Searched vs sold: Europe’s EV consideration gap

How the electric cars Europeans search for compare with the ones they buy



IMAGIN.studio ‘European EV Pulse Report’
Based on over 100 million image views across the UK, Germany, France, Italy and Spain between 1 July to 30 September 2026, set against new electric car registrations for July and September 2026

Europe’s most-searched EVs in Q3 are rarely its best sellers

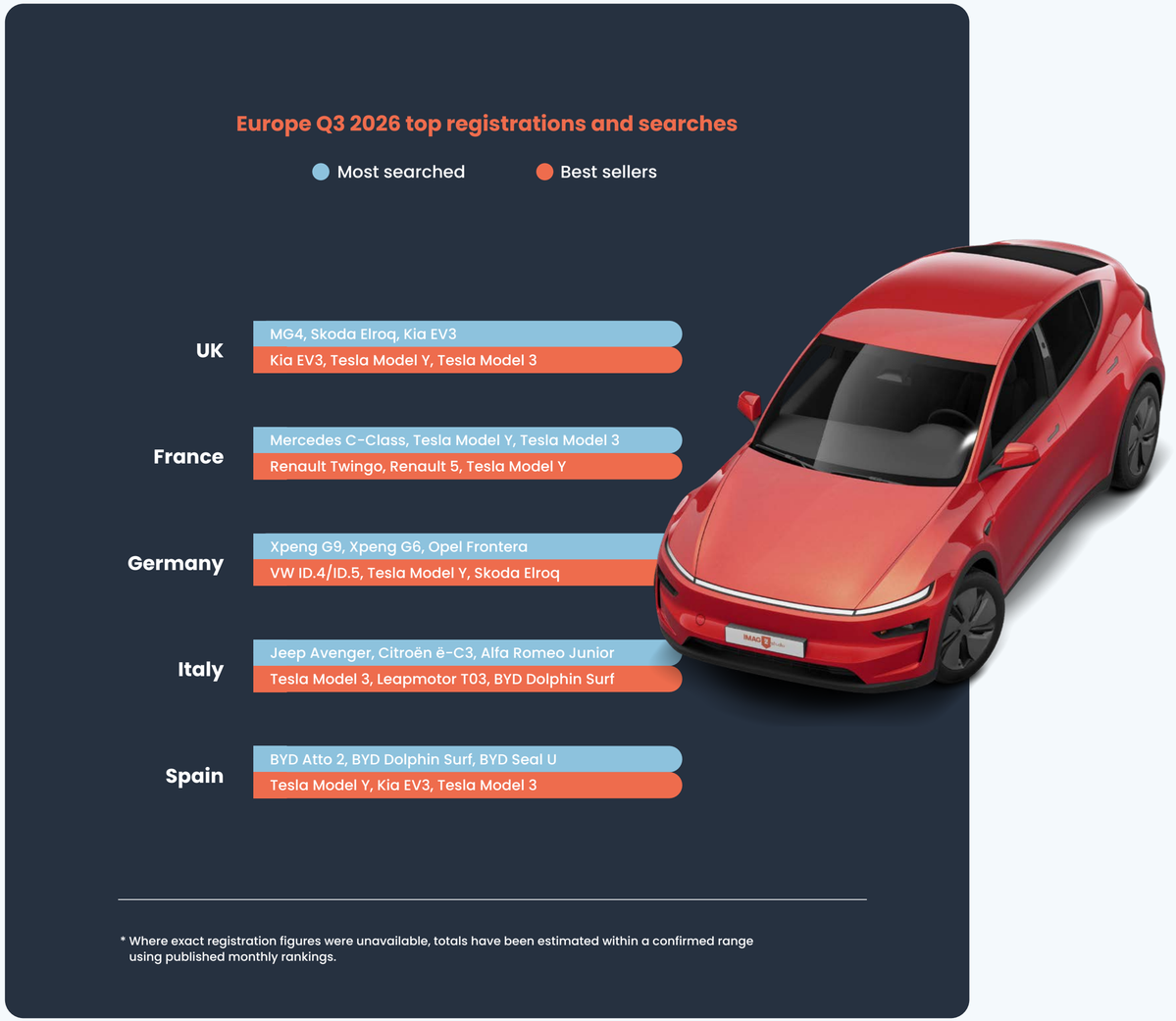
Across the UK, France, Germany, Italy and Spain, the electric cars shoppers look at most online are rarely the ones that register in the largest numbers.

