

RESEARCH SUMMARY

Title	Attitudes to TfL's freight operator recognition scheme (FORS)
Objective	To identify current perceptions and awareness of FORS amongst members and non-members, benchmark FORS against other similar schemes and establish willingness to pay for existing and potential elements of the FORS
Date	August 2010
Methodology	Desk research comparing FORS services with other freight industry service providers. 119 interviews conducted with freight operators (FORS members and non-members) by telephone, face to face and on-line. Spreadsheet model estimating the potential revenue generated assuming different pricing arrangements tested

Key findings

- **Non-Members:**
A perception exists that the FORS membership is currently dominated by larger companies. Smaller companies tended to perceive the scheme as being for larger companies. Sixty-five per cent hadn't heard of FORS making a lack of awareness the main barrier to membership. Of the existing FORS services, non-members stated that they were most likely to use the fuel efficiency and on-line driver training.
- **Members:**
Of the services offered, the majority of members said that they would be most likely to use the FORS website (91%) and the online benchmarking system (82%). The least favourable potential services included GreenRoad Driver profiling.
- **Willingness to Pay (WTP):**
There was consensus across all respondents that larger companies should pay more for services than smaller companies, if charges were introduced. The mean stated WTP values for site assessments ranged from £40 for micro companies (0-10 employees) to £360 for large companies. The range for workshops was £20 per person for micro companies to up to £130 for large companies.
- **Spreadsheet Model:**
Various scenarios were tested, which showed a constant charge of £75 per person per workshop regardless of fleet size generates the most amount of revenue for TfL despite the least number of attendees. However, in order to encourage smaller companies to join, the pricing structure should be more favourable to the smaller companies.

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