UpShift

The State of the EV Search Marketing Landscape

January 2026

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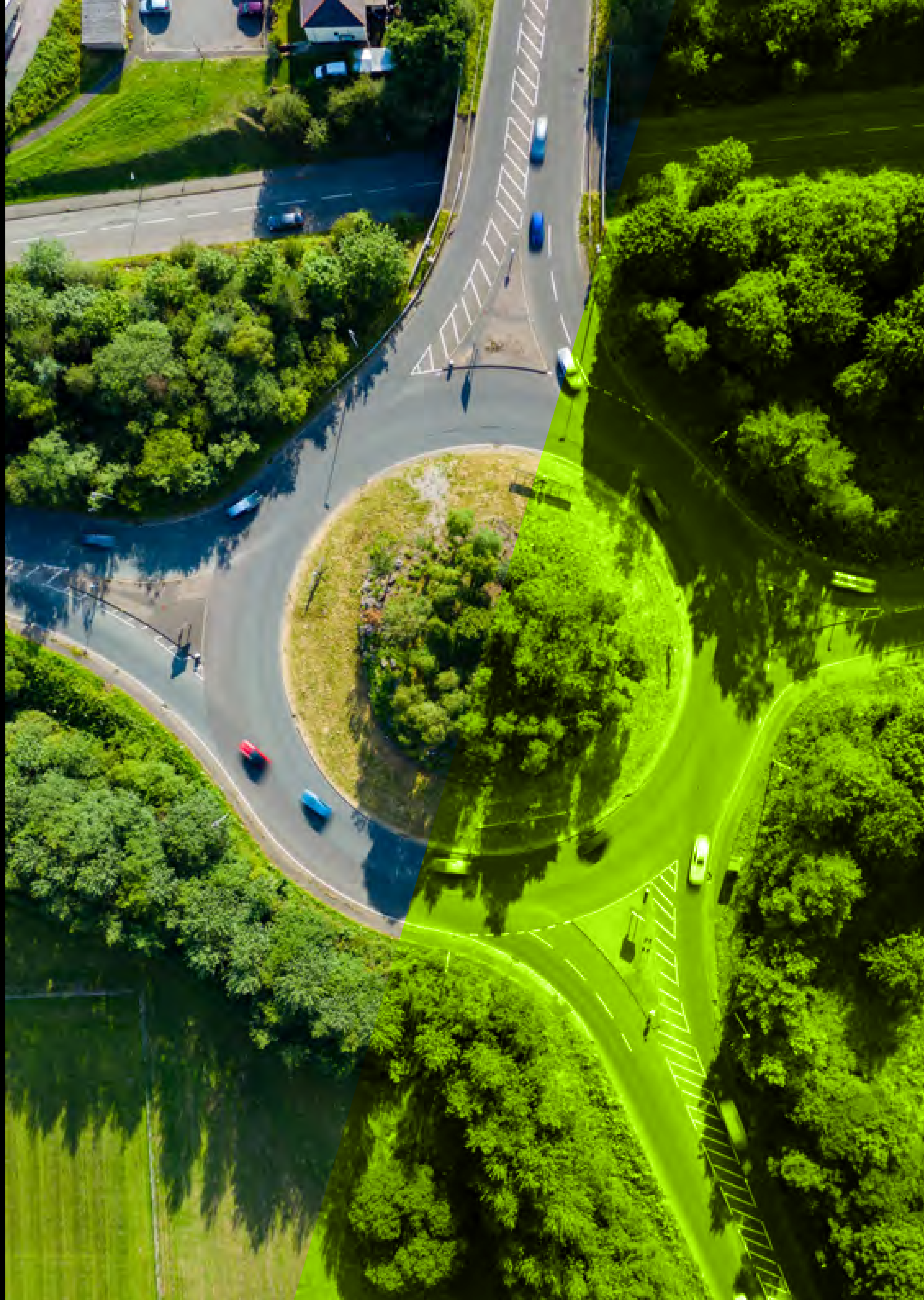


About UpShift

Introduction

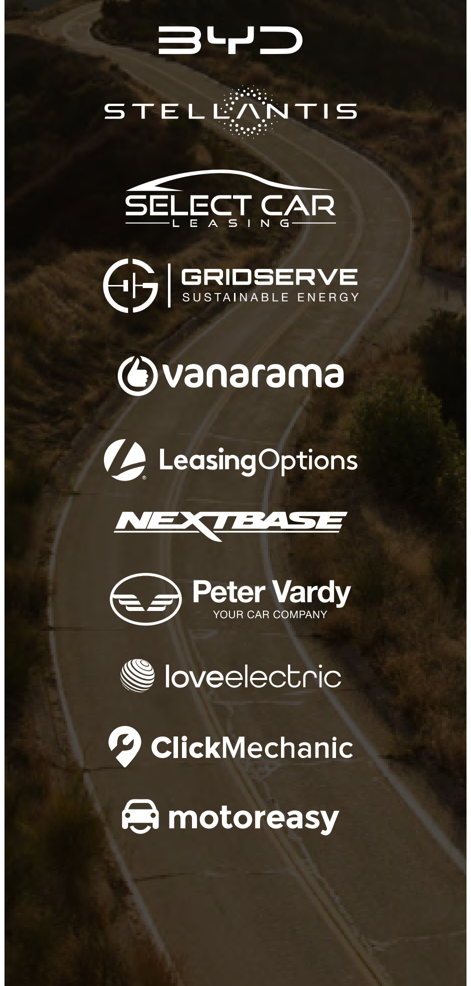
Part of the wider **Evolved group**, **UpShift** is a specialised search agency that focuses on building **long-term partnerships** with businesses in the automotive sector.

With a **proven track record of success**, **UpShift** has helped a variety of companies across many sub-sectors in the automotive industry, and has built long-term partnerships with **specialist and global brands**.

Capabilities

- SEO
- STRATEGY DEVELOPMENT
- PAID SEARCH
- DIGITAL PR & OUTREACH
- CUSTOMER INSIGHTS & CRO
- AI STRATEGY
- BRAND CONSULTANCY

Who we work with



CHALLENGES WE SOLVE	OPPORTUNITIES WE REALISE
Reducing reliance on marketing cost by offsetting pain channels and security commercial sustainability	Developing and executing brand propositions and market positioning that underpin performance
Recovering stagnant and/or eroding performance	Data transformation to understand a true ROI, reduce waste, and maximise investment
Provide expert consultancy, insight, and reporting to assist with board and key investor decisions	Developing, executing, and managing marketing strategies that align with key commercial business objectives
Navigating changing industry / market economics by streamlining marketing strategies	Increasing ecommerce sales or generating new leads through marketing optimisation
Challenging industry competitors	Launching a new brand, product or service online
Website migration management / recovery	Upskilling and training inhouse teams to realise marketing potential

UpShift

Introduction

The UK's transition to electric vehicles has entered a new phase.

Battery electric vehicles (BEVs) accounted for **nearly one in five new car registrations in 2024**, with August 2025 setting a record **26.5% monthly share**.

Policy is tightening through the government's **Zero Emission Vehicle (ZEV) Mandate**, which requires **80%** of new cars sold by 2030 to be zero-emission, while new purchase incentives such as the **£3,750 Electric Car Grant** and ongoing **company-car tax advantages** continue to shape demand.

Charging infrastructure is expanding rapidly, with more than **82,000 public charge points** now installed across the UK, including almost **17,000** rapid chargers. Yet access remains uneven, and consumers without driveways still face a **20%** VAT penalty on public charging compared with **5%** at home. Meanwhile, the used EV market has surged, **188,000 transactions in 2024**, **up 57% year-on-year**, but concerns about battery life, depreciation, and residual values remain front of mind.

None of these friction points will surprise industry insiders. The challenges of charging, cost, and consumer confidence are discussed daily by manufacturers, leasing platforms, and policymakers.

The value of a search-led perspective lies elsewhere: in quantifying how big these anxieties are, how quickly they are shifting, and how they intersect with excitement for new models.

Introduction cont.

Across the UK, there are now over 2.4 million **monthly EV-related searches**, spanning shorthand terms like "EV" (1.3 million searches), mainstream language like "electric car" (1 million), and more formal usage of "electric vehicle" (162,000).

THESE AREN'T JUST STATISTICS, THEY ARE A LIVE REFLECTION OF THE NATIONAL CONVERSATION.

Search captures the pulse of demand in a way that sales data alone cannot: highlighting not only which models and categories are winning attention, but also where barriers still slow conversion.

This whitepaper builds on that foundation. In the chapters ahead, we'll:

- Map the **most searched EV models and categories** in the UK, and how demand is shifting between SUVs, hatchbacks, saloons, and city cars.
- Analyse the **balance between brand-led and generic discovery**, showing which OEMs are winning the search battle and where marketplaces are gaining ground.
- Compare **EV vs ICE search behaviour**, to understand where electrification is eroding interest in petrol and diesel alternatives and where ICE resilience remains.
- Unpack the **barriers to conversion revealed in search queries**, from charging anxiety to cost of ownership and battery life.
- Look ahead to **2026 and beyond**, where early signals suggest a surge in used EV demand, model-specific affordability battles, and policy-driven spikes in consumer intent.

By combining market context with search intelligence, we aim to give OEMs, leasing platforms, and marketplaces a **clearer lens on digital demand**: where to focus, where to reassure, and where to act fast to capture growth.

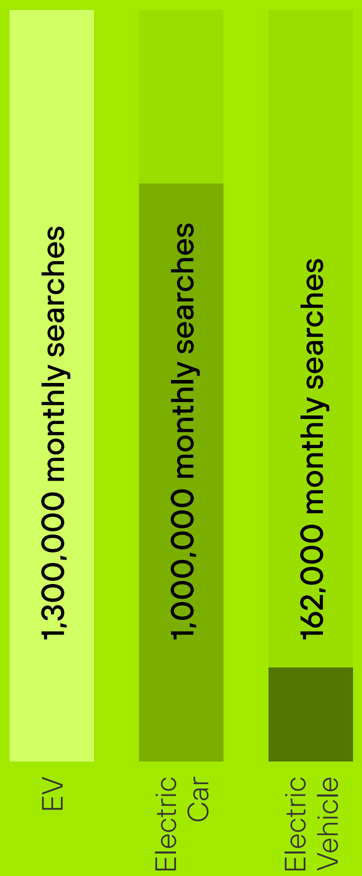
Search Appetite at Scale

The language consumers use when searching matters.

While the automotive industry often defaults to "**EV**," search behaviour reveals a broader linguistic landscape and that landscape carries meaning.

How someone searches, whether they use "**EV**," "**electric** car," or "**electric vehicle**", gives us important clues about how they think, what stage of the journey they're in, and what's driving their curiosity or concern.

Search Appetite at Scale



Broad Search Trends

Across the UK, there are now over **2.4 million generic EV-related searches** every month, spanning three main linguistic variations:

"EV" leads with **1.3 million** monthly searches

This shows how far the term has moved from niche technical shorthand into everyday conversation.

"**Electric car**" commands around **1 million** searches

Used more commonly by everyday consumers.

"**Electric vehicle**" accounts for **162,000** monthly searches

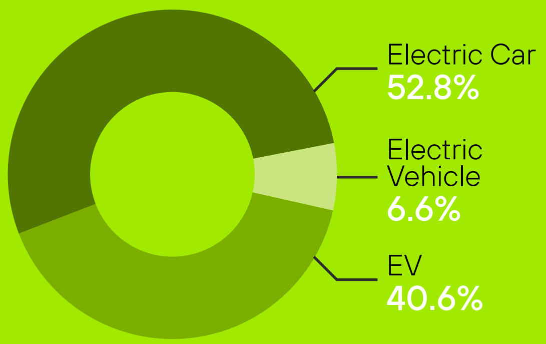
A smaller share, but one that spikes in response to news or policy changes.