Only **2 of the 15** most-searched EVs in IMAGIN.studio’s Q3 dataset were also top-three sellers in their market: the Kia EV3 in the UK and the Tesla Model Y in France. Germany, Italy and Spain show no overlap at all.

The reasons differ by market. Brand familiarity, launch timing, price support and the growing weight of fleet and leasing channels all shape what converts.

- Searched and sold overlap: **2 of 15** models
- Markets with no overlap: Germany, Italy and Spain

Interest is only the first step. Turning it into registrations depends on being familiar, affordable and easy to choose wherever buyers and fleets make decisions.



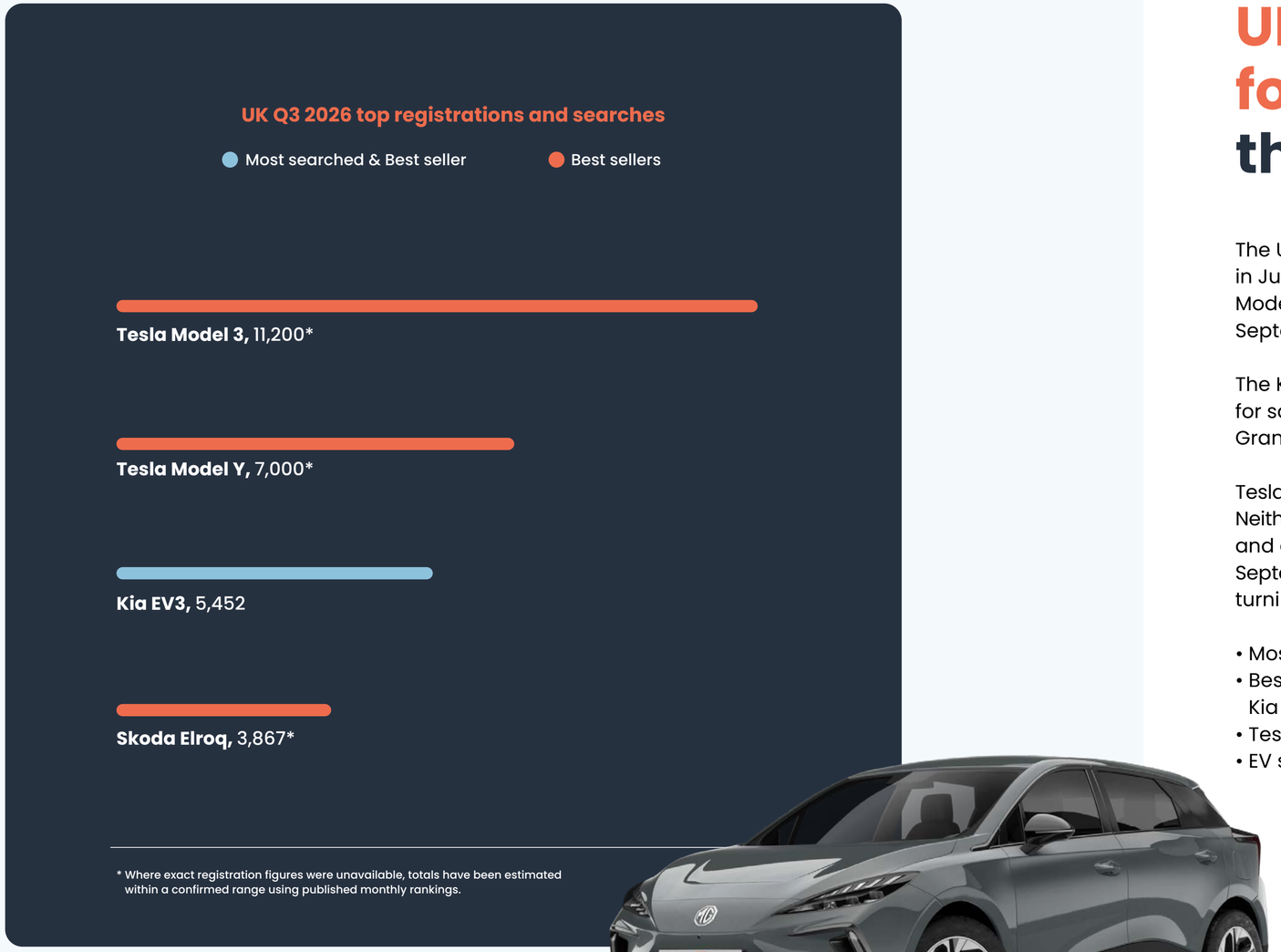
UK buyers search for the MG4, but buy the Tesla Model 3

