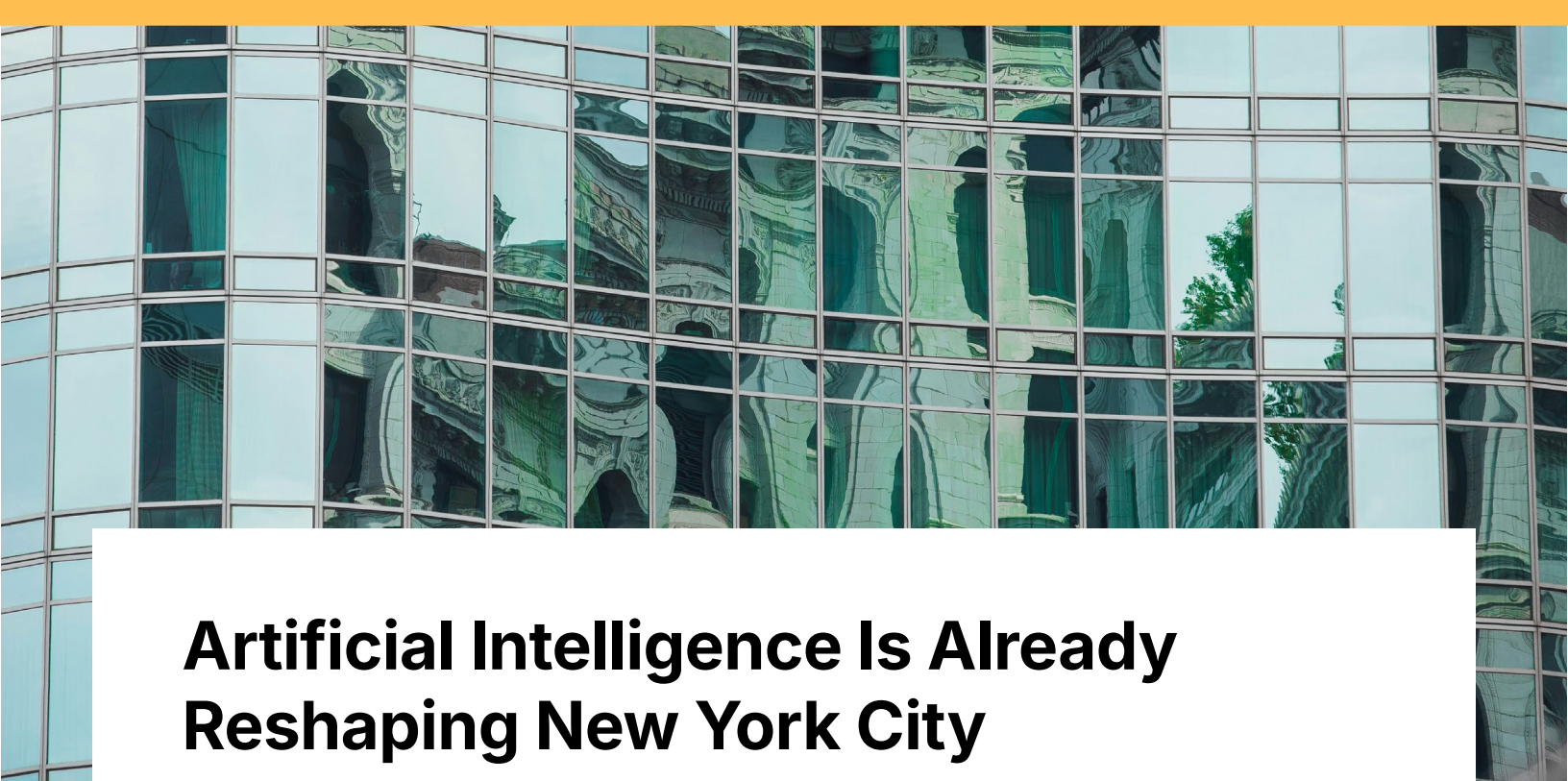




Artificial Intelligence Is Already Reshaping New York City

Introduction

Artificial intelligence (AI) is no longer a future issue for New York City. It is becoming one of the defining economic questions facing the city today. Business leaders, policymakers, and researchers are increasingly divided over whether AI is already reshaping the job market or if fears of a "jobs apocalypse" are overblown.¹ National numbers can be read either way. Unemployment remains low, but entry-level hiring in the industries most exposed to AI tells a different story.

