

Europe's EV interest gap

How consumer search demand
is shifting across five major European
car markets

IMAGIN studio



IMAGIN.studio European EV Pulse Report

Based on more than 300 million image views across the UK, Germany, France, Italy and Spain between 1 March and 30 April 2026

Electrified vehicles now dominate European car search demand

Across the UK, Germany, France, Italy and Spain, consumer interest has shifted firmly toward electrified vehicles.

Between March and April 2026, electric and hybrid vehicles accounted for **almost two-thirds (66%)** on average of all searches across IMAGIN.studio's European dataset. That marks a clear move away from petrol and diesel as the default search for online car buyers.

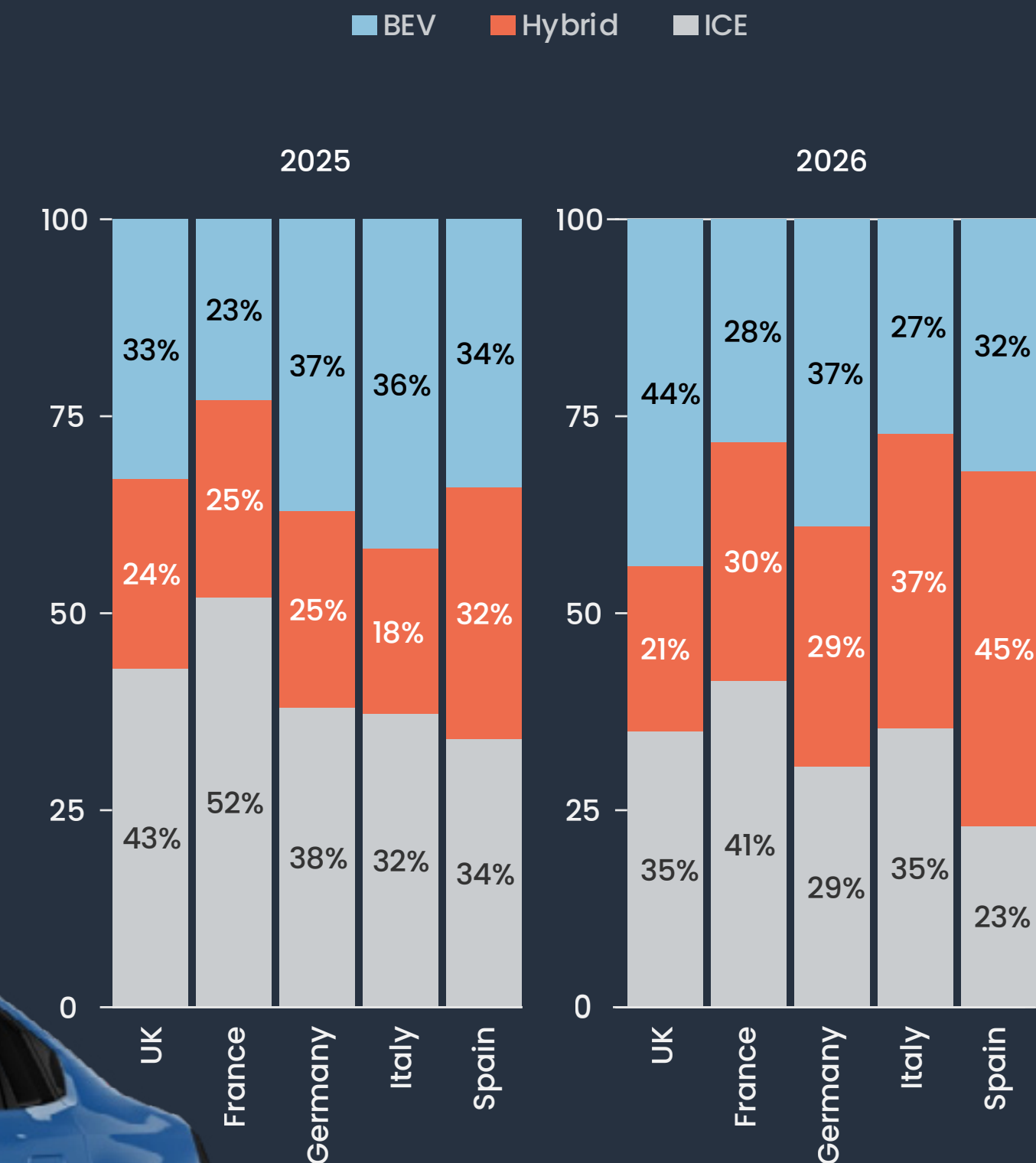
But the headline hides a more complex picture. Europe is not moving in one direction at one speed. Each market is taking a different route, shaped by fuel prices, affordability, charging access, model choice and consumer confidence.