The UK's most-searched EV is the MG4, yet it missed the monthly top 10 in July, August and September. Tesla led Q3 sales, with more than 11,200 Model 3 and around 7,000 Model Y registrations, most of them in the September plate-change month.

The Kia EV3 is the only model on both lists, third for searches and third for sales with 5,452 registrations. It joined the government's Electric Car Grant list in April. The Skoda Elroq, second for searches, recorded 3,867.

Tesla's lead shows what an established EV brand converts at quarter end. Neither Tesla qualifies for the grant, so its volume rests on brand familiarity and a market where fleet and business buyers took 57.5% of new cars in September. The EV3 shows the opposite route: a grant-eligible newcomer turning interest into steady sales across all three months.

- Most searched: MG4, Skoda Elroq, Kia EV3
- Best sellers, Q3: Tesla Model 3 (11,200), Tesla Model Y (7,000), Kia EV3 (5,452)
- Tesla Model 3, September: 9,929, the month's best-selling EV
- EV share of new cars, September: 28.3%, a record 99,201 registrations



France’s best sellers are the cars its incentives reward

France is the only market where Tesla features on both lists. The Model Y was second for searches and first for sales, with 15,205 registrations between July and September.

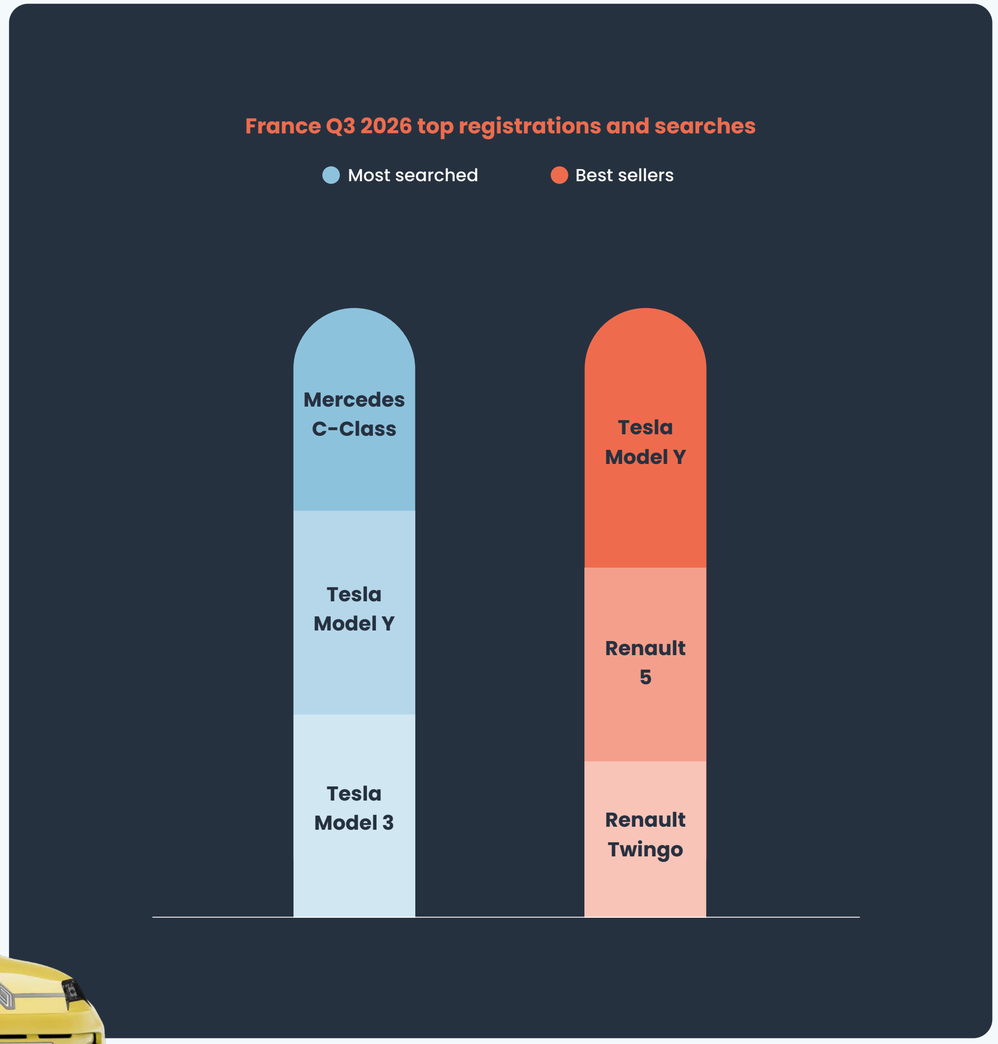
Neither of the other two searched models made the monthly top 10. The Model 3 is built in Shanghai and misses France’s eco-score, the environmental rating that unlocks the state-backed bonus, social leasing and company car tax relief. The electric Mercedes C-Class is a launch story: it went on sale in May and first deliveries are now under way.

