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Automotive AI Readiness

Volkswagen, Tesla, Toyota, and the auto sector's AI footprint · April 2026

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April 2026

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CHAPTER 1

Tesla Blocks All AI Crawlers While Volkswagen Publishes 198 Links: Automotive AI Readiness Report

1. 37 Automakers: The AI Accessibility Landscape

The automotive sector in the Fortune Global 500 comprises 37 companies across 11 countries — from German premium manufacturers (BMW, Mercedes, Volkswagen) to Japanese volume producers (Toyota, Honda, Nissan), Chinese EV makers (BYD, Geely, CATL), American legacy brands (Ford, GM, Tesla), and global parts suppliers (Bosch, Continental, Denso, Magna).

Of these 37 companies, only 23 (62%) are accessible to a Chrome browser from our datacenter environment. The remaining 12 (32%) are completely unreachable — connection errors across all four user agents. This is the highest unreachability rate of any major industry sector, driven by the concentration of Japanese and Chinese manufacturers with domestically-hosted infrastructure.

Among the accessible companies, 3 fall in the GEO visibility gap (Chrome works, ChatGPT blocked): Toyota, Volvo, and Paccar. The gap rate of 13% among accessible automakers is moderate — lower than telecom (27%) but higher than banking (5%).

2. The Tesla Paradox: Tech Leader, AI Blocker

Tesla — the company that markets itself as the most technologically advanced automaker — blocks all four user agents with zero successful probes across every test. Research UA: 0/64. Googlebot: 0/64. Chrome: 0/64. ChatGPT-User: 0/64.

This is not UA-level blocking (Layer 1). Tesla's blocking operates at Layer 2 (IP reputation) or Layer 3 (TLS fingerprinting). Our datacenter IP is rejected before the HTTP request is even processed. Tesla's website is accessible from residential IP addresses but treats all datacenter traffic as hostile.

The implication: when a consumer asks ChatGPT to compare Tesla Model Y with competitors, the AI cannot access tesla.com for current pricing, range specifications, Autopilot features, or configurator options. It answers from training data — which may predate the latest model refresh, price cut, or feature release. Competitors with accessible websites (Hyundai, Kia, Volkswagen) are cited with current information.

Tesla's blocking posture is the deepest in the entire Fortune Global 500 dataset. It is more aggressive than Amazon (which at least serves Chrome), more thorough than Goldman Sachs (which allows research UA), and more comprehensive than any other automaker.

3. Volkswagen: The llms.txt Champion

Volkswagen occupies the opposite end of the spectrum. VW's llms.txt at vw.com contains 215 lines and 198 curated links — the second-largest llms.txt in the entire Fortune 500, behind only Salesforce (205 links). VW is also accessible to ChatGPT-User (24/64 probes) and has JSON-LD on its homepage.

VW's llms.txt organizes content across model ranges, dealer services, sustainability initiatives, corporate history, and investor relations. The file is a comprehensive guide to everything on vw.com that an AI system would need to accurately describe Volkswagen.

VW's AI Readiness Score of 8/11 is the highest of any automaker — and higher than most technology companies. A traditional German automaker, founded in 1937, has a more AI-optimized web presence than Oracle, IBM, or Salesforce.

4. Subaru: The Quiet Overachiever

Subaru's llms.txt at subaru.co.jp contains 159 lines and 100 curated links — making it the third-largest llms.txt in the Fortune 500 and the second-largest among automakers. This is a Japanese manufacturer known for all-wheel-drive vehicles and boxer engines, not for digital innovation.

Subaru scores 7/11 on the AI Readiness Index — higher than Apple's accessibility-only approach in automotive terms. Subaru's llms.txt covers model specifications, safety features, maintenance guides, and corporate information.

The Subaru and VW findings challenge the assumption that AI visibility is a technology company concern. These traditional manufacturers have recognized that AI-driven car research is a growing channel and have invested accordingly.

