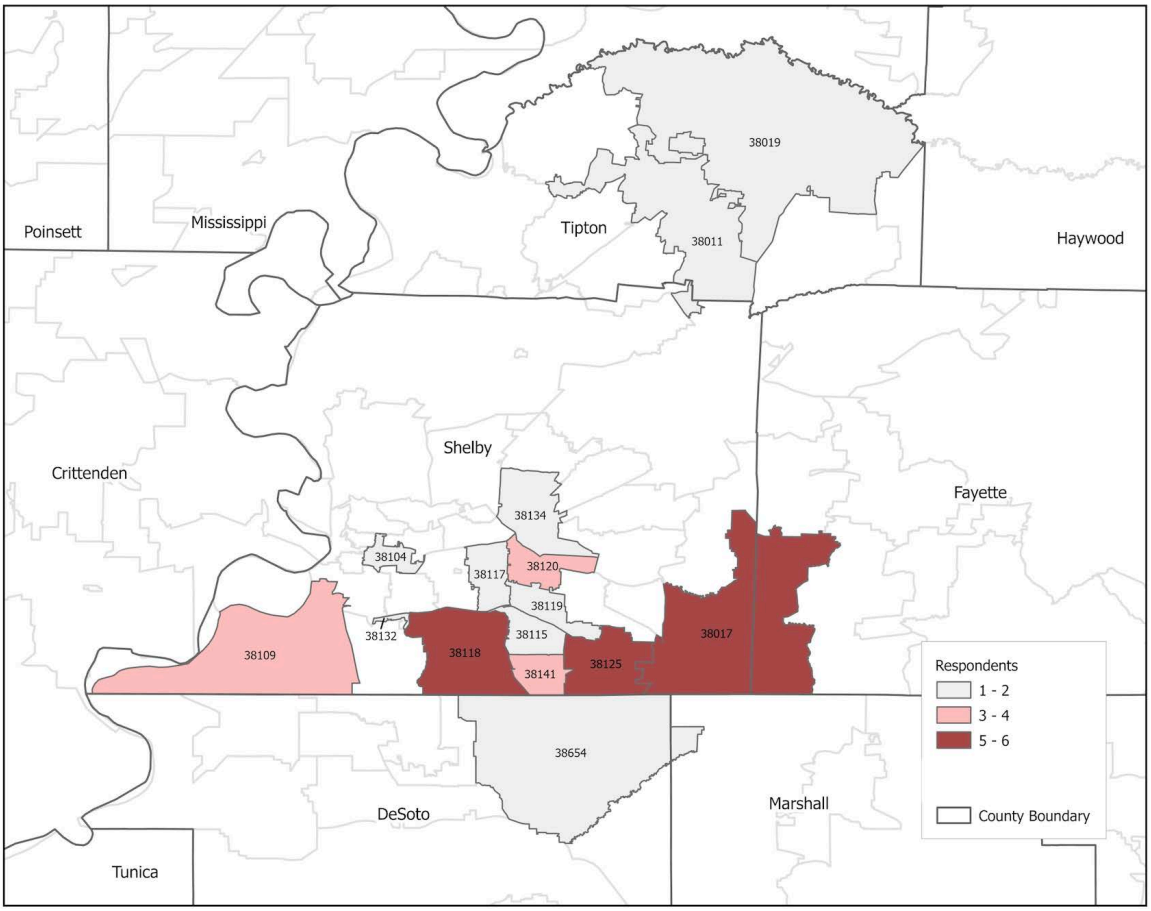

Figure 3. Question 1 – Heat Map of Zip Codes for Respondents

The zip code was used to determine the state of the respondent. Table 2 shows the distribution of answers broken down by state of interest.

Table 2. Question 1 - Responses by State (40 Respondents)

State	Count	Percent of Total
Tennessee	38	95%
Mississippi	2	5%
Total	40	100%

Note: *Four respondents were located outside the Greater Memphis region (in New York, Georgia, or Florida), although the companies they represent conduct freight operations in the area. Nine respondents did not provide valid zip code data hence were excluded from the figure.*

2025 FREIGHT STAKEHOLDER SURVEY
Question 2: Type of Industry

Compared to the 2020 stakeholder survey, the 2025 respondent geographic distribution shifted. In 2020, respondents were distributed across Tennessee (80.7%), Mississippi (10.1%), and Arkansas (9.2%). The 2025 survey yielded no respondents from Arkansas, with the 40 valid zip codes of respondents concentrated in Tennessee (95.0%) and Mississippi (5.0%), indicating a more geographically focused sample within the core MPO service area.

Question 2: Type of Industry

Question 2 was used to gather the respondent's industry information. Figure 4 shows a breakdown of the industries. The respondents were allowed to choose multiple answers.

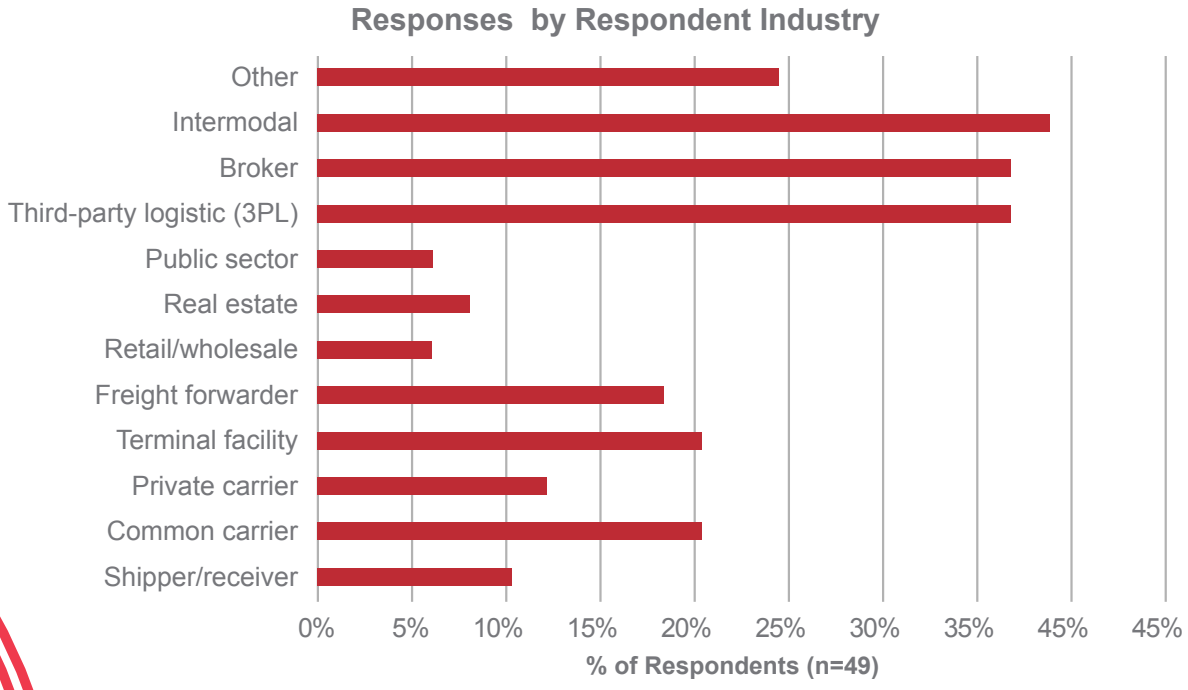

Figure 4. Question 2 – Responses by Respondent Industry

Compared to the 2020 results, the 2025 respondent industry composition showed notable shifts. Response distribution changes were noted in the relative representation in the 2025 sample from the intermodal industry *(+10 percentage points)*, the broker industry *(+20 percentage points)*, and 3PL services *(+10 percentage points).* In contrast, sample representation from traditional carrier categories declined: common carriers decreased by approximately 15 percentage points, and shipper/receiver companies decreased by approximately 20 percentage points. Public sector, retail/wholesale, freight forwarder, terminal facility, and private carrier response representation remained relatively stable between the two surveys.

Question 2 also allowed for a free response “Other” option. The “Other” responses included: Consultant, Distributor, Freight and Logistic consulting, Harbor and Fleeting Services, IPE Chassis Provider, Port and Harbor, Railroad, State Government, Truck and Trailer Parking, and Trucking Company.

Question 3: Number of Company Employees

Question 3 was used to determine the size of each company. Figure 5 shows the distribution of the number of employees at each respondent's company.

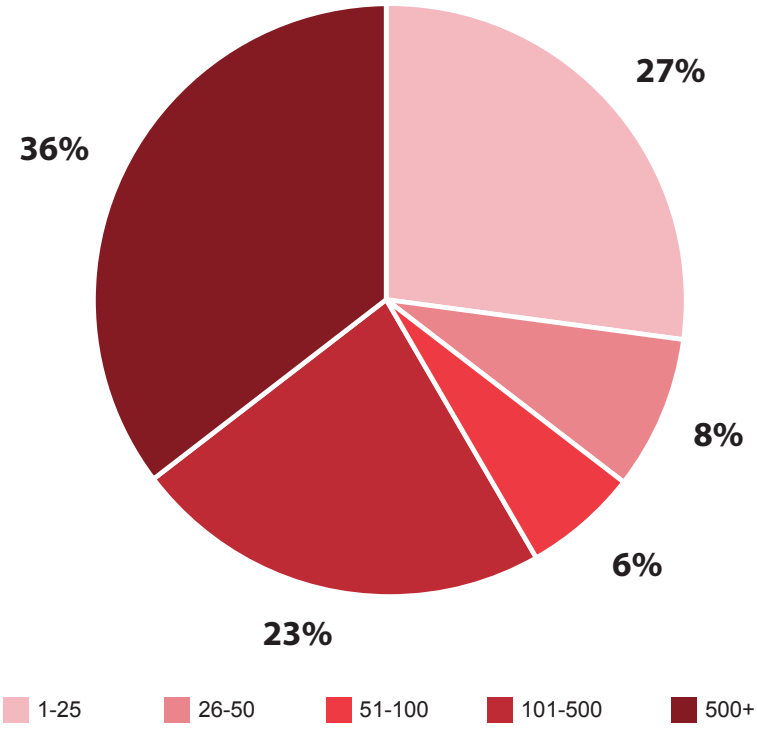

Figure 5. Question 3 – Percentage of Respondents by Number of Company Employees (n = 48)

Most responses were provided by companies with 500+ employees (36%), 1-25 employees (27%), and 101-500 employees (23%). The 2020 results had most of the responses from companies with 1-25 employees (28%), 101-500 employees (29%), and 500+ employees (18%). Overall, the distribution of the company sizes remained relatively consistent.

Question 4: Company Mode(s)

Question 4 was used to determine the transportation modes of each company; respondents could pick multiple answers. Figure 6 below shows the percentage of respondents representing each mode.

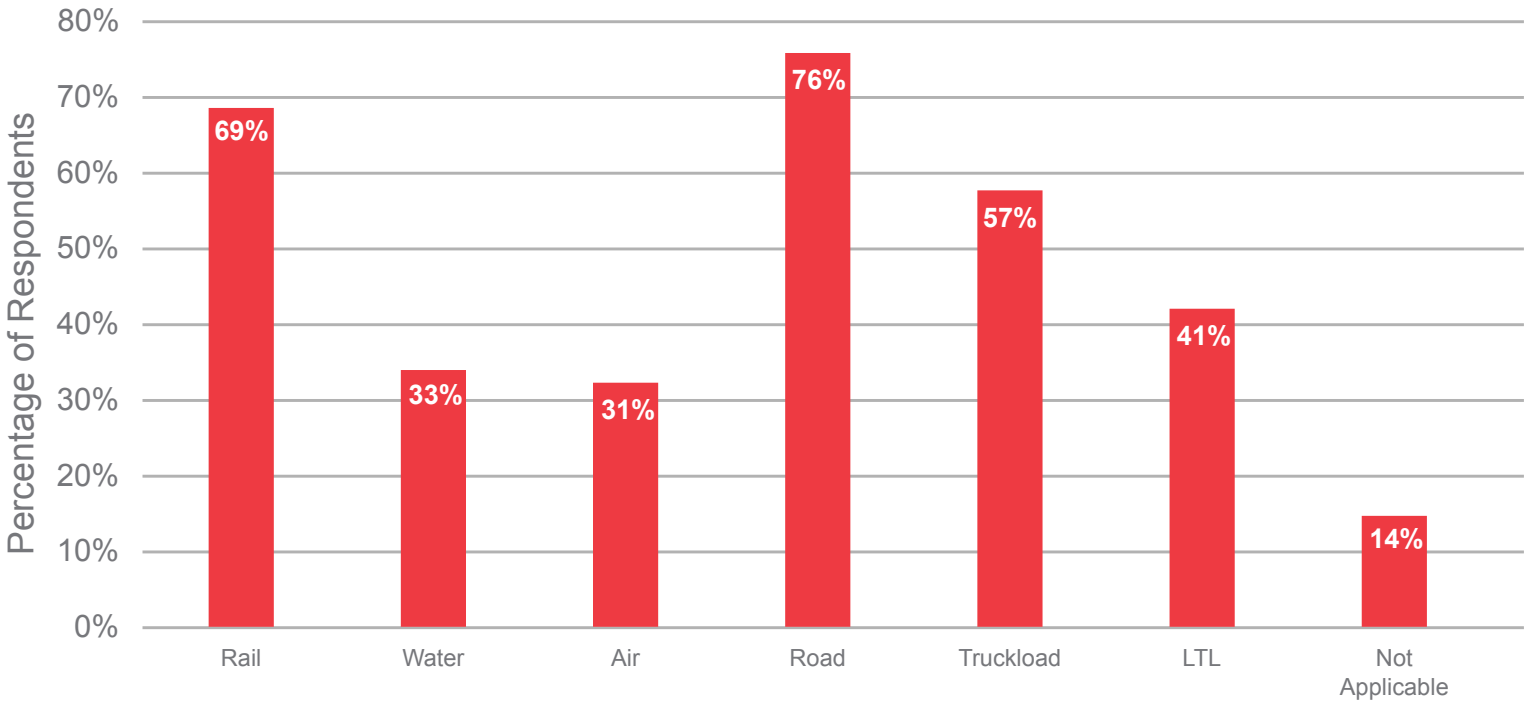

Figure 6. Question 4 – Number of Respondents Representing each Mode (n=49)

Compared to the 2020 results, the 2025 respondent modal representation showed notable changes. Rail representation increased from 54% in 2020 to 69% in 2025 *(+15 percentage points)*, and Road-based operations increased from 65% to 76% *(+11 percentage points)*. Conversely, Truckload representation declined from 70% to 57% *(-13 percentage points)*, while Water, Air, and less than truckload (LTL) modes showed smaller declines. The increased rail and road representation suggests the 2025 sample more strongly reflects perspectives from integrated logistics operators and rail industry stakeholders.