New York City offers one of the clearest places to see that debate play out. In the first half of 2026, AI companies leased more than 2.2 million square feet of office space in the city, more than double their total for all of 2025.² New York's AI startups also raised a record \$16.7 billion in venture capital last year, second only to the Bay Area.³ By any visible measure, AI is arriving in New York, fast.

Yet the benefits of AI's growth are proving uneven. While AI companies are expanding their physical footprint and attracting record investment, employment gains remain limited across several of the white-collar industries most exposed to AI. Entry-level hiring is declining as employers raise expectations for AI skills. New York is experiencing AI's growth and its workforce disruption at the same time.

In January 2025, the New York City Economic Development Corporation (NYCEDC) released *New York City's AI Advantage*, a strategy to position the city as a global leader in applied AI and build an AI-ready workforce.⁴ While the strategy emphasizes AI literacy and growth of the city's startup ecosystem, it does not yet fully address a specific risk: the erosion of entry-level pathways into established white-collar industries, including finance, information, and professional services.

This challenge is not unprecedented. As employers computerized office operations in the 1980s, the first wave of technology-enabled productivity gains reduced the availability of many entry-level roles while increasing demand for workers with more advanced technical skills.⁵ Workers who could adapt benefited; workers who could not often experienced wage declines, displacement, or slower career progression. Today's shift toward AI raises similar questions. In a recent poll of the Class of 2026, more than half of respondents said they need stronger AI skills than their education provided to succeed at work.⁶

AI is already driving productivity gains, and AI companies are rapidly expanding their physical footprint across the city.⁷ However, neither productivity gains nor commercial leases are guaranteed to translate into durable career opportunities. As AI reshapes hiring and skill demand in white-collar occupations, New York City will need a strategy that preserves access to middle-income careers while supporting continued innovation and growth.

This report joins a growing body of work examining AI's impact on opportunity and employment in New York City. Recent research has explored AI's effects on hiring in the technology sector and its broader economic implications.⁸ This report extends that discussion to New York City's established white-collar industries and commercial real estate market, and offers recommendations to ensure the city's growing AI footprint translates into lasting economic opportunity.