The EV question has changed.

The issue is no longer whether consumers are looking at electrified vehicles. They are. The bigger issue is which type of electrification they trust enough to buy.



European Powertrain Search Share 2025 vs 2026 (%)



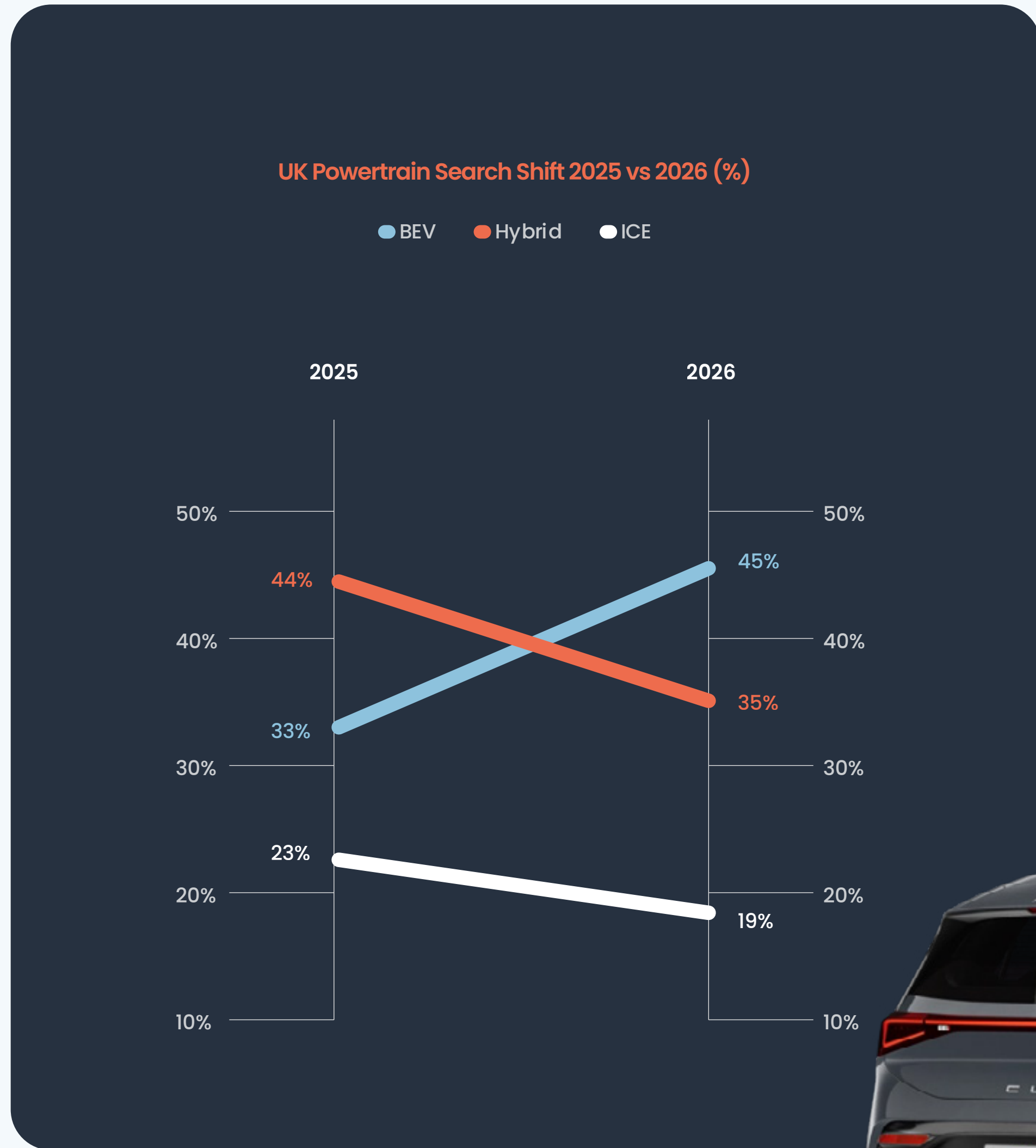
The UK is Europe's strongest BEV-interest market