Renault dominates the rest of the chart. The Renault 5 and new Twingo took second and third place, helped by the return of social leasing on 16 July.

- Most searched: Mercedes C-Class, Tesla Model Y, Tesla Model 3
- Best sellers, Q3: Tesla Model Y (15,205), Renault 5 (11,334), Renault Twingo (9,126)
- EV share of new cars, September: 41.6%, a record
- Company EVs carrying the eco-score, first half: 82.56%

Company buyers point the same way. The Scénic, Model Y and Renault 5 were also the top three eco-scored EVs registered by French businesses in the first half.









Germany has Europe's widest gap between interest and sales

The three most-searched EVs in Germany, Xpeng's G9 and G6 and the Opel Frontera, missed the monthly electric top 10 in every month of the quarter. The Tesla Model Y registered more than 11,000 sales in Q3, more than any other EV.

The Volkswagen Group dominates sales, with seven of July's top 10 EVs, six of August's and five of September's. These are familiar brands with deep roots in German company car fleets, in a market where businesses registered 59.4% of all new cars in August. Tesla's quarter-end push put the Model Y second, with 8,038 registrations in September alone.

Xpeng registered 1,163 cars in August, up 311% on a year earlier, and both Xpeng models qualify for Germany's 0.25% company car tax rate.

- Most searched: Xpeng G9, Xpeng G6, Opel Frontera
- Best sellers, Q3: Tesla Model Y (11,000+), Skoda Elroq (10,707), VW ID.4/ID.5 (8,225)
- EV share of new cars: 28.4% in June to 34.5% in September, after a household subsidy of €3,000 to €6,000 opened on 19 May
- Frontera Electric, July and August: 962 in Germany, 2,123 in the UK as a Vauxhall

Germany's gap is a fleet gap. Xpeng has won the attention, but the company car lists behind most German registrations are still built around familiar names: Volkswagen Group, BMW, Mercedes and Tesla.

Italy searches for familiar Stellantis names and buys from BYD, Leapmotor and Tesla