AI's Early Impact: Restructured Hiring and Skill Demand

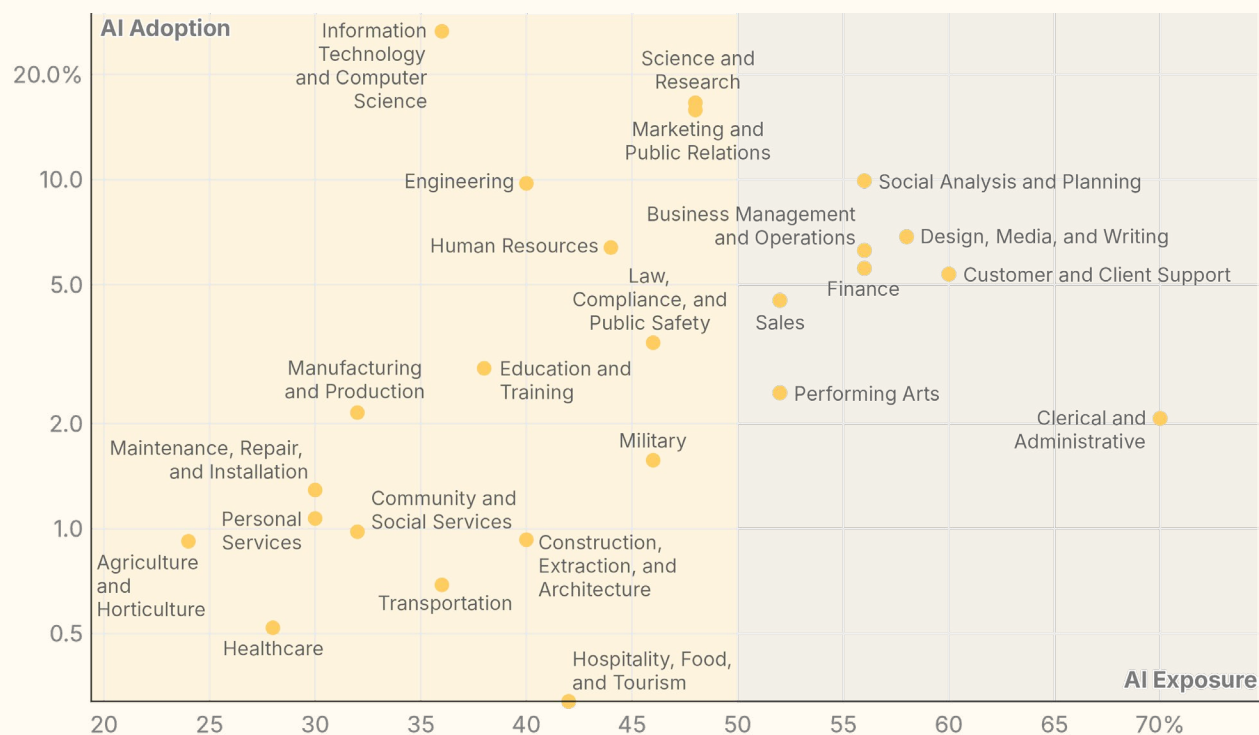
AI Adoption is Fueling Opportunity, but Not at the Entry-Level

To assess how AI adoption is reshaping hiring and skill demand in New York City, this analysis combines Lightcast job posting data, federal employment data, and a Stanford-developed AI exposure index.⁹

Figure 1 compares AI adoption, measured by the share of job postings that mention AI, with AI exposure, measured by the share of an occupation's skills susceptible to AI augmentation. Occupational groups common in white-collar industries, including finance, business management and operations, and design, media, and writing, have both high AI exposure and high adoption rates.

Figure 1: AI Adoption & Exposure Vary Widely Across New York City's Industries

Share of skills susceptible to AI augmentation versus share of roles utilizing AI



Source: PFNYC analysis of Lightcast data; Stanford 2025 AI Index Report

At the same time that AI adoption increased across New York City’s industries, the labor market slowed; the city’s private sector added just 38,000 jobs last year, half of 2024’s total. These gains, however, were not evenly distributed across the city’s labor market.¹⁰ Industries with higher levels of AI adoption experienced more positive employment change than those with lower adoption, suggesting a relationship between AI adoption, productivity gains, and industry growth.

Yet, at a more granular level, the picture changes. Since ChatGPT’s public release in 2022, occupations most exposed to AI automation have experienced some of the steepest declines in entry-level hiring, even within industries that continued to add jobs overall. Hiring has increasingly concentrated among experienced workers, not junior ones: entry-level job postings that mention AI skills are up 55%, even as the number of entry-level jobs shrinks.¹¹ Table 1 highlights the same pattern across occupations, showcasing that AI-enabled productivity gains may be reducing the number of junior roles employers need to perform routine work.

Table 1: Occupations Most Vulnerable to AI

Change in entry-level posts and AI exposure in occupation groups with over 50% AI exposure

Occupation Groups	Change in Annual Job Posts	AI Exposure
Design, Media, and Writing	-40.6%	58%
Customer and Client Support	-34.4%	60%
Clerical and Administrative	-30.5%	70.0%
Business Management and Operations	-26.8%	56.0%
Finance	-23.4%	56.0%
Social Analysis and Planning	-12.7%	56.0%
Sales	-10.4%	52.0%

Source: PFNYC analysis of Lightcast data; Stanford 2025 AI Index Report

Recent analysis from the U.S. Census Bureau reinforces these findings. Since 2022, graduates with majors in the most AI-exposed fields, like Computer Science, Information Sciences, Mathematics, and Business Economics, have experienced lower employment rates and reduced wages compared to both their pre-2022 average and their less AI-exposed counterparts.¹² The Census Bureau compares the entry-level labor market for AI-exposed industries to the conditions caused by a major recession.

