











Commercial MotorTransport

NOVEMBER 2021 £10













DEMOGRAPHICS

This report is based on a survey of readers of Motor Transport and Commercial Motor. Half of the respondents are responsible for making purchasing decisions, up from 40% in a similar survey in March 2020. Another 32% have purchasing influence. Some 42% are chief executives, senior managers, or company directors, while another 18% are owners or partners.

Third-party logistics providers make up the largest proportion of respondents, 44%, while 35% are own-account operators. Municipal and waste (7%) and public sector (3%) are the other significant groups.

The average size of a fleet is 83 vehicles, and annual turnover, on average, is £67.6m. Within this there are a considerable range of fleet sizes. Some 40% have fewer than five vehicles, while another 9% have 6 to 10 vehicles. Almost one third (30%) operate fleets of 11 to 50 vehicles. Fleets of more than 100 vehicle account for 12% of respondents.

The sample this year is skewed slightly towards smaller fleets compared with the 2020 survey. For example, in 2020 some 34% of respondents had fleets of 10 vehicles or fewer, against 49% this year.

This is also evident in company turnover figures.



In our latest survey, some 12% have turnovers of more than £100m, compared with 18% in 2020. At the other end of the scale, 55% of respondents this year have turnovers of less than £10m compared with 44% in 2020.

In terms of geography, just over one fifth of respondents are based in the Eastern traffic area, closely followed by South Eastern and Metropolitan. North Western, West Midlands and North Eastern traffic areas are also strongly represented.

This research was completed by 207 industry respondents.

THE AVERAGE SIZE OF A FLEET IS **83 VEHICLES, AND ANNUAL TURNOVER, ON AVERAGE, IS £67.6M**







INTRODUCTION

The use of cameras and video technology on vehicles has been increasing over the past few years and there is no doubt that there has been a renewed focus on the technology as a result of the introduction of the Direct Vision Standard (DVS) in London.

Enforcement of the DVS scheme began in March 2021 and in June TfL said it had issued 7,000 penalty charge notices (PCNs). PCNs carry a fine of up to £550.

Some 70,000 HGVs had been fitted with equipment to meet the DVS and 136,000 permits had been issued, according to TfL, which says the scheme is improving road safety and saving lives, although it has not produced any comparative figures.

This research was conducted in September 2021 among the audience of Commercial Motor and Motor Transport magazines and follows a study in March 2021. The aim is to see how operators' views have changed, particularly regarding the way they are deploying cameras and video technology on their fleets: the reasons for using it; rating of its usefulness; important factors when purchasing it; and essential features.

The survey was designed for fleet managers and for those with responsibility for keeping commercial vehicle fleets compliant.

This supplement, brought to you in conjunction with Brigade, Fastview360, Omnitracs, Lytx,

> Sales executive David Dennison david dennison@roadtransport com Group production manager Isabel Burton Events and projects editor Hayley Pink Production editor Clare Goldie Divisional director Vic Bunby Managing director Andy Salter

Subscription services Quadrant Subscriptions Services. 0330 333 9544 cmsubs.com

020 3148 3333 Email: customercare@dvvsubs.com

Printed by: Bishops Printers Distributed by: Marketforce



Road Transport Media, First floor, Chancery House,



Reasons for purchase

Introduction

Demographics

Case study: Fastview 360

and Vision Techniques, looks at the way such

examines the relationships between buyers and

sellers and how the market is evolving in terms

We hope you find this study a helpful insight

into the use of this increasingly popular

technology is purchased and deployed. It

of added value and features.

CONTENTS

technology.