Search Appetite at Scale

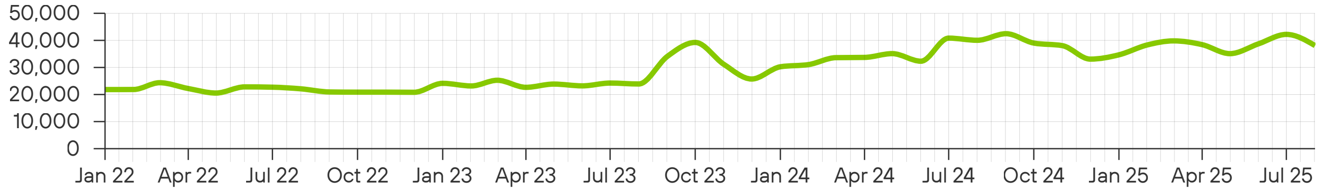
All three terms peaked in **2024**, driven by announcements, incentives, and model launches before softening slightly into **2025**.

Search demand for "**EV**" in particular has more than doubled since **2022**, showing its rise as the dominant term in the consumer vocabulary, but the trend isn't linear, it's volatile, reactive, and often triggered by external forces.

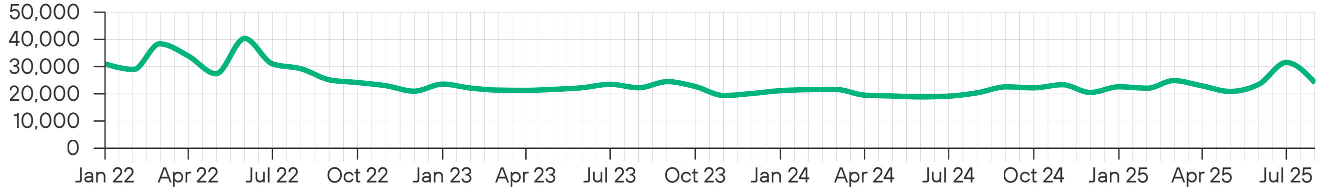
Monthly share of searches



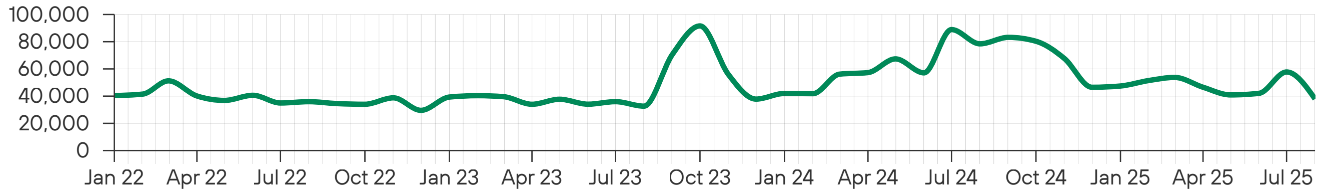
2022–2025 search volume: **"EV"**



2022–2025 search volume: **"Electric Car"**



2022–2025 search volume: **"Electric Vehicle"**



Analysing Search Clusters to Reveal Underlying Intent

While overall search volume shows the scale of interest, it doesn't tell us what people are actually trying to understand or solve.

To build that layer of insight, we analysed UK search data across thousands of related keywords, not just the headline terms, but all their meaningful variations.

Rather than looking at these in isolation, we grouped them into clusters, families of queries that share a common underlying intent. This method helps surface broad behavioural themes and clarify what users are really looking for at different stages of the journey.

Why This Matters

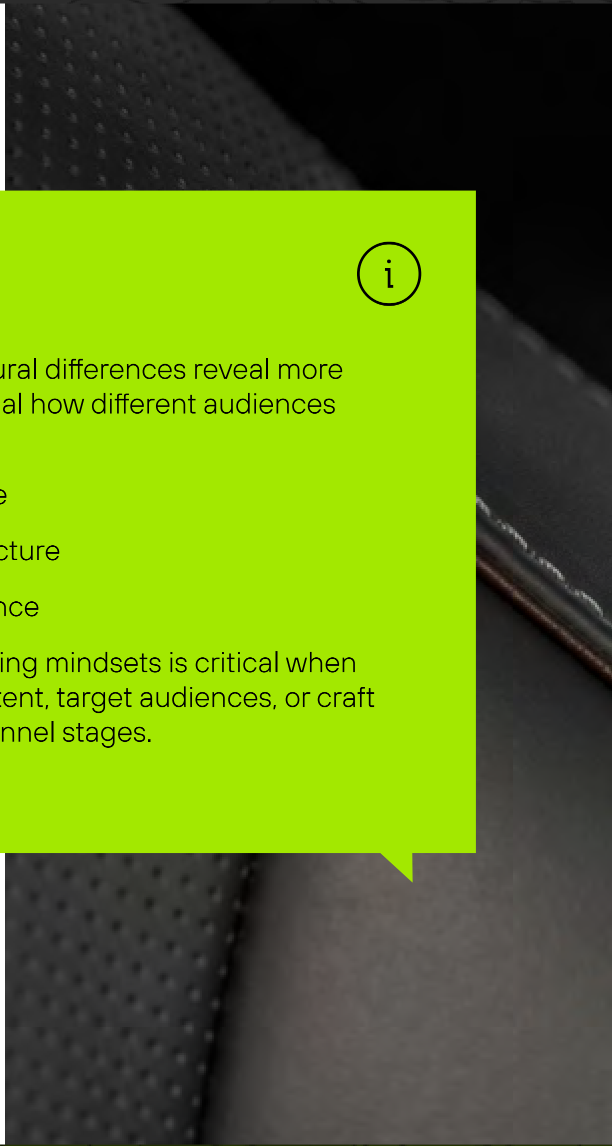
These linguistic and behavioural differences reveal more than just semantics, they signal how different audiences approach electrification:

Car = affordability and lifestyle

EV = ownership and infrastructure

Vehicle = policy and compliance

Understanding these underlying mindsets is critical when deciding how to position content, target audiences, or craft messaging across different funnel stages.

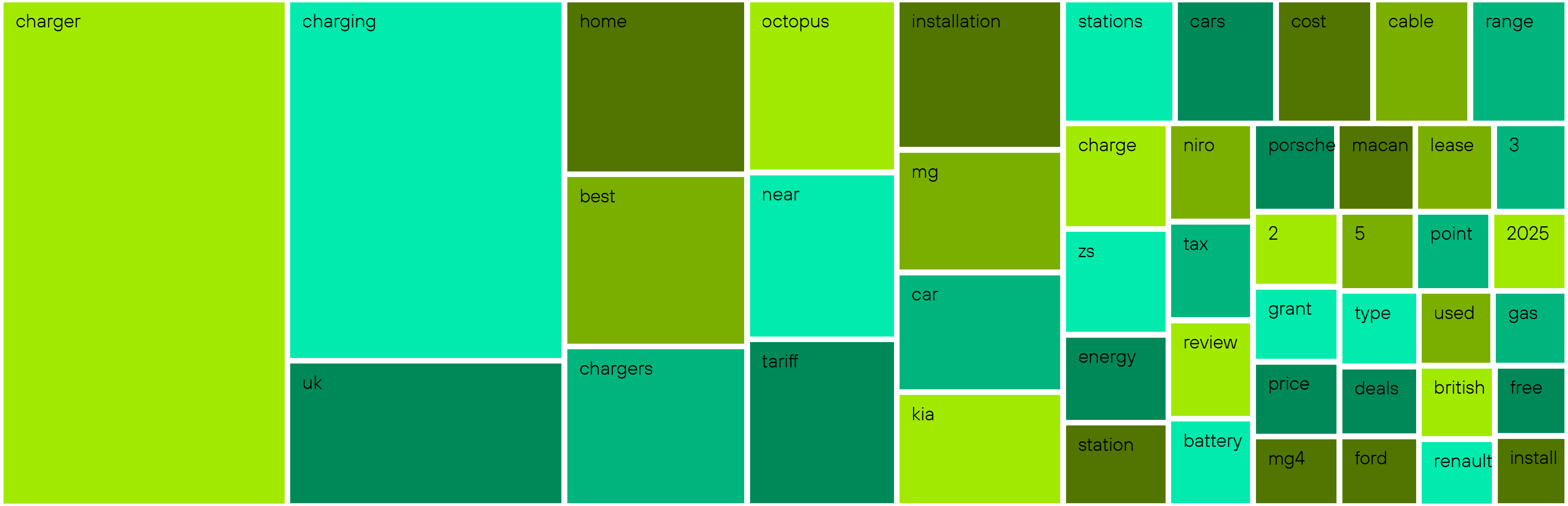


Analysing Search Clusters to Reveal Underlying Intent

"EV"

The largest clusters relate to charging and running costs, e.g. EV charger near me, EV charging cost, EV tariff.

This suggests that while the shorthand has entered mainstream vocabulary, it's most often used when people are exploring the **practicalities of ownership** or **feeling infrastructure-related anxiety.**



Analysing Search Clusters to Reveal Underlying Intent

"Electric Car"

Clusters focus heavily on **affordability and lifestyle fit,** e.g. cheapest electric car, electric car deals, best small electric car, best electric car for families.

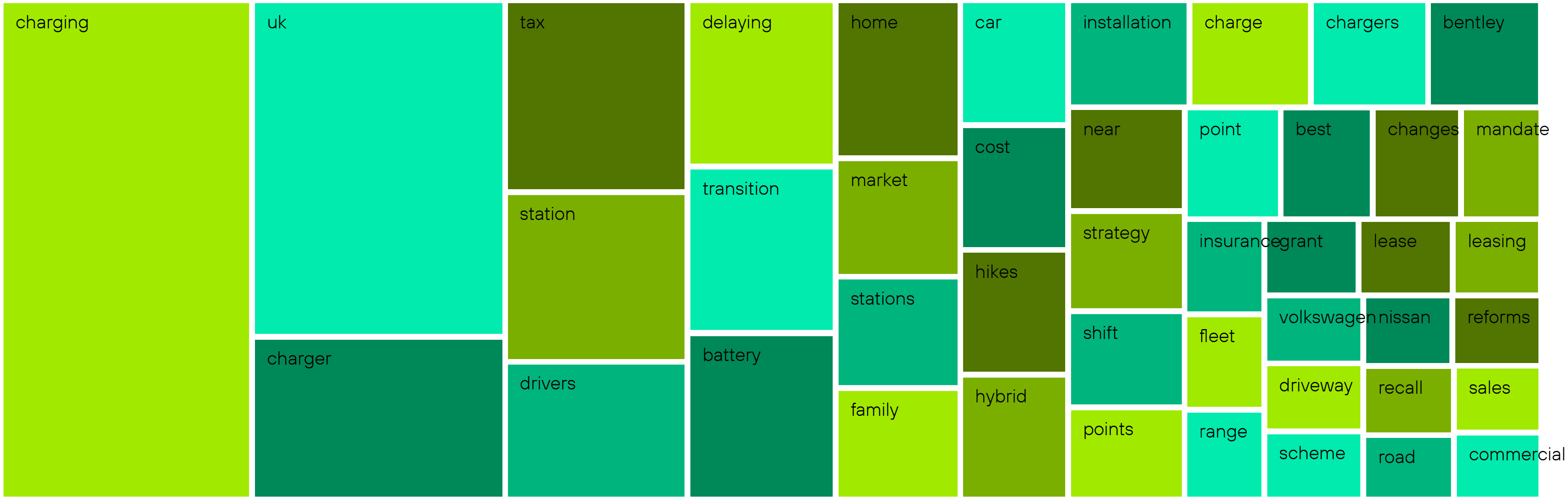
This reflects a **consumer-facing, purchase-led mindset,** where people are actively comparing options and narrowing choices.