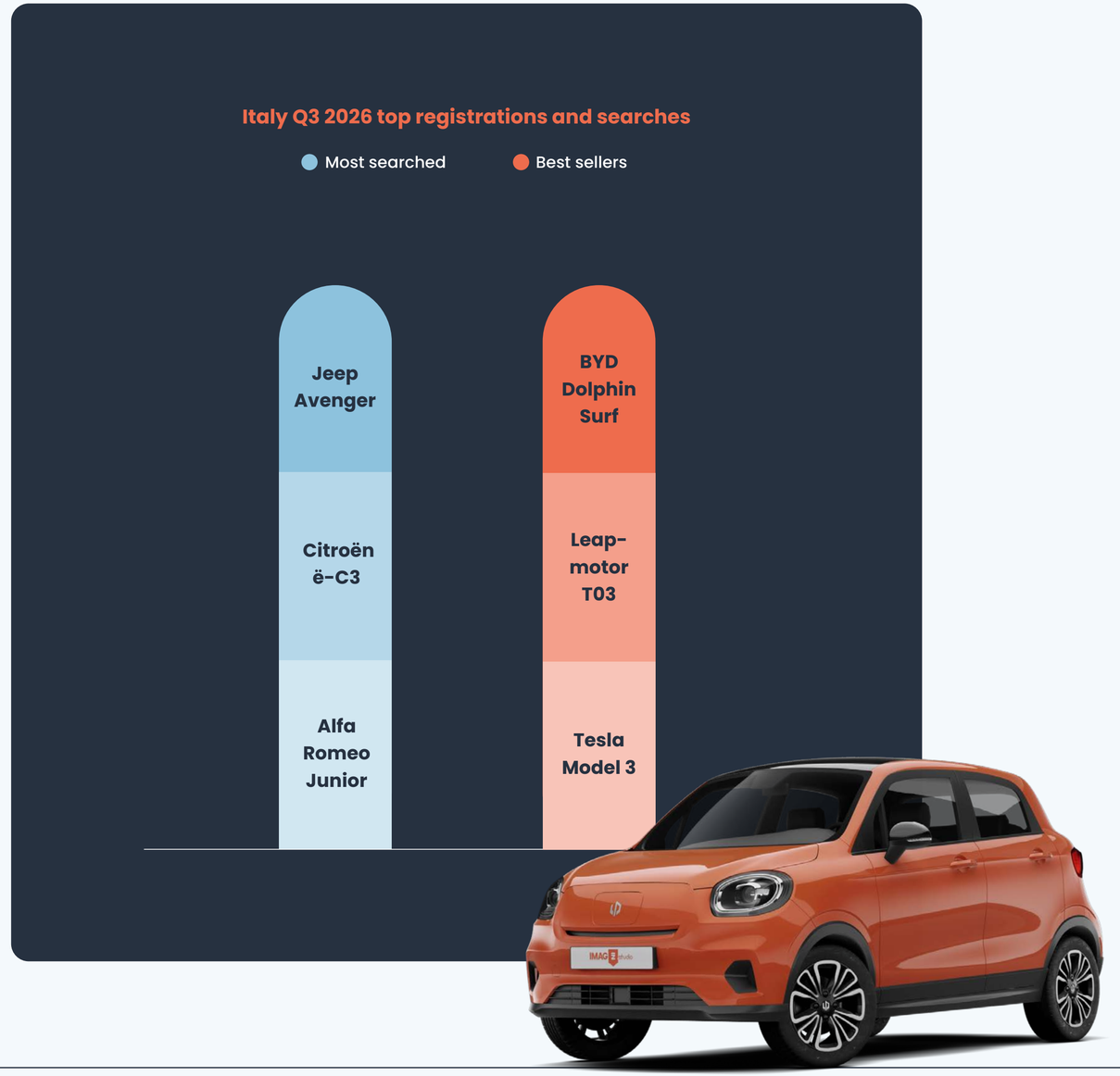
Italians searched most for three familiar Stellantis models, while the BYD Dolphin Surf, Tesla Model 3 and Leapmotor T03 led electric sales. None of the Jeep Avenger, Citroën ë-C3 or Alfa Romeo Junior made the monthly electric top 10 in July, August or September.