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

- Vehicles using cameras
- Case study: Lytx
- Impact of cameras
- Decisive factors
- Rating the technology
- Case study: Omnitracks
- Future tech
- Case study: Vision Techniques
- Conclusion



St Nicholas Way, Sutton, Surrey SM1 1JB Published by DVV Media International Ltd



© 2021 DVV Media International Ltd



2













es, within the

past year

Yes within the

past two years

11%

Have you bought vehicle

6%

20%

Reasons for not buying vehicle

44%

Not relevant

cameras/video technology

23%

Too

expensive

18%

5%

No. have no

No, but would

Yes, more than

two years ago

like to in

next year

plans to do so

cameras/video technology

19%

CASE STUDY: BRIGADE

Scots fish supplier gets bonus benefits from Brigade

DR Collin & Son supplies fish sourced from Scottish waters and transports live produce across the Channel. When it fitted Brigade's live streaming

The fleet collects fish from rural western ports by accessing single-track and narrow roads. Transport manager David Rosie says: "Some of the worst places to drive are in northern Scotland. We began to fit plugin forward-facing

One day the cameras caught a camper van flying around the corner and Rosie realised it needed a permanent solution. Brigade's Service Partner in Scotland, Banlaw, met with Rosie to suggest the most suitable solution.

Now each tractor unit is fitted with a Brigade MDR-504G-2000 recorder with 4G live streaming services. Four cameras are fitted to the tractor unit: one is forward-facing; one either side of the cab; and one at the rear.

Shortly after fitting the equipment, a DR Collin & Son truck was rear-ended. Rosie explains:

FASTVIEW360

"Our lorry joined the motorway, where there was stationary traffic but a lorry behind collided into the back of him.

BRIGADE

"The outside lane was empty, our driver steered into the outside lane avoiding the stationary cars in front. The collision broke the pipework cutting off the air supply, one tank came out of the back of the trailer and boxes of prawns were strewn across the motorway."

Footage from a second DR Collin truck following recorded everything. Rosie downloaded the footage

and sent it to the drivers to show the French police. "The drivers showed the police the film and that was all they needed to see, after that you would not contemplate putting a lorry on the road without cameras."

Rosie also discovered a new use for the cameras, with a fifth camera fitted inside the trailers. Drivers do physical checks of live loads. However, because of Brexit, once the trailer has the Environmental Health signature it is sealed and drivers cannot re-enter the vehicle. Rosie says: "The cameras are great. It's an added bonus, we never fitted them for that, now they are invaluable because we can still monitor the live load on its journey."

Smart Drive

```
44%
```

cameras to record incidents it also found an unintended benefit that could help it with some Brexit issues.

cameras," he says.

PURCHASING PATTERNS

This survey suggests that the market for vehicle cameras and video technology has remained fairly stable over the past year. Some 44% of respondents have bought equipment within the past year (45% in the previous survey), while another 11% have bought equipment within the past two years (13% last time).

What is different between the figures for this survey and last year's is the higher proportion of smaller operators this year. And this tends to suggest that there is increased interest in the technology among smaller companies.

Another way that this year's survey differs from its predecessor is in the number of operators who have no plans to buy cameras or video technology. At 19% this is a significantly higher proportion than the previous survey's 11%.

Given that one fifth of the operators have no plans to use the technology, the survey explores the reasons given. By far the most common reason (44%) is that it is not seen as relevant to the operation. This is up from 32% in the 2020 survey.

As always, cost is an issue, but the proportion citing it as a major barrier at 23% is down from 35% last year. And as last year, 15% are still unconvinced of the benefits.

One respondent was clear: "If the customer wants it, let them pay for it."

WHAT IS DIFFERENT BETWEEN THIS SURVEY **AND LAST YEAR'S IS THE HIGHER PROPORTION OF SMALLER OPERATORS THIS YEAR**















CASE STUDY: FASTVIEW360

Putting driver safety and road users' safety first

Like many companies with fleets of vehicles, AR Richards has suffered in the past from high insurance costs and painful 50/50 insurance claims for incidents that were not the fault of its drivers.

Having used other camera solutions, the familyrun company from Shropshire has worked with Fastview360 for several years benefiting from its solutions and service. With the benefit of Fastview360's reliable products, all AR Richards' HGVs are fitted with a fully HD camera system, side detection system, event button and monitor as standard. The systems are all backed up with 1TB hard disk and cloud storage facilities, enabling the office to access footage remotely.