Analysing Search Clusters to Reveal Underlying Intent

"Electric Vehicle"

Though lower in volume, these searches are weighted toward **policy, tax, and regulation**, e.g. electric vehicle tax 2025, electric vehicle mandate, electric vehicle grant.

These queries often **spike in response to government announcements**, suggesting the term is more common in **fleet, compliance, or policy-aware contexts.**

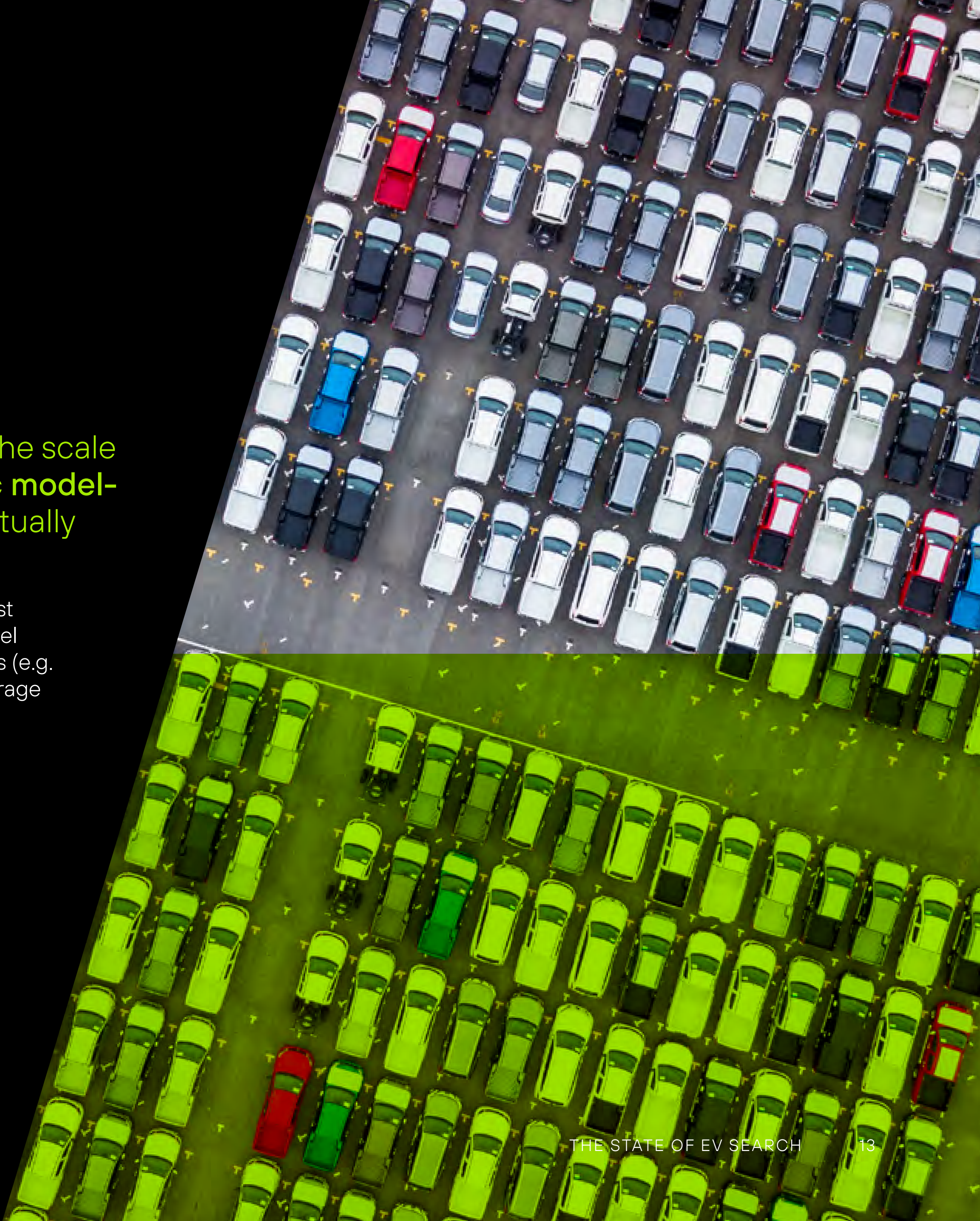


Most Searched EV Models

While generic search interest for EVs shows the scale of consumer engagement, looking at **specific model-level demand** helps us understand what's actually driving consideration.

To uncover this, we analysed search volume for over **50** of the most prominent electric cars on sale in the UK, tracking both exact model keywords (e.g. "Tesla Model 3") and their broader keyword variants (e.g. "Tesla Model 3 price", "Model 3 range", etc.). The data reflects average monthly UK search volumes across **2025**, as well as year-on-year change compared to **2024**.

Together, these numbers offer a snapshot of **where the energy in the market really is**, which brands are gaining traction, which models are fading, and how consumer attention is shifting as the EV landscape matures.



Model-Level Demand is Concentrated, But Shifting Fast

While consumer search interest spans dozens of EV models, demand is highly concentrated in a handful of clear frontrunners.

Even among these, the leaderboard is changing rapidly. The **Tesla Model 3** still commands the highest total search volume at **250,000 monthly queries,** but it now faces stiff competition from fast-rising challengers like the **BYD Seal** and **Volvo EX30**, both of which have posted **YoY search growth over 30%**.

SUVs continue to dominate the landscape, with models like the **Tesla Model Y, Skoda Enyaq,** and **Hyundai Ioniq 5** all generating six-figure search volumes, reflecting the segment's strong alignment with UK consumer preferences. However, some previously hyped models are seeing interest plateau or decline, **Kia EV6** searches have dropped **15% YoY**, while the **Tesla Model X** is down **6%**.

This divergence in search performance reveals a market where brand momentum can shift quickly, often driven by pricing changes, new launches, or earned media buzz. The battleground is no longer just about range or badge; **search data shows the winners are those matching consumer priorities on value, format, and visibility.**

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"TESLA MODEL 3"

250,000

MONTHLY QUERIES

"BYD SEAL" & "VOLVO EX30"

+30%

YOY SEARCH GROWTH

The Top 20 Most Searched EV Models in the UK

This table ranks the top 20 EV models by total monthly search volume.

Combining exact keyword queries (e.g. "Tesla Model Y") with long-tail variations such as "Tesla Model Y price", "Model Y range", or "Tesla Model Y lease deals."

This gives us a clearer view of real-world interest not just brand awareness, but active consumer curiosity, often tied to decision-making moments.

RANK	MODEL	EXACT KEYWORD VOL.	TOTAL SEARCH VOL. (INCL. VARIATIONS)	YOY CHANGE
1	**TESLA MODEL 3**	**114,000**	**250,000**	**+5%**
2	TESLA MODEL Y	100,000	213,000	+5%
3	BYD SEAL	71,000	167,000	+45%
4	POLESTAR 2	62,000	133,000	+4%
5	KIA EV9	51,000	110,000	+34%
6	BMW I4	48,000	132,000	+15%
7	SKODA ENYAQ	47,000	126,000	+14%
8	KIA EV6	45,000	103,000	-15%
9	VOLVO EX30	41,000	94,000	+34%
10	HYUNDAI IONIQ 5	38,000	118,000	-2%
11	NISSAN LEAF	36,000	130,000	-3%
12	MG 4	30,000	87,000	+16%
13	TESLA MODEL S	22,000	53,000	0%
14	MERCEDES EQA	21,000	72,000	+17%
15	BMW IX3	20,000	47,000	-5%
16	AUDI Q4 E-TRON	15,000	54,000	+15%
17	MERCEDES EQE	12,000	54,000	+22%
18	HYUNDAI KONA EV	7,000	20,000	-5%
19	LUCID AIR	3,500	9,000	0%
20	PEUGEOT E-2008	1,400	10,000	-10%

Segment Breakdown:

What Body Type Trends Reveal

To understand what's driving EV search demand at a deeper level, we broke the data down by vehicle segment, grouping each model into logical consumer-facing categories like SUV, hatchback, saloon, or luxury flagship.

This allows us to go beyond the headline leaderboard and assess where demand is strongest, which types of models are gaining traction, and how consumer intent varies between form factors.

- **City Cars / Superminis** (A & B Segment)
- **Family Hatchbacks** (C-Segment)
- **Compact SUVs** / Crossovers (B & C-SUVs)
- **Mid-size / Large SUVs** (D & E-SUVs)
- **Saloons / Coupes** (D-Segment & Premium)
- **Premium / Luxury Flagships**

City Cars / Superminis

(A & B Segment)

RANK	MODEL	EXACT KEYWORD SEARCH VOLUME (AVG MONTHLY)	TOTAL SEARCH VOL. (INCL. VARIATIONS)	YOY CHANGE
1	BYD DOLPHIN	**27,000**	**62,000**	**37%**
2	RENAULT ZOE	14,000	46,000	-3%
3	HONDA E	17,000	34,000	8%
4	FIAT 500E	7,800	19,000	15%
5	MINI ELECTRIC (MINI COOPER SE)	2,800	14,000	9%
6	PEUGEOT E-208	2,700	10,000	10%
7	RENAULT 5 E-TECH	2,600	6,600	53%

Small, affordable, and built for the urban commuter, this category remains relevant, though total search volumes are lower than larger formats.

- The **BYD Dolphin** stands out with **62,000 total searches** and **+37% YoY growth**, suggesting Chinese brands are gaining visibility.
- Models like the **Renault Zoe**, **Fiat 500e**, and **Mini Electric** still register demand, though not all are seeing growth.
- The **Renault 5 E-Tech**, despite not yet launching, is already driving significant interest, up **+53% YoY**, thanks to nostalgic design and aggressive pre-launch comms.

This is the affordability battleground. Search intent here is practical and price-led, a mix of first-car buyers, city dwellers, and value hunters.

Family Hatchbacks

(C-Segment)

RANK	MODEL	EXACT KEYWORD SEARCH VOLUME (AVG MONTHLY)	TOTAL SEARCH VOL. (INCL. VARIATIONS)	YOY CHANGE
1	NISSAN LEAF	**36,000**	**130,000**	**-3%**
2	MG 4	20,000	87,000	16%
3	VW ID.3	23,000	78,000	2%
4	CUPRA BORN	71,000	33,000	21%
5	VAUXHALL CORSA-E	3,900	18,000	4%
6	KIA SOUL EV	2,000	5,500	-2%
7	VAUXHALL ASTRA ELECTRIC	800	2,800	16%

Once the dominant car shape in the UK, hatchbacks now face pressure from SUVs and crossovers.

- The **Nissan Leaf**, an early leader, is showing signs of decline (**–3% YoY**) as newer rivals emerge.
- The **Cupra Born** and **VW ID.3** perform well, but neither has broken into mass-market levels of interest.

> This segment is functional but no longer aspirational. Searchers here are often comparing options or looking for the cheapest route into EV ownership, but they may be easily pulled toward compact SUVs.

Compact SUVs / Crossovers

(B & C-SUVs)

RANK	MODEL	EXACT KEYWORD SEARCH VOLUME (AVG MONTHLY)	TOTAL SEARCH VOL. (INCL. VARIATIONS)	YOY CHANGE
1	VOLVO EX30	**41,000**	**94,000**	**34%**
2	MERCEDES EQA	21,000	72,000	17%
3	MG ZS EV	11,000	26,000	6%
4	KIA NIRO EV	11,000	22,000	14%
5	PEUGEOT E-2008	1,400	10,000	10%
6	HYUNDAI KONA EV	900	3,700	-14%
7	JEEP AVENGER EV	600	880	40%

Sitting between hatchbacks and larger SUVs, this segment is quietly gaining momentum.

