



European commercial fleet dashcam market research report

GEOTAB®

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Executive summary

Across Europe and the UK, commercial fleets are under increasing pressure to improve driver safety, reduce claims costs and demonstrate a stronger duty of care. Dashcams and video telematics can help fleets address these pressures by identifying road risk earlier and generating actionable safety insights.

This report examines current market adoption, measurable safety and financial impacts, driver privacy and acceptance, and the legal considerations fleets need to address when deploying camera-based technology.

Key figures

2M+

video telematics systems in use across European commercial fleets in 2025

74%

of enterprise fleets surveyed by Verizon in 2023 were using in-cab video

4.3M

video telematics systems forecast to be in use by 2030

47%

of fleets surveyed by Geotab in 2025 achieved ROI from video telematics in one year or less

91.6%

of drivers surveyed by Geotab in 2025 would set aside privacy concerns if footage could exonerate them

Market adoption

Publicly available data on dashcam adoption across European commercial fleets is fragmented, with different sources measuring installed systems, market revenue and survey-reported fleet usage. However, the available evidence points in the same direction: video telematics is evolving from a specialist safety tool into a more established element of commercial fleet operations, particularly among larger fleets.

Berg Insight finds that more than 2 million video telematics systems were in use across European commercial vehicle fleets in 2025. The report forecasts that the installed base will more than double to 4.3 million by 2030, representing a compound annual growth rate (CAGR) of 16%.¹

Berg Insight's broader fleet-management research identifies 44.4 million commercial vehicles in use across EU25+3 in 2023, underscoring the scale of the addressable fleet market. However, this should be treated as market context rather than a direct denominator for video telematics penetration, as installed-system counts, total vehicle parc and survey-reported fleet adoption measure different things.

The wider European dashcam market shows significant variation between countries. Mordor Intelligence estimates that the UK had the largest market share, accounting for 28.85% of European dashcam market revenue in 2025, while Spain is expected to record the fastest national growth, with a forecast CAGR of 13.02% to 2031. Comparable public figures for fleet-specific dashcam penetration are limited at country level. Available market-revenue data points to the UK as the largest European dashcam market, while Germany, France and Italy together account for a substantial share of the wider market, with a combined share of 39.8%. However, these figures cover the total dashcam market rather than commercial fleets alone, so they should be treated as country-level market context rather than fleet adoption data.

¹[Berg Insight, The Video Telematics Market, 7th Edition](#)



Survey evidence suggests that in-cab video is already established in many European fleets. A survey of 1,538 European fleet managers, executives and other mobile business professionals found that adoption was particularly strong among enterprise fleets, with 74% reporting that they used in-cab video in 2023.⁴

Percentage of fleets using in-cab video* by fleet size

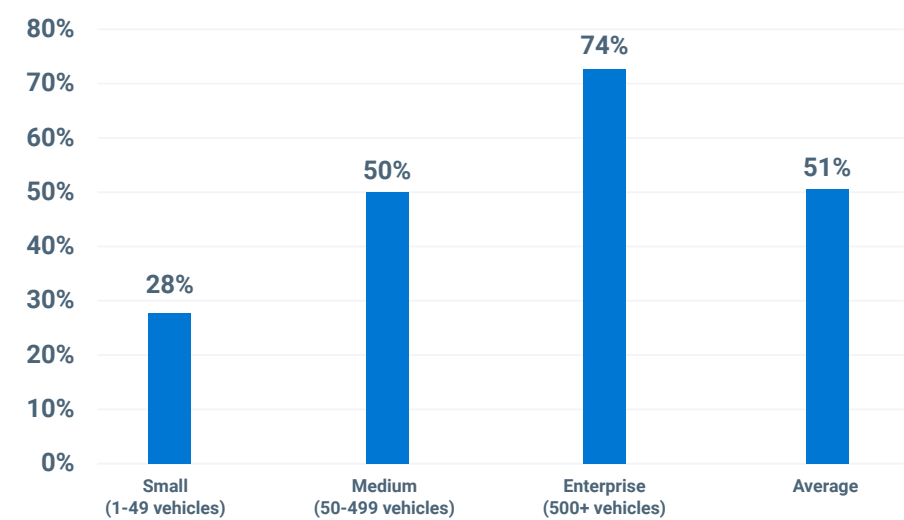


Fig. 1. Percentage of survey respondents stating that their fleet utilised in-cab video*, by fleet size. Source: Verizon Connect Fleet Technology Trends Report 2026

*Including front- and driver-facing cameras

The same survey found that usage was relatively evenly distributed across the identified sectors, with the highest adoption figures in passenger transportation (56% of fleets) and general freight (55% of fleets).