Question 5: Years in Operation in the Greater Memphis Area

Question 5 asked the respondents how many years the business has been in operation in the Greater Memphis Area. The respondents were allowed to enter any value. The results were grouped and are shown below in Figure 7.

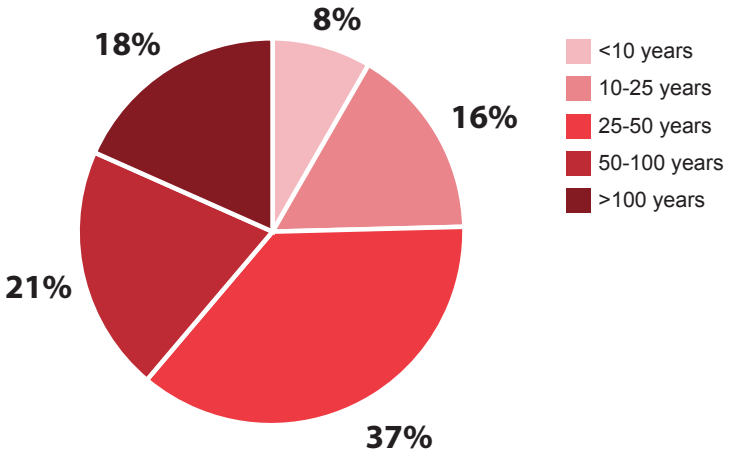

Figure 7. Question 5 – Percentage of Responses by the Years in Operation in the Greater Memphis Area (n =49)

The results remained relatively consistent with the results of the 2020 survey. Figure 8 shows the years of operation of the respondent's company based on their mode.

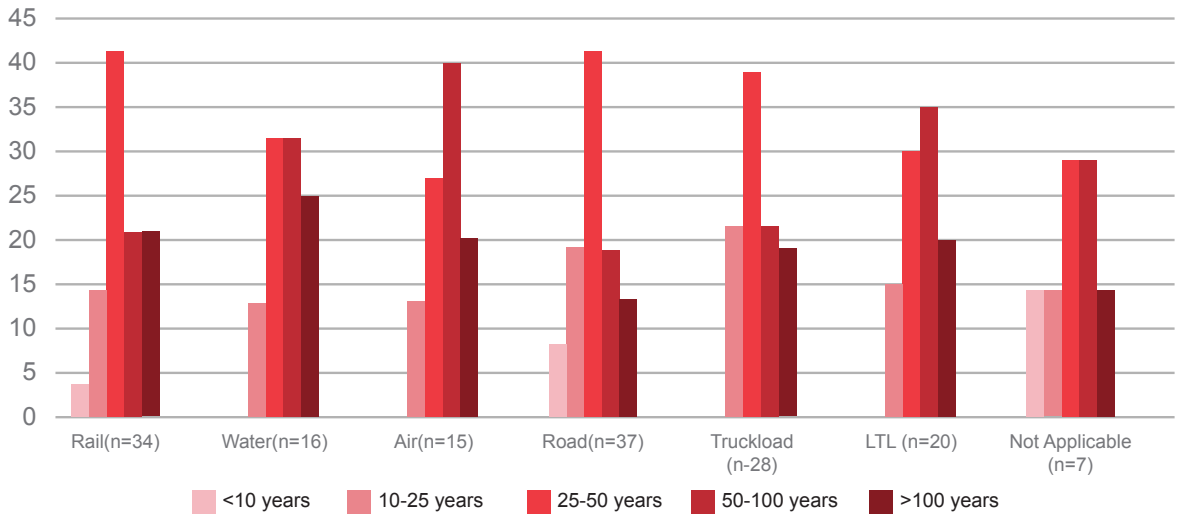

Figure 8. Question 5 – Analysis of the Years in Operation in the Greater Memphis Area by Mode

Compared to the 2020 results, the overall distribution of years in operation showed a notable shift. Companies with 50-100 years of operation decreased from 27% in 2020 to 21% in 2025, while companies operating for over 100 years increased from 10% to 18%. This shift suggests the 2025 sample included a higher proportion of long-established freight companies compared to 2020. The analysis of years in operation by transportation mode remained consistent with 2020 patterns.

Question 6: Decision to Locate Company

Question 6 asked if the respondent was involved in the decision to locate the company in the Memphis Metropolitan Area. Figure 9 below shows the percentage of respondents involved. Only 10 percent of the respondents were involved in the decision to locate their company. If respondents indicated they were involved, they were shown a follow-up question regarding factors influencing the decision.

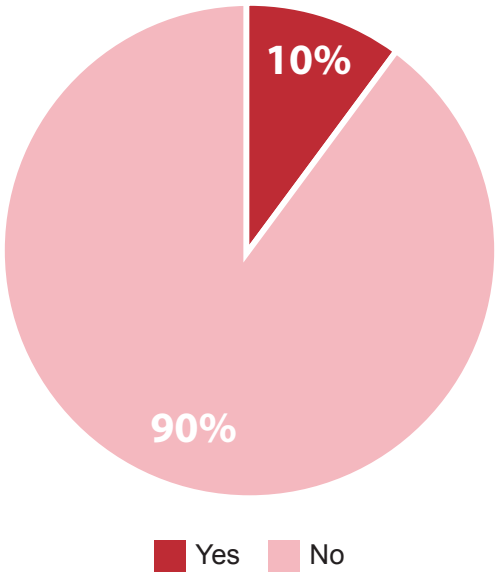

Figure 9. Question 6 – Percentage of Responses that were Involved in the Decision to Locate their Company (n =50)

The number of respondents involved in the decision to locate the company dropped from 30% in 2020 to 10% in 2025.

Question 7: Factors in Decision to Locate Company

Question 7 asked the respondents to rate the importance of 8 potential factors involved in their decision to locate the company. A 5-point Likert scale was used, with 1 being “Not important” and 5 being “Very important”. Question 7 was only shown to the respondents who indicated “yes” in Question 6. Of the 5 respondents who were shown question 7, only 2 responded. The highest-rated response was workforce, followed by cost of land and availability of multimodal freight infrastructure. The lowest rated factor was supplier proximity, although it was still rated as ‘somewhat important’. Compared to the 2020 results, the mean importance of each factor remained constant. Because of the decrease in respondents since the 2020 survey, a mean response by mode chart was not created. No respondents indicated other U.S. regions that were competitive with the Greater Memphis Area when deciding to locate.

Question 8: Local Infrastructure Rating

The survey respondents were asked to rate the local transportation infrastructure on a 5-point Likert scale for the following criteria: meeting current requirements, ready for future requirements, and importance to business operations. The scale descriptions are shown in Table 3. There were no descriptions for the ratings of 2 and 4.

Table 3. Question 8 - Likert Scale Descriptions

	Meeting Current Requirements	Ready for Future Requirements	Importance to Business Operation
1	"Falls short of Requirements"	"Falls short of Requirements"	"Not important"
3	"Meets requirements"	"On pace to meet Requirements"	"Somewhat important"
5	"Exceeds requirements"	"Exceeds requirements"	"Critical"

Table 4 shows the mean responses to Question 8. For the categories "meeting current requirements" and "ready for future requirements", a higher mean reflects a more favorable perception of both the current and future performance of the category. For the category "importance to business operations" a higher mean signifies that the category is of greater importance to the respondent's business operations. For the 2025 survey event, the mean rating across all items for "meeting current requirements" was 3.02, and for "ready for future requirements" was 2.94, falling slightly above and below the "meets requirements" score, respectively. The mean rating across all items for "importance to business operations" was 3.93, falling between "somewhat important" and "critical."

While the mean scores for each category reflect general trends, there were noticeable differences in scores between items in each category. Figure 10 displays the mean responses for each item in the local infrastructure rating across the three categories, illustrating how respondents assessed current conditions, future readiness, and overall importance to business operations.

2025 FREIGHT STAKEHOLDER SURVEY

Question 8: Local Infrastructure Rating

Table 4. Question 8 - Mean Response for Local Infrastructure Rating

Category	Meeting Current Requirements	Ready for Future Requirements	Importance to Business Operation
Roadway connectivity	3.41	2.89	4.31
Pavement conditions	**2.03**	**2.19**	3.97
Interstate/highway accessibility	3.38	3.26	**4.38**
Visibility of signing, markings and signals	3.22	3.07	3.83
Street lighting	2.94	2.93	3.69
Traffic Signal	3.03	2.96	**3.44**
Bottlenecks	2.63	2.59	3.71
Curbs/road geometrics	3.17	3.08	**3.22**
Inter modal access	**3.60**	**3.32**	**4.38**
Rail operations	3.39	3.24	4.36
Air operations	**3.72**	**3.32**	3.55
Port operations	3.18	3.00	3.76
Road Safety	2.58	2.81	4.34
Personal Security	**2.10**	**2.44**	4.14

The top two highest rated conditions are indicated in bold black font and the lowest two rated responses are noted in bold red font in Table 4.

The most favorable perceptions noted in the 2025 survey were for air operations (3.72/3.32) and intermodal access (3.60/3.32) for both meeting current and ready for future requirements, respectively. The most poorly rated items were pavement conditions (2.03/2.19) and personal security (2.10/2.44), with both receiving mean ratings that fall between “Falls short of requirements” and “Meets Requirements”.

In 2020, the most favorable perceptions for meeting current and ready for future requirements were found for air operations (3.39/3.34) and interstate/highway accessibility (3.32/3.07), although intermodal access was not far behind with mean ratings of 3.21 and 3.07, respectively. The least favorably rated items in 2020 were pavement conditions (1.94/1.96) and bottlenecks (2.37/2.40), with personal security closely following (2.44/2.44).

It should be noted that most mean ratings from the 2020 sample, with the exception of the “safety” and “security” items, were somewhat lower than that for 2025. Figures 11 and 12 present a comparison of 2020 and 2025 mean ratings for meeting current and future requirements across all categories.