- The **Volvo EX30** is the breakout model here, **+34% YoY** and over **90,000 total searches**, showing that smart design and price positioning can win big.
- **Mercedes EQA**, **Kia Niro EV**, and **MG ZS EV** all perform steadily, reflecting a growing appeal across different price points.
- Several of these models are bridging company car and family use, a sweet spot for mass adoption.

> This segment is versatile, with models balancing size, price, and badge appeal. It could be the next sweet spot for EV volume.

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Mid-size / Large SUVs

(D & E-SUVs)

RANK	MODEL	EXACT KEYWORD SEARCH VOLUME (AVG MONTHLY)	TOTAL SEARCH VOL. (INCL. VARIATIONS)	YOY CHANGE
1	TESLA MODEL Y	**100,000**	**213,000**	**2%**
2	SKODA ENYAQ	47,000	126,000	14%
3	HYUNDAI IONIQ 5	38,000	118,000	-2%
4	KIA EV9	51,000	110,000	34%
5	KIA EV6	45,000	103,000	-15%
6	FORD MUSTANG MACH-E	13,000	60,000	-4%
7	VW ID.4	15,000	55,000	14%
8	AUDI Q4 E-TRON	15,000	54,000	15%
9	BMW IX3	18,000	47,000	15%

This is the category with the highest total search volume by far.

- The **Tesla Model Y** is the undisputed king, **213,000 monthly searches**, backed by brand familiarity and global visibility.
- **Kia EV9**, **Skoda Enyaq**, and **Hyundai Ioniq 5** also show strength, with high combined volumes and strong YoY growth.
- Even more established models like the **VW ID.4** and **Audi Q4 e-tron** post respectable numbers, suggesting this isn't just hype, it's long-term category strength.

For many buyers, the EV of the future looks like an SUV. This segment combines lifestyle appeal, family practicality, and perceived value for money.

Saloons / Coupes

(D-Segment & Premium)

RANK	MODEL	EXACT KEYWORD SEARCH VOLUME (AVG MONTHLY)	TOTAL SEARCH VOL. (INCL. VARIATIONS)	YOY CHANGE
1	TESLA MODEL 3	**114,000**	**250,000**	**5%**
2	BYD SEAL	71,000	167,000	45%
3	POLESTAR 2	62,000	133,000	14%
4	BMW I4	48,000	132,000	15%
5	MERCEDES EQE	12,000	54,000	22%
6	HYUNDAI IONIQ 6	13,000	34,000	20%
7	AUDI A6 E-TRON	5,000	13,000	19%

Though narrower in variety, this category performs surprisingly well in search, driven by both innovation and executive appeal.

- **Tesla Model 3** and **BYD Seal** both lead here, the latter showing massive momentum at **+45% YoY**.
- Strong volume across **BMW i4**, **Polestar 2**, and **Hyundai Ioniq 6** shows this isn't just a Tesla game anymore.
- These models often feature in search queries around fleet benefits, tax advantages, and high-end tech.

> This is where rational meets emotional. Sleek design, strong ranges, and tax-efficient leasing make this a powerful segment for business and premium private buyers.

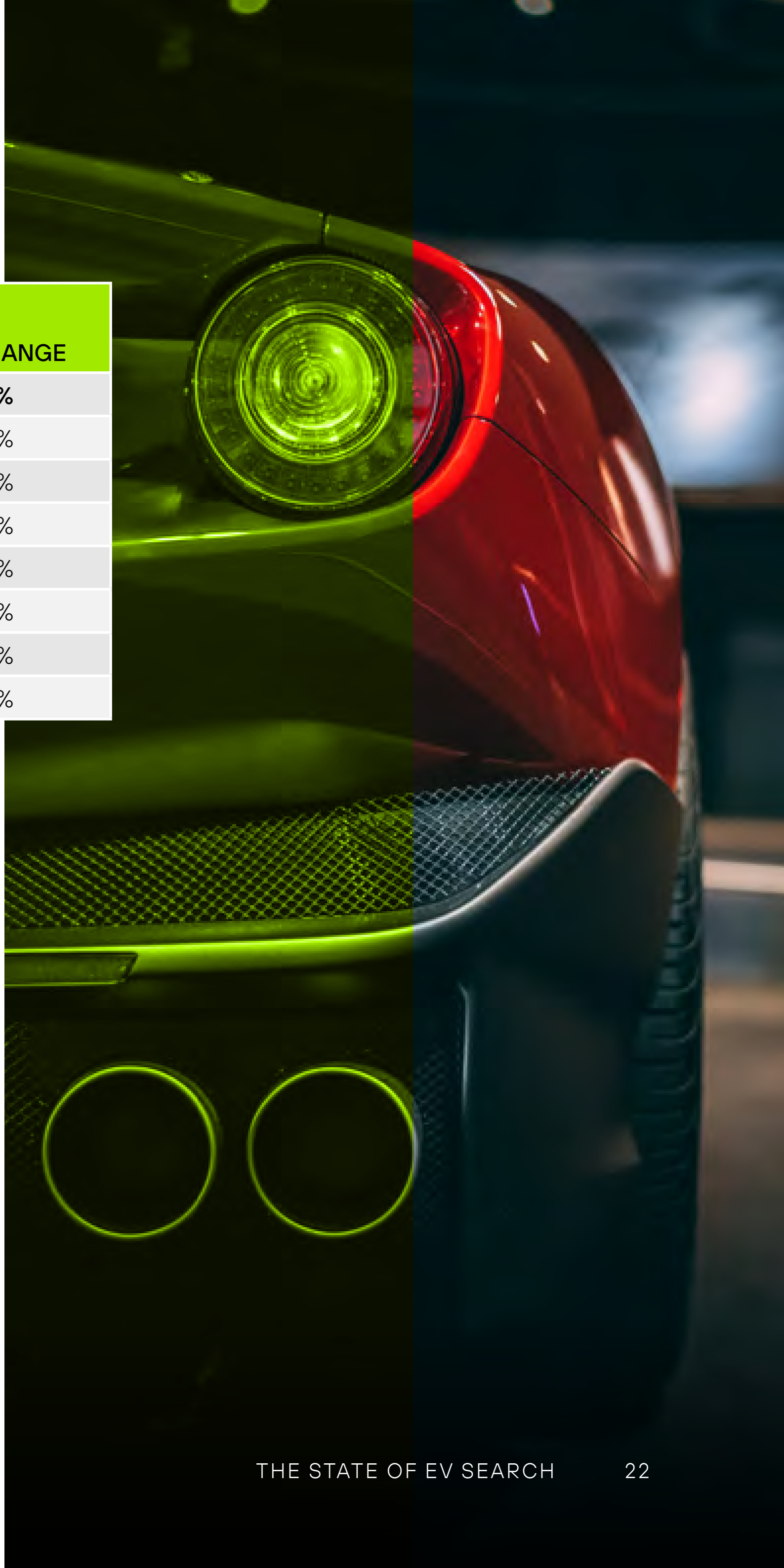
Premium / Luxury Flagships

RANK	MODEL	EXACT KEYWORD SEARCH VOLUME (AVG MONTHLY)	TOTAL SEARCH VOL. (INCL. VARIATIONS)	YOY CHANGE
1	**PORSCHE TAYCAN**	**24,000**	**151,000**	**8%**
2	JAGUAR I-PACE	24,000	88,000	4%
3	TESLA MODEL X	25,000	54,000	-6%
4	TESLA MODEL S	22,000	53,000	-10%
5	MERCEDES EQS	8,200	42,000	3%
6	BMW I7	23,000	40,000	16%
7	LUCID AIR	5,000	9,900	10%
8	AUDI E-TRON GT	3,300	5,000	4%

Though lower in overall search volume, these models matter, especially for influencing brand perception and showcasing innovation.

- **Porsche Taycan** leads the charge with **151,000 total searches**, followed by the **Jaguar I-Pace**, **BMW i7**, and **Tesla Model S**.
- While YoY growth is more modest, search interest in newer nameplates like **Lucid Air** suggests there's room for innovation to cut through, if the price and press are right.
- These models may not convert as easily, but they often shape how the public (and press) perceive the pace of EV progress.

> This segment isn't about volume, it's about brand halo. If you want to win hearts, not just wallets, this is where the drama lives.



Key Takeaways: What Search Volumes Really Tell Us

SUVs dominate

Bigger formats account for the lion's share of EV search volume. They align with consumer priorities around range, safety, and confidence, making them the perceived "safe bet" while charging and battery-life anxieties remain.

Saloons are surging

Models like the BYD Seal and Polestar 2 show saloons and coupes are no longer niche. Strong media coverage and striking design are helping them outpace traditional hatchbacks, even at similar price points.

City cars and hatchbacks are steady, not growing

Practical options like the Nissan Leaf and MG4 continue to draw healthy search volumes, but growth is flat. Without innovation or fresh press, they feel dependable but less exciting.

New entrants draw curiosity

BYD, Lucid and other challengers are making visible dents in search demand. Even if sales remain small, search activity shows consumers are open to exploring unfamiliar brands when they bring something different to the table.

Legacy leaders lose momentum

Early pioneers such as the Nissan Leaf and Ford Mustang Mach-E are sliding down the search rankings. Familiarity is no longer enough to hold attention in a market that prizes novelty and perceived value.

Premium drives aspiration

Flagships like the Porsche Taycan, BMW i7, and Lucid Air don't dominate registrations, but they dominate attention. These "halo" models shape perceptions of EV innovation, even if uptake is limited.

Overall: What This Tells Us About the EV Market

Search data offers a window into **momentum, perception, and shifting priorities**.

The models generating the most interest are not always the ones topping sales charts, but they reveal the ideas and aspirations shaping the EV narrative, status, savings, curiosity, convenience, and a dose of uncertainty.

The direction of travel is clear: **momentum is tilting toward newer entrants and bolder formats**. Traditional players like Nissan, Vauxhall, and Ford remain part of the conversation, but they are losing ground in search to challenger brands that push harder on design, performance, or affordability. Consumers are no longer simply searching for "an EV", they are searching for a better EV.

We also see how **perception and reality diverge**. City cars are affordable and available, yet generate little buzz. Premium flagships command headlines without commanding roads. SUVs sit between the two, converting both visibility and adoption. This divergence underscores the gap between mindshare and market share, a critical factor for brands planning their next moves.

Most importantly, the data highlights the rise of the **EV-native brand**. Tesla, Polestar, and BYD are not just competing in the marketplace, they are redefining what "electric car" means to UK consumers. Tesla sets the cultural benchmark, Polestar frames EVs as a design-led lifestyle choice, and BYD challenges the market with aggressive pricing. These brands are shaping the conversation far beyond their registration numbers.

BRAND	SEARCH VISIBILITY (UK)	SALES VOLUME (UK)	VISIBILITY > SALES?
TESLA	**Very High**	**Very High**	**No (Aligned)**
BYD	High and Rising	Low	Yes
POLESTAR	High	Low to Moderate	Yes

So in the next section, we'll zoom in on these **EV-first brands** to explore how they're outperforming legacy players in the digital battleground and what others can learn from the way they've engineered relevance.

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Brand Spotlights: Who's Really Leading the EV Conversation?

In the UK EV market, visibility and influence don't always match sales volumes. Some brands dominate registrations, but not attention.

Others, particularly EV-first players, are winning the conversation online, commanding outsized search interest compared to their actual market footprint.

This section explores three brands at the heart of that story: **Tesla**, **BYD**, and **Polestar**. Each represents a different angle on the EV transition, from Tesla's cultural and sales dominance, to BYD's affordability-driven surge, to Polestar's design-led premium niche.

