

Let's Talk Fleet Risk - Episode 7

Matthew Avery, Thatcham

Simon: Hello and welcome to the February edition of let's talk fleet risk which, this month, is all about Advanced Driver Safety Systems, or ADAS for short.

ADAS covers all the collision avoidance systems and driver assistance technology that can help avoid a collision or minimize the severity in the event it can't be avoided altogether. It's a subject I'm personally fascinated by, and I've monitored how these systems have developed over recent years.

With me today is Matthew Avery who is the Chief Research Strategy Officer for Thatcham Research.

Hi Matthew and welcome to the podcast

Matthew: Hi Simon

Simon: Matthew – perhaps you could start by giving us a brief introduction as to why ADAS is important, how Thatcham is involved, and what your role is?

Matthew: Sure – Thatcham is a not-for-profit UK Insurance research centre and we're members of Euro NCAP – I'm sure many of the listeners will know Euro NCAP – it's 25 years old now and has been leading the charge to getting information to the consumer for them to buy a safer vehicle.

Since about 2014 we have really pushed the fitting of advanced driver assistance systems that help avoid the collision in the first place, and we've moved on from crash testing to seatbelts and airbags and the ability to avoid having the collision in the first place.

Vehicle manufacturers have been fitting technology - cameras and radars - on vehicles to detect what's around them, respond to a potential collision threat by automatically putting brakes on and steering away from the collision. It's very effective technology and we're seeing it really working. We've now got a huge amount of standard fit in AEB technology and its reducing crashes by about 35% so it's really good technology. It's there not only to protect yourself but it's also there to protect other road users and vulnerable road users. These systems will detect cyclists and pedestrians and other vehicles and [preventing a life-threatening collision. We saw this technology working so we began to broaden our scope in 2018 and looking at other vehicle types. Thatcham undertook research which showed the huge void there is between passenger cars and vans. We have a huge amount of standard fit on passenger cars - and vans from the same manufacturer have almost no technology fitted at all.

A good example is Nissan – we looked at the Nissan Duke and that has standard fit lane support systems, advanced driver systems, radars, speed limiters. Great technology – a 5-star car. When we look at the NV400 which is the Interstar at the same sort of price –

absolutely no technology available at all, not even as an option and we thought there's no reason for a manufacturer who makes the equipment, not doing that.

So, we started our first ratings in 2020 of commercial vans to highlight to the public and to fleet operators, to owner drivers and to large fleets – you must have this technology fitted. You have it on your cars, you should have it on your vans - where much of it is simply not available, choose another van. Where it is available as a cost option make sure that as an operator, you're ticking those boxes to protect you and your driver and your brand.

Simon: So, I wanted to talk specifically today about ADAS on Vans. ADAS on cars has been developing quickly for over a decade now and we've reached a point where there are some fairly advanced systems available, and in order to score highly on the Euro NCAP safety ratings, most cars now have many of these systems fitted as standard. But that isn't the case with vans, which have been much slower to adopt the technology – why is that? Why don't they put that ADAS technology onto the vans?

Matthew: We think most of it is just down to consumer pressure and economics - manufacturers understand the power of the NCAP 5-star rating – and if you do not have 5 stars or 4 stars, you're unlikely to appeal to a broad market. We see that with vehicle manufacturers, so they strive to get the 5-star rating, whether that's Renault or Volvo or Mercedes Benz. Every manufacturer strives for the 5-star rating.

But as there wasn't a similar rating for commercial vans, there's only the regulations which did not require any ADAS fitting so manufacturers are thinking why do I need to fit it? If I can make my van cheaper and more competitive then I will do that. Some broke the mould – Mercedes was producing a lot of optional equipment and VW on their Transporter range was beginning to fit AEB as standard and we saw a market drive for that. Hence the need for the ratings to tell the consumer which van to buy.

Simon: You've been working with Euro NCAP to create this new safety rating system for vans so users can clearly see what systems are available and how good they are. In December 2020 you released the first set of results from tests on 19 common models of van in the UK – what did you find?