2025 FREIGHT STAKEHOLDER SURVEY

Question 8: Local Infrastructure Rating

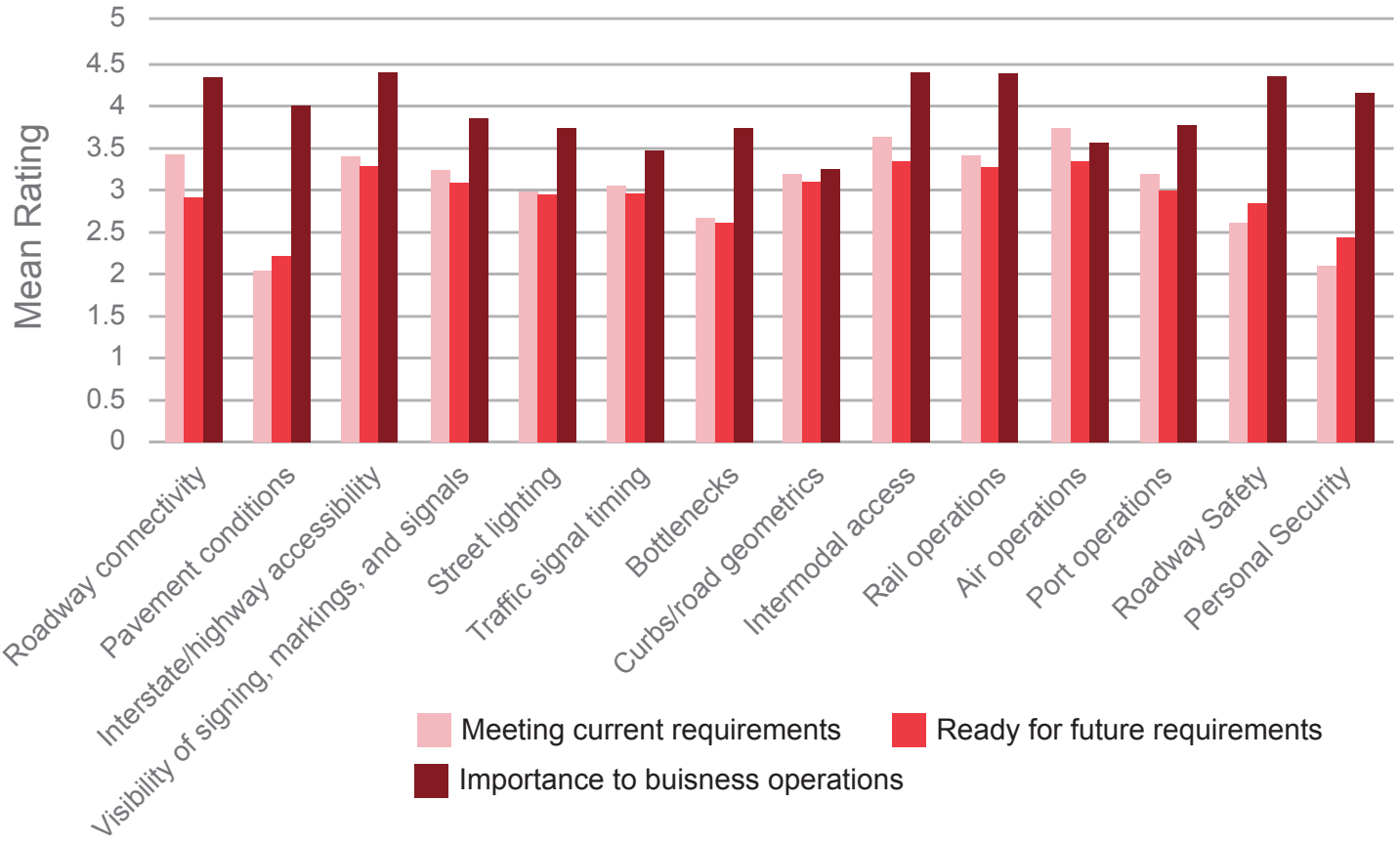

Figure 10. Question 8 – Mean Responses for Local Infrastructure Rating

2025 FREIGHT STAKEHOLDER SURVEY

Question 8: Local Infrastructure Rating

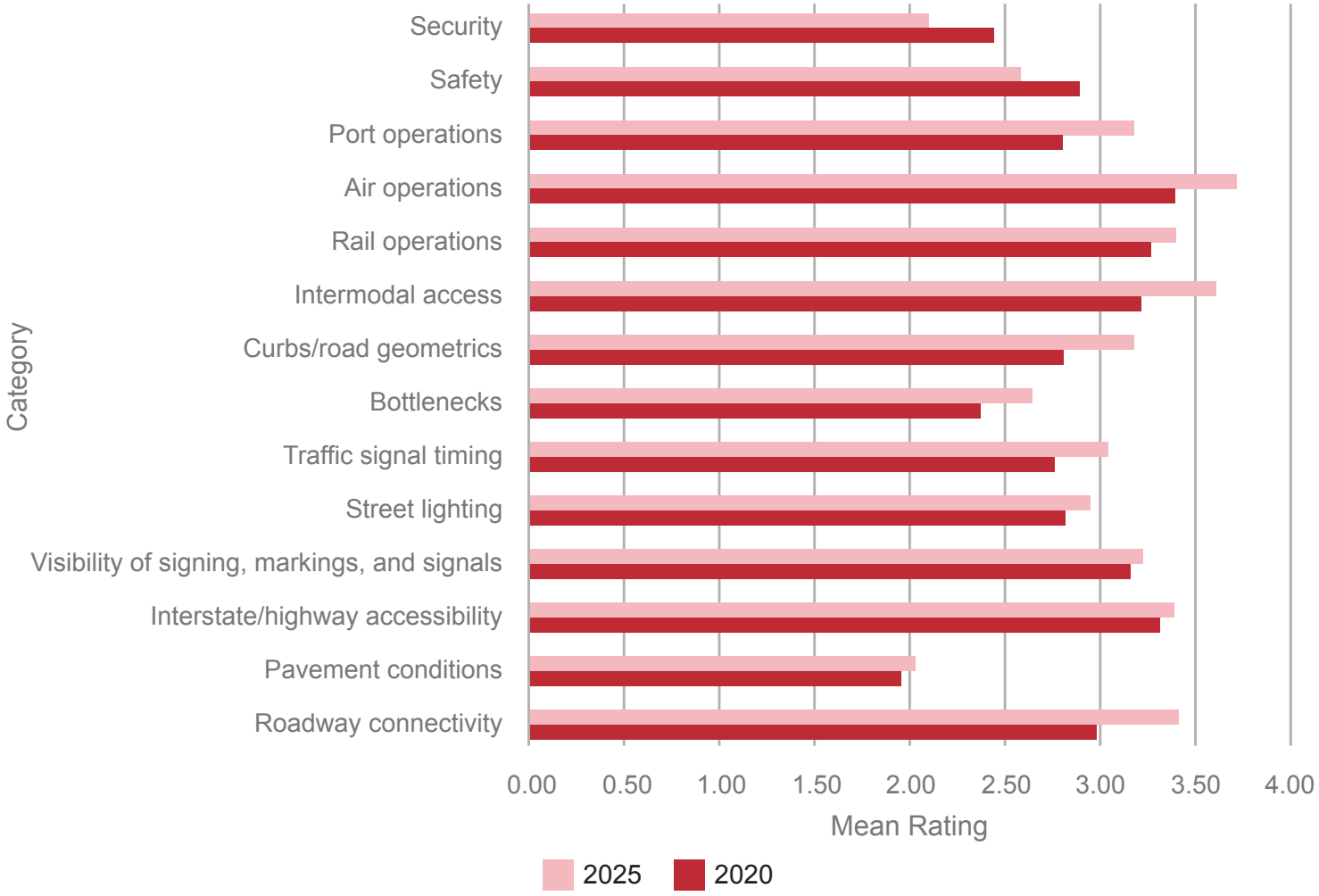

Figure 11. Question 8 – Comparison of 2020 and 2025 Stakeholder Mean Ratings: Meeting Current Requirements.

2025 FREIGHT STAKEHOLDER SURVEY

Question 8: Local Infrastructure Rating

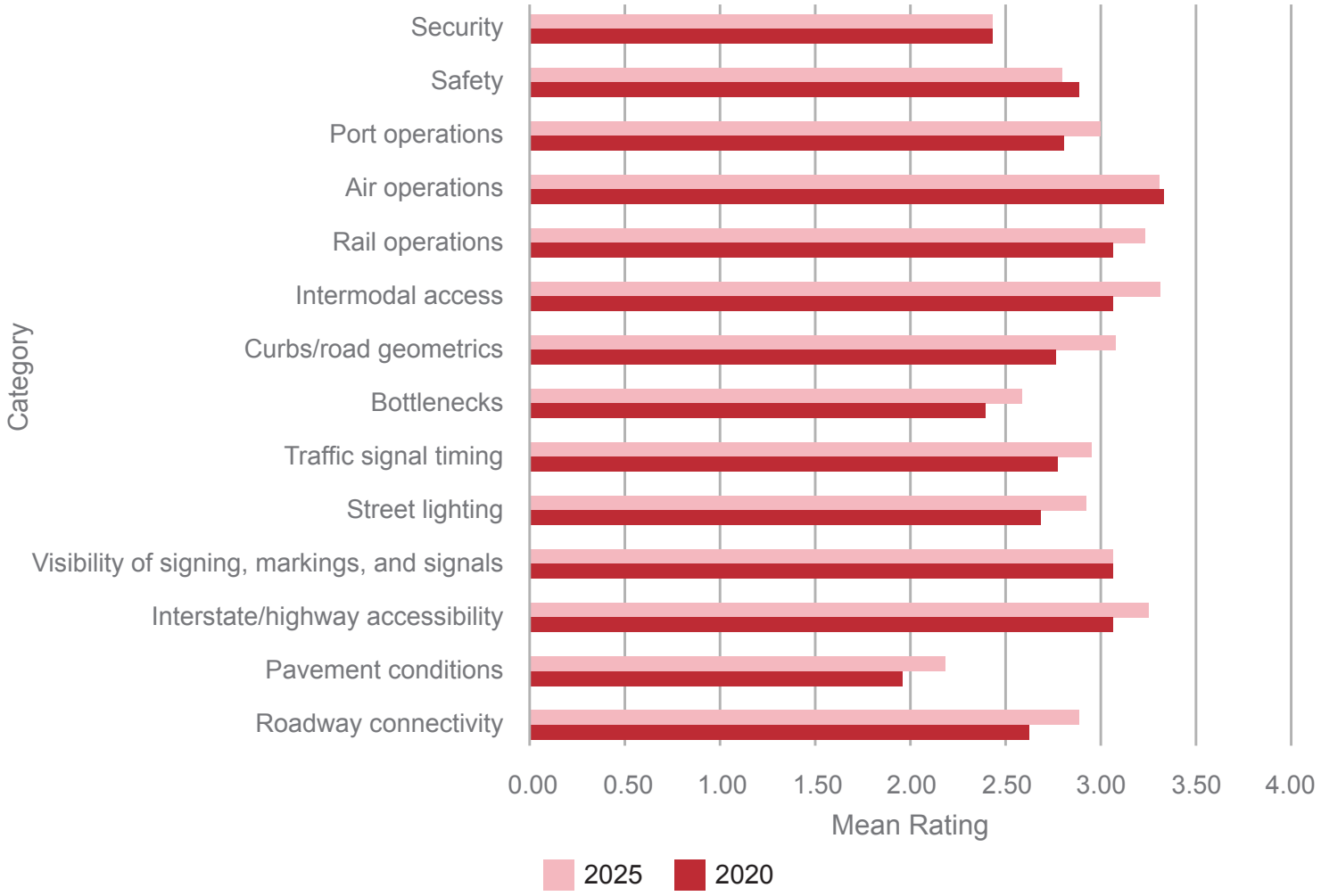

Figure 12. Question 8 – Comparison of 2020 and 2025 Stakeholder Mean Ratings: Ready for Future Requirements.

For importance to business operations, interstate/highway accessibility and intermodal access, both having a mean rating of 4.38, were identified as the most critical in 2025. Roadway connectivity (4.53) and interstate/highway accessibility (4.40) were identified as the most critical in the 2020 survey.

Respondents in 2025 identified traffic signal timing and curbs/road geometrics as least critical, although both still received mean ratings that fell between“Somewhat Important” and “Critical.” These items were the lowest rated in the 2020 survey event as well, with similar mean ratings to 2025. Figure 13 presents a comparison of 2020 and 2025 mean ratings for importance to business across all categories.

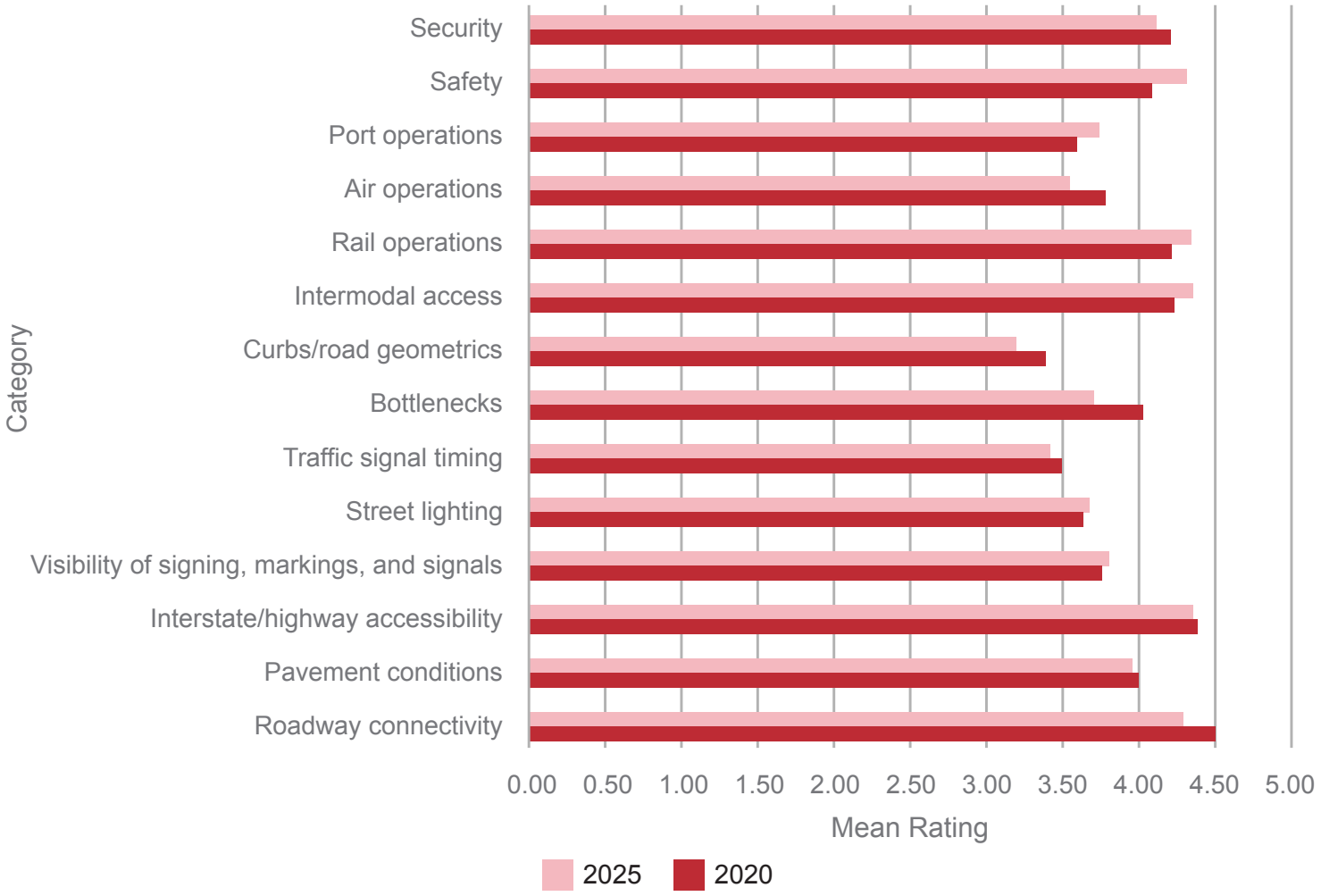

Figure 13. Question 8 – Comparison of 2020 and 2025 Stakeholder Mean Ratings: Importance to Business Operations.