Percentage of fleets using in-cab video* by sector

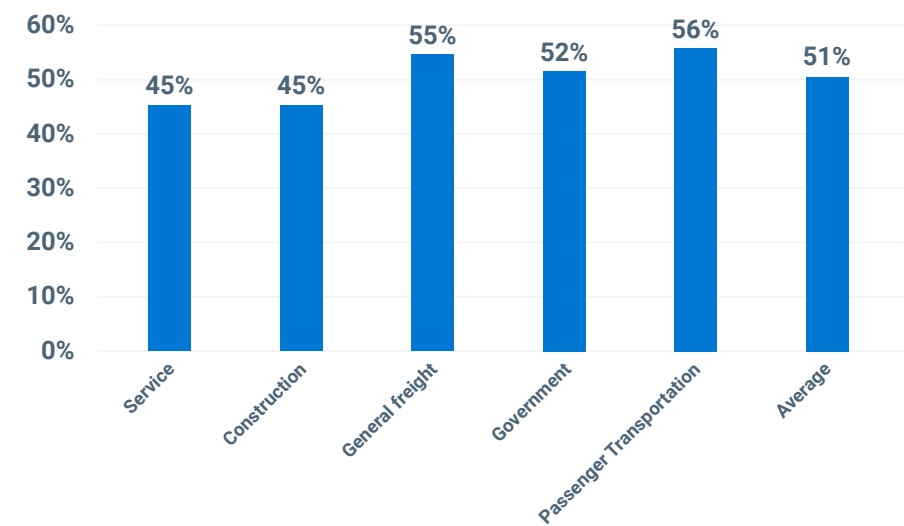


Fig. 2. Percentage of survey respondents stating that their fleet utilised in-cab video*, broken down by industry sector. Source: Verizon Connect Fleet Technology Trends Report 2026

*Including front- and driver-facing cameras

² <https://media.berginsight.com/2025/11/27150615/bi-fm20-ps.pdf>
³ [Mordor Intelligence Europe Dashboard Camera Market Size and Share Analysis](#)
⁴ [Verizon Connect Fleet Technology Trends Report, 2026](#)



Safety and financial impacts

Road safety remains a significant challenge across Europe, creating both a human and commercial imperative for fleets to reduce risk. Video telematics can support this by helping operators identify unsafe driving behaviours, protect drivers with objective evidence of incidents and move from reactive claims management towards proactive safety intervention.

European Commission research estimated that there were around 19,800 deaths on EU roads in 2024, and that human error is a contributing factor in 95% of road traffic accidents.⁵ Organisations including the British Safety Council have highlighted the role of video telematics and machine vision in identifying and mitigating unsafe driving behaviours.⁶

Geotab data shows a strong return on investment for customers using its AI-driven solutions. In 2023, fleets using Geotab's integrated safety features, including dashcams, saw a 40% reduction in collision rates.⁷



In a separate survey of 1,817 fleet and operations decision-makers across Europe, **47% of respondents across all industries reported achieving a positive ROI** on their video telematics solutions in one year or less.⁸

⁵ [European Parliament, Safer roads: what are the EU measures to reduce car accidents?](#)

⁶ [British Safety Council, Fleet and video telematics: why prevention is now key](#)

⁷ [Geotab, 2024 State of Commercial Transportation Report](#)

⁸ [Geotab, Connected Fleets in Europe Report 2026](#)

Published case studies show that video-enabled fleet safety programmes, including AI dashcams, have delivered measurable reductions in claims frequencies and costs. The most detailed public financial examples are from the UK.

In one UK case study, an HGV fleet fitted with AI-powered dash cameras reduced its average claims cost per vehicle-year from £1,713 before installation to £423 after installation. The number of claims reduced by 21% in the year after the technology was installed, while the loss ratio fell from 48% to 15%.⁹

Another UK case study, involving a healthcare transport provider, reported a 78% reduction in frequency, and a 96% reduction in the cost of road traffic incidents after dash cameras were installed. In the four months before the technology trial, there had been 18 road traffic incidents, costing the insurer £30,000-£35,000. During the four-month trial period, this fell to four incidents, with a total insurer cost of £1,500. In absolute terms, the fleet recorded 14 fewer road traffic incidents during the trial period than in the preceding four months.¹⁰

European examples outside the UK also point to measurable benefits, although public financial figures are less common.