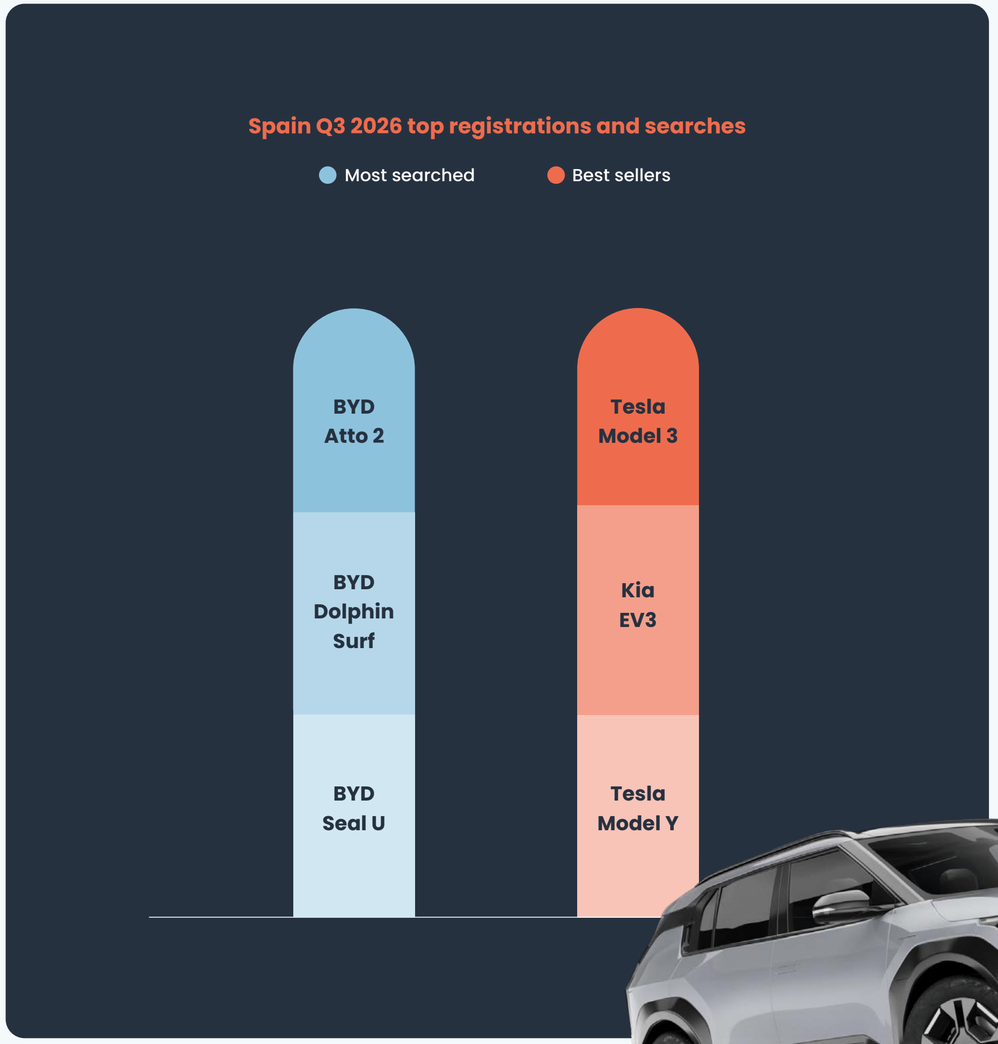
Electric cars took 7.6% of the Italian market in September, up from 6.4% in August and still the lowest share of the five markets. In a market this young, price carries more weight. State incentives made the Leapmotor T03 Italy's best-selling EV in the first half, and their effect faded over the summer.

- Most searched: Jeep Avenger, Citroën ë-C3, Alfa Romeo Junior
- Best sellers, Q3: BYD Dolphin Surf (1,465), Leapmotor T03 (1,349), Tesla Model 3 (1,238*),
- Jeep Avenger, August: 1,313 hybrids out of 1,566 registrations

Italy has the interest and the tax case for electric. Company car drivers pay benefit tax on 10% of a BEV's reference cost, against 50% for petrol and diesel. That gives the brands Italians already search for a clear route to converting interest into electric sales.

* Where exact registration figures were unavailable, totals have been estimated within a confirmed range using published monthly rankings.







In Spain, BYD’s search lead sits just behind the sales leaders

BYD held all three top search positions in Spain, and two of those models reached the sales top five: the Dolphin Surf fourth with 1,354 registrations and the Atto 2 fifth with 1,281.

Tesla’s Model 3 led Q3 with more than 2,700 registrations, nearly all of them in September, ahead of the Kia EV3 on 1,445 and the Model Y on around 1,400. Among private buyers, the Leapmotor B10 outsold the EV3 in July and the Atto 2 did in August, so business and rental registrations do more of the work for the EV3.

The Seal U missed the electric top 10, but Spain buys it in large numbers as a plug-in hybrid. The Seal U DM-i was the country’s second best-selling plug-in hybrid in August with 581, behind the Atto 2 DM-i on 783.

- Most searched: BYD Atto 2, BYD Dolphin Surf, BYD Seal U
- Best sellers, Q3: Tesla Model 3 (2,700*), Kia EV3 (1,445), Tesla Model Y (1,400*)
- EV share of new cars, September: 18.6%, a record

BYD’s search lead converts across both powertrains, and companies in Spain are part of that story.

* Where exact registration figures were unavailable, totals have been estimated within a confirmed range using published monthly rankings.

Six reasons searches and sales diverge

Search captures curiosity. Registrations capture a finished decision, shaped by price, tax, timing and who is paying.

Familiar brands need less searching. Tesla's Model 3 led UK sales in Q3 and the Tesla Model Y led Germany, without appearing in either market's top searches.

Launches draw attention before cars arrive. The electric C-Class led French searches just as deliveries began.

Price and incentives settle the final choice. Best sellers cluster where support is strongest: social leasing in France, the Electric Car Grant in the UK, Germany's household subsidy and Italy's scrappage incentives.

Market maturity changes who converts. Low-priced challengers already lead where EVs are still a small share of sales.

Some searched nameplates sell mainly as hybrids. The Avenger, Atto 2 and Seal U registered more cars with a combustion engine than as pure EVs in August.

Quarter-end timing skews monthly charts. Tesla registered 131 cars in Spain in July and 3,736 in September. In Germany, its Model Y fell from 6,023 registrations in June to 299 in July, then reached 8,038 in September.

Familiarity does much of the work. Buyers who already know a brand spend less time researching it, and fleet choice lists are built around names drivers recognise.





Fleet and leasing channels decide a large share of EV sales

Fleets, leasing companies and employers decide much of what Europe's EV drivers end up in. Businesses registered 59.4% of Germany's new cars in August, fleets and businesses took 57.5% of the UK's in September, and electric reached 42% of French fleet registrations in August.

In these channels, the choice usually starts with a list. A driver picks from the employer's approved models or a leasing company's rate book, then compares a handful of options on a portal. The Scénic in France and the ID.7, Elroq and iX1 in Germany are the kind of models these lists are built around: familiar, practical and easy to compare.

Tax rules steer company buyers firmly towards electric:

UK: benefit-in-kind tax on 4% of an EV's list price in 2026/27

Germany: 0.25% of list price per month for EVs up to €100,000

Italy: benefit-in-kind on 10% of a BEV's standard ACI running cost, against 50% for petrol, diesel and non-plug-in hybrids.

France: a 70% cut in taxable benefit for eco-scored EVs, and a €4,000 charge for each low-emission vehicle large fleets fall short of their target

Spain is the exception. Its tax relief for electric company cars is the weakest of the five, and majority of EVs registered in September went to private buyers. The question for newer brands is how quickly they can become an easy, familiar choice on the platforms where fleet and leasing decisions are made.

Martijn Versteegen,
CEO at IMAGIN.studio

Challenger brands have already won attention in Europe. The next step is to look as familiar and easy to choose as the incumbents at every point where a decision is made.
Treat every platform as a showroom. Every trim, colour and option should look accurate and consistent on dealer, leasing and comparison sites.

Be ready for the launch peak. Complete, high-quality visuals should be live across partner sites when a car is revealed and orders open.
Show up where fleets choose. Rate books, salary sacrifice portals and company car tools shape a large share of EV sales in the UK, Germany and France.

Make the electric version unmistakable. Where a nameplate is sold as both a hybrid and an EV, shoppers need to see the difference clearly.
Repeat until familiar. Jaecoo in the UK and BYD in Spain show how quickly a newcomer can become a mainstream choice.

Familiarity can be built. Brands that look consistent and complete wherever buyers compare cars give shoppers and fleet managers fewer reasons to default to the names they already know.

“Q3 shows European buyers exploring more electric models than ever, often from brands that were barely on sale here two years ago. Yet only two of the 15 cars they searched for most finished in their market’s top three for sales.

“Brand familiarity and fleet choice lists still decide where most registrations land, and curiosity only converts when a newer model feels as safe a choice as an established one. Challenger brands can build that confidence by presenting every model, trim and option as completely and consistently as the names buyers already know, on every site where drivers and fleet managers compare cars.”





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