Question 9: Costs to Business – Congestion

Question 9 asked respondents to assess the cost impacts of congestion on the transportation modes utilized by their company. Table 5 shows the number of respondents and their corresponding rankings for each category. A rank of 1 indicates the highest cost burden, while a rank of 6 represents the lowest..

2025 FREIGHT STAKEHOLDER SURVEY

Question 9: Costs to Business - Congestion

Table 5. Question 9 - Number of Respondents by Cost to Business - Congestion

	← More Costly					Less Costly →
Rank	**1**	**2**	**3**	**4**	**5**	**6**
Delayed arrivals/pickups/ departures/deliveries	**14**	**6**	**5**	**4**	**0**	**1**
Additional fuel expended	**4**	**5**	**6**	**8**	**3**	**3**
Increased labor costs	**5**	**7**	**8**	**6**	**3**	**0**
Lost resources - drivers, truck capacity to meet loading per week/day/hour	**4**	**8**	**4**	**8**	**4**	**1**
Longer operating hours	**1**	**0**	**4**	**3**	**17**	**4**
Incremental location(s) required	**1**	**3**	**2**	**1**	**2**	**20**

Figure 14 shows the data from Table 6 as a stacked bar chart. The darker the color the higher the cost to business.

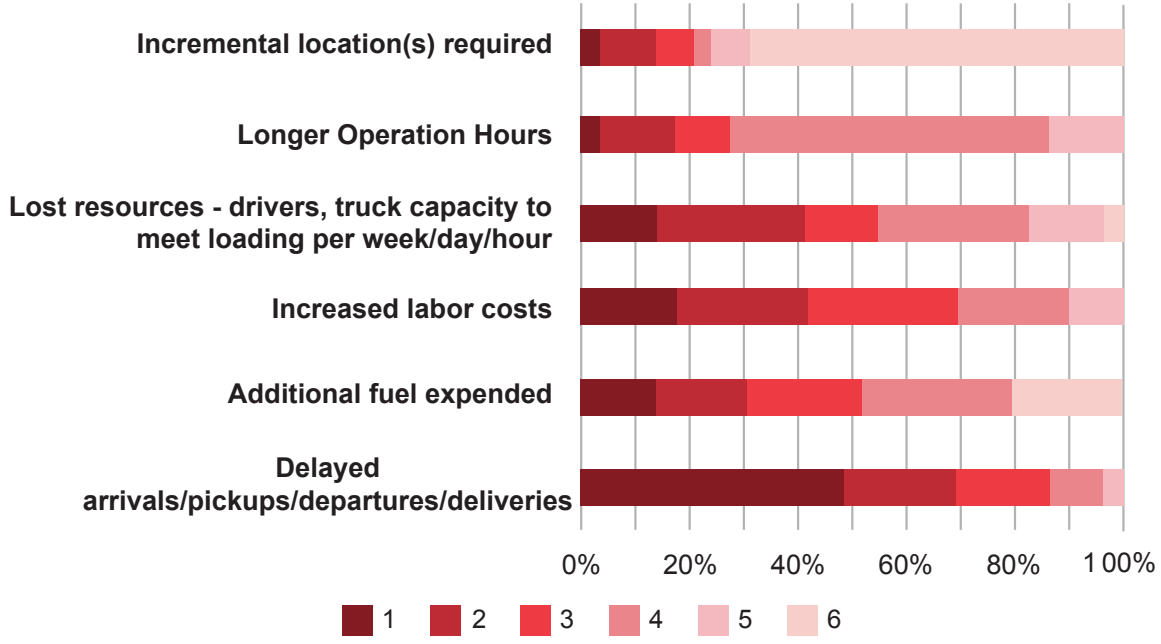

Figure 14. Question 9 – Rank of Cost to Business – Congestion

Delays and increased labor costs remain the two highest congestion-related costs to business operations in 2025. These findings are consistent with the results of the 2020 survey. Table 6 shows the mean rankings of cost impact associated with each transportation mode represented by the respondents' companies. A lower mean value indicates a higher cost to business.

Table 6. Question 9 - Mean Rank by Mode for Cost to Business - Congestion

Cost	Rail	Water	Air	Road	Truckload	LTL
Delayed arrivals/pickups/ departures/deliveries	1.95	1.92	1.90	2.04	2.11	2.00
Additional fuel expended	3.42	3.83	3.60	3.41	3.58	3.77
Increased labor costs	2.81	2.75	2.60	2.79	2.79	2.85
Lost resources - drivers, truck capacity to meet loading per week/day/hour	3.24	2.92	3.20	3.17	3.16	2.69
Longer operating hours	4.41	4.42	4.30	4.54	4.42	4.69
Incremental location(s) required	4.85	5.17	5.40	5.04	4.95	5.00

The primary difference from the 2020 survey is the increased relative cost in the category "incremental location(s) required", scoring a range of 5.52-5.64 and a mean across all modes of 5.6 in 2020 and a range of 4.85-5.17 and a mean of 5.1 in 2025. Another difference from the 2020 survey is the decrease in relative cost associated with longer operating hours, scoring a range of 3.68-4.1 and a mean across all modes of 3.9 in 2020 and a range of 4.30-4.71 and a mean of 4.5 in 2025.

Question 10: Technology Use

Question 10 asked respondents to assess the extent to which certain technologies are used within their companies. Each technology was rated using a five-point Likert scale, where 1 indicated "Not Used" and 5 indicated "Widely Used." Respondents also had the option to select "Not Applicable to my mode/business". Figure 15 shows the mean rating for each category. Two categories were newly added to the 2025 survey and therefore have no 2020 values: AI-enabled predictive analytics for operations and maintenance, and Generative AI/Large Language Models for business applications. Conversely, blockchain, which was included in the 2020 survey, was removed from the 2025 questionnaire. All other technology categories include comparable mean ratings across both survey years. Approximately 20-25 respondents indicated use of each technology in the 2025 survey.

2025 FREIGHT STAKEHOLDER SURVEY

Question 10: Technology Use

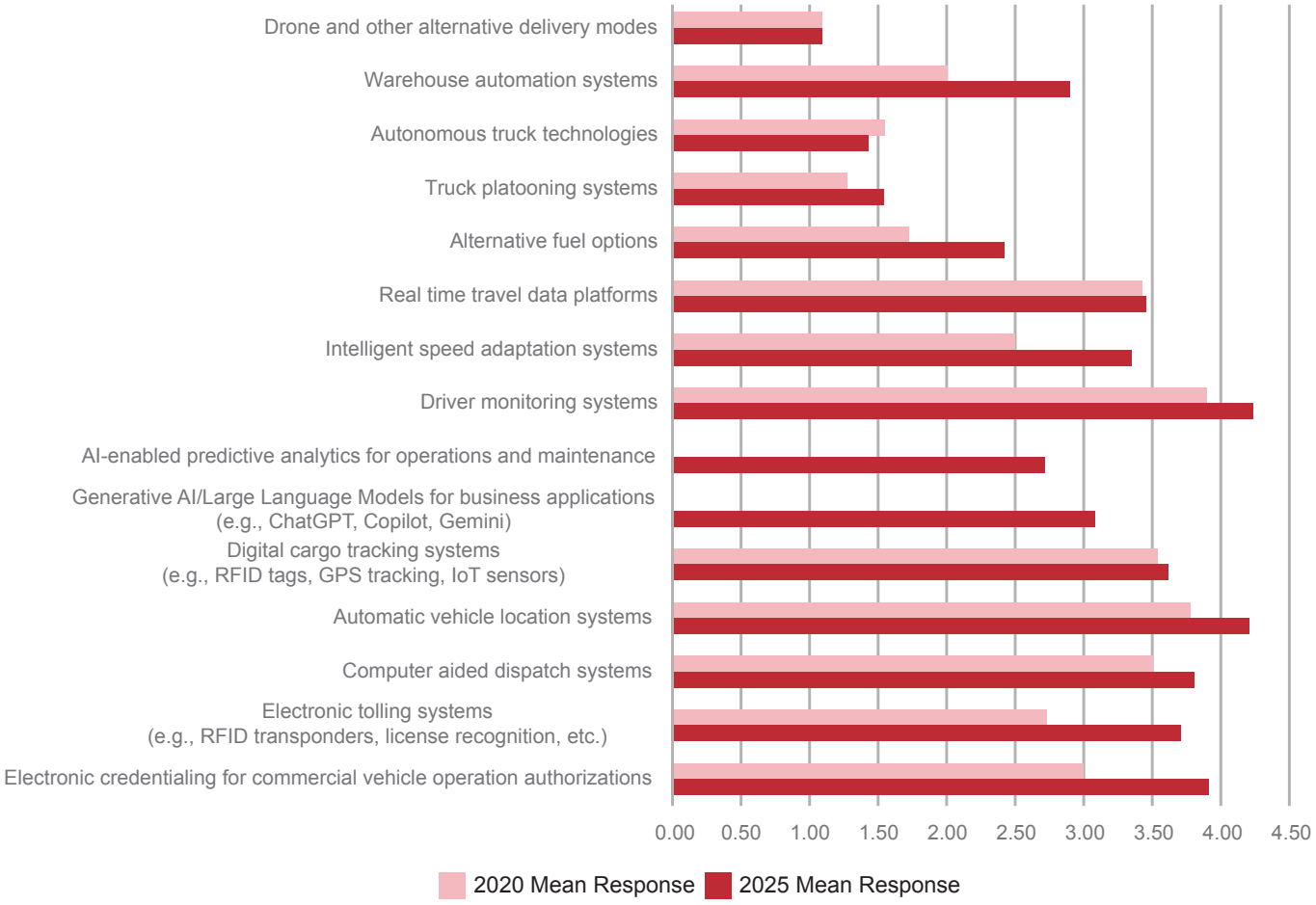

Figure 15. Question 10 – Mean Response for Technology Use

Most technology categories received higher mean ratings in 2025 compared to 2020, indicating increased adoption and perceived usefulness over time, with only minor decreases in a few areas. It should be noted that the small sample size and difference in distribution of respondent company types is likely the reason for the few discrepancies observed where reported technology use slightly declines from 2020 to 2025. Figure 16 shows the mean response for technology use broken down by the modes the respondent's company represents.

2025 FREIGHT STAKEHOLDER SURVEY

Question 10: Technology Use

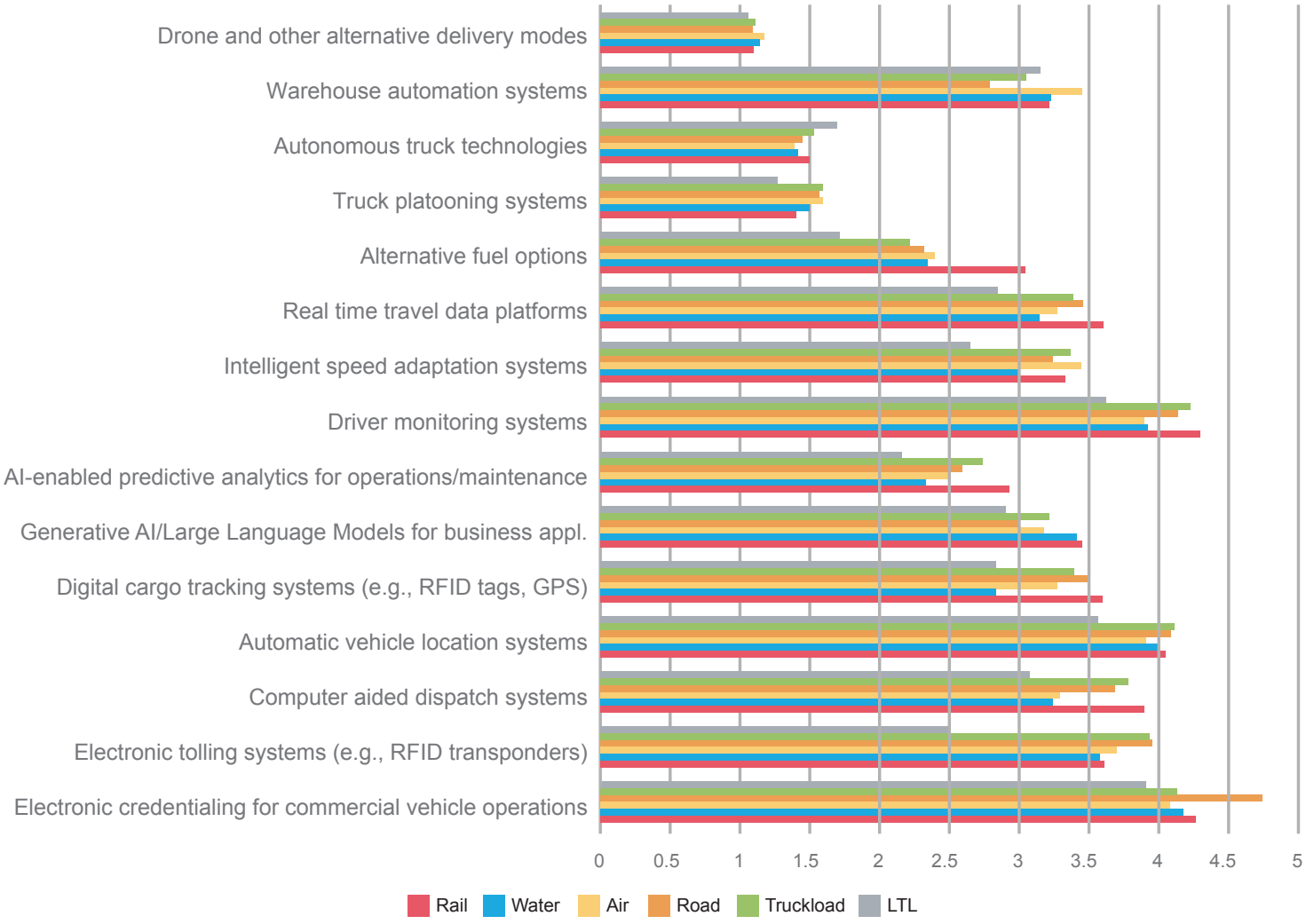

Figure 16. Question 10 – Analysis of Technology Use by Mode (mean response)

Question 10 also included a free response component, allowing respondents to describe the effects of deploying these technologies. The responses provided by those who chose to answer are shown below:

- We utilize this technology to dispatch our trains to their specific destinations
- We are able track and locate locomotives anywhere on our network at their precise location
- We are able to track specific cargo on our network per train at any specific time
- Trailer Trucking-saves time
- Doesn't fit exactly, but we are using idle - sensor that turns on air or heat based on outside temp; also use driver behavior predictive analytics for safety applications - inward and outward facing cameras and can forecast safety risks
- We have a system in which we can track the location and makeup of a train at any given time anywhere on our network
- We have a test hybrid fuel locomotive

Question 11: Operational Strategies

Question 11 asked respondents to identify the methods their company employs to combat the effects of freight traffic on local communities and to enhance operational efficiency for freight carriers. Figure 17 shows the percentage of respondents who utilize each operational strategy.