Office staff use Fastview360's AutoCMS to automatically collect video footage of any incident and get the drivers to add their version of the incident on the AutoCMS driver app. Claims are now resolved in a matter of hours, saving thousands of pounds a year.

> In the initial rollout, a schedule of planned installs allowed minimal disruption to the operator's schedule. As new vehicles are due to arrive, Fastview360 installs the kit

at the dealership, so the vehicle is ready to hit the roads as soon as it arrives at the AR Richards depot.

Each of the trucks is fitted with a minimum of a four-camera system from Fastview360, all of which are 1080p HD quality, along with an HD DVR with 4G, a 1TB hard disk, GPS and in-cab monitor. Some vehicles have up to nine cameras to enhance safety around a bin lorrytype vehicle where pedestrians are often in close proximity. This system provides a 360-degree view around the truck allowing it to record any incidents from any angle of impact.

Using Fastview360's AutoCMS cloud-based software, AR Richards can access its whole fleet from one online platform to live view, view hardware statuses and manage incidents.

Transport manager Stuart Williams says: "With the footage being remote access and great quality, disputes are settled easily and with 20:20 vision when the team are on the road I know my drivers and the public are safe."

Smart Drive

London's Direct Vision Standard (DVS), which came into force in March 2021, has become a key issue for many operators as all vehicles above 12 tonnes now need a safety permit to operate in the capital.

REASONS FOR PURCHASE

TfL's DVS measures the driver's direct field of vision from the cab and rates it from 0 to 5 stars. depending on how much drivers can see. Vehicles rated 1 to 5 stars receive a free safety permit automatically. Operators of HGVs rated 0 must fit safety systems including: cameras covering blind spots linked to a video display in the cab; an audible warning when turning left; motion sensors covering the sides of the vehicle at low speeds; and a warning on the back of the vehicle.

This survey found that 44% of respondents had purchased vehicle cameras and video technology to comply with the DVS. This is

Contractual requirement

Supported by

from client

0%

Other

up from 20% in last year's survey. Not only that, almost one third (30%) say they had fitted cameras to achieve FORS or CLOCs accreditation. Again this is up on last year's figure of 25%.

But the biggest reason for adopting the technology, cited by 57% of respondents, is to improve safety standards in the fleet. Even so, this is down from 73% in 2020.

Reducing insurance costs (43%) and improving driver behaviour (38%) are also important reasons. However, the proportion of respondents choosing these reasons is significantly down on the previous survey, perhaps reflecting a shift in focus to meet the imminent DVS.

Clients are also playing an increasing role in the

2021 2020

70%

80%

SmartDrive 3 8 1

60%



adoption of this technology: 12% of respondents said cameras are a contractual requirement from a client. That is up from 9% in 2020.

A number of respondents highlighted the benefits of cameras in protecting their drivers from unjustified claims, including crashfor-cash scams and reckless road users.









Reasons for purchasing vehicle cameras/

12%

12%

20%

30%

40%

50%

10%

FASTVIEW360

Yes, we make regular purchases from a preferred

supplier to ensure we

upgrade technology

requirements

Yes, we make multiple purchases from a preferred

supplier based on contract

CASE STUDY: LYTX

Engaging drivers, reducing risk, and saving costs

Bacton Transport Services provides general and dedicated road transport and distribution services to UK businesses and required technology that would engage drivers, reduce risk, and save costs.

Before implementing Lytx's Driver Safety Programme, Bacton Transport faced three challenges:

• the company was keen to enhance its safety culture and further raise overall driving standards across the workforce;

• fleet managers needed to engage drivers and have the tools in place to facilitate better conversations and coaching sessions;

• Bacton wanted to adopt a reliable, easyto-use solution that would give direction with actionable insights to the company's programme.

The business decided to implement Lytx's Driver Safety Programme, which harnesses MV+AIpowered video telematics to provide unrivalled fleet safety, productivity and cost savings. This sophisticated technology helps to reduce risk by identifying distracted and risky driving behaviours not triggered by a G-force including, mobile phone use, eating, drinking, smoking, inattentiveness, and failure to wear a seatbelt.

