

THE ECONOMY AT A GLANCE

HOUSTON



GREATER HOUSTON
PARTNERSHIP

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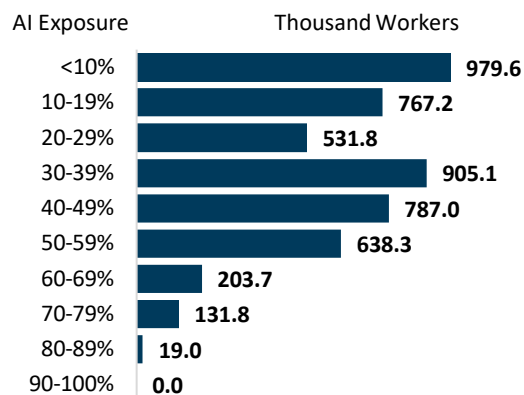
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AI EXPOSURE

Artificial intelligence has moved rapidly into the workplace, taking on writing, coding and analysis that once required the skills of highly trained professionals. It promises a major boost to productivity, but its growing capabilities have also fueled concerns about widespread job displacement. So far, labor market data has offered few clear signals. Some studies find early signs of weaker hiring among young workers in certain fields, while others point to productivity gains that could eventually spur job creation. Although widespread job losses remain speculative, a consensus is emerging that AI has greater potential to reshape some occupations than others.

To better understand where AI could have the greatest impact, researchers at OpenAI developed an exposure score estimating what share of an occupation's regular tasks an AI could help complete substantially faster or potentially perform on its own.

METRO HOUSTON WORKFORCE BY LEVEL OF AI EXPOSURE



Source: Partnership Analysis of OpenAI and LightCast data

Applying these scores to metro Houston's roughly five million workers (including payroll workers and the self-employed) reveals a workforce with relatively limited

exposure. Nearly 2.3 million workers, or 46.1 percent of the total, have exposure scores below 30 percent. That includes almost one million with scores under 10 percent, reflecting the region's sizable concentration of work that relies on physical interaction, hands-on experience and specialized technical skills.

HOUSTON'S WORKFORCE IS ONE OF THE LEAST EXPOSED TO POTENTIAL AI DISRUPTIONS

Share of Metro Workforce with AI Exposure < 30%

Metro	%	Metro	%
1 Riverside	54.4	11 Atlanta	43.4
2 Houston	46.1	12 Philadelphia	43.4
3 Los Angeles	45.5	13 New York	42.3
4 Detroit	45.3	14 Tampa	42.0
5 Chicago	44.5	15 Dallas	41.9
6 San Diego	44.1	16 Seattle	41.2
7 Orlando	44.0	17 San Francisco	40.7
8 Minneapolis	43.8	18 Denver	39.3
9 Miami	43.7	19 Boston	39.1
10 Phoenix	43.5	20 Washington	38.3

Note: Limited to the 20 most populous U.S. metros

Source: Partnership Analysis of OpenAI and LightCast data

Houston stands out among major U.S. metros for its relatively low exposure to AI. Of the nation's 20 most populous, only Riverside, California, has a larger share of workers with exposure scores below 30 percent. Houston's distinctive industry mix helps explain why. Energy, manufacturing, construction and health care support occupations combining specialized technical expertise with hands-on responsibilities, making many tasks harder to automate than the office-based work more prevalent elsewhere.

And for Houston's more exposed workers, AI may offer as much opportunity as risk. The region specializes in occupations like engineering and health science, where AI could accelerate research, design and analysis, but much of the work still depends on physical tasks, personal interaction and human accountability. These roles are difficult to automate entirely, even when individual tasks can be completed much faster. For these workers, AI may prove more of a force multiplier than a replacement.