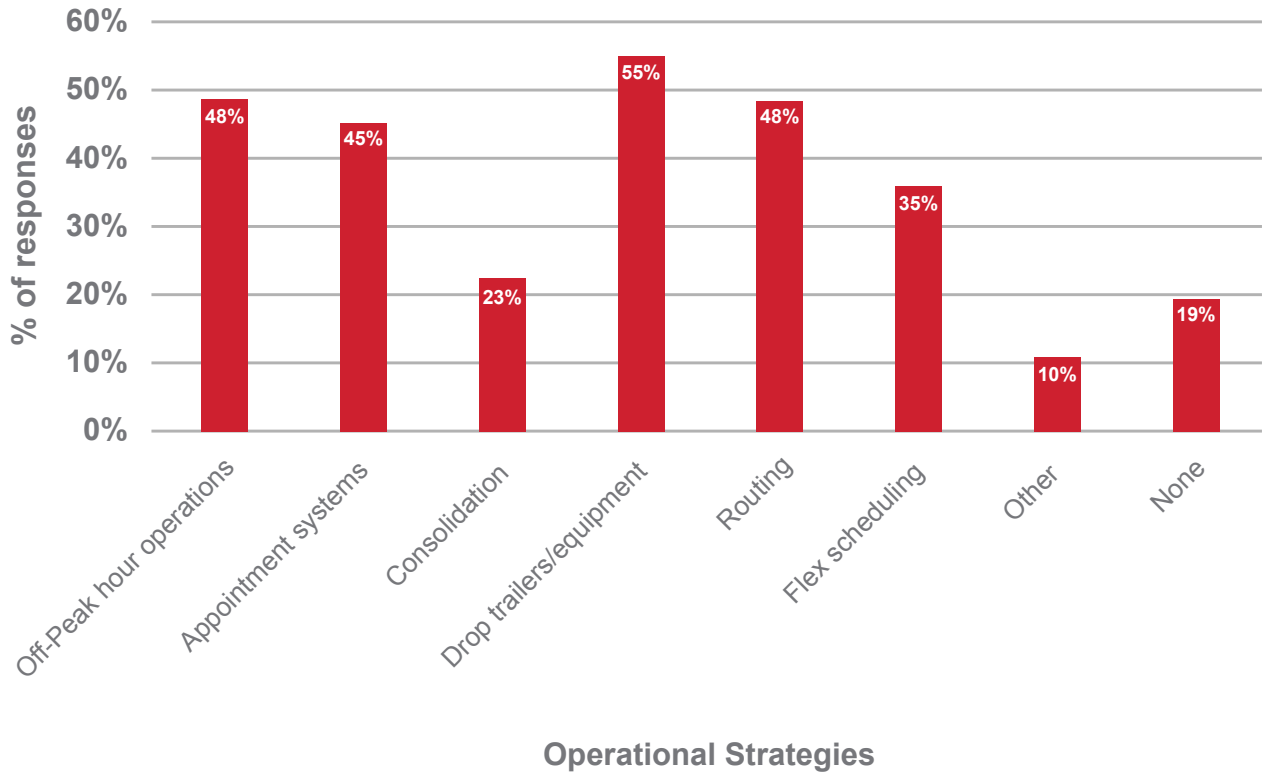

Figure 17. Question 11 – Response to Operational Strategy Use

There was an increase in the usage of all operational strategies to enhance the efficiency of the respondent's companies in 2025 as compared to 2020. In 2020, the most frequently reported strategy in use was drop trailers/equipment, with 37% of respondents reporting its use.

Figure 18 shows the percentage of respondents who utilize each operational strategy broken down by the modes of transportation.

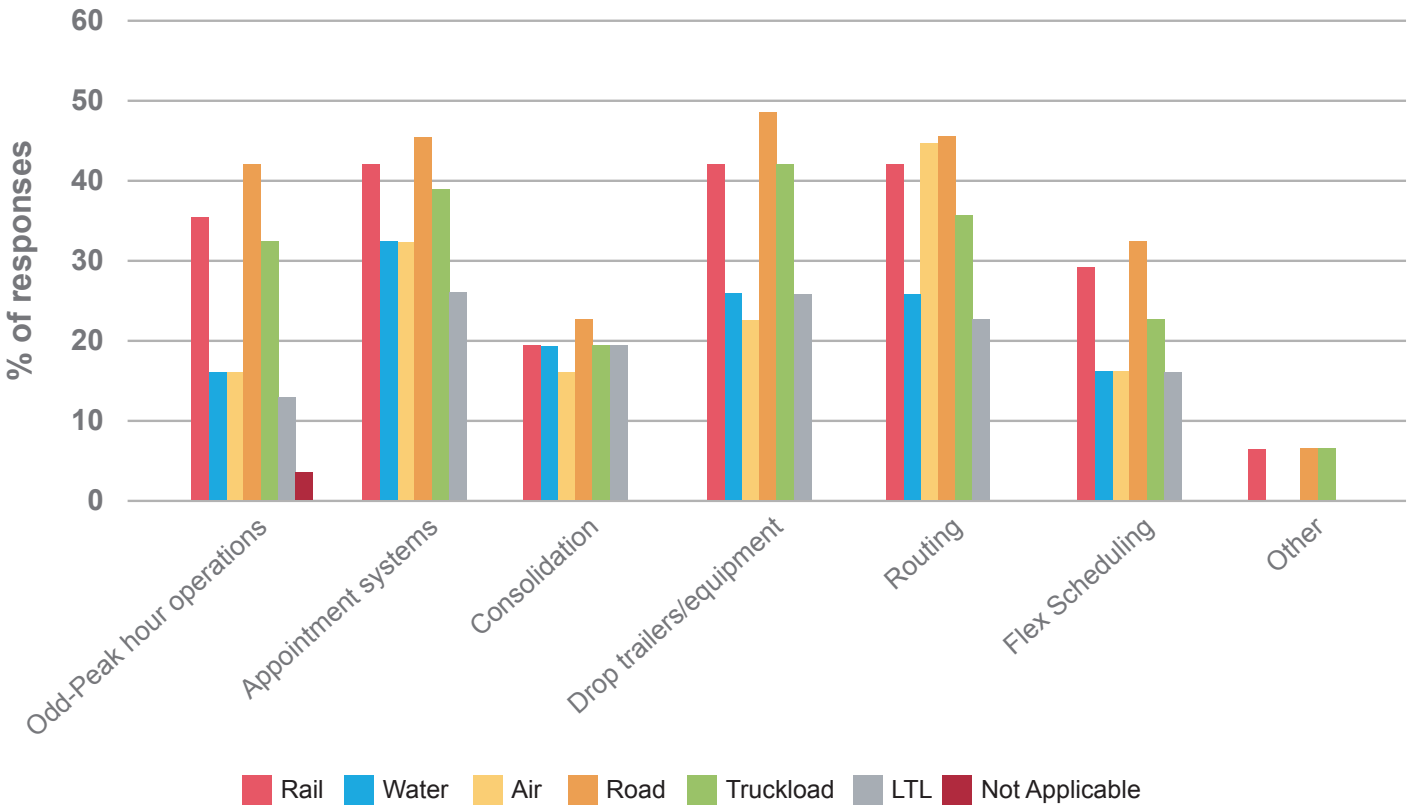

Figure 18. Question 11 – Analysis of Operational Strategy Use by Mode

There was an overall increase in operational strategies utilized across all modes. The data was not broken down by state as there was insufficient data to do so.

Question 12: Safe Truck Parking Availability

Question 12 asked respondents if they feel there is a shortage of safe parking in the Greater Memphis Area. Figure 19 presents the results.

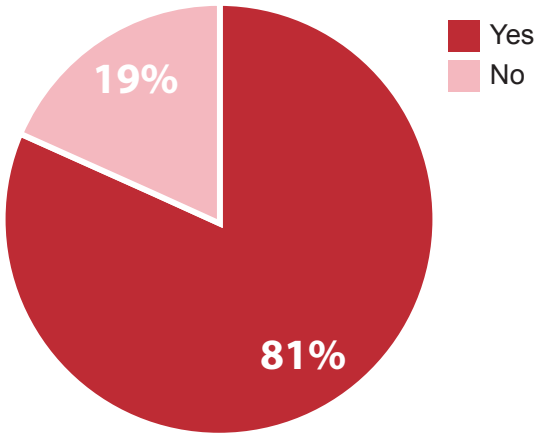

Figure 19. Question 12 – Responses by Shortage of Safe Truck Parking (n = 32)

Approximately 81% of respondents reported a shortage of safe truck parking. This was a slight increase from the 2020 survey, in which roughly 78% responded yes, although the difference is not statistically significant.

Question 13: Locations for Expanded Truck Parking

Question 13 expanded on Question 12 by asking respondents to identify up to three locations where additional truck parking is needed. Participants were shown a Google Maps image of the Greater Memphis Area and were able to make their selections directly on the map. Figure 20 displays a heat map summarizing the results, with brighter red areas representing locations with higher proportions of total respondents indicating expanded parking needs. The responses in 2025 were less concentrated than that found in 2020, as shown in Figure 20.

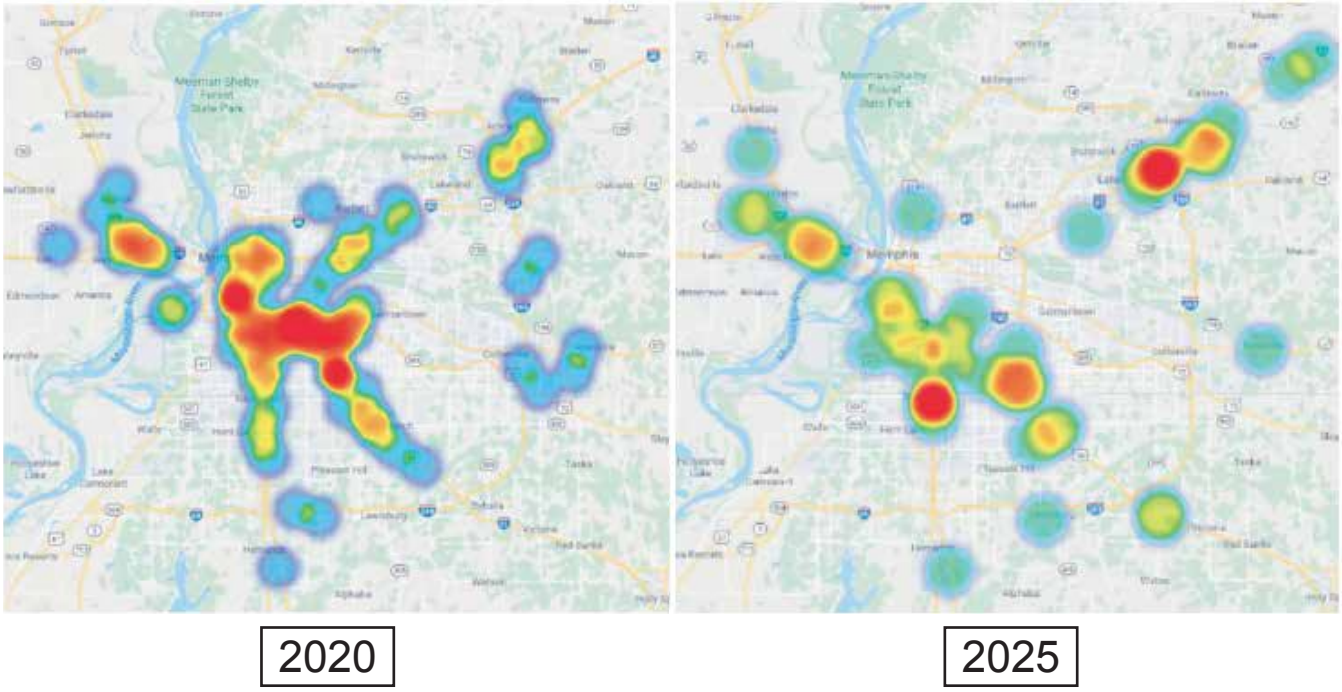

Figure 20. Question 13 – Analysis of Expanded Truck Parking – Heat Map

Question 14: Barriers to Driver Efficiency

Question 14 was shown only to respondents who selected “Road,” “Truckload,” and/or “LTL” as modes in Question 4. This question asked participants to report how frequently their drivers encounter each of the 14 barriers to efficiency, as well as to evaluate the extent to which each barrier affects their company’s efficiency. The questions used a 5-point Likert scale, with the frequency scale ranging from 1 = “Never” to 5 = “Very often.” For the impact scale, response options ranged from 1 = “Little to no effect” to 5 = “Extremely disruptive.” The mean responses for this question are shown in Figure 21.