Bacton Transport general manager of fleet Nick Newman says: "We trialled a handful of

FASTVIEW360

Supported by



Other solutions focused on telling us what had already happened – whereas Lytx could tell us when something was about to happen, allowing us to review risky behaviours and prevent them from escalating. This, coupled with the ability to enable a method of risk management that makes coaching and training drivers our top priority, sealed the decision for us."

Since implementing the system in 2020, Bacton Transport has seen a 43% reduction in overall risk. When comparing October to November 2020 with December 2020 to January 2021, Bacton Transport achieved the following significant improvements in risky behaviours:

• 80% reduction in mobile phone distraction;

81% reduction in smoking while driving;

• 61% reduction in distraction caused by eating or drinking;

• 35% reduction in following distance.

Newman adds: "The response from drivers has been overwhelmingly positive. Driver engagement like this is the reason we chose Lytx over the competition. For what was initially just a camera, it has exceeded our expectations. I cannot recommend Lytx enough."

Smart Drive

```
Don't knov
```

VEHICLES USING CAMERAS

Having made the decision to use the technology, the next issue is whether cameras need to be fitted to all the vehicles in the fleet. Almost half (47%) the operators who use cameras have them fitted to all their vehicles, but the rest are more selective. One in five have cameras fitted to three quarters of their vehicles, while another $\overline{7}$ % have them fitted to half or more.

But, 8% of operators said they have fitted them to less than 10% of their vehicles.

On average, the survey shows that 75.6% of the vehicles in the survey are fitted with cameras and video technology.

Keeping technology up to date is always an issue for companies and there is some debate over the best way to approach it. Almost two thirds (64%) of respondents who have purchased equipment said they do so on an ad-hoc basis. This compares with 51% in the survey last year.

Some 24% of respondents make regular



Proportion of fleet fitted with vehicle cameras/video technology

Supported by















Do you continually refresh

camera/video technology

24%

12%

purchases from a preferred supplier to ensure that technology is upgraded in a timely way.

This is down from the last year when 32% said

It is worth remembering that the demographic

differences between the respondents in the two

surveys could be responsible for at least some of

this was their preferred strategy.

this difference.

9

IMPACT OF CAMERAS



More than half (53%) of the operators using vehicle cameras said they have seen an improvement in driver behaviour. Not only that, 44% have seen a fall in insurance claims. Other benefits include a reduction in incident reporting (36%) and a reduction in personal injury claims (18%).

These figures are noticeably lower than in the 2020 survey when 47% said they had seen a reduction in incident reporting and 29% had seen a reduction in personal injury claims. The reasons for this are not obvious. It might reflect the fact that roads were quieter during the lockdowns or it might be a sign of a maturing market. Perhaps surprisingly, fuel economy is cited as a benefit by 14%.

One respondent said there had been a rise in reporting incidents "as drivers were aware we

can check". Another said there had been a reduction in thefts from vehicles, while a third said "driver avoiding prison following crash".

In a question posed by sponsor Brigade, respondents were asked about the impact of fitting camera systems on reducing collisions or near-misses. Opinions were clearly split on this with one in five respondents saying the use of cameras could play a significant part (50% or more) in reducing collisions. However, 41% though the effect was small, less than 10%.

As cameras on their own are a passive technology that does not alert the driver to take action, Brigade always recommends that they are combined with active technology such as sensor systems with driver alerts to reduce collisions.

DECISIVE FACTORS

This survey examines the key issues for operators when purchasing camera and video technology.

Product reliability and quality come top of the list, chosen by 80% of respondents. This is closely followed by the level of service and support available – important to 74% of respondents.

Not surprisingly, 47% said it is very important that the equipment is approved for industry schemes, such as FORS, DVS and Earned Recognition, while another 32% said this was fairly important. Some 87% said length of warranty is either very or fairly important.