To set the scene, we compared them across **key dimensions of performance and perception**, from search visibility and sales volumes to consumer positioning and growth momentum.

Brand Positioning Matrix

This comparison makes it clear: Tesla remains the benchmark, but its dominance is being tested.

BYD is converting global momentum into rapid UK growth, and Polestar has carved out a distinct brand identity that far outweighs its registration numbers. Together, these brands highlight how **attention is fragmenting in the EV space**, and how digital visibility is becoming just as important as showroom performance.

From here, we'll take a closer look at each brand in turn, unpacking what's driving their search interest, how that compares with their UK market presence, and what other OEMs can learn from their positioning.

DIMENSION	TESLA	BYD	Polestar
SEARCH VISIBILITY	Very high, Model Y & Model 3 dominate UK EV search volumes (200k+ monthly each).	Rapidly rising, Seal & Dolphin showing double-digit YoY growth, outpacing sales.	High relative to sales, Polestar 2 consistently strong in searches (133k monthly).
UK SALES VOLUMES	Market leader, Model Y was UK's best-selling EV in 2024; thousands sold monthly.	Small but fast growth, ~20,000 units in 2025 so far (double 2024 full-year).	Niche, well below 10k units annually, but with strong brand recognition.
GROWTH MOMENTUM	Slowing in some months; signs of maturity.	Explosive growth (+100% YoY), still in early adoption phase.	Moderate, tied to premium niche; search growth > sales growth.
BRAND POSITIONING	Tech-led disruptor, mass-market + premium. Strong cultural relevance.	Value-led, diverse line-up (city cars to SUVs). Clear affordability pitch.	Design-led, premium-lite. Modern aesthetic and Scandinavian identity.
CONSUMER PERCEPTION	Default EV brand; aspirational but increasingly "mainstream."	Challenger, curiosity-driven. Affordable & new, curiosity outpaces ownership.	Stylish, aspirational, seen as "cool" alternative to Tesla.
CHALLENGES	Competition from Chinese entrants; softening brand buzz in UK media.	Converting high visibility into sustained sales; building trust and infrastructure.	Limited range and volume; less competitive on price vs mass brands.

Brand Spotlight:

TESLA

Tesla remains in a league of its own when it comes to EV-related search visibility in the UK.

Across all queries containing the term "Tesla", the brand attracts over **3.2 million searches per month**, spanning everything from vehicle models to charging infrastructure, share price, and cultural moments.

This scale isn't just impressive, it's indicative of Tesla's broader status. For many UK consumers, **Tesla is EV**. That default association gives the brand an ongoing advantage in search, particularly in a category where trust, range anxiety, and resale value are still barriers.

Search Performance: Cluster analysis

TESLA

Cluster analysis of **Tesla** search queries shows how that visibility breaks down.

Model-Specific
~1.75m monthly searches

Terms like "Tesla Model 3", "Tesla Model Y", "Tesla Cybertruck."

This is a brand where people know what they want, and they search accordingly.

Price, Leasing & Value
~230k monthly searches

Queries such as "Tesla Model 3 price UK", "Tesla cheapest model", or "Tesla PCP deals" show growing interest in affordability and financing options.

Reviews & Comparisons
~130k monthly searches

Terms like "Tesla Model Y review", "Tesla vs Polestar", or "Is Tesla worth it" reveal ongoing appetite for validation and reassurance.

Technology & Features
~80k monthly searches

Encompasses searches around "Tesla Autopilot", "Tesla charging", "Tesla Powerwall", and other product adjacencies.

Dealers & Availability
~45k monthly searches

Including queries like "Tesla test drive UK", "Tesla dealership near me", or "Tesla delivery times."

Generalised Searches
~970k monthly searches

Includes broad or non-specific terms like "Tesla", "Tesla UK", "Elon Musk Tesla", and others with unclear transactional intent.

TESLA

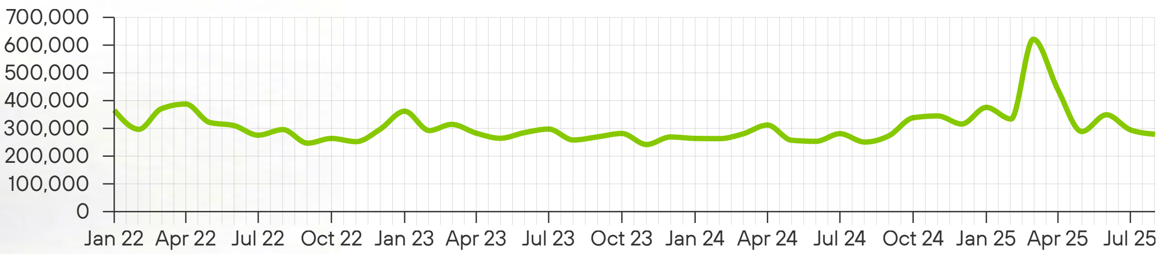
Search Performance

Tesla's search profile is the most mature of any EV brand in the UK.

Nearly **55% of total search volume is model-specific**, showing a high degree of product awareness and consideration-stage behaviour. The remaining volume is split across finance, tech, comparisons, and culture, reflecting a brand that lives well beyond the car lot.

That said, total searches for the keyword "Tesla" have largely **stagnated since 2022**, with only short-lived spikes (notably in **March-April 2025**) rather than sustained growth. This plateau suggests Tesla has hit maturity in the UK search landscape: still dominant, but no longer expanding at the same pace.

'**Tesla**' Search Volume Trend



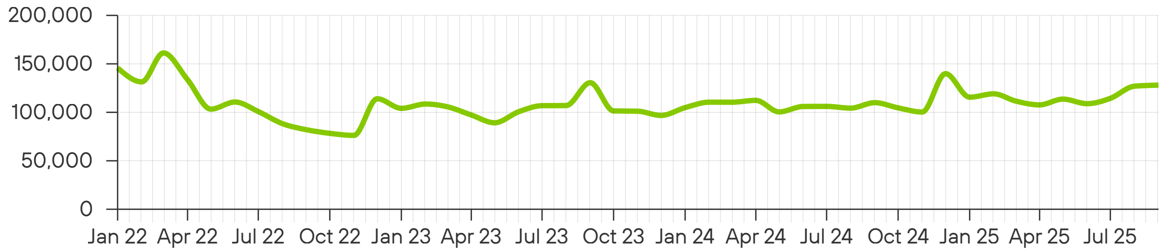
UpShift

Model Trends

Model-level search trends highlight where demand is consolidating.

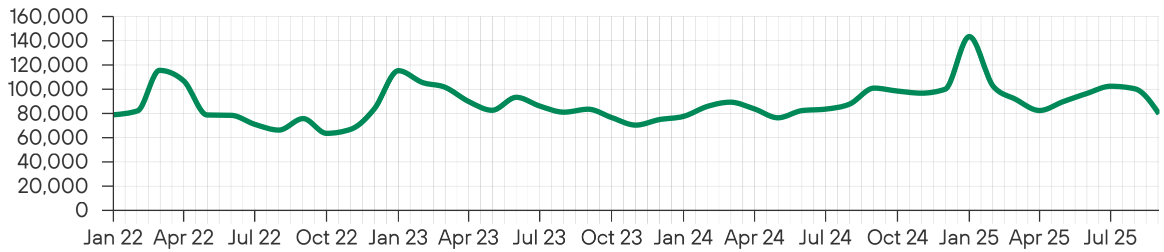
Tesla Model 3: Search volumes remain consistently high (~139k/month in 2025), but growth has plateaued after years of dominance.

‘**Tesla Model 3**’ Search Volume Trend



Tesla Model Y: The breakout star. Searches surged to 143k/month in 2025, matching its position as the UK’s best-selling EV.

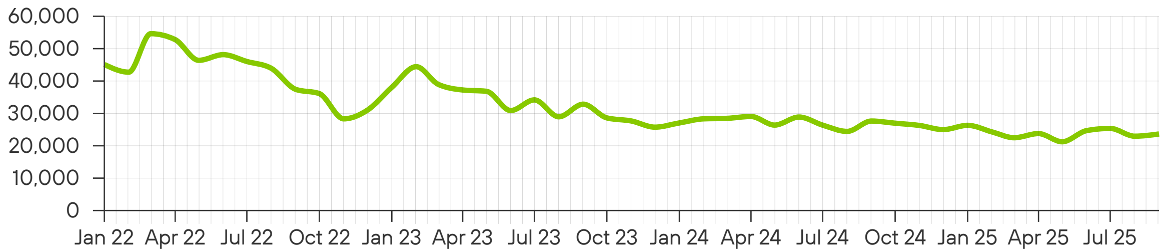
‘**Tesla Model Y**’ Search Volume Trend



Model Trends cont.

Tesla Model X: Searches have fallen sharply (from 45k/month in 2022 to just 26k/month in 2025), showing waning interest in Tesla's higher-end flagship.

'**Tesla Model X**' Search Volume Trend



Market Position

Tesla is one of the few EV brands where **search demand and sales performance overlap**. The Model Y was the UK's best-selling EV in 2024, and **Tesla** consistently appears near the top of new registrations.

That said, momentum is uneven. Registrations surged through 2024 but dipped sharply in mid-2025: **-36% year-on-year in May** and **-60% in July**, before partially recovering in August. Analysts attribute this to a mix of factors, intensifying competition from Chinese brands like BYD, softer economic conditions, and increasing reputational risks tied to Elon Musk. His high-profile controversies, such as the January 2025 salute incident, generated widespread backlash. While it is difficult to prove causality, it's generally accepted that sales declines in the following months coincided with periods of heightened media scrutiny.

Search data also shows these fluctuations aren't just about cars, they reflect **Tesla**'s identity as **a financial and cultural brand**. For example, the sharp spike in Tesla searches earlier in 2025 aligns with the period when its share price plummeted, triggering a surge of financial-market interest. In fact, finance-related queries (e.g. **Tesla** share price, **Tesla** stock) account for over one million UK searches per month (around a third of all **Tesla** related search queries), more than the entire search demand for some established OEMs. This underlines how **Tesla**'s market position is sustained not just by car buyers, but by investors, the press, and public curiosity around Musk himself.

In short, **Tesla**'s market position in the UK remains powerful but volatile. It has succeeded in converting awareness into adoption, but its fortunes are now more tightly bound to cultural and financial narratives than any other automotive brand. This visibility is a double-edged sword: it fuels attention, but it also exposes **Tesla** to sharper swings in perception when sentiment turns.

What’s Driving Search Demand?

Cultural dominance
Tesla is shorthand for “EV” in UK consumer searches.

Ecosystem effect
Superchargers, Powerwall, and Autopilot extend visibility beyond cars.

Media buzz
Elon Musk is both a magnet for attention and a reputational risk.

Simplicity
A streamlined model line-up makes Tesla easy to search and compare.

TESLA

Takeaway

Tesla is the yardstick for EV visibility in the UK, commanding more than 3.2m searches a month across vehicles, finance, infrastructure, and culture.

But the data also shows a brand consolidating around just two models, the Model 3 and Y, while others fade.

Competitors should note two lessons: Tesla’s success lies in clarity and ecosystem reach, but its reliance on cultural buzz makes it vulnerable if newer entrants (like BYD) can pair attention with affordability.