The UK has moved ahead of the rest of Europe on battery electric vehicle interest.

BEVs have accounted for **45% of UK searches** in 2026, up from **33%** the year before. Petrol fell from **44% to 35%**, meaning BEVs have now overtaken ICE vehicles in UK search demand.

This makes the UK the clearest example of a BEV-first market in IMAGIN.studio's dataset. Car buyers are putting EVs at the centre of the search process.

But there is still a conversion gap. EVs have accounted for **23% of total UK car sales in 2026**, far below the **45% BEV** search share. Interest is running ahead of adoption.



The UK does not have an EV awareness problem. It has a confidence and conversion problem. Buyers are interested, but they still need clearer information on range, charging, price, specification and ownership cost.

Spain is choosing electrification, but not full electric

Spain is one of the strongest electrified markets in the dataset, but its growth is being led by hybrids rather than BEVs.

Hybrid searches jumped from **32% in 2025 to 45% in 2026**, making hybrid the dominant powertrain in Spanish search demand. BEV interest stayed broadly stable, moving from **34% to 32%**, while petrol fell sharply from **34% to 23%**.

That makes Spain a useful warning against treating “EV interest” as one single trend. Spanish car buyers are moving away from ICE, but many appear to prefer a lower-risk bridge rather than a full BEV switch.



Spain is not rejecting electrification.

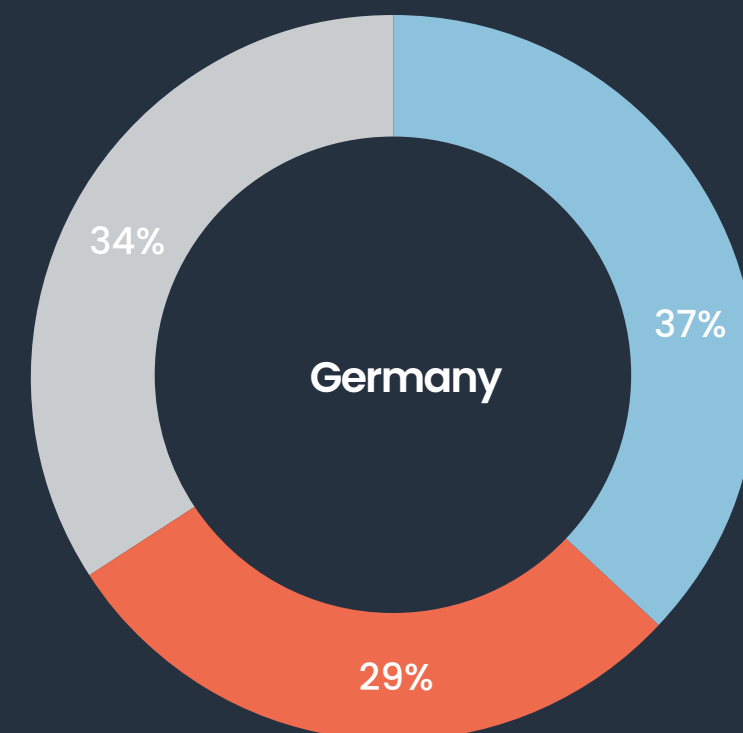
It is choosing a more familiar version of it. For OEMs and retailers, that means hybrid content should not sit behind BEV messaging. It should carry its own value story.