Return on investment is very important to 29% and fairly important to another 41%.



of respondents said product reliability and quality are top priority

Very similar proportions of respondents highlight the importance of brand reputation in the market.

One respondent highlighted the importance of being able to offer employees support in real time, while another said ease of integration with off-board systems was important.



















Smart Drive

RATING THE TECHNOLOGY

Vehicle camera and video technology gets the thumbs up from operators who are using it, receiving an average rating of four out of five. Some 38% believe it is invaluable. In fact, on a scale from one to five, 73% rate it either a four or five. Less than 10% rated it only one or two. The ratings are generally similar to the previous survey and suggest that once operators move to using the technology, they quickly become convinced of the benefits.

In a question posed by sponsor Omnitracs, respondents were asked whether it was important for vehicle camera technology to include sensors to detect distracted or inattentive driving behaviour with in-cab alerts.

Some 16% of respondents are already using this technology, while another 25% say they would like it in their fleet. However, just over half said it is not a priority for them.

A question posed by sponsor Fastview360 asked respondents about the importance to their

business of features for software and support. Automatic incident capture and playback is cited at very important by 62% and important by another 14%.

Another high scorer is ease of installation and re-installation, regarded as important or very important by 72%.

In another question, respondents were asked about the importance of being able to source additional transport management needs such as telematics and tracking. This is clearly important to a significant number of operators. Some 22% described it as invaluable, while another 21% gave it a high priority.

And, in a question posed by sponsor Lytx, respondents were asked what type of company they were most likely to partner with for vehicle camera and video technology. Top choices include telematics specialists (46%) and technology companies (22%).

4

Yodel enhances fleet safety with SmartDrive

Yodel, the UK independent parcel carrier, enhanced its fleet safety programme and

The company operates a proactive, ongoing safety improvement programme implementing the latest technology across all aspects of its fleet to ensure continuous improvement.

The investment in SmartDrive's video-safety programme has seen Yodel exceed its 2020 annual fleet safety target regarding collision reduction, in just six months, as well as exonerating its drivers when not-at-fault and providing protection from fraudulent claims.

Yodel head of fleet and transport Andy Yemm* says: "With SmartDrive we benefit from objective risk scoring of on-road instances and follow up with driver coaching. It was great news to hear that, on the strength of data from the SmartDrive programme, our insurer accepted that our new proactive approach to road safety was capable of significantly reducing our collision risk."

Yodel adopted a proactive, rather than reactive, approach to on-road fleet risk in 2019 and spent considerable time examining offerings from various camera suppliers. After an intensive head-to-head trial period, it chose SmartDrive.

While other systems would have required the Yodel driver-trainer team to assess thousands of pieces of footage, SmartDrive's managed service

Supported by

reduced collision rates on its HGV fleet, using SmartDrive Systems' managed service videobased safety programme.

FASTVIEW360

approach means that all footage is reviewed, and



Yemm says without SmartDrive it would have taken huge internal resources to manage this amount of data effectively and, in practical terms, would have been impossible to implement and objectively use as part of a proactive driver safety improvement programme. He says his team now has clear guidance as to which incidents to follow up with specified levels of intervention, from debriefing to coaching.

Yemm says the risk-scored camera footage is more effective than a driver-trainer assessing from the cab because it generates more reliable real-world observations. The footage is risk-scored against a comprehensive list of observations by SmartDrive's risk analysts. He says having cameras on the vehicles had an immediate effect on driver behaviour, but the value of the system is the guided coaching.

*Andy Yemm was in post at the time of the case *study production.*





1%

1 (no value)

1%



2



3



5 (invaluable)





12





FUTURE TECHNOLOGY

Development of camera and video technology is rapid, so we asked operators what they regarded as areas most important for future camera monitor technology.

Top of the list was high-definition cameras and monitors. This was rated as very important by 56% and important by another 27%. Operators are also concerned that technology keeps pace with future DVS requirements, with 60% of respondents describing this as either important or very important. Another 60% highlight the value of integration with advanced driver assistance schemes, such as lane departure warning, collision warning and pedestrian detection.