HOUSTON MSA NONFARM PAYROLL EMPLOYMENT

	September '26	August '26	September '25	Change From		% Change From	
				August '26	September '25	August '26	September '25
Total Nonfarm Payroll Jobs	3,489,400	3,496,700	3,455,800	-7,300	33,600	-0.2	1.0
Total Private	3,030,300	3,049,700	2,993,300	-19,400	37,000	-0.6	1.2
Goods Producing	582,500	584,000	568,900	-1,500	13,600	-0.3	2.4
Service Providing	2,906,900	2,912,700	2,886,900	-5,800	20,000	-0.2	0.7
Private Service Providing	2,447,800	2,465,700	2,424,400	-17,900	23,400	-0.7	1.0
Mining & Logging	73,100	73,400	73,100	-300	0	-0.4	0.0
Oil & Gas Extraction	35,500	35,600	35,200	-100	300	-0.3	0.9
Support Activities for Mining	36,100	36,200	36,400	-100	-300	-0.3	-0.8
Construction	269,300	269,700	255,500	-400	13,800	-0.1	5.4
Manufacturing	240,100	240,900	240,300	-800	-200	-0.3	-0.1
Durable Goods Manufacturing	153,500	153,900	150,800	-400	2,700	-0.3	1.8
Nondurable Goods Manufacturing	86,600	87,000	89,500	-400	-2,900	-0.5	-3.2
Wholesale Trade	176,400	176,200	177,500	200	-1,100	0.1	-0.6
Retail Trade	318,000	319,800	316,800	-1,800	1,200	-0.6	0.4
Transportation, Warehousing & Utilities	198,900	199,900	196,000	-1,000	2,900	-0.5	1.5
Utilities	25,500	25,500	24,400	0	1,100	0.0	4.5
Air Transportation	21,800	21,900	20,900	-100	900	-0.5	4.3
Truck Transportation	31,200	31,300	30,400	-100	800	-0.3	2.6
Pipeline Transportation	16,000	16,100	15,400	-100	600	-0.6	3.9
Information	26,800	27,100	28,300	-300	-1,500	-1.1	-5.3
Telecommunications	9,500	9,600	10,200	-100	-700	-1.0	-6.9
Finance & Insurance	113,200	113,800	115,300	-600	-2,100	-0.5	-1.8
Real Estate & Rental & Leasing	62,900	63,300	62,600	-400	300	-0.6	0.5
Professional & Business Services	578,000	581,900	562,700	-3,900	15,300	-0.7	2.7
Professional, Scientific & Technical Services	285,600	287,600	280,700	-2,000	4,900	-0.7	1.7
Legal Services	35,100	35,200	34,500	-100	600	-0.3	1.7
Accounting, Tax Preparation & Bookkeeping	26,400	26,500	27,000	-100	-600	-0.4	-2.2
Architectural, Engineering & Related Services	80,100	80,600	78,900	-500	1,200	-0.6	1.5
Computer Systems Design & Related Services	41,100	41,600	41,500	-500	-400	-1.2	-1.0
Admin & Support, Waste Mgt & Remediation	249,100	250,800	238,600	-1,700	10,500	-0.7	4.4
Administrative & Support Services	234,700	236,400	224,900	-1,700	9,800	-0.7	4.4
Employment Services	85,500	86,600	78,200	-1,100	7,300	-1.3	9.3
Private Educational Services	73,400	73,100	72,600	300	800	0.4	1.1
Health Care & Social Assistance	401,500	403,700	396,900	-2,200	4,600	-0.5	1.2
Arts, Entertainment & Recreation	42,000	42,800	42,600	-800	-600	-1.9	-1.4
Accommodation & Food Services	326,000	332,500	323,100	-6,500	2,900	-2.0	0.9
Other Services	130,700	131,600	130,000	-900	700	-0.7	0.5
Government	459,100	447,000	462,500	12,100	-3,400	2.7	-0.7
Federal Government	35,900	35,400	36,700	500	-800	1.4	-2.2
State Government	104,200	103,400	101,400	800	2,800	0.8	2.8
State Government Educational Services	56,700	55,800	55,000	900	1,700	1.6	3.1
Local Government	319,000	308,200	324,400	10,800	-5,400	3.5	-1.7
Local Government Educational Services	214,600	204,300	221,200	10,300	-6,600	5.0	-3.0

Source: Texas Workforce Commission