Employers are Shifting AI Skill Demand Toward Deployment and Agentic Systems

Rapid shifts in employer demand for AI skills may explain the inverse relationship between AI adoption and entry-level hiring. Each year, employers expect prospective employees to have more AI skills while they eliminate outdated requirements. Skills once considered specialized have become baseline expectations; last year, “Data Mining” and “Text Summarization” disappeared from job postings as employers assumed entry-level employees understood these concepts. In their place, new requirements tied to AI deployment, like “Agentic Systems” and “Generative AI Agents,” became top specialized skills for entry-level positions. In total, 38 skills have emerged in entry-level job posts since 2022, while 30 have been eliminated, all within various skill buckets.¹³

Table 2: New York City Employers are Trending Towards AI Applications

Eliminated Skill Buckets	Emerging Skill Buckets
Legacy Toolkits	Generative AI
Pre-Deep Learning Methods	Agentic AI
Specialized, Dated AI Applications	AI Infrastructure and Deployment
Embedded AI Concepts	Model Optimization
	Applications and Interfaces

Skill bucket definitions adapted from Stanford's 2025 AI Index Report Appendix 4 using eliminated and emerging skills in Lightcast's job posting data for New York City. Skills in eliminated buckets appeared in 2022 entry-level job postings, but not in 2025. Skills in emerging buckets appeared in 2025 entry-level job postings, but not in 2022.

Source: PFNYC analysis of Lightcast data; Stanford 2025 AI Index Report

Table 3: Year-over-Year Change in Entry-Level Skill Requirements

	2023	2024	2025
New Skills	22	23	27
Eliminated Skills	24	22	18

Source: PFNYC analysis of Lightcast data; Stanford 2025 AI Index Report

Employers are not simply seeking “more AI skills;” they increasingly want workers who can apply, manage, and adapt AI systems in real workplace settings. As a result, employers increasingly envision agentic AI systems working alongside employees who can design, deploy, and supervise them, reducing employers’ need to hire for routine, entry-level tasks. For example, JPMorgan envisions each employee building their own personalized AI assistant, and in 2025, Salesforce transformed over 500 customer support roles into AI and data positions after deploying AI agents to handle customer service tasks.¹⁴

This dynamic is already visible in software engineering, historically one of the strongest entry points into New York City’s tech economy. AI code generators are increasingly capable of performing tasks historically assigned to junior developers, potentially reducing one of the most common entry points into the technology workforce.¹⁵ Future engineers may be required to understand the skills of a junior developer without first holding that position. For many, this shift may have downstream impacts on career progression; historically, individuals who experience delayed employment or initial labor market entry through lower-paying jobs have reduced relevant skill accumulation and redirected career paths.¹⁶

The demand for specialized skills is colliding with the workforce’s current AI baseline. In a recent poll of the Class of 2026, only 28% of graduates said their school integrated AI into their curriculum.¹⁷ As AI adoption accelerates, rising skill thresholds and reduced routine work will narrow traditional pathways into white-collar careers, requiring greater skill-development support for students and entry-level workers alike.

Pipeline Erosion

New York has faced a similar transition before: the rapid integration of AI echoes the computerization of office work in the 1980s. Then, new technical skill demands, rising education requirements, and the conversion of routine roles into specialized ones reshaped entry-level employment. Workers who could not adapt to computerization faced pay cuts, early retirement, and displacement to less intensive jobs.¹⁸ By 2016, the initial tech-induced shift contributed to a 7% employment decline for roles like financial clerks and secretaries, and office work’s share of U.S. employment fell from 18% to 12%.¹⁹ AI is driving comparable changes over a

much shorter time frame.²⁰ NYCEDC has similarly estimated that approximately 244,000 New York City jobs are at risk of AI-related displacement, underscoring the potential scale of labor market disruption if workforce adaptation does not keep pace.²¹

The current landscape of AI adoption risks eroding New York City's white-collar career pipeline and jeopardizing the historical link between entry-level work and upward mobility. Anthropic researchers recently modeled AI's economic impact through 2030, finding that worker displacement caused by AI automation in knowledge occupations (including office jobs) could range from about 0.3% under a modest AI adoption scenario to nearly 14% under an extreme rapid adoption scenario, reflecting substantial uncertainty about AI's ultimate effect on knowledge work.²² Just as computerization displaced workers with limited skill sets, AI automation could weaken mobility and widen the divide between workers who can adapt to AI-enabled roles and those who cannot, emphasizing the need for a stronger citywide AI workforce strategy.