Germany and France show steady, but slower, movement

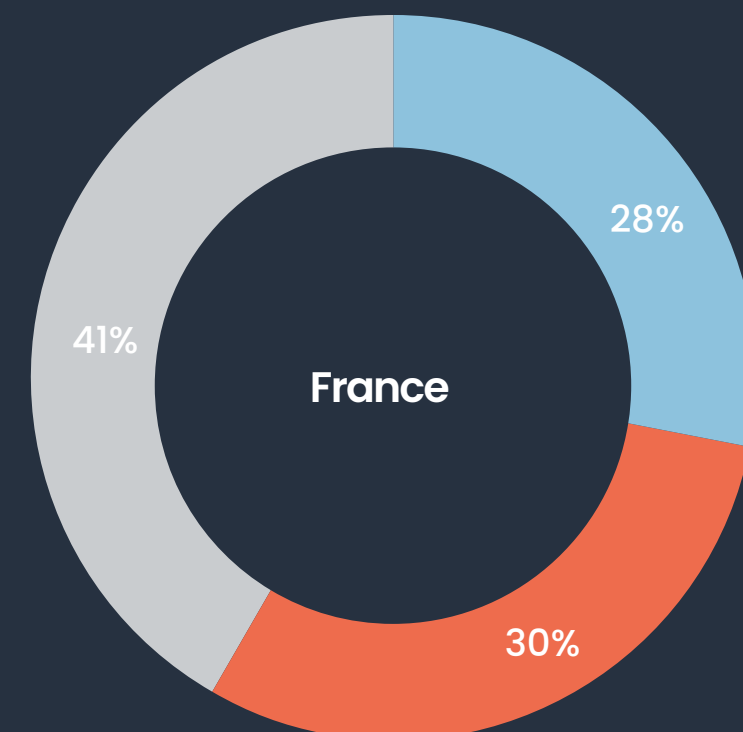
Germany and France show two different middle-ground markets. Germany has become a balanced three-way market. BEV interest remained stable at around **37%**, hybrid interest rose from **25% to 29%**, and petrol fell from **38% to 34%**. No single powertrain dominates.

France is moving from a more ICE-heavy starting point. Petrol remained the largest single category at **41%**, but it fell from **52%** the previous year. BEV interest rose from **23% to 28%**, while hybrid interest increased from **25% to 30%**.



Germany and France Powertrain Search Share 2026

- BEV
- Hybrid
- ICE



Balanced markets need better comparison tools.



When BEV, hybrid and petrol remain close, buyers need simple ways to compare cost, range, charging, equipment and use case. Poor presentation risks slowing the decision.