In Germany, **ALSCO** reported saving more than **€20,000** by using video evidence to clarify one costly incident,¹¹ while Hövels Bus reported €20,000-€25,000 in avoided accident-related **costs** after dashcam footage helped clarify several damage cases.¹²

⁹ [RSA Insurance, Reducing risks on the road](#)

¹⁰ [Geotab, HATS Group case study](#)

¹¹ [Samsara, ALSCO customer case study](#)

¹² [Samsara, Hövels customer case study](#)



Camera evidence can also reduce the commercial burden associated with disputed incidents by helping fleets to establish liability faster, challenge false claims and avoid prolonged legal or claims-handling processes. However, public sources rarely separate legal costs from broader claims costs.

Survey evidence supports these findings. A survey of 1,817 European fleet professionals found that video telematics helped fleets improve performance across key safety and commercial outcomes, with an average of 76% reporting improved driver safety, 68% reporting a reduction in false claims, and 62% reporting a reduction in safety incident costs.

Commercial and safety benefits of video telematics

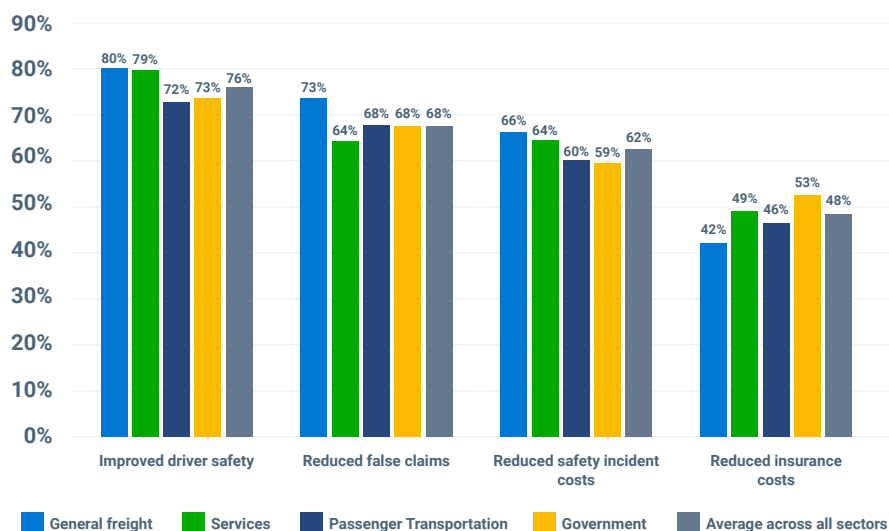


Fig. 3. Percentage of respondents reporting improved safety and commercial outcomes from video telematics. Source: Geotab Connected Fleets in Europe Report, 2026

The same survey suggests that fleets are seeing reductions across a broad range of safety-related events. Across all sectors, the greatest reported improvements were in driver fatigue and driver distraction, with an average of 47% and 46% of respondents, respectively, reporting reductions of 41% or more in the frequency of these events after using video telematics.

Percentage of respondents reporting reductions of 41% or more in the frequency of selected safety events after using video telematics

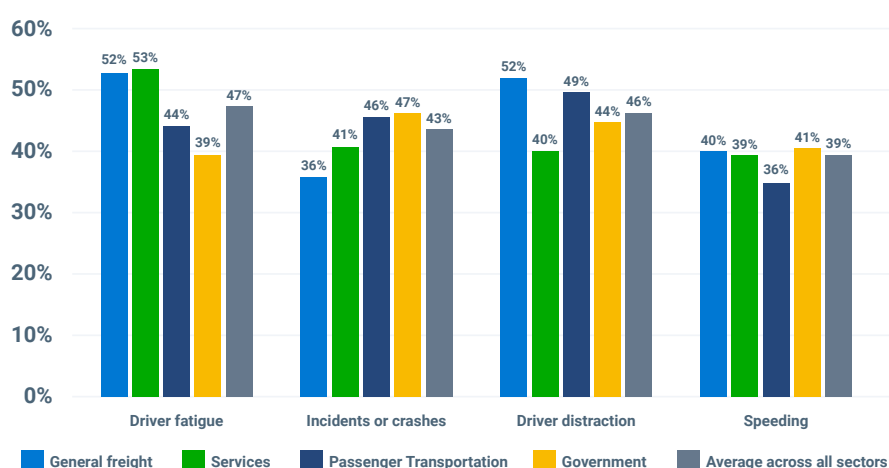


Fig. 4. Percentage of respondents reporting reductions of 41% or more in the frequency of selected safety events after using video telematics, by sector. Source: Geotab Connected Fleets in Europe Report, 2026

Together, these findings indicate that video telematics can help European operators shift from reactive accident investigation to proactive risk reduction. By combining event footage, AI-enabled alerts and driver coaching, fleets can identify risky behaviours earlier and support drivers to correct them before they result in collisions.