Beyond white-collar occupations, AI adoption may also affect career pathways for workers without bachelor's degrees. About 49% of these pathways are already exposed to AI, suggesting that AI's workforce implications extend beyond the industries examined in this report.²³ If workforce adaptation does not keep pace, economic growth may coincide with fewer pathways into middle-income careers across a broad segment of the labor market.

AI's Growing Real Estate Footprint

The impact of AI software on hiring is visible in the city's labor market data. But AI's presence in New York City is accelerating change in another way: AI companies themselves are rapidly building their physical footprint across the city. Tech and AI companies' share of Manhattan office leasing rose from 9.3% in 2024 to 14.7% in 2025, and leasing activity has only accelerated throughout 2026.²⁴ In just the first half of the year, AI companies leased over 2.2 million square feet of commercial office space, more than double 2025's year-end total of 936,000 square feet.²⁵

AI companies' expansion in New York City reflects both new firms entering the market and established companies growing their footprint. Through Q2 2026, 13 existing AI firms in New York City signed new leases that more than doubled their square footage, adding a combined 1.2 million square feet of office space.²⁶ This growth is occurring even as the broader Manhattan office market continues to work through excess supply — the borough's overall vacancy rate stood at 19.3% in Q2 2026, still well above both historical (14.1%) and pre-pandemic (9.7%) averages.²⁷

Much of this activity, however, is running ahead of actual headcount. In 2025, AI firms typically leased 60% more space than their staffing required, and nearly 80% of AI office leases were under 25,000 square feet — small footprints for what are often small teams.²⁸ This pattern echoes the dot-com era, when a well-funded sector leased aggressively ahead of realized headcount growth. Tech and AI companies also tend to sign leases that are, on average, three years shorter than those of firms in finance, law, and real estate, suggesting that even the real estate side of AI's expansion remains provisional.²⁹

Some AI companies have doubled down on their physical commitment to New York City. Yet the sector's presence has not significantly shifted the broader labor market: through August 2026, employment in the Financial Services and Professional and Business Services sectors has only grown by 0.6% and 0.04% respectively, while employment in the Information sector has declined almost 2%.³⁰

New York's ability to attract this activity is itself notable. As cities including San Francisco, Austin, and Washington, D.C. compete for AI talent and investment, New York's pull has translated into real leasing demand and record venture capital: in 2025, AI startups in New York City raised \$16.7 billion, the city's best year on record for AI investment and second only to the Bay Area.³¹

Taken together, the data suggest a central tension in New York City's AI-powered economy: investment, office leasing, and public attention are growing rapidly, while opportunities to enter many white-collar careers are becoming more limited.

Building Up and Building Out New York City's AI Strategy

New York City's Competitive Position

New York City ranks ninth globally in Counterpoint Research's AI City Index, behind Singapore (first), Seoul (second), and San Francisco (fifth).³² The city trails these competitors in public- and private-sector AI initiatives, communications infrastructure, university research output, and startup ecosystem strength. Closing this gap will require not only continued investment in AI infrastructure and startups, but also a workforce strategy comparable to those of higher-ranked cities. AI companies' growing office footprint reflects real momentum in New York City's ability to attract the growing sector, but competitiveness in real estate and investment alone will not close the workforce strategy gap that separates New York from higher-ranked cities.

The Workforce Strategy Gap

New York City is already pursuing its goal of becoming the leading global city for applied AI. Although many current initiatives are promising, most focus on ecosystem development, startup growth, and AI literacy. The city has yet to develop a comparable strategy to assess and respond to AI's effects on occupations, workforce demand, and entry-level career pathways.