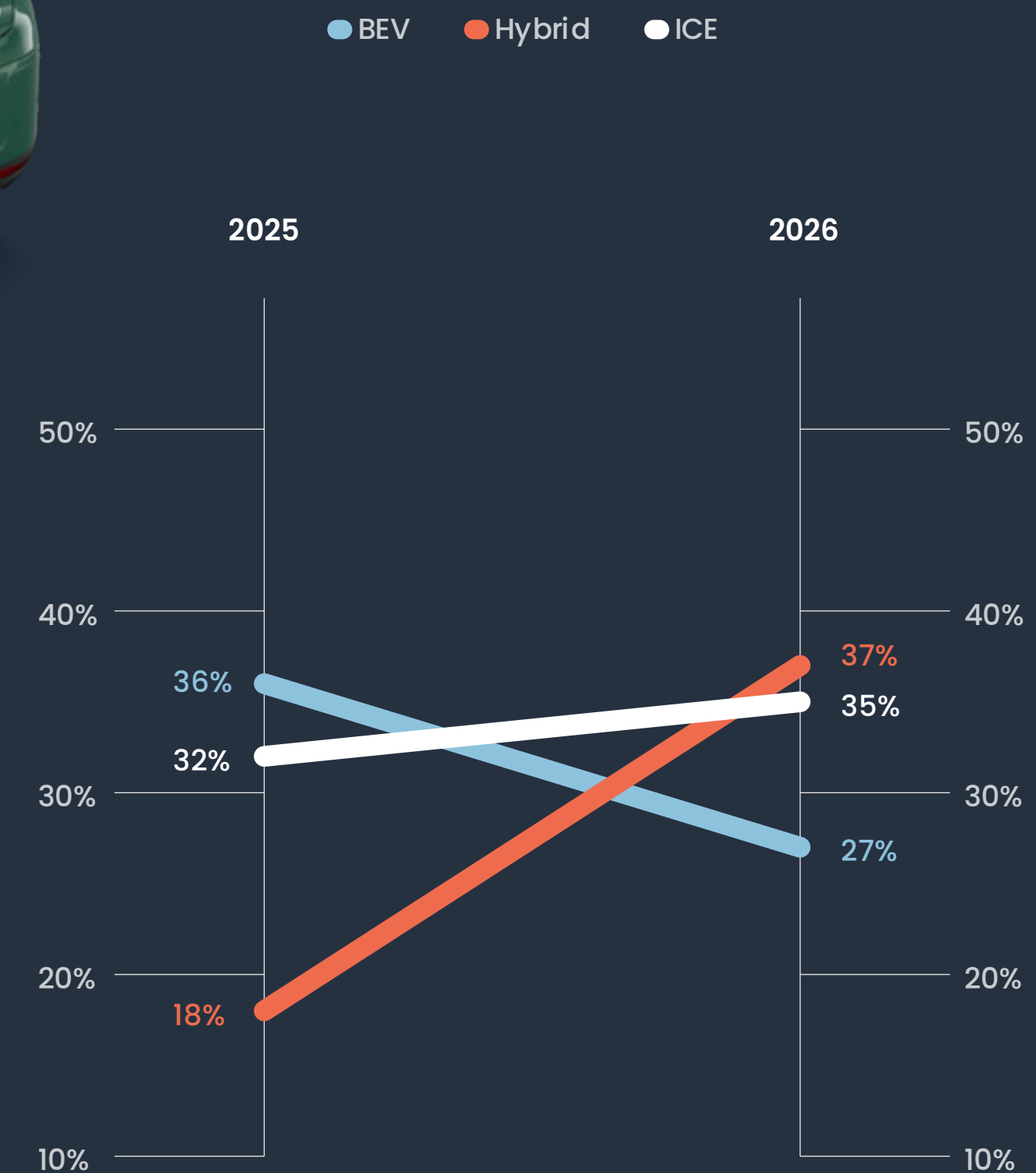


Italy lagging behind other major European markets on EV

BEV searches fell from **36% in 2025 to 27% in 2026**, while petrol increased from **32% to 35%**. Hybrid demand rose sharply from **18% to 37%**, making it the largest category, but the drop in BEV interest is the clearest sign that the transition is not guaranteed.

Italy's market is now more fragmented than the others. Hybrid leads, petrol has rebounded, and BEV interest has fallen. This suggests buyers may still be interested in efficiency, but less confident about going fully electric.

Italy Powertrain Search Shift 2025 vs 2026 (%)



 **Italy is the cautionary case.**
EV interest can fall. Digital presentation has to do more than show the vehicle; it must reduce doubt.



Martijn Versteegen, CEO at IMAGIN.studio:

“Crossing the point where electric vehicles generate more consumer interest than ICE engines is a significant milestone for the European market. It shows that electrification is no longer a future ambition, but a present reality in the minds of car buyers.

However, interest alone does not guarantee adoption. Consumers are becoming more engaged with EVs, but they are also more discerning. Economic uncertainty and rising fuel costs are clearly influencing behaviour, but buyers still need confidence in what they are choosing.

What’s particularly encouraging is that this growth is being driven from two directions. Many existing BEV drivers are choosing to stay electric when replacing their vehicles. This shows high satisfaction with the technology. At the same time, we’re seeing fresh interest from drivers who are moving away from petrol and diesel, exploring electric options for the first time.

As the number of available electric models continues to grow, the challenge for the industry is to present these vehicles in a way that is clear, transparent and easy to understand. Helping consumers compare options, visualise specifications and explore features digitally will be critical in turning this growing interest into meaningful action.”



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