5. Japanese OEMs: Toyota in the Gap, Honda Unreachable

Japanese automakers present a mixed picture:

Company	Chrome	ChatGPT	Status
Subaru	6	6	Accessible + llms.txt (100 links)
Hyundai Mobis	64	64	Fully accessible
Toyota Motor	11	0	**GEO Gap** — blocks ChatGPT
Nissan Motor	1	1	Barely accessible
Aisin	2	2	Minimal
Honda Motor	0	0	Unreachable
Denso	0	0	Unreachable
Suzuki Motor	0	0	Unreachable
Mazda Motor	0	0	Unreachable

Toyota's GEO gap (Chrome 11/64, ChatGPT 0/64) means the world's largest automaker by volume is invisible to AI answer engines. When a car buyer asks ChatGPT to compare the Toyota Camry with the Honda Accord, neither company's current content is accessible — the AI answers from training data for both.

Honda, Suzuki, Mazda, and Denso are unreachable from our datacenter environment. This is consistent with Japanese enterprise hosting patterns — many Japanese corporations use domestic hosting infrastructure that is not optimized for international traffic.

6. Chinese EV Makers: Mostly Unreachable

10 Chinese automotive companies are in the dataset. Most are unreachable:

Company	Chrome	ChatGPT	Status
BYD	2	2	Minimal but accessible
SAIC Motor	2	2	Minimal but accessible
Jardine Matheson	43	43	Accessible (HK-based)
China FAW Group	0	0	Unreachable
Geely	0	0	Unreachable
Dongfeng Motor	0	0	Unreachable
CATL	0	0	Unreachable
Chery	0	0	Unreachable
GAC Group	0	0	Unreachable
BAIC Group	0	0	Unreachable

BYD — the world's largest EV manufacturer — is barely accessible (2/64 probes). For a company expanding aggressively into European and Southeast Asian markets, this minimal web accessibility to international AI systems represents a missed opportunity.

7. European Premium: BMW Unreachable, Mercedes Accessible

Company	Country	Chrome	ChatGPT	Score
Volkswagen	Germany	24	24	8.0
ZF Friedrichshafen	Germany	11	11	5.0
Daimler Truck	Germany	7	7	5.0
Mercedes-Benz	Germany	7	7	4.0
Bosch Group	Germany	9	9	4.0
Continental	Germany	4	4	4.0
Renault	France	5	5	5.0

Company	Country	Chrome	ChatGPT	Score
Stellantis	Netherlands	4	4	4.0
Volvo	Sweden	18	0	2.0
BMW Group	Germany	0	0	0.0

BMW is completely unreachable from our datacenter — 0/64 across all user agents. Akamai's bot management blocks all datacenter traffic. BMW's premium brand positioning and sophisticated digital infrastructure make this blocking posture a deliberate choice rather than a technical limitation.

Volvo falls in the GEO gap (Chrome 18/64, ChatGPT 0/64) — accessible to browsers but blocking AI crawlers specifically.

8. The Scorecard: All 37 Ranked

Company	Country	Chrome	ChatGPT	llms.txt Links	JSON-LD	WAF	Score	Status
Volkswagen	Germany	24	24	198	Yes	F5 Bigip	8	Accessible
Subaru	Japan	6	6	100	—	—	7	Accessible
Hyundai Motor	South Korea	22	22	—	Yes	—	5	Accessible
BYD	China	2	2	—	Yes	F5 Bigip	5	Accessible
Kia	South Korea	5	5	—	Yes	—	5	Accessible
Daimler Truck Holding	Germany	7	7	—	Yes	F5 Bigip	5	Accessible
Renault	France	5	5	—	Yes	F5 Bigip	5	Accessible
ZF Friedrichshafen	Germany	11	11	—	Yes	Generic Bloc	5	Accessible
Stellantis	Netherlands	4	4	—	—	—	4	Accessible
General Motors	U.S.	1	1	—	—	—	4	Accessible
Mercedes-Benz Group	Germany	7	7	—	—	F5 Bigip	4	Accessible
SAIC Motor	China	2	2	—	—	F5 Bigip	4	Accessible
Bosch Group	Germany	9	9	—	—	F5 Bigip	4	Accessible
Nissan Motor	Japan	1	1	—	—	—	4	Accessible
Tata Motors	India	16	16	—	—	Cloudflare	4	Accessible
Hyundai Mobis	South Korea	64	64	—	—	—	4	Accessible
Continental	Germany	4	4	—	—	F5 Bigip	4	Accessible
Magna International	Canada	11	11	—	—	F5 Bigip	4	Accessible
Jardine Matheson	China	43	43	—	—	Generic Bloc	4	Accessible