Privacy and driver acceptance

For European fleet operators, successful video telematics implementation depends on trust as much as technology. Drivers are more likely to accept dashcams when fleets engage them early, explain how privacy will be protected and demonstrate that camera footage can support them, not simply monitor them.

Evidence suggests that when drivers understand the benefits of the technology, they have a higher level of acceptance. A study of 157 truck drivers in Germany found that the perceived usefulness of road-facing dashcams is pivotal to their acceptance, driven by social norms, functionality and control. The study found that the perceived risks and privacy concerns did not significantly impact intention to adopt road-facing dashcams, suggesting that when the benefits are clear, they can outweigh individual privacy concerns.¹³

This is supported by Geotab's European driver survey, which gathered responses from 3,514 van and lorry drivers across the UK, France, Germany, the Netherlands, Spain, Ireland and Italy. The survey found that 91.6% of all respondents would be willing to set aside their privacy concerns if the dashcam footage could be used to exonerate them after a collision.¹⁴

These figures were broadly similar across the surveyed markets, although there was some variation by country. Ireland recorded the highest level of willingness, at 95.4%, while France recorded the lowest, at 77.2%.

Would you be willing to overlook privacy concerns if dashcam footage could prove you were not at fault after a collision?

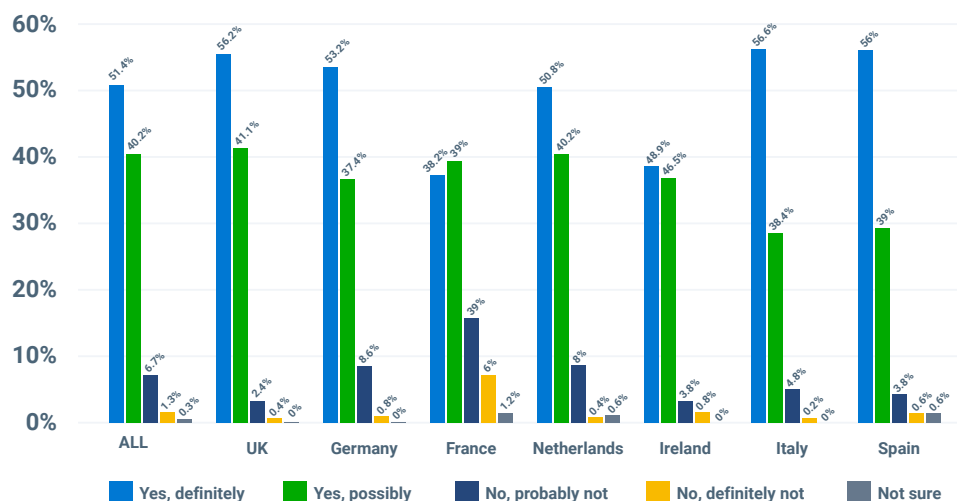


Fig. 5 Percentage of respondents who would be willing to set aside privacy concerns if the dashcam footage could prove they were not at fault after a collision. Source: Geotab European driver survey, 2025.

These findings reinforce that fleets should not merely treat driver acceptance as a communications exercise after the technology has been selected. Privacy, access controls, and driver-facing benefits need to be built into employee engagement from the start.

¹³ [Big brother is watching you: Examining truck drivers' acceptance of road-facing dashcams, Transportation Research, T Gruchmann and A Jazairy, 2025](#)

¹⁴ [Geotab European Driver Survey, 2025](#)

Implementation best practices

Best practice guidance broadly recommends that fleets:



Engage drivers and, where relevant, their representatives before implementation, explaining the purpose of the dashcam programme and how footage will be used.



Agree how **driver privacy** will be protected before deployment begins, including what is recorded, when footage is retained, who can access it and how unnecessary personal data will be minimised.



Use **privacy-by-design** features where available, such as event-based recording, restricted access, audio controls and face or licence plate blurring.



Focus on the benefits that the technology offers, as an **independent witness** that can protect drivers in the event of a non-fault accident.



Conduct a pilot or phased rollout to show drivers the **real-world benefits** that their colleagues experience.

These recommendations draw on regulator guidance^{15,16,17} on vehicle surveillance, data minimisation, transparency and employee consultation, alongside published research¹⁸ and case study evidence^{19,20} showing that driver acceptance improves when the technology is clearly linked to driver protection, safety and incident evidence.