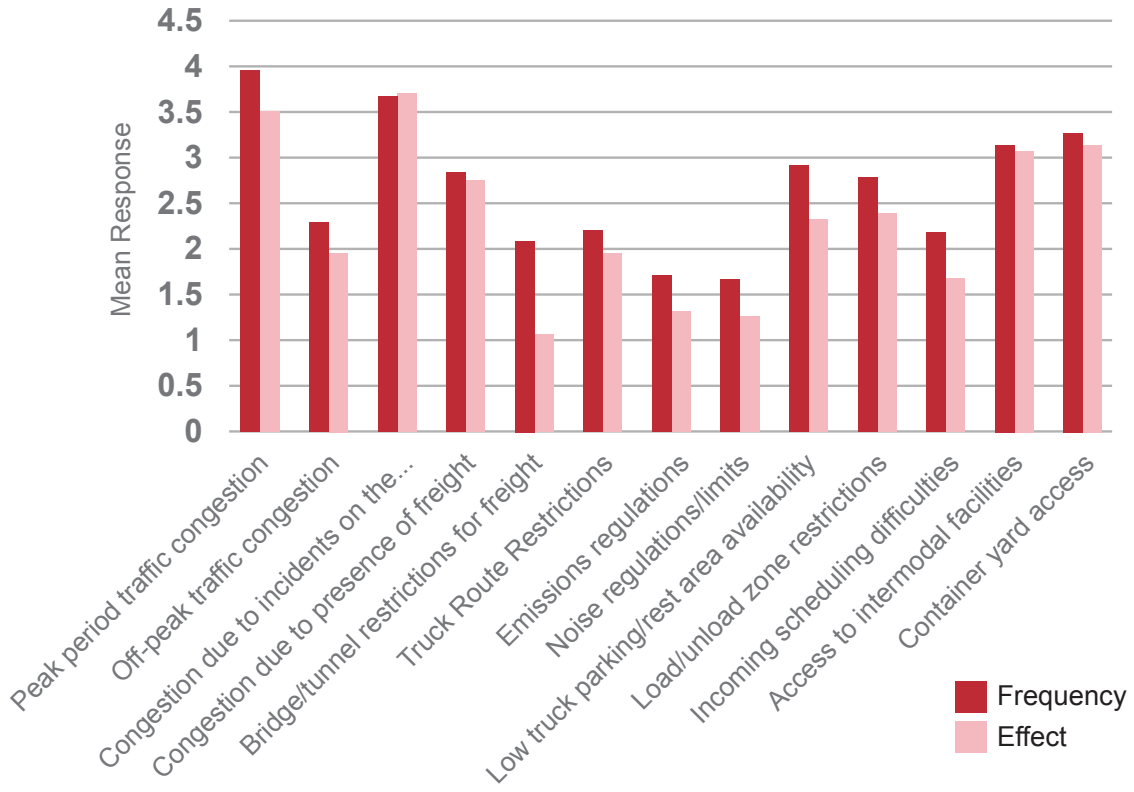

Figure 21. Question 14 – Response by Barriers to Driver Efficiency

Compared with the 2020 results, the overall effect of the 14 barriers on efficiency has decreased slightly; although most patterns remain generally consistent. Data was not broken down by state as there were insufficient responses to do so.

Question 15: Effects of COVID-19

Question 15 was a free response option, allowing respondents to describe the long-term impacts their businesses have experienced because of the COVID-19 pandemic. This was a new question that was not part of the 2020 survey. Six participants responded and their answers are shown below:

- Rail congesting, equipment failure, lack of equipment
- Less talent in workforce
- Work-from-home employment opportunities have decreased the available employee pool for companies not offering this option.
- Accelerated Digital Transformation and Automation: We've invested heavily in technology, such as advanced supply chain management systems and automation for delivery processes, to enhance efficiency and reliability. Increased Operational Costs: Tighter border controls and cross-border processes have raised logistics expenses longterm, including higher fuel, labor, and compliance costs due to ongoing supply chain volatility.
- Mainly, the shortage of freight inbound to the Memphis area.
- Slowed deliveries

Question 16: Effects of Recent Changes

Survey respondents evaluated how three recent city developments have affected their company operations (Figure 22). Blue Oval City Development received generally neutral reactions. The largest share of respondents (63 percent) indicated it would have little to no impact on their operations, while views on its benefits were mixed. Only a small proportion (13 percent) believed it would have a very positive impact, suggesting that most stakeholders do not expect major operational changes associated with this development. In contrast, the newly completed I-55 and Crump Interchange was viewed much more favorably. A clear majority (65 percent combined) rated its impact as positive or very positive, with 35 percent selecting the highest rating. Only 9 percent viewed the interchange negatively. These responses point to broad support and perceived value of this project among stakeholders. Responses to ELD / Hours of Service Tracking were more divided and generally less favorable. Nearly one-third (30 percent) rated it as having a negative impact, while 48 percent perceived little to no impact. Very few respondents (4 percent) believed it has a very positive effect. This pattern suggests continued skepticism or operational concerns related to ELD and hours-of-service requirements. Overall, respondents were most enthusiastic about the I-55 interchange improvements, largely indifferent toward the Blue Oval City development, and comparatively critical of ELD/hours-of-service tracking requirements. These differences highlight varying levels of stakeholder support and perceived operational relevance across the three initiatives. No “Very Negative” ratings were recorded for any of the items in Question 16.

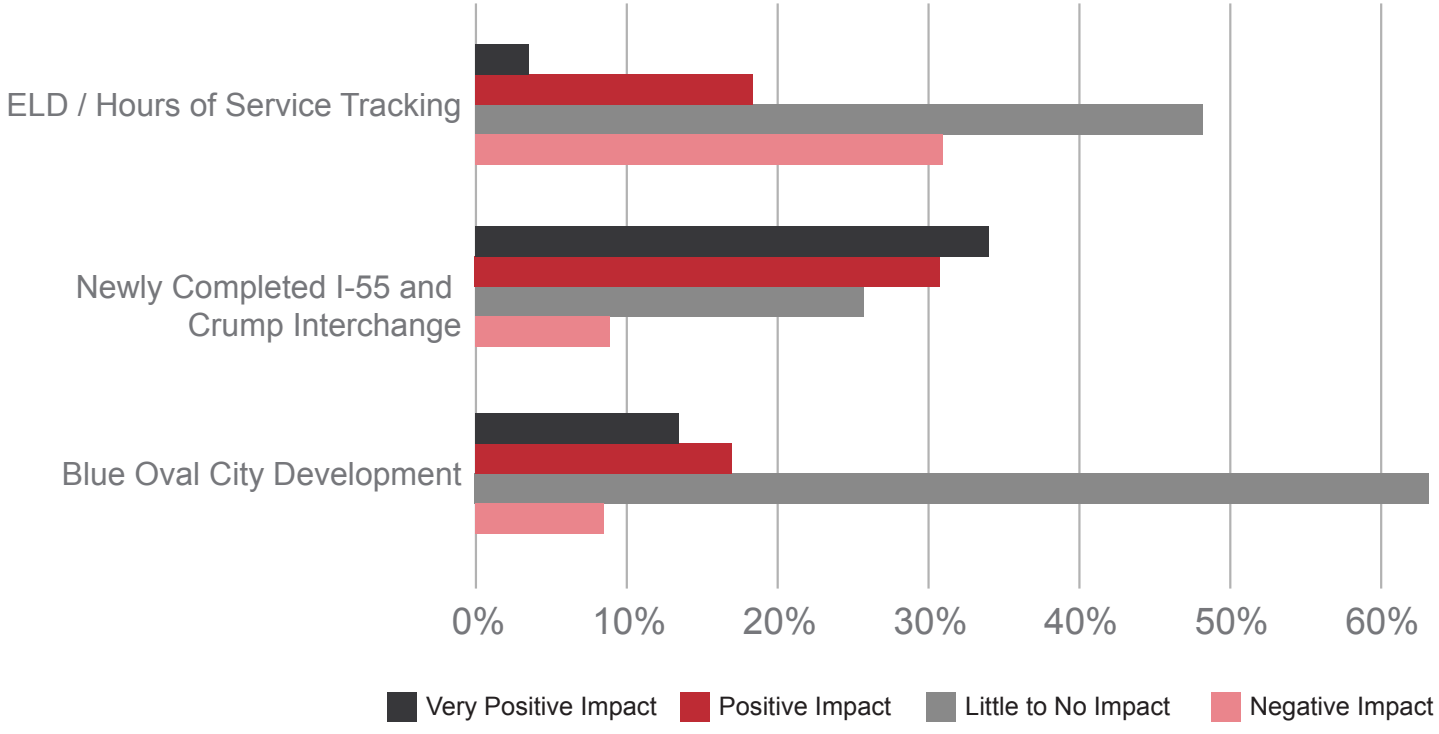

Figure 22. Question 16 – Percent Of Respondents Indicating the Impact of Three Recent Regional Developments. Bars Show the Distribution across Impact Categories from Negative to Very Positive.

Question 17: Effects of Future Changes

Figure 23 shows how respondents expect four regional projects to affect their company. The New Mississippi River Bridge at Three Kings Crossing received the strongest support. More than half of respondents (54 percent) expect it to have a very positive impact, and another 33 percent expect a positive impact. Together, 87 percent believe the bridge will help their business. This suggests that companies see the new bridge as something that will improve transportation and support economic activity in the region. The Blue Oval City development received more cautious optimism. About 21 percent expect a very positive impact and 38 percent expect a positive impact, meaning 59 percent have favorable expectations. However, 41 percent believe it will have little to no impact on their business, showing that many are unsure how directly this project will benefit them. The Lamar Avenue reconstruction had the most mixed responses. About 36 percent expect a positive or very positive impact, but 7 percent expect a very negative impact. Half of the respondents think it will have little to no effect on their operations. This suggests there is uncertainty and concern about how this project may affect day-to-day business activity. The Marshall County battery factory development showed the lowest level of optimism. About 65 percent of respondents think it will have little to no impact, and only 35 percent expect a positive or very positive effect. Companies seem unsure that this project will benefit them directly. Overall, respondents were most optimistic about the new bridge and least optimistic about the battery factory project.

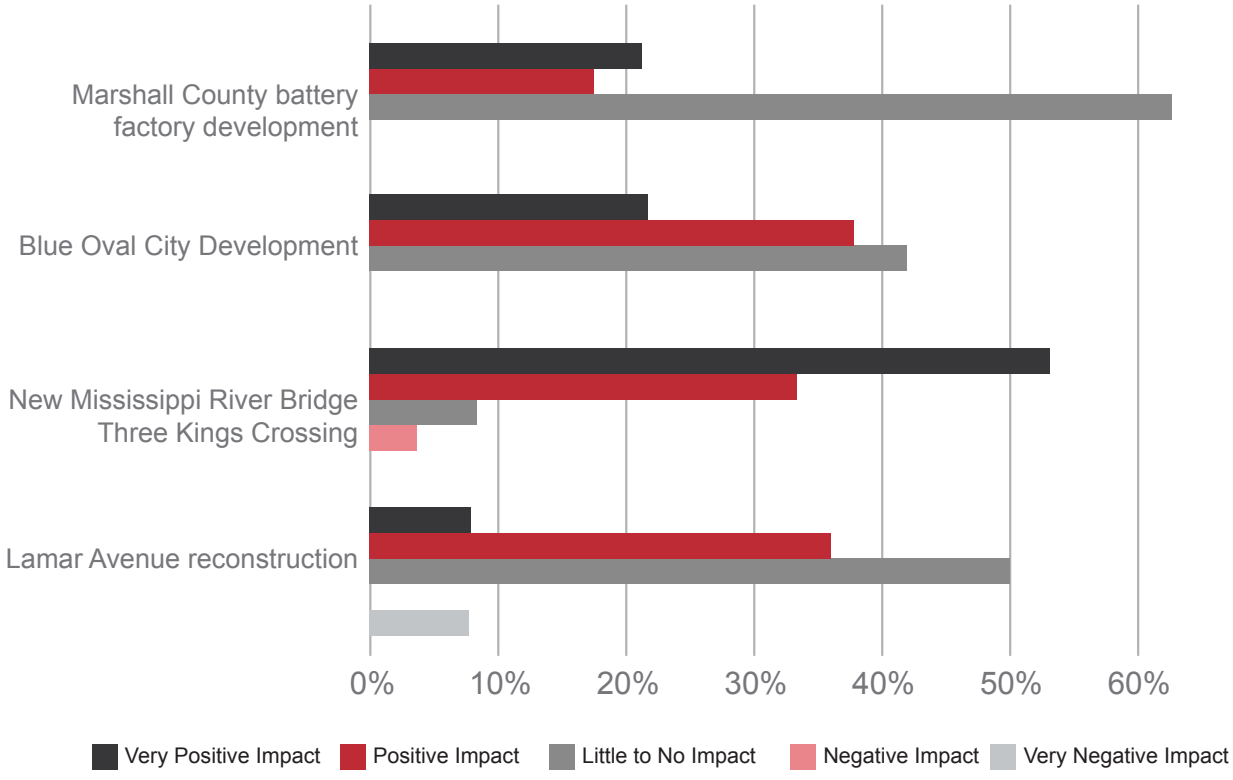

Figure 23. Question 17 – Percentage Of Company Respondents Reporting Expected Impacts of Four Upcoming Regional Projects. Bars Represent the Percent of Total Responses in Each Impact Category: Very Positive Impact, Positive Impact, Little to No Impact, Negative Impact, and Very Negative Impact.