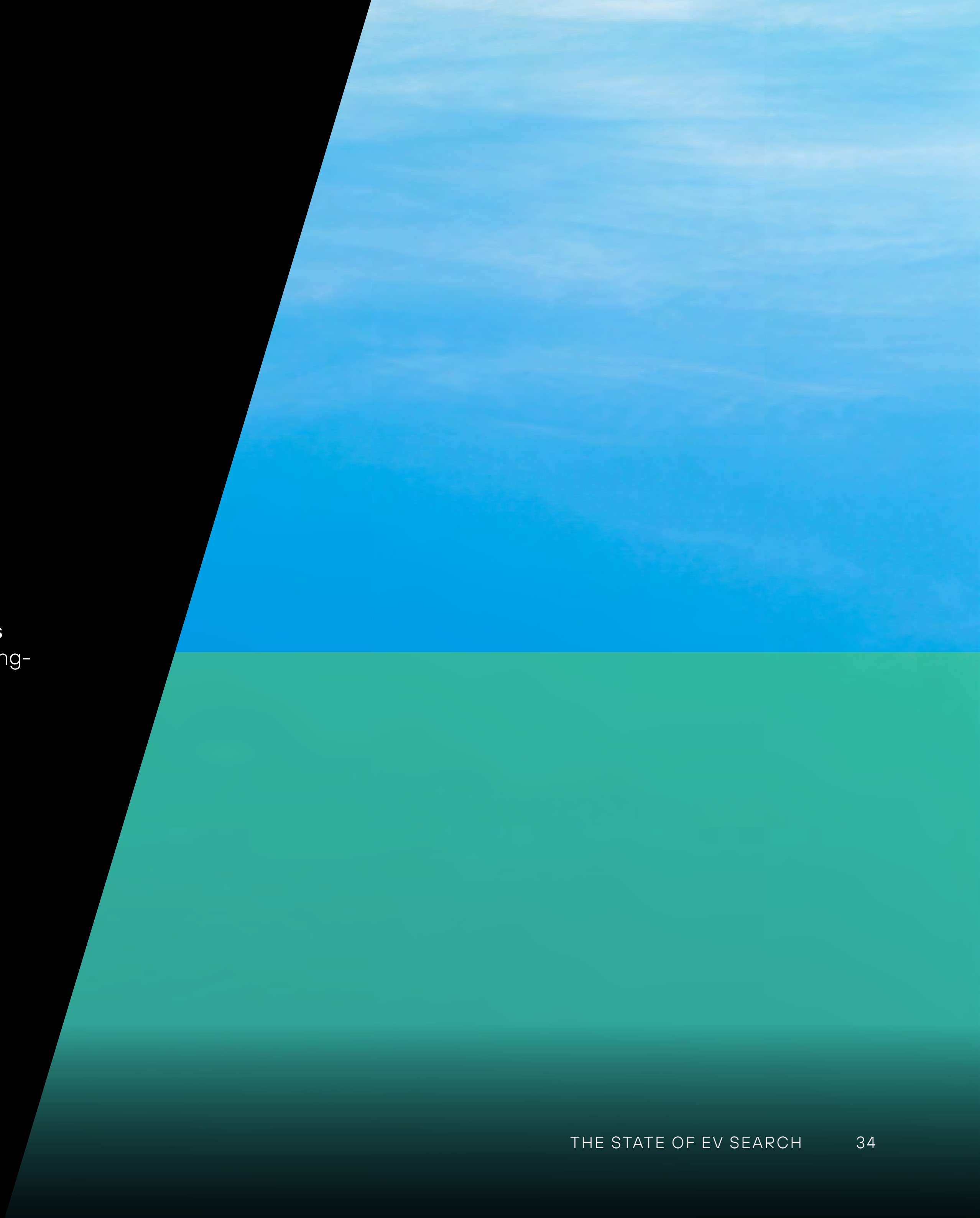
Brand Spotlight:

BYD

BYD's surge in UK search visibility has been nothing short of remarkable.

In 2022, searches for the brand were negligible. By 2025, BYD now attracts **~882,000 searches per month across all keywords containing the brand name.** That puts it in the same league as long-established OEMs, despite only entering the UK market in 2023.

The growth has been highly event-driven, with spikes in 2024–25 linked to **new model launches** (Dolphin, Seal, Sealion 7), **attention-grabbing price announcements** (like the Dolphin Surf at **£18,650**), and **awareness campaigns** such as UEFA EURO 2024 sponsorships and Octopus EV partnerships.



Search Performance: Cluster analysis

Cluster analysis of **BYD** search queries shows where consumer attention is focused.

Model-Specific
~278k monthly searches

Search terms such as 'BYD seal', ' BYD Atto 3' or 'BYD Sealion 7' for example.

Price, Leasing & Value
~130k monthly searches

Queries such as "BYD price UK", "BYD Dolphin cost", "BYD cheapest EV". Affordability is the dominant lens through which BYD is being discovered.

Reviews & Comparisons
~56k monthly searches

Terms like "BYD Seal review", "BYD vs Tesla", "BYD reliability". This reflects a brand still being assessed and benchmarked by a curious, but not yet convinced, audience.

Technology & Features
~20k monthly searches

Smaller but meaningful queries around "BYD battery", "BYD bus", and "BYD energy" underline BYD's wider role as a diversified EV and energy company.

Dealers & Availability
~5k monthly searches

Including "BYD dealers UK" and "BYD cars for sale", these signals show that buyers are actively exploring where to access the cars.

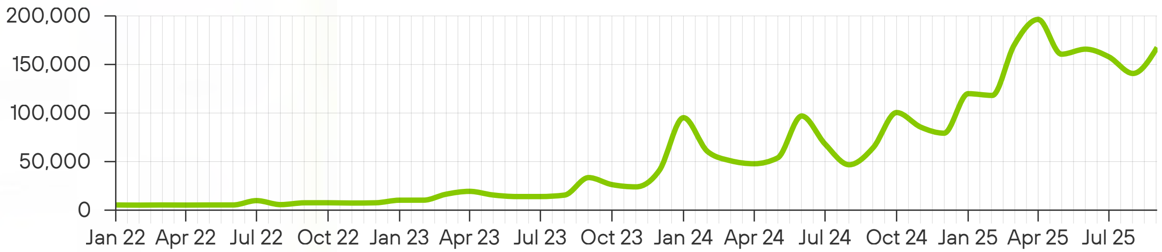
Generalised Searches
~392k monthly searches

The bulk of BYD's volume still sits in broad brand searches without clear transactional intent. This highlights how BYD remains in a **discovery and trust-building stage** in the UK market.

Search Performance

Taken together, the picture is clear: BYD has broken through the obscurity barrier with extraordinary speed, reaching over 880,000 UK searches per month, a level comparable to long-established OEMs, despite only entering the market in 2023. The "BYD" keyword itself illustrates this surge. From under 20k searches/month in 2022–23, volumes jumped to 50k–100k averages through 2024, and now regularly exceed 150k+ per month in 2025. Unlike Tesla, which has plateaued, BYD is still climbing fast, showing how awareness is expanding, not just spiking.

'**BYD**' Search Volume Trend



But while visibility is high, **potential intent remains early-stage**. Around **31% of BYD's total search volume is model-specific** (e.g. Seal, Dolphin, Sealion 7), compared to **55% for Tesla**. That gap signals where each brand sits on the awareness-to-consideration spectrum. Tesla's audience is typically further down the funnel, searching for specific models and specs. BYD's searchers, by contrast, are still getting to know the brand, and deciding whether to trust it.

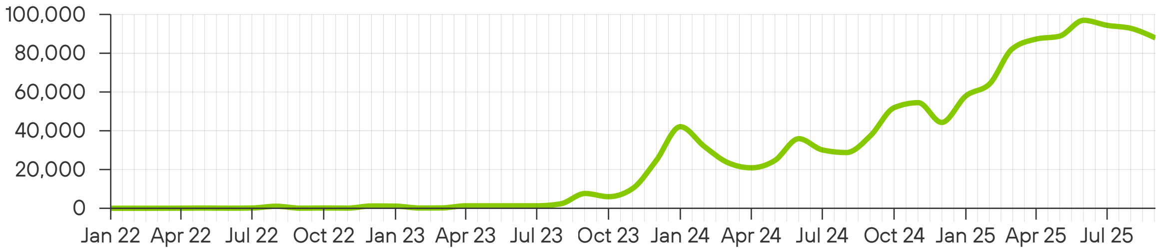
When searches do show intent, they centre on **affordability, value, and credibility checks**, not dealership visits or configuration tools. It's a brand-led search profile, not a product-led one. In short, BYD is attracting significant attention, but still earning its place as a serious contender.

Model Trends

BYD's search momentum isn't just brand-led, its model-level visibility is growing at pace, with each new vehicle entering the UK market sparking fresh interest. From the affordable Dolphin to the sporty Seal, these launches have helped BYD evolve from a curiosity to a serious contender.

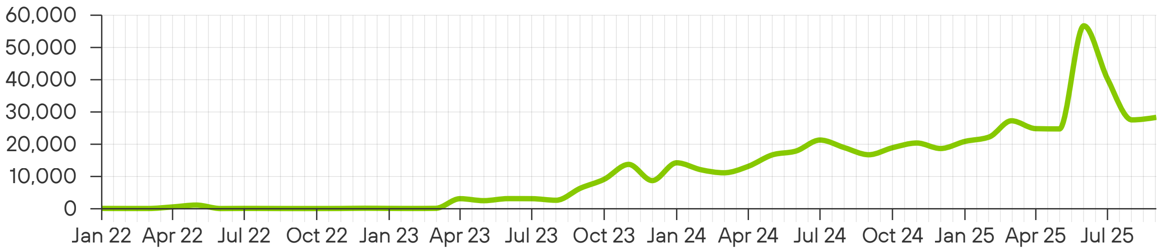
The Seal is BYD's breakout hit in the UK. Monthly search volume has grown more than double since its UK launch, peaking mid-2025. Sleek design, credible range, and comparison-friendly pricing have pushed it into direct competition with premium sedans like the Model 3 and Polestar 2.

'**BYD Seal**' Search Volume Trend



The Dolphin has become BYD's affordability poster child. It saw a huge spike in interest in summer 2025, driven by the launch of the **Surf edition at £18,650**. Search volume has since stabilised, suggesting strong awareness, but now needs continued PR to sustain buzz.

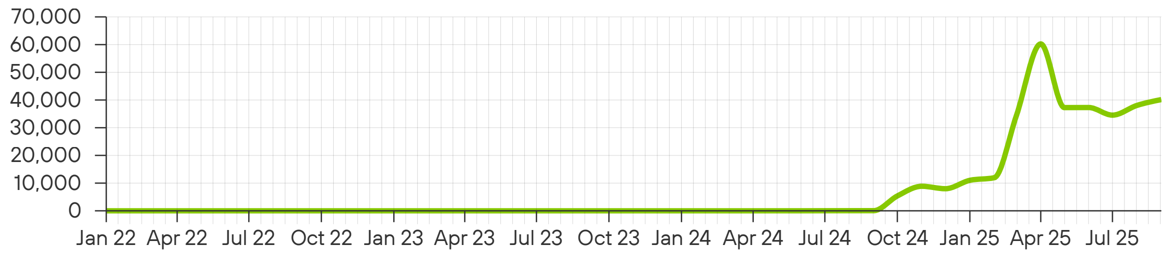
'**BYD Dolphin**' Search Volume Trend



Model Trends

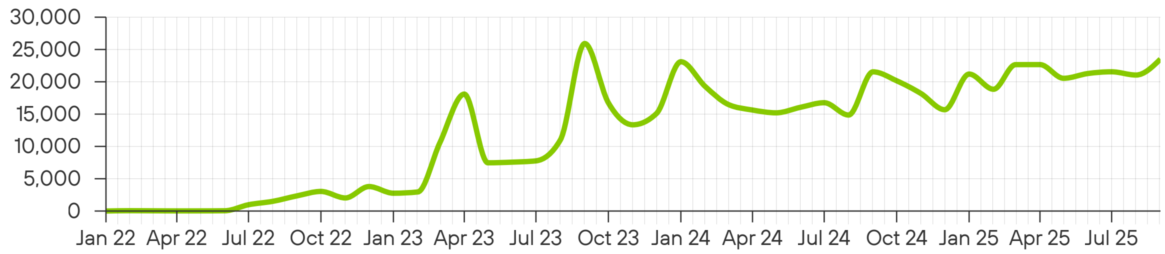
A more recent launch, the Sealion 7 grabbed attention quickly with a sharp spike in April and continued strength into Q3 2025. With interest now outpacing many legacy-brand SUVs, it's clearly landing with the UK audience, despite still being early in its awareness curve.