What New York City Is Already Doing on AI³³

AI Advisory Council	A cross-industry body of AI leaders and investors that will advise the Mayor's Office on AI adoption across New York City's economy.
AI Nexus	Program launching in fall 2026, operated by startup accelerators C10 Labs and Plug and Play, to support NYC startups with networking opportunities, funding, training programs, and mentorship.
"Demystifying Generative AI"	A 10-hour learning opportunity, developed and delivered by the New York Jobs CEO Council, for CUNY students to develop foundational awareness of generative AI.
The Founder Fellowship	An EDC program that has supported 393 NYC-based founders since 2022 by connecting tech and AI startups with resources and networks to grow.
NYC Startup Internship Program	Offers ~65 internships annually to CUNY students within New York City's tech startups, offering hands-on tech and AI experience.
Venture Capital	In 2025, the city's AI startups had their best VC fundraising year on record, with \$16.7 billion raised, second only to the Bay Area.

Learning from Other AI-Forward Cities

To avoid repeating previous cycles of tech-enabled worker displacement and protect New York City's white-collar industries' entry-level career pipelines, an AI strategy must be built up and out. Lessons from Singapore, Seoul, and San Francisco on addressing pipeline erosion and cushioning workforce impacts can inform updates to New York City's AI framework and illustrate three different approaches to managing the workforce implications of AI adoption.

Singapore: Centralizing Workforce Development for AI Adoption

Singapore has built a centralized system that aligns workforce training, industry demand, and AI adoption. Singapore's structure differs significantly from New York City's, but its approach to aligning AI adoption, workforce development, and employer demand offers several useful lessons. In 2025, newly created positions, including entry-level, accounted for a greater share of Singapore's job market than in previous years, with office-using industries exceeding the national average in new entry-level positions.³⁴

- **Centralized industry transition supports:** Singapore produced AI transition plans for each industry by identifying roles at risk of displacement and which skills are necessary for augmented work.³⁵ Those findings informed programs such as the TechSkills Accelerator, which helps workers in affected industries develop AI-related capabilities.³⁶
- **Direct upskilling and employment pipelines:** Singapore's government coordinates a 6-to-9-month AI apprenticeship with participation from leading private sector companies, which is projected to grow to 15,000 annual participants by 2030.³⁷ On top of this, Singapore also subsidizes SkillsFuture, an early-to-mid-career upskilling platform that lets professionals earn credits in AI skills.³⁸

Lesson for NYC: Singapore combines AI adoption, skills training, and employer demand into a single strategy, identifying occupations likely to be affected by AI and building training and employment pathways in advance.

Seoul: Embedding Workforce Development Across Public-Private Systems

Seoul aims to become the first physical AI city, integrating AI across public services, education systems, and industry partnerships to build continuous, system-wide training and career pipelines.³⁹

- **Embed AI across the entire ecosystem:** Seoul is integrating AI into everyday public services through generative AI chatbots and kiosks for civic complaints and tourism, exposing residents to AI systems and building baseline AI literacy. The city also founded the Seoul AI Innovation Council, a cross-industry-academic body that shares research, joint ventures, and networking opportunities with professionals and the public.⁴⁰
- **Coordination with higher education:** Seoul's universities offer over 100 AI programs and have trained over 9,000 individuals in AI skills in 2025.⁴¹ Through partnerships with NVIDIA, SK, and other AI companies, the city designed courses for its Youth Employment Academies and aims to provide 1,000 annual internships by 2030.⁴² Seoul is also expanding computing infrastructure and cloud-based GPU access to support advanced AI training across universities and academies.

Lesson for NYC: Seoul creates continuous opportunities to develop AI familiarity and experience through exposure and practical use within public services, education, and employer partnerships.