Question 18: Locations for Future Emphasis

Question 18 asked the respondents to choose three locations that they believe require the most attention over the next 5 years. Survey participants were able choose any location on a provided map of the service region. Researchers defined 13 likely selection areas using polygons that were visible to respondents to facilitate response categorization. The top five locations by frequency of selection include:

- Airport area
- Lamar Avenue
- I-40 east / US-64 / I-269 Northeast
- I-40/I-55 in West Memphis, AR
- Downtown Memphis

A heat map is displayed in Figure 24, with red indicating the highest concentration of responses. The response choices are shown in Figure 25. Additional responses resulting from participants selecting areas outside the predefined polygons resulted in an 'Other' category. Participants had the opportunity to describe these locations in Question 19. Descriptions in some cases did not correspond to the physical location the respondent selected, indicating error in choosing a site on the map.

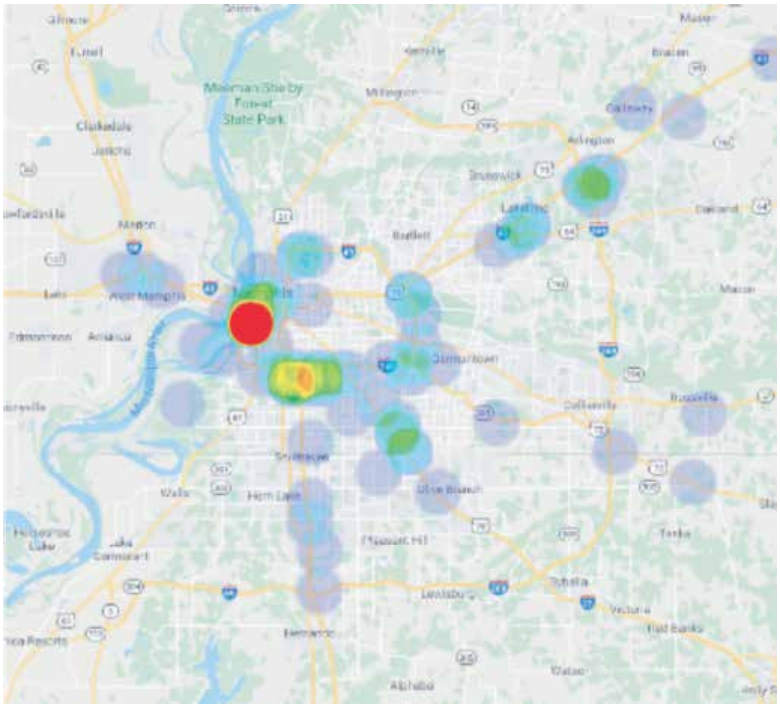

Figure 24. Question 18 – Heat Map of Response by Areas in Memphis that Require the Most Attention

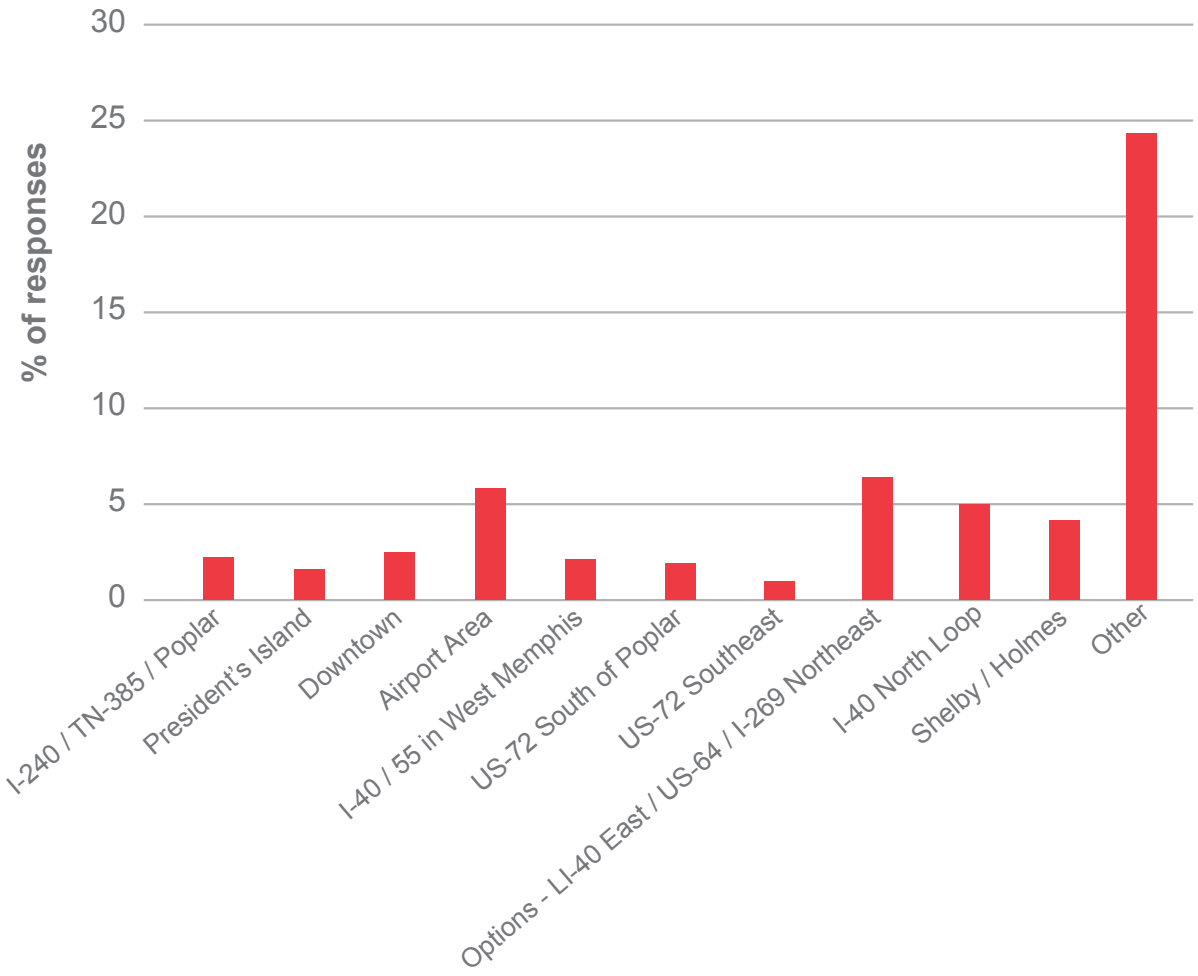

Figure 25. Question 18 – Response by Areas in Memphis that Require the Most Attention

Question 19: Reasons for Locations for Future Emphasis

Question 19 allowed the respondents to further describe the areas they selected, and provide reasons these choices from Question 18. Table 7 provides a description of the area selected, reasons that respondents chose the location, and the frequency that the location was selected by survey participants. The data is presented with the highest frequency responses listed first. Respondents were not required to provide a reason for each location that they selected, thus, the number of reasons does not necessarily correspond to the frequency of the location being selected. Some of the locations that were classified as 'Other' actually fell within the pre-defined categories based on how the respondents described them, so these adjustments were made in the frequency announcement in Table 7.

Table 7 - Question 19 Responses

Location Description	Reasons for Selection	Frequency
Airport Area	Need to improve roads and paving around the Memphis Aerotropolis; While in the plan, Airways BLVD interchange modification will be beneficial for the Region; Airways I-55 to Airport	9
Lamar	congestion, poor roads; More truck parking in this trucking corridor; Dangerous area due to amount of truck traffic in the area due to industry and BNSF ramp in the area. Highly used roadway; This is a nightmare from Airways south. Poor traffic flow and roadways; Need to improve condition of road, minimize any access points	7
I-40 east / US-64 / I-269 northeast	Harrahan Bridge; North of Hernando; congestion	6
I-40/I-55 in West Memphis, AR	This is the obvious confluence of two major interstates with high freight usage rates. Buckey's is soon coming to town as well!; Outdated ramps & configuration	5
Downtown	Access	4
I-240/TN-385/Poplar	Traffic is getting heavier; 240/385 west interchange	4
President's Island	Road Improvements	4
I-40	Needs to be 6 lane all the way to Stanton; pavement conditions (2); Widening to Blue Oval of I-40	4
I-40 Eastern Shelby County	Congestion; To catch WB I-40 freight traffic before it hits the inner city area.	3
I-40-240 Flyover	It's the most heavily used roadway in the area, just need to maintain roadway and utilize high vis signage to help OTR truck traffic move more smoothly	3

Table 7 - Question 19 Responses

Location Description	Reasons for Selection	Frequency
New Bridge	Criticality of the Hernando-Desoto Bridge. A 3rd bridge needs to be built to support critical commercial traffic into and out of Tennessee; Need third bridge	3
Shelby/Holmes	240/55 interchange confusion bottlenecks	3
Highway 70	Needs to be expanded to stanton because it is the other main artery into Memphis, if I-40 is shut down	2
I-40 North Loop	Terrible pavement condition	2
I-55 Bridge	Enough said; Criticality of the I-55 Bridge. A 3rd bridge needs to be built support critical commercial traffic into and out of Tennessee.	2
I-55 south	road conditions - especially pavement	2
Memphis	CN rail access	2
US-72 south of Poplar	N/A	2
BN ramp area	N/A	1
Byhalia	Area is growing	1
CN/CSX	Multiple rails as well as depots for intermodal equipment.	1
I-40 - Lakeland area	Merging of Jackson traffic	1
Norfolk Southern - Rossville	Improve road entrance into NS Rail	1
Olive Branch	Not enough lanes for traffic	1
South Memphis	Major area for intermodal traffic with the BNSF and IMC.	1
Third Street	Crime/Theft	1
Transportation to BOC	Blue Oval City will have impacts to traffic in the NE quadrant of Shelby and into Fayette County.	1
West Memphis	Union Pacific rail access	1

Question 20: Topics for Future Emphasis

Question 20 asked respondents to select the five most important and five least important topics for emphasis within the next 5 years. Figures 26 and 27 display the percentage of respondents to indicate that a topic is one of the five most important and five least important, respectively.

