

AI Office-Efficiency Opportunity in Physical-Service Businesses

Where exposed office work supports work performed in person

Business Buyer School modeled estimate. Opportunity points are not predicted savings, profit growth, or investment returns.

Dental offices rank first in the broad office-opportunity specification among 83 coverage-qualified industries where most employment is in in-person occupational groups, at 17.2 opportunity points (Business Buyer School modeled estimate).

Physician offices rank second in that specification (16.7) but fall to rank 41 under a narrower definition, so the ordering depends heavily on definitions. Building equipment contractors (10.4) and automotive repair (10.4) sit mid-table at ranks 23 and 24. The index multiplies exposed office work by the share of in-person work, using BLS May 2025 staffing. It is a heuristic for where to investigate, not a measurement of realized benefit, savings or returns.