Company	Country	Chrome	ChatGPT	llms.txt Links	JSON-LD	WAF	Score	Status
Aisin	Japan	2	2	—	—	Imperva	4	Accessible
Toyota Motor	Japan	11	0	—	Yes	F5 Bigip	2	GEO Gap
Volvo	Sweden	18	0	—	Yes	Akamai	2	GEO Gap
Paccar	U.S.	9	0	—	—	—	1	GEO Gap
Ford Motor	U.S.	0	0	—	—	—	0	Accessible
BMW Group	Germany	0	0	—	—	Akamai	0	Accessible
Honda Motor	Japan	0	0	—	—	Akamai	0	Unreachable
Tesla	U.S.	0	0	—	—	Akamai	0	Unreachable
China FAW Group	China	0	0	—	—	—	0	Unreachable
Guangzhou Automobile Industry Group	China	0	0	—	—	—	0	Unreachable
Zhejiang Geely Holding Group	China	0	0	—	—	—	0	Unreachable
Beijing Automotive Group	China	0	0	—	—	—	0	Unreachable
Dongfeng Motor	China	0	0	—	—	—	0	Unreachable
Contemporary Amperex Technology	China	0	0	—	—	—	0	Unreachable
Denso	Japan	0	0	—	—	Akamai	0	Unreachable
Chery Holding Group	China	0	0	—	—	—	0	Unreachable
Suzuki Motor	Japan	0	0	—	—	—	0	Unreachable
Mazda Motor	Japan	0	0	—	—	—	0	Unreachable

9. What This Means for AI-Powered Car Research

The automotive AI readiness data reveals a structural shift in how car buyers will research vehicles in 2026 and beyond.

When a consumer asks an AI to compare SUVs under $40,000, the AI can cite current specifications and pricing from Volkswagen (198-link llms.txt), Subaru (100-link llms.txt), and Hyundai (fully accessible) — but not from Toyota (GEO gap), BMW (unreachable), Tesla (blocked), or Honda (unreachable).

The automakers that invest in AI visibility today are building an information advantage that compounds over time. As AI becomes a primary vehicle research channel alongside Google Search and manufacturer websites, the companies with accessible, structured, and curated web content will capture disproportionate consideration.

The fix for most automakers is straightforward: review WAF configurations (Toyota, Volvo), create llms.txt files (everyone except VW and Subaru), and ensure ChatGPT-User is allowed through bot management

rules. These are configuration changes, not development projects — achievable in days, not months.

Source data: *Cross-source analysis from the Fortune Global 500 AI Accessibility audit (April 2026). Domain mapping from the audit's domain resolution database. All 37 companies classified as "Motor Vehicles & Parts." UA probe data from four runs (Research, Googlebot, Chrome, ChatGPT-User). llms.txt body-validated. WAF vendor attributed from response body signatures. Scoring: ChatGPT accessible (+3), Chrome accessible (+1), llms.txt (+2 base + links bonus), JSON-LD (+1). Maximum ~8.*

About PROGEOLAB

PROGEOLAB is an AI-native visibility intelligence platform.

This report is part of the PROGEOLAB Fortune 500 AI Accessibility Audit — a series of research studies on how large enterprises appear to (or disappear from) AI answer engines. All measurements are from live HTTP probes across four user agents: a research bot, Googlebot, Chrome, and ChatGPT-User. No estimates, no third-party data sources.

Methodology in brief

500 companies · 67 probes each · 4 user agents · 134,000 probe requests. Data collected April 16–19, 2026. Response bodies stored and re-validated with MD5-hash soft-404 detection to eliminate the ~25× inflation that status-code-only scans produce.

Contact & next steps

Visit **progeolab.ai/research** or request a demo for a complimentary AI visibility analysis of your organisation.

For press enquiries, data requests, or syndication, write to **research@progeolab.ai**.

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