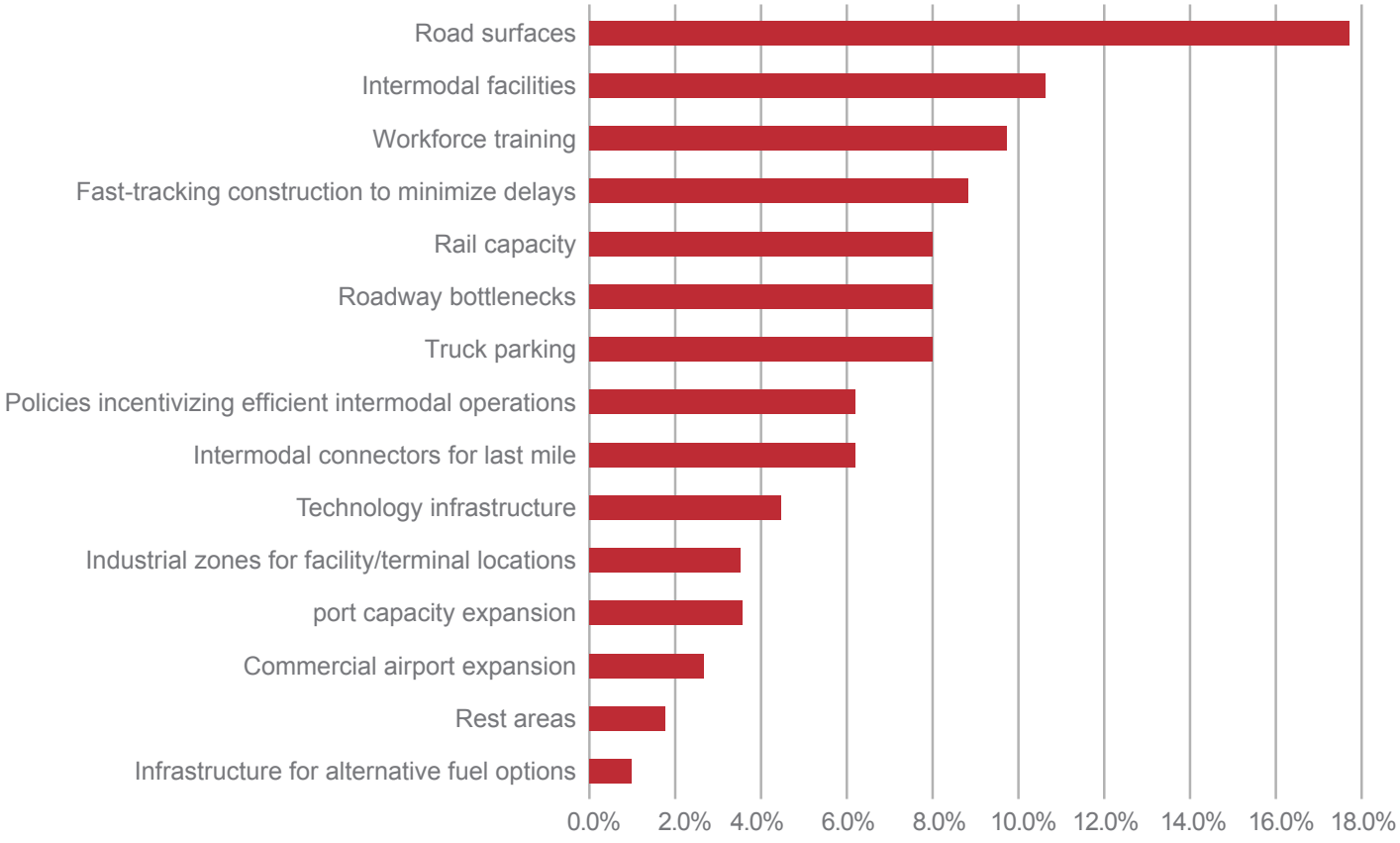

Figure 26. Question 20 – Most Important Topics for Future Emphasis

Question 20: Topics for Future Emphasis

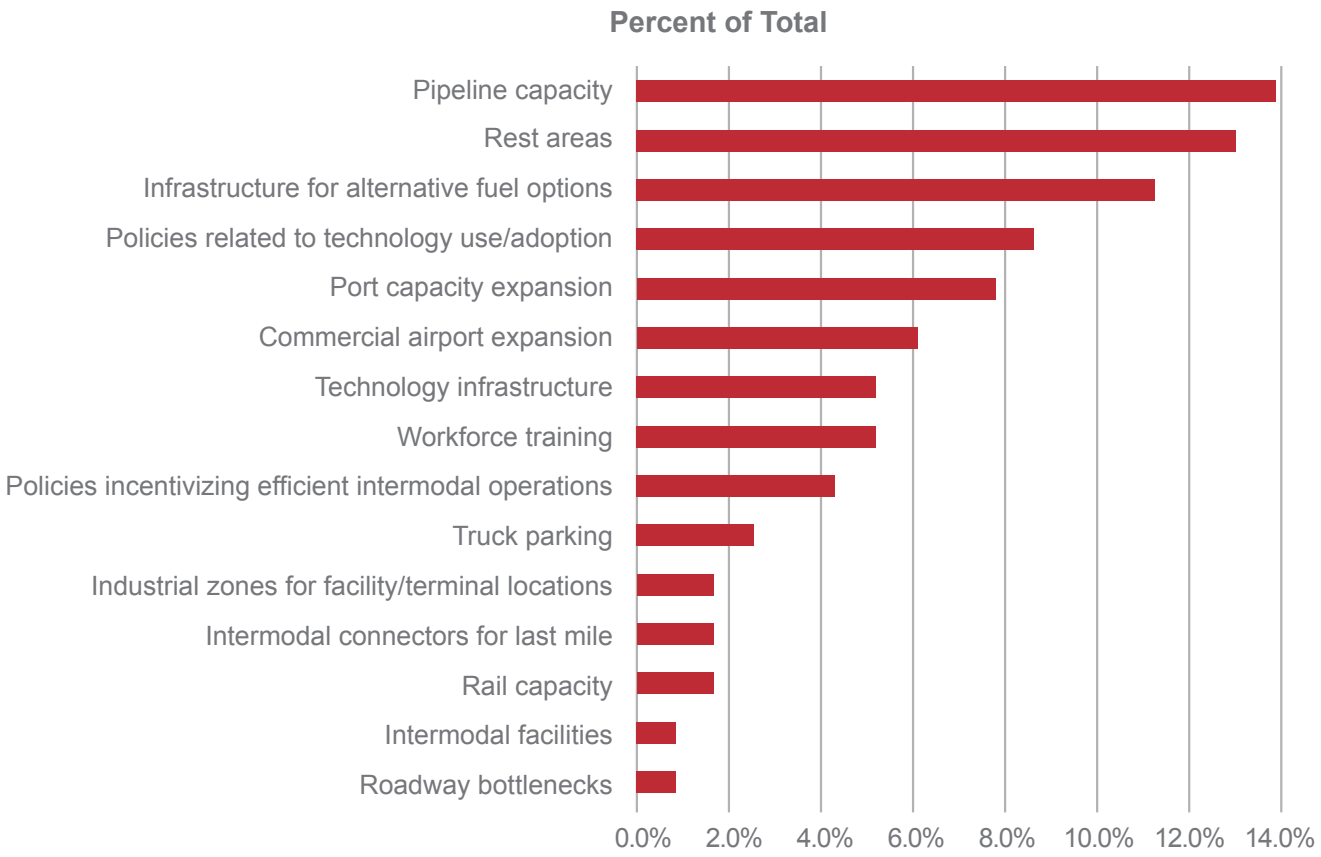

Figure 27. Question 20 – Least Important Topics for Future Emphasis

The topics that were most frequently selected as being the most important for future emphasis were road surfaces, intermodal facilities, workforce training, fast-tracking construction to minimize delays, and truck parking. The five topics that were selected most frequently as being the least important were pipeline capacity, rest areas, infrastructure for alternative fuel options, and policies related to technology use/adoption.

The results for the 2025 survey event were very similar to that from 2020. An important difference is that 'Roadway bottlenecks' was the second most frequent choice for area needed most emphasis in 2020. It is not in the top 5 for 2025, indicating respondents are seeing improvements in traffic congestion from projects that have been completed since 2020. Truck parking is within the top 5 for 2025, while rail capacity was included in 2020. The same choices were in the top five both years for least important topics for future emphasis, although in a slightly different order of frequency.

Question 21: General Recommendations from Respondents

Question 21 allowed respondents to add any additional comments or recommendations that were not addressed in any of the survey questions. The results are as follows:

- Cargo security is the greatest concern. We spend a lot of time, effort, and money to ensure our clients' products are safe and secure.
- New bridge on time on budget.
- Would like improvement in quality chassis availability and free storage time at rail yards to become more competitive.
- Long-term looking at connecting I-69 to Memphis as well as continuing to expand I-40 and highway 70 to Stanton.
- Increased prosecution for freight theft.
- Security/crime is a big issue.
- Cargo theft is a major concern that all railroads in the city are working collaboratively to combat.
- Alignment with the state policies

Summary

Compared to the MPO's 2020 Freight Stakeholder Survey, the 2025 survey was distributed to a similar number of stakeholders (over 200 in 2025, 188 in 2020) and yielded a smaller number of completed responses (53 in 2025, 109 in 2020). The 2025 respondent pool showed a more geographically concentrated distribution, with respondents primarily located within Tennessee and Mississippi and no respondents from Arkansas. Several respondents provided ZIP codes outside the MPO service area, although they indicated their companies had freight operations in the greater Memphis area. Some respondents also did not provide ZIP code information, resulting in a smaller set of valid geographic responses. The increased use of online distribution channels, including LinkedIn, broadened outreach to companies across a range of industry types and transportation modes. Unlike prior survey cycles, the 2025 respondent mix reflected higher representation from rail and road-based operators and continued participation from small and medium-sized businesses in the greater Memphis area.

The primary objective of the 2025 survey was to obtain updated feedback from freight stakeholders within the Memphis MPO service region regarding infrastructure conditions, operational challenges, industry trends, technology use, and the impacts of recent and anticipated development projects. The resulting information will inform the update of the MPO Freight Plan and support future Regional Plan updates. The key findings of this survey are as follows:

1. Multimodal freight infrastructure remains one of the region's strongest assets. Intermodal access and interstate/highway accessibility continue to receive the highest importance ratings for freight mobility.
2. Pavement conditions remain one of the most inadequate infrastructure elements, consistently falling short of current and future operational requirements.
3. Security-related issues, including cargo theft, and lingering COVID-19 disruptions emerged as critical concerns. Respondents highlighted increased theft risks, staffing shortages, rail equipment delays, and continued operational volatility.
4. Congestion continues to impose major operational costs, particularly through delayed arrivals/departures and higher labor expenses. These patterns remain consistent with 2020 findings.
5. Safe truck parking shortages intensified slightly, with 81 percent reporting inadequate availability an increase from the roughly 78 percent reported in 2020. Key hotspots include the I-240 corridor, Lamar Avenue, and the I-55/I-40 interchange in West Memphis.
6. Technology adoption increased across nearly all categories. Digital tracking, dispatch automation, and alternative fuel technologies saw wider use, and new AI-based tools such as predictive analytics and generative AI were introduced in 2025.
7. Operational strategies such as off-peak scheduling, load consolidation, and appointment systems saw broader adoption, particularly among road, truckload, and LTL operators.
8. Recent regional developments had mixed impacts, while expectations for future projects vary widely.
   A. The I-55/Crump Interchange was viewed most favorably among recent developments, with a clear majority reporting positive effect.
   B. The New Mississippi River Bridge – Three Kings Crossing generated the strongest positive expectations of all future projects, with nearly nine in ten respondents anticipating benefits.
   C. The Blue Oval City and the Marshall County battery facility received more cautious expectations. Most respondents expected little to have no impact, though a minority anticipated positive effects.
9. The Airport Area, Lamar Avenue, and the I-240/I-40 corridor were the most frequently cited priority locations for MPO attention. Additional "Other" selections indicate freight concerns distributed across a wider geography not fully captured by predefined choices.
10. Road surfaces, intermodal facilities, workforce training, fast-tracking construction to minimize delays, and truck parking were identified as the most important topics for emphasis moving forward. Workforce training was especially important to air freight stakeholders.

It was not possible to meaningfully compare differences in responses to the 2025 survey by states because the majority of respondents were from Tennessee. Modal differences were modest overall, although companies operating rail reported greater impacts from COVID-19-related disruptions.

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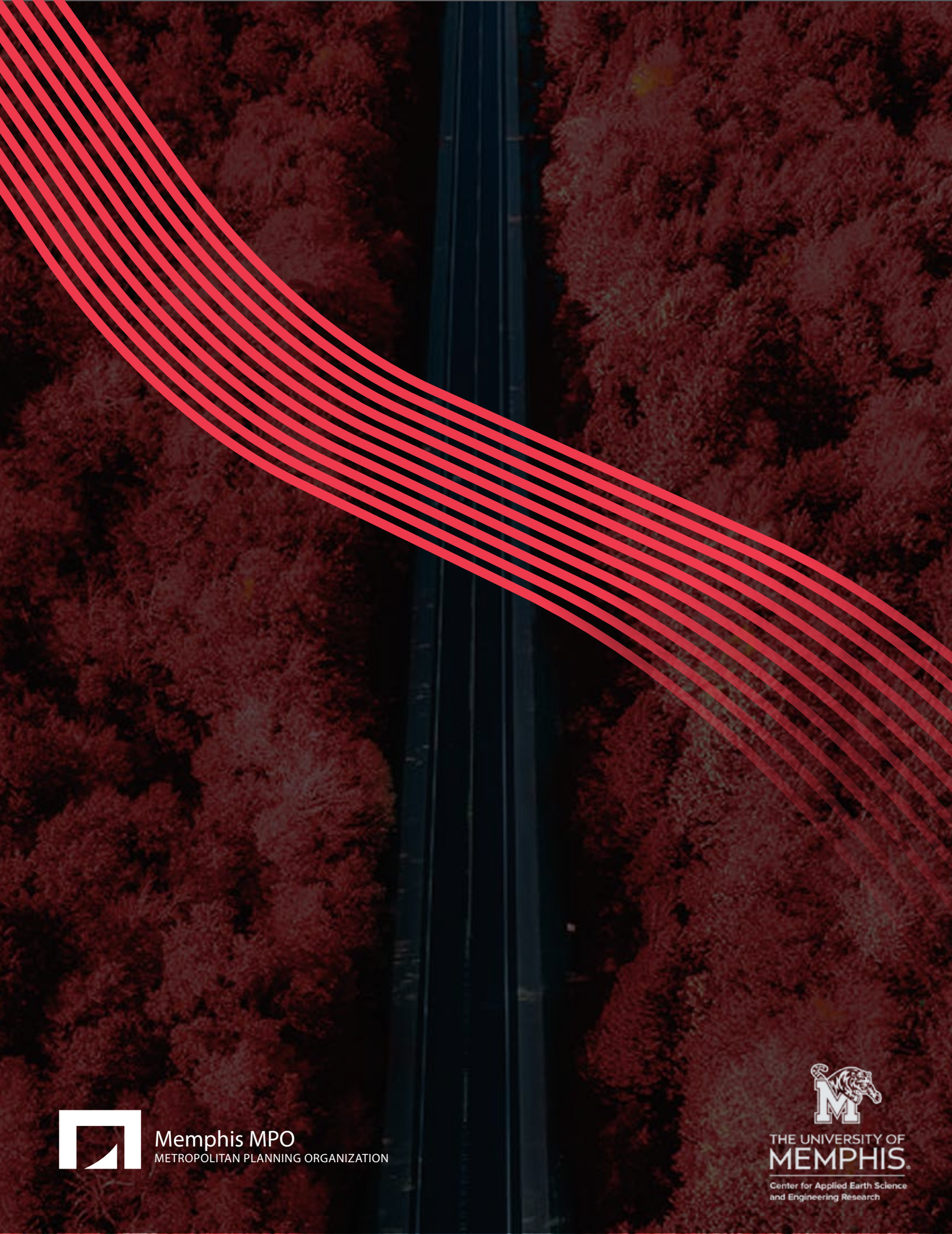

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