San Francisco: Deriving AI Innovation from the Private Sector

San Francisco relies heavily on a private sector-driven model in which investment drives AI innovation, with limited centralized coordination of workforce development. San Francisco metro area's entry-level job postings have declined 47% since 2022, suggesting an innovation-driven, private sector-only model may constrain the entry-level market.⁴³

- **Partnerships with AI Leaders:** California has partnered with Adobe, IBM, Google, Microsoft, and NVIDIA to allow California public school students and workers access to training modules and courses for AI skills. The California State University system has also partnered with AI industry experts to guide workforce and future course development.⁴⁴
- **Venture Capital investment, but limited opportunity:** San Francisco draws on the Bay Area's tech ecosystem for AI advancement, which captured 60% of global AI venture capital funding in 2025.⁴⁵

Lesson for NYC: Despite leading in AI investment and innovation, San Francisco has experienced steep declines in entry-level hiring, suggesting that a strong AI ecosystem alone does not automatically translate into strong workforce outcomes.

Key Implications for New York City

- **Entry-level hiring trends are an early warning sign of broader changes in New York City's labor market.** AI adoption is changing how workers enter white-collar careers, not simply how they advance within them. As routine work is automated and skill expectations rise, workers may face growing challenges accessing the experience and opportunities that have traditionally led to middle-income careers.
- **AI competitiveness and workforce competitiveness can no longer be treated separately.** The cities most aggressively pursuing AI growth are also investing in institutions that help workers adapt to technological change. Workforce strategy is increasingly becoming part of AI competitiveness rather than a separate policy objective.
- **New York City lacks a clear mechanism for understanding how AI is reshaping occupations and workforce demand.** While the city has invested in AI literacy, startup growth, and ecosystem development, it is less clear who is responsible for identifying emerging labor market disruptions, tracking changing skill requirements, or coordinating responses across employers, educators, and workforce providers.
- **AI's visible growth in New York City can be mistaken for broad economic opportunity.** The city's AI sector is expanding rapidly in commercial real estate, venture capital, and public attention—but this growth is not translating into proportional job creation, particularly at the entry level. Policymakers and the public should be cautious about treating leasing activity and investment figures as reliable indicators of the sector's employment impact.

Recommendations

The Partnership's recommendations draw on New York City's current entry-level career landscape and how other global city governments are building guardrails against AI's impact on white-collar careers. Some of these recommendations run parallel to those recently put forward by the Center for an Urban Future and the Office of the New York City Comptroller, whose work focused on the tech sector and fiscal outlook, respectively. The recommendations below expand that thinking to New York City's broader white-collar economy.

- **Create a formal process for monitoring AI's impact on occupations, skill requirements, and entry-level hiring and use those findings to guide workforce investments.** New York City currently tracks AI ecosystem growth, investment, and startup activity, but has no comparable mechanism for identifying where AI is changing skill requirements, reducing entry-level hiring, or reshaping occupations. A better understanding of these shifts should inform workforce investments, education planning, and future AI strategy updates.
- **Develop new ways for workers to gain practical AI experience as traditional entry-level roles evolve.** As employers increasingly prioritize workers who can apply, manage, and adapt AI systems, New York City should identify new models that allow students and early-career workers to build practical experience and demonstrate job readiness. These could include employer-sponsored projects and challenges, AI-integrated coursework, and other applied learning models that do not depend on employers maintaining or expanding traditional entry-level positions.
- **Integrate AI literacy and practical AI use into New Yorkers' everyday interactions with public institutions and services.** As AI literacy becomes a baseline expectation across many occupations, New York City should look beyond standalone training programs and create opportunities for residents to use and understand AI through schools, libraries, universities, workforce programs, and city services. Seoul's experience suggests that broad familiarity with AI can be built through repeated, practical use across many aspects of civic life.
- **Track AI-driven real estate activity alongside labor market data to avoid conflating visible growth with job creation.** AI's expanding presence in New York City's commercial real estate market — through new leases and headline investment activity — is the most visible sign of the sector's growth. But this activity does not reliably indicate job creation, particularly at the entry level. New York City should ensure that economic development strategy and public communication clearly distinguish between AI's physical and financial footprint and its actual employment impact, so that leasing activity and venture capital investment are not mistaken for broad-based economic opportunity.

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