'**BYD Sealion 7**' Search Volume Trend



The Atto 3 was BYD's launch model in the UK and saw its peak in late 2023. While it's still attracting ~20k searches a month in 2025, newer models are beginning to eclipse it. This suggests Atto 3's role is shifting from hero model to dependable entry-point.

'**BYD Atto 3**' Search Volume Trend



Market Position

BYD may be a new name to many UK consumers, but behind the scenes it's anything but a startup.

Already the world's largest EV manufacturer by volume, its entry into the UK in early 2023 marked the beginning of a calculated push into one of Europe's most competitive markets.

The approach? Aggressive pricing, rapid model rollout, and high-profile brand partnerships. The Atto 3 laid the groundwork, but momentum really took off in 2024 with the arrival of the Dolphin and Seal, and BYD's visibility surged again in 2025 following its **UEFA EURO 2024 sponsorship** and partnerships with **Octopus EV** and others. The result: from obscurity to nearly **900k monthly searches**, putting BYD on par with many legacy OEMs in just two years.

But while interest is surging, sales are still catching up. According to SMMT data, BYD sold just **3,621 vehicles in the UK in the first 8 months of 2025**, compared to over **26,000 Teslas** in the same period.

The Seal is leading BYD's UK charge, but overall uptake remains modest. Some of this is structural, a relatively small dealership network and limited brand familiarity, but some of it reflects ongoing consumer hesitation. **Search data still skews toward curiosity, not conversion.**

Even so, BYD's ascent feels inevitable. It's not trying to play the legacy game, it's outflanking it. With models undercutting rivals by thousands, specifications that often surprise, and a portfolio expanding into every major format (SUV, hatch, saloon), BYD is building something many Chinese challengers are still struggling to achieve: **trust**. And once that clicks, the sales curve may steepen just as fast as the search one did.

What's Driving Search Demand?

Launch momentum
Each new model (Seal, Dolphin, Sealion 7) triggers distinct spikes in search, with Seal alone up 20x YoY.

Affordability buzz
Price-led headlines (e.g. Dolphin Surf at £18,650) drive high-volume, value-focused discovery.

Review curiosity
"BYD vs Tesla" and *"Is BYD any good?"* style queries dominate, showing consumers are intrigued but still benchmarking.

Sponsorship reach
UEFA EURO 2024 partnership gave BYD broad brand exposure beyond the EV niche.

Fleet partnerships
Visibility boosted via salary sacrifice platforms like Octopus EV, especially among business users.

Brand-building stage
Searches are still top-of-funnel, focused on trust and value, not yet on dealers or ownership.

Takeaway

BYD's search profile reveals a brand that's generating disproportionate curiosity, not just because it's new, but because it's disrupting the rules.

Consumers aren't just looking for specs; they're searching for answers. Is it reliable? Is it as good as Tesla? Why is it so cheap?

The brand's breadth of models is working in its favour, inviting exploration across price points and formats.

As awareness continues to grow, the challenge will be converting this volume of curiosity into meaningful preference, and doing it before others catch up on price.

Brand Spotlight:

Polestar

Polestar occupies a unique position in the UK EV search landscape, not yet a household name like Tesla, but clearly more mature and recognised than newer challengers like BYD.

With **547,000 average monthly searches** across all UK terms containing the brand name, Polestar is now firmly within the upper tier of electric-first manufacturers in terms of online visibility.

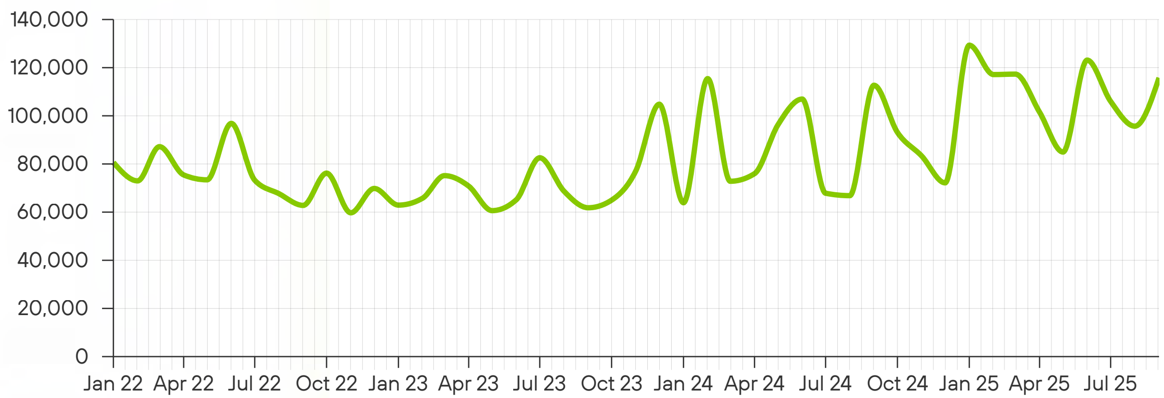
Search interest in "Polestar" itself has also shown renewed strength through **2025**, peaking at over **129,000 monthly searches** in January and maintaining consistently high volumes throughout the year. While this doesn't always translate to direct purchase intent, it reinforces Polestar's brand recognition and ongoing relevance in the EV conversation.

Polestar

Search Performance

Search interest is notably well distributed across both brand and product touchpoints.

'**Polestar**' Search Volume Trend (Total = 547k per month)



Around **31% of all searches are focused on individual models**, particularly the **Polestar 2, 3, and 4**, while the rest spans a mix of brand-level queries, pricing comparisons, feature checks, and reviews. That blend signals a brand sitting in the mid-funnel: visible enough to prompt curiosity, but still earning its way into purchase consideration.

Search Performance: Cluster analysis

Polestar

Cluster analysis of the **Polestar** search landscape reveals a market increasingly familiar with the brand's line-up.

Model-Specific
~171,000 monthly searches

Terms such as "Polestar 2", "Polestar 3", and "Polestar 4". These searches indicate growing recognition of the individual vehicles and interest in what sets them apart.

Price, Leasing & Value
~63,000 monthly searches

This includes terms like "Polestar price UK", "Polestar 2 lease", and "Polestar cost of ownership". The volumes show that Polestar is being discovered as a considered purchase, often compared against more mainstream or affordable EVs.

Reviews & Comparisons
~43,000 monthly searches

Queries such as "Polestar 2 review", "Polestar vs Tesla", or "Polestar reliability" suggest that consumers are still working out whether this Scandinavian-backed brand can deliver on its promise.

Technology & Features
~18,000 monthly searches

Polestar's Android Automotive OS and advanced driver-assistance features are drawing specific attention. Queries like "Polestar app" and "Polestar tech" highlight a tech-forward audience interested in more than just range and price.

Dealers & Availability
~10,000 monthly searches

Searches for "Polestar test drive", "Polestar near me", and "Polestar dealers UK" show early-stage exploration, but volumes remain relatively modest compared to intent-heavy brands like MG or Tesla.

Generalised Searches
~242,000 monthly searches

The largest cluster is still broad brand queries, things like "Polestar car", "what is Polestar", or "Polestar EV". This reflects a brand still in the process of introducing itself to UK audiences, many of whom are encountering it for the first time.

Polestar
Search Performance

Polestar's UK search footprint totals around **547,000 searches per month**, placing it behind Tesla and BYD in overall search volume, but ahead of many traditional OEMs.

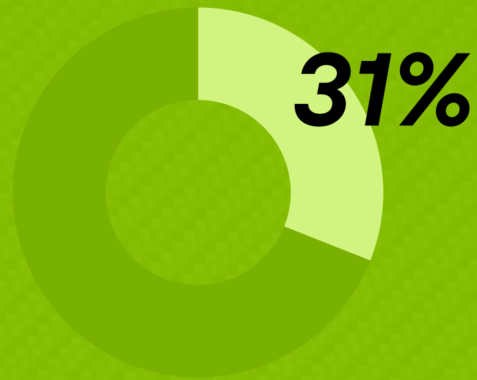
However, **volume alone doesn't tell the full story**. Polestar's search profile reveals a brand with **deeper trust, clearer positioning, and stronger mid-funnel signals** than its newcomer rivals.

Around **31% of Polestar's total search volume is model-specific**, driven by the Polestar 2, 3 and 4, all of which show steady or rising interest. Meanwhile, a further 18% comes from review and comparison queries, such as "Polestar vs Tesla" or "Polestar reliability", reflecting a user base that is **actively assessing Polestar as a legitimate alternative** to more established players. Even leasing-related searches are notably strong, indicating **real-world consideration and financial planning**, not just curiosity.

In contrast to BYD, which generates higher overall volume (~882k), Polestar's searchers are less likely to be asking what the brand is and more likely to be asking whether it's right for them. While BYD is still battling for recognition and trust, Polestar appears to have **crossed that threshold**, benefitting from **strong brand cues (Volvo affiliation, Scandinavian design) and a more premium, design-led proposition.**

Taken together, Polestar's search profile suggests **a brand still growing in size, but already mature in perception.** It may not yet be driving mass-market scale, but in the battle for credibility and mid-funnel attention, it's already a serious contender.

547,000
SEARCHES PER MONTH



MODEL-SPECIFIC SEARCH VOLUME

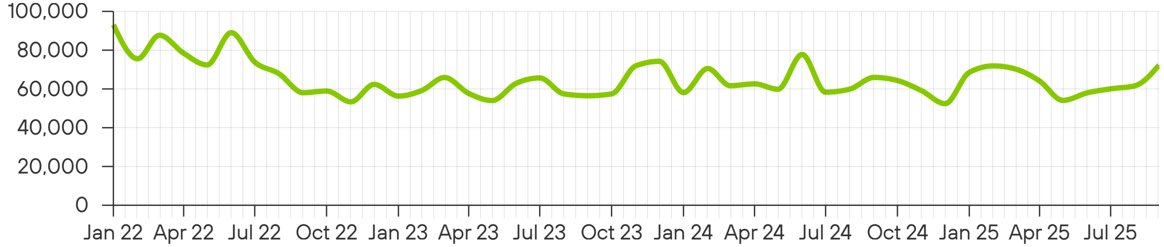
"...growing in size, but mature in perception."

Model Trends

Model-level search trends highlight where demand is consolidating.

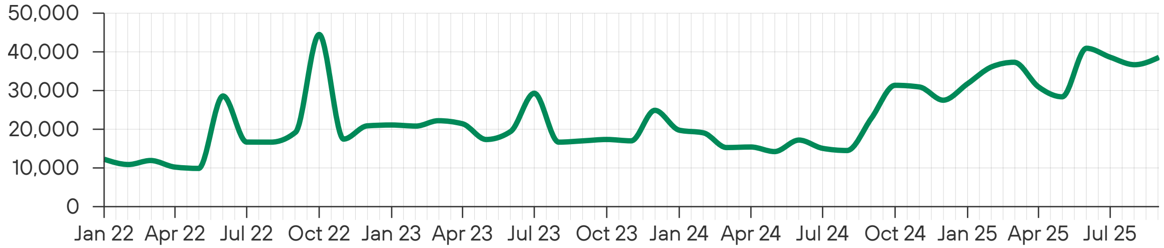
Tesla Model 3: Search volumes remain consistently high (~139k/month in 2025), but growth has plateaued after years of dominance.