Matthew: We were shocked by what we found. Most ADAS systems aren't fitted as standard – VW were fitting some of it as standard – but most of it including the best-selling van in the UK – Ford Transit Custom – just had none of this equipment as standard.

Some manufacturers were fitting it as an option, but there were quite a lot who weren't even doing that – I mentioned Nissan – so we tested 19 vans and obviously a lot of these are shared – so Stellantis badge the same van in different markets, whether it's a Fiat or a Peugeot or a Citroen, but it's essentially the same van off the same production line.

We decided to rate in separate categories, so we have a platinum rating and there no platinum ratings, then gold – and then silver and bronze and then a not-recommended and there were too many vans that were simply not recommended. That was our first set of ratings and best performers were VW and from Ford with their large transit and the Mercedes Sprinter – those were our best performers then, but we were hoping we would see some manufacturers rising to the challenge, and this year we have.

Simon: What was the response from the vehicle manufacturers and fleet managers to those results?

Matthew: It was mixed. Vehicle manufacturers recognised this – they said we are making the right plans for the customers, and therefore there is not so much of a requirement from customers to buy this and can we really afford to make our van less competitive than another van by putting this safety equipment on?

When we talked to them, they said ‘we do have this technology – and we could fit it if there was a demand.’ We see Euro NCAP driving the demand - so the message to the fleet operators is you can’t afford to not have your vehicles on the road earning money and even after a minor collision they could be off the road being repaired – and the potential injuries for your drivers - and think about your brand reputation as well. Nobody wants to see a sign written van involved in a collision on Facebook or Twitter, so there’s lots of reason why you should be buying a van with this equipment. Our ratings make the choice clear – buy this van with this equipment and you’ve got the safest van on the market.

Simon: What’s the thinking behind the different type of safety rating to the cars - the Euro NCAP car ratings 5 star is the top whereas with the vans you’ve opted for bronze, silver, gold, platinum...

Matthew: There’s a couple of things – we wanted to separate it. We got a different message to a different audience. It’s a B2B message – we are trying to talk to fleet operators and owner drivers and they’ve probably, on their drive, they’ve got a 5 star Euro NCAP vehicle to protect themselves and their families – do they do that for their drivers?

So we’re talking to a different audience and we wanted to separate it. The other thing is this is a series of tests that we will change every couple of years so we will continue to raise the barrier and also we wanted to see this as a badge of honour so we’ve been engaging with a lot of traffic authorities like Transport for London and National Highways to inform them – they have the power to encourage the users of the roads to be driving safer vehicles so maybe you could say that we don’t want you to drive in London unless you’ve got a vehicle of a certain safety rating. Maybe you would be more likely to get a delivery contract if you have vehicles that are safer – if they’re Gold and not Bronze, you could be more likely to get that contract. We are trying to encourage a new audience to understand the benefits of driving safer vehicles.

Simon: That’s something that Driving for Better Business encourages – in one of your previous answers you mentioned about the time the vehicle is off road if there’s been an incident – while it’s repaired – and from the conversations I have with fleet managers that is one of the biggest costs / risks to the business. You can’t do business if your fleet is off the road being repaired so it’s really important that they look at this technology as it removes one of the key risks involved in running a fleet.

Matthew: That’s right and you also have to think of the driver who is injured in the incident. Hopefully they recover but they are probably not signing up to work and we know there’s a lack of delivery drivers, especially around HGVs and we understand that one of your best assets is your driver so you should be protecting that driver.

Recruiting is not so easy, so if you have safer vehicles and you’re making a point of saying – look, come and work for us because we have the safest vehicles on the market that could attract them.

What we are trying to do is make the information available A lot of fleet managers say they don’t know what to choose – manufacturers trying to flog stuff ‘but I don’t know if I need all

the stuff' so we're helping them make that choice by saying these are the technologies that make a difference, that improve the safety of the vehicles. Why not talk to your insurer – does that mean your fleet premiums are reduced? Worth talking to them as well.

Simon: What are the technologies – what are some of the most common you want to see adopted?

Matthew: The most important is AEB – autonomous emergency braking - using a radar or a camera or a combination of both using a concept called centrefusion to identify if the driver is responding and if they don't put the brakes on automatically, so stopping front into rear crashes – the most common urban crashes. It also prevents accidents with pedestrians and cyclists as well. AEB is one of the most important technologies.

The second most important is probably out of lane support systems – a lot of crashes occur because drivers are momentarily distracted and their vehicle crosses over a white line either into another car or runs into a tree or crosses over the centre line - all crashes you want to avoid so we look at lane support technologies, as well as simple seat belt reminder warnings. Very powerful encouragement to put a safety belt on. Too many commercial vehicle drivers are not wearing safety belt even though it's a legal requirement.

Also, things like speed limiters – a lot of people see this as big brother controlling your speed but it's also extremely helpful. People really see the benefit of controlling their speed. Having a reminder to tell you this is a 30, 40 or 50 speed limit. Most of us want to stick to the speed limits and having a reminder is really helpful. It helps you keep a clean licence as well.

Simon: I sometimes hear people being a bit disparaging of these systems, probably through lack of understanding that drivers can get lazy, and complacency sets in. Is that a valid concern?

Matthew: Probably but we don't see it in the statistics. When we look at the efficacy of these systems in the market, vehicles that have this technology have fewer crashes than those that don't. Period. So why wouldn't you want this technology?

Simon: So, the reason we're talking today is that you're about to release the second set of results for the van tests. Have things improved?

Matthew: Yes, they have. I'm pleased to say Simon, they have improved. Probably the standout star is the Fiat Ducato. That is the very first platinum rated van. That is the safest van that we've ever tested - it's a fairly regular van – not high end – but we're very pleased that Fiat have made the provision to put the technology on the vehicle. It doesn't come as standard, you have to tick the box, but at least the Stellantis Group that own Fiat are making that technology available. So that's the first platinum rated van.

We also see some movement on the Ford Transit Custom - the UK's best-selling van has got a gold rating – it was silver before – and really, the most disappointing is probably Nissan with their Interstar – which was formerly the NV400 which was our worst performer and gets a 'not recommended' rating. Nissan doesn't even see fit to fit the technology as an option. If you check their equivalent price passenger cars like a Duke or a Qashqai, they have the technology as standard. We voted the Qashqai the 'What Car' safety car of the year because it had so much good technology in a value package. So, Nissan know how to do this, but when it comes to vans, they seem to ignore the customer so I suggest maybe van operators might want to look elsewhere.

Simon: You mentioned that a lot of the vans in previous years tests, similar to what you said about Nissan – the technology wasn't even available as an option. You tested 19 vans last year – have you seen that manufacturers are more willing to offer this technology now?

Matthew: Yes – we're seeing Renault and Ford using more technology and their ratings increasing so our first step is to make the technology available and a sneak peak on our next ratings - we will be putting our requirements even higher and will be expecting manufacturers to fit a lot of this technology as standard. We will continue to raise the bar and encourage fitting as standard as they do for passenger cars.

Very good ratings so far and we're pleased to see a significant increase especially as van sales continue to rise. Let's see a corresponding rise in the safety ratings of those vans. The manufacturers are on notice that we will expect to see the technology flitted as standard in the future.

Simon: What about the different technologies themselves? Do you see variations on the capabilities in an AEB system or a lane keeping system across different manufacturers for example?

Matthew: Yes, we see some differences. The Fiat Ducato's AEB system was very good for cyclists, pedestrians, car to car, whereas some of the other systems such as Renault are less sensitive – they work with cars but not always pedestrians and cyclists so we do see some differences in performance and that's why it is so important that we have these grades. It's not a tick box – you either have AEB or not – it's also how good is the system.

One of the most important technologies we are beginning to see fitted would be the Drive monitoring systems. Again, it sounds like spies in the cab but this technology, which is very new even to passenger cars, we are not seeing on vans yet – but it's monitoring the drivers status to makes sure the driver is not drowsy and whether the driver is paying attention. There's an awful lot for a van driver to do now. They have very quick turn round between drops and its all too easy to be distracted looking at mobile phones to see where your next drop is, so that technology which brings the drivers eyes back to the road all the time is vitally important to increase safety.

Simon: You mentioned about fleet managers to take these safety systems into consideration when they are acquiring their vans, I guess whether they are leasing or buying. One of the things we want to do is to encourage much wider fit across vans as that then helps the technology to filter through to the secondhand market. That technology then becomes available to others. What should fleet managers be saying to their leasing companies or manufacturers to encourage this to be fitted as standard or at a lower cost? Can fleet managers put pressure on the manufacturers to work harder at this?

Matthew: I think fleet managers have a role to play. If you're looking at a new fleet of vans you can look at some of the brands like VW who are fitting this technology as standard and make a choice there as opposed to other brands. I would urge fleet managers to look at our ratings. If you want a standard fit system, then some manufacturers are making vans with standard tech, and I think that a fleet manager making the point that 'we've decided on these new vans for our fleets because they tick all the boxes because we want a safe fleet' - that's

making a very important statement. Manufacturers understand the power of that, and their product can continue to be competitive so I think there is a huge bargaining case that fleet operators can make - and the fleet managers - in saying 'I am not buying your vehicles unless you put this equipment on, and you make it standard.'

Simon: One of the things I noticed from the results this year as well as last year, there's a huge spread from top to bottom – they do seem to have shifted slightly further upwards as we have our first platinum van, and in the previous results there were 5 'not recommended', but there's only one this year. There's still some improvement, but that huge spread of results is still a concern isn't it. Do you expect the rest of the manufacturers to follow Fiat's lead and put some more effort into this now?

Matthew: Yes, we would. As you said, we have one coveted Platinum manufactured, 7 Silver, 6 Bronze and 4 Golds so manufacturers are beginning to respond. One of the things behind this is that there is a new European regulation called the General Safety Regulation - GSR2 – that stipulates new vans going on sale this year will have to have some of this technology fitted as standard, so a European directive is forcing manufacturers to do this and by 2024 all manufacturers will have to fit some of this technology.

So you might ask why we are doing what we are doing. Any regulation like that tends to work at a fairly low level so while manufacturers will be forced to fit the tech it won't be a high performing system so what we will be moving towards once we get manufacturers engaged is making it standard fit and then really pushing the performance to avoid manufacturers just fitting the minimum requirements to pass the regulation – actually fitting high performing systems. You won't get Gold or Platinum unless you've got a system that way outperforms the regulatory requirements plus there are several things in our ratings that aren't yet required in the regulations, so we are going as ever above and beyond where the regulations lie – even in 2025.

Simon: Fantastic. We are publishing this podcast just after the official test results are released so where can our listeners go to find out more about the test results and see where the vans they commonly purchase sit in that league table?

Matthew: Euroncap.com – they can see all the ratings there. You can find a link to that on the Thatcham Research website. The other useful provision on the EuroNCAP website is you can drill down into that and it will show you the availability on each market so we cover EU27 plus 1 now and we show the ratings across all of the EU states. You'll be able to look at the UK and say what's available on our van because it is different between countries. And we do have a reasonably high level in the UK and we're much better than say France or Italy – so it's doubly impressive that Fiat have decided to make this equipment available as an optional fit – and I would urge people to look at a Platinum van – look at a Fiat Ducato.

Simon: Fantastic. We'll put links to that in the show notes. Matthew, thank you for being our guest today and I look forward to seeing what the response will be to these latest results.

(transition)

Simon: If you manage drivers and their vehicles, and you face similar issues to those discussed in this podcast, there are links in the show notes to some useful resources on the Driving for Better Business website. And these are all free to access. If you enjoyed the conversation, please don't forget to hit subscribe - so you know when the next episode is released. And please also give us a 5-star review, as this helps us to get up the podcast rankings, and makes it more visible to others who might also find it useful. You can follow us – that's Driving for Better Business on Twitter, Facebook and LinkedIn. And most importantly, please help us to spread the word. All our resources are free for those who manage fleets and their employees who drive for work. Thank you for listening to Let's Talk Fleet Risk, and I look forward to welcoming you to the next episode.