And there is also a lot of interest in 360-degree cameras that display a single image on the

monitor: some 26% said this is very important to them and another 29% regard it as important.

Driver monitoring was regarded as important by 44%, although 35% said it was of little or no importance to them. The development of camera technology also holds out the possibility of replacing mirrors entirely. However, only a few (18%) respondents regard this as important, while 60% regard it as of little or no importance.

In a question posed by sponsor Vision Techniques, respondents were asked if they were interested in testing new innovations or product testing. Some 20% of respondents said they are very interested in participating, while 30% are somewhat interested. Overall, this is slightly down on last year, when 59% expressed an interest.



CASE STUDY: VISION TECHNIQUES

Banksman Autobraking puts Aggregate Industries in spotlight

Aggregate Industries (AI) is at the frontline of the construction and infrastructure industry. In the UK, it has more than 330 sites and 4,100 employees.

Senior contracts manager Colin Holland develops and manages the group's safety strategies across its national sites and supports employee development. After a number of vehicle collisions in its national contracting business, Holland looked at the effect they were having on the business and its employees and developed strategies to reduce risks associated with these types of accidents. The investigations identified that blind spots were a concern and vehicle size, driving position and working environments increased reduced visibility for drivers.

Holland was concerned that vehicle inspection and defect reporting is required and needs to be completed to meet PUWER regulations. His research found there was no system available that offered proof or evidence that inspections had been carried out by the operative before using the vehicle. AI then looked at technologies to support its safety initiatives, and approached Vision Techniques with a brief to reduce the risk of harm or injury to employees and the public. It also wanted to provide evidence of incidents that could be used to enhance its training programmes and promote a safe working culture.

Holland says: "It's rare to find companies that support developments. I am confident our partnership is going to be a long and successful one."

The collaboration began with a consultation. Vision's technical and sales team conducted site visits looking at the company's operations, which gave it an insight into the complexity of its work.

FASTVIEW360









The solution was to trial Banksman Autobraking with forward- and rear-facing cameras integrated with Vision's VT Record3. Banksman Autobraking works to eliminate collisions by using an auto-braking radar system, which uses low-energy microwaves emitted from the vehicle to automatically activate the vehicle's braking system if anything is detected within a defined exclusion zone. The system alerts the driver and, when integrated with VT cameras and DVR, sends a downloadable footage of the zone to a designated person when the autobraking system is activated or deactivated. This enables the designated person to gain a realtime assessment of the scenario. The footage can be used for investigative and training purposes. Since its installation, there have been no reversing incidents reported on sites where Banksman has been deployed.

Since the roll-out of Banksman Autobraking across AI's southern region, the collaboration has achieved the highest accolade winning a Highways England Award for Excellence in Safety. Banksman Autobraking was commended for its potential to boost improvements in behavioural safety culture and raise safety performance in the highways sector.

Vision and AI continue to push boundaries with the development of a new reporting tool, soon be launched, which Vision says will change industry standards.

Smart Drive











CONCLUSION

Adoption of cameras and video technology on vehicles has been increasing over the past few years, but it is clear that the introduction of the DVS in London in March 2021 has had an impact in getting operators to fit equipment.

In fact, TfL believes some 70,000 HGVs had been fitted with equipment to meet the DVS.

Some 44% of respondents surveyed said this was why they had fitted cameras – up from 20% in the survey last year.

Nevertheless, the biggest reason for adopting the technology, cited by 57% of respondents, is to improve safety standards in their fleet.

Vehicle camera and video technology gets the thumbs up from operators who are using it, receiving an average rating of four out of five. More than half the operators using vehicle cameras said they have seen an improvement in driver behaviour, while 44% said they have seen a fall in insurance claims.

However, there is evidence that some operators who have fitted equipment solely to comply with the regulations are not taking advantage of the benefits that the technology offers.

And some 20% of operators surveyed have no plans to use camera technology. There is still plenty of room for growth in the market.



Supported by









SmartDrive