¹⁵ [Information Commissioner's Office, Surveillance in vehicles](#)

¹⁶ [Commission Nationale de l'Informatique et des Libertés \(CNIL\), "Augmented" cameras in the passenger compartments of freight vehicles](#)

¹⁷ Agencia Española Protección Datos (AEPD), On-board cameras and data protection

¹⁸ [Big brother is watching you: Examining truck drivers' acceptance of road-facing dashcams, Transportation Research, T Gruchmann and A Jazairy, 2025](#)

¹⁹ [Ringway Jacobs Reduces Accidents and Increases Productivity with SureCam](#)

²⁰ [Circet and Geotab case study: boosting safety and sustainability with fully integrated fleet insights](#)



Legal framework

The use of dashcams and video telematics in commercial fleets sits within a wider European legal framework designed to protect privacy, data protection and employee rights. Fleet operators must ensure that where dashcams are to be used, they are introduced transparently, proportionately and with appropriate safeguards.

At the EU level, privacy and data protection are grounded in Articles 7 and 8 of the EU Charter of Fundamental Rights. Employee monitoring has also been considered through the lens of Article 8 of the European Convention on Human Rights, which protects the right to respect for private and family life. Across Europe and the UK, the processing of personal data is primarily governed by the GDPR and UK GDPR, alongside national constitutional, employment and data protection laws.²¹

For employers, the legal considerations extend beyond data protection alone. EU Directive 2002/14/EC gives employee representatives the right to be informed and consulted about significant changes to working conditions. Eurofound notes that, even where national laws do not explicitly refer to monitoring technologies, introducing systems that monitor employee behaviour or performance may fall within this type of workplace change. In practice, this means that fleets may need to consider employee consultation requirements before introducing dashcams, particularly where systems include driver-facing cameras or behavioural analysis features.²²

²¹ European Union, Charter of Fundamental Rights of the European Union, Articles 7 and 8; Council of Europe, European Convention on Human Rights, Article 8; Regulation (EU) 2016/679, General Data Protection Regulation; UK GDPR and Data Protection Act 2018.

²² [Eurofound, Employee monitoring: A moving target for regulation, 2024](#)

National rules also vary. Eurofound identifies Austria, Germany, Finland, France and the Netherlands as examples of EU Member States where employee representatives have specific information and consultation rights related to employee monitoring. Works council or employee representative consultation may be particularly important in countries such as Germany, France and the Netherlands, where workplace monitoring can trigger additional information, consultation or co-determination requirements. This reinforces the need for fleet operators to treat video telematics implementation as a privacy, employment and change-management issue, not simply as a technology deployment.

The UK Information Commissioner's Office provides practical guidance on vehicle surveillance that illustrates the types of safeguards fleet operators should consider when deploying video telematics.²³

Practical safeguard	What this means for fleet operators
Conduct a Data Protection Impact Assessment (DPIA)	Assess how vehicle surveillance could affect the rights and freedoms of drivers, passengers and other individuals whose personal data may be captured.
Provide clear privacy information	Place clear and informative signage within vehicles to let drivers and passengers know when video surveillance systems may be used, and who to contact in the event of a query.
Limit audio recording	Audio should generally be switched off by default and used only in exceptional circumstances where it is clearly justified.
Define governance and retention rules	Establish clear procedures for footage retention, retrieval, subject access requests and onward disclosure to third parties where appropriate.
Control access to footage	Limit access to authorised personnel and define the circumstances in which footage may be reviewed, shared or used.
Minimise unnecessary personal data	Use proportionate settings and privacy-by-design features where available, such as event-based recording, restricted access, masking or blurring.
Consider applicable surveillance guidance	Ensure compliance with relevant surveillance camera guidance or codes of practice where these apply.

²³ [Information Commissioner's Office, Surveillance in vehicles](#)

Conclusion

The evidence shows that video telematics is becoming an increasingly established part of European fleet operations, particularly among larger and higher-risk fleets.

Published case studies and fleet survey data show that camera-enabled safety programmes can reduce collisions, claims costs and false claims, while supporting drivers with objective evidence when incidents are disputed.

The core consideration for fleets is how to deploy the technology responsibly and in a way that builds driver confidence. Organisations that engage drivers early, apply privacy-by-design safeguards and align implementation with local legal and employment requirements are likely to achieve a smoother rollout and stronger long-term results.

About Geotab

Geotab is a global leader in connected operations, video telematics and AI-powered insights. Trusted by more than 100,000 customers — from small and mid-size fleets to Fortune 500 enterprises and public-sector organisations, including the U.S. federal government, Geotab connects approximately 6 million vehicles and assets and processes 100 billion data points daily. With ISO/IEC 27001:2022, SOC2, FIPS 140-3 and FedRAMP authorisations, Geotab's open platform and 700+ partner ecosystem unify safety, compliance and operations in a single system. Our mission: a safer, more efficient, and more sustainable world in motion.



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