'**Polestar 2**' Search Volume Trend



Polestar 3, the larger SUV, continues to build momentum, though more gradually. Monthly searches hover between **30,000–40,000 across 2025**, up slightly on 2024. Visibility is solid but more muted, reflecting a model that sits in a crowded (and higher-priced) segment.

'**Polestar 3**' Search Volume Trend

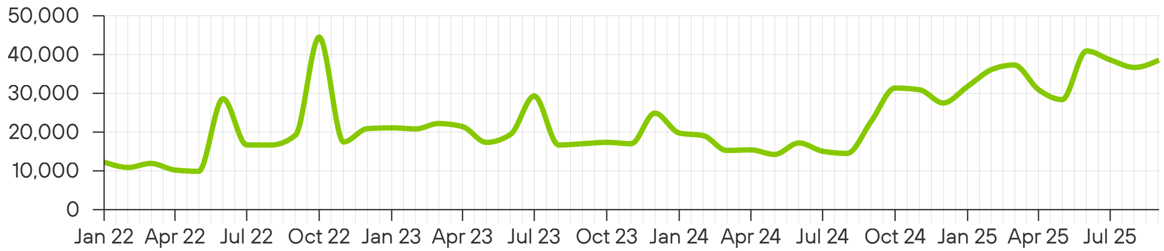


UpShift

Model Trends cont.

Polestar 4 is the real breakout story. Search volume surged dramatically in early 2025, jumping from around 20k/month in 2024 to peaks above **90,000 monthly searches** in September 2025, overtaking the Polestar 2 for the first time. This sharp rise reflects strong launch activity, a bold SUV-coupé design, and a price point that undercuts luxury rivals.

'**Polestar 4**' Search Volume Trend



Market Position

Polestar may not dominate the headlines like Tesla or boast the sheer scale of BYD, but in the UK market, it plays a different, and arguably more deliberate, game.

Originally launched as **Volvo**'s performance sub-brand, **Polestar** spun out as a standalone EV marque with a clean, design-led identity rooted in Scandinavian minimalism, safety credentials, and premium sustainability.

That Volvo heritage matters. It gives Polestar **credibility** with older, more brand-conscious audiences, especially those wary of Chinese newcomers or flashier EV disruptors. And while Polestar vehicles are manufactured in China, the brand distances itself through sleek European styling, recycled materials, and a quiet confidence in its tech stack and over-the-air capability, **all traits that resonate with a growing segment of the UK EV buyer base.**

2025 has seen **Polestar** increase its presence in both marketing and model availability. The **Polestar 2** continues to do much of the heavy lifting in terms of awareness and sales, but the **Polestar 3 and 4** are now landing in meaningful numbers, the latter enjoying a sharp spike in UK search interest since Q1.

Unlike many rivals, **Polestar** is not chasing mass-market attention through aggressive pricing or broad influencer campaigns. Instead, it's leaning into **quality, brand trust, and targeted digital retail partnerships**, including its longstanding relationship with BVRLA-accredited leasing providers and premium EV specialists.

That strategy has helped it build one of the more stable EV audiences in the UK, even if not the largest. The brand consistently draws over **500,000 searches a month**, comparable to BYD, but with a user base that's further down the funnel. In a fragmented and noisy EV category, Polestar's clarity, heritage and design restraint remain its biggest advantages. **The challenge now is scale.**

What's Driving Search Demand?

Design-led appeal
Polestar's minimalist Scandinavian styling drives strong visual and brand recognition.

Volvo halo effect
The Volvo connection gives instant trust and familiarity, especially among older, premium buyers.

Leasing over retail
Many searches reflect a leasing-led route to ownership, especially for company car drivers.

Model curiosity
Interest in the 3 and 4 models is rising fast, boosted by recent launches and strong critical reception.

Subtle sustainability
Quiet emphasis on recycled interiors and ethical materials appeals to climate-conscious buyers.

Polestar

Takeaway

Polestar's story in UK search is one of **quiet credibility** rather than explosive growth.

With over half a million monthly searches, it doesn't rival Tesla's scale or BYD's pace, but its visibility profile is far healthier than either at the consideration stage. Where Tesla dominates the top of mind and BYD the headlines, Polestar owns the middle, a brand consumers already trust and are now seriously evaluating.

Its success lies in **clarity and consistency**. The Volvo heritage delivers instant reassurance, its Scandinavian design language makes the cars distinctive, and its digital-first retail model speaks to a modern, confident audience. Search data shows that Polestar is winning interest from buyers who already understand EVs and are weighing design, leasing value, and quality, not just cost.

The challenge ahead is **scale without dilution**. As the Polestar 3 and 4 reach more UK roads, the brand will need to sustain its premium identity while broadening appeal. If it can keep its clean design and purpose-led positioning while expanding awareness, Polestar could become the default premium alternative to Tesla, less loud, but every bit as credible.

Summary: At A Glance

METRIC	TESLA	BYD	Polestar
AVERAGE MONTHLY SEARCH VOLUME (UK)	3,200,000	882,000	547,000
% MODEL-SPECIFIC QUERIES	55%	31%	31%
TOP-SEARCHED MODEL	Model Y	BYD Seal	Polestar 2
MOST COMMON SEARCH THEME	Ecosystem & Culture	Price & Affordability	Design & Leasing
YEARS ACTIVE IN UK MARKET	Since 2014	Since 2023	Since 2020
# OF KEY MODELS IN UK LINE-UP	4 (Y, 3, S, X)	4 (Seal, Dolphin, Atto 2, Atto 3, Sealion 7)	3 (2, 3, 4)
SEARCH INTENT PROFILE	Consideration-stage	Discovery-stage	Mid-funnel Consideration
PRIMARY GROWTH DRIVER	Cultural dominance & tech halo	Price-led disruption	Design & Volvo trust
YOY SEARCH TREND (VS. 2024)	Flat-to-declining	Rapid growth	Gradual upward trend
EV BRAND PERCEPTION	Benchmark brand	Challenger brand	Premium niche brand

Legacy OEM EV Visibility

While **Tesla**, **BYD** and **Polestar** dominate much of the EV conversation, the majority of UK car buyers still associate electrification with long-established manufacturers. To understand how these legacy OEMs are performing in digital visibility, we built a simple benchmark: the **Legacy OEM EV Visibility Index**.

Using **Ahrefs Keyword Explorer**, we calculated the **total monthly UK search volume for all keywords containing each brand name and the word "electric."** This approach provides a consistent baseline across brands, showing how strongly each is being explicitly connected with electrification in consumer search behaviour.

	AVG. MONTHLY SEARCH VOL.	NUMBER OF KEYWORDS
RENAULT	81,000	2,249
BMW	64,000	4,944
FORD	57,000	4,664
HYUNDAI	54,000	5,091
VW, VOLKSWAGEN	50,000	3,860
AUDI	48,000	2,732
MERCEDES	48,000	4,055
KIA	40,000	4,312
MG	31,000	1,609
VAUXHALL	29,000	1,064
VOLVO	25,000	2,302
NISSAN	24,000	1,660
PEUGEOT	23,000	1,413
JAGUAR	22,000	1,097
TOYOTA	22,000	2,691
SKODA	19,000	805
HONDA	15,000	2,426
CITROEN	11,000	831
LAND ROVER	7,100	455
MAZDA	4,700	554

The table to the left shows:

EV Search Volume (monthly average): The total demand for brand + electric queries in the UK.

Keyword Count: The number of unique search queries captured for each brand.

This methodology doesn't capture every EV-related query (e.g. model-specific searches like "ID.3" or "Ioniq 5" without the word electric are not included). Instead, it isolates how directly consumers are associating each brand with "electric" at the point of search, a useful signal of top-level brand positioning in the EV landscape.

What the Data Reveals

Renault leads legacy visibility. With 81k monthly searches, Renault outperforms larger German rivals in the "brand + electric" space. This is almost entirely driven by the Zoe and upcoming Renault 5 storylines, evidence that a focused EV narrative can outweigh broader brand size.

German premium brands are strong but fragmented. BMW, Audi, Mercedes, and VW all cluster between 48k–64k monthly searches. Their high keyword counts (2.7k–5k) show broad coverage across many models, but none dominate consumer association with "electric" in the way Tesla or BYD do.

Korean OEMs punch above their weight. Hyundai (54k) and Kia (40k) are mid-pack in volume, but their strong keyword breadth (4–5k each) reflects a wide EV presence, Ioniq and EV families are cutting through.

Volume brands underperform. Ford (57k) shows decent visibility, but Nissan (24k), despite the Leaf being the world's first mainstream EV, lags significantly. Similarly, Vauxhall (29k) and Peugeot (23k) are modest considering their UK market presence.

Lagging legacies. Land Rover (7.1k) and Mazda (4.7k) barely register. With no EVs (LR) or only token models (Mazda MX-30), searchers simply aren't associating these brands with electrification yet.

Search breadth matters. Brands like BMW and Hyundai have nearly **5k "electric" keywords each**, suggesting consumers explore them across many different EV angles. By contrast, Renault and Nissan have fewer keyword variants but higher average searches per keyword, showing attention is more concentrated on specific models.

Conclusion: Where Next for EV Search?

The UK's EV market is no longer in its infancy. Search behaviour shows a sector that is maturing, fragmenting, and increasingly defined by new entrants.

Tesla still dominates mindshare, but its visibility has plateaued. BYD's ascent is rapid, driven by affordability headlines and model launches, while Polestar continues to build a credible premium niche. SUVs have emerged as the safe bet for buyers, city cars and hatchbacks are stagnating, and saloons are finding new momentum through design-led challengers.

For legacy OEMs, the challenge is clear. While many enjoy deep brand familiarity, consumers are not consistently associating them with "electric." Renault and BMW show strength, but stalwarts like Nissan and Ford risk being eclipsed in the EV conversation. Search behaviour also makes clear that barriers remain: consumers are still preoccupied with charging, cost, and confidence.

The years ahead will bring further volatility. Policy milestones such as the ZEV Mandate will spark search spikes. Used EVs are poised for a surge, while compact SUVs and saloons may become the new battlegrounds. Above all, the gap between attention and adoption remains critical, and search gives us the clearest window into where the next wave of momentum will come from.

Action Framework: Turning Search Insights into Growth

AUDIENCE	WHAT SEARCH SHOWS	RECOMMENDED ACTION
OEMS	Weak "electric" association vs Tesla & BYD	Build brand-led EV campaigns; reinforce electrification as a core identity, not a side product.
MARKETPLACES	Rising share of generic EV discovery	Develop comparison tools, editorial content, and trust signals that capture early-stage interest.
LEASING FIRMS	Search dominated by cost, tax, and BIK queries	Lead with affordability narratives, total-cost-of-ownership calculators, and simple leasing explainer content.
POLICY/INDUSTRY	Spikes linked to mandates, grants, VAT changes	Prepare communications that translate policy into consumer language quickly.

The Upshift Perspective

Search is more than a mirror of demand, it is a live signal of how consumers are connecting (or failing to connect) with the EV transition.

It shows the battlegrounds where brands must win attention, the anxieties that hold buyers back, and the models that capture imagination long before they reach showrooms.

At **Upshift**, we help OEMs, leasing platforms, and marketplaces turn search data into strategies that convert, whether that means shaping brand narratives, targeting content where anxieties peak, or positioning products at the point of decision.

The EV battleground isn't just on the road, it's in search. And in that space, attention is fragmenting fast.

THE QUESTION IS: WHO WILL CAPTURE IT?

Want to dig deeper into your brand's search performance?

We help automotive brands turn search data into commercial advantage, from strategy to execution

If you'd like tailored insight or support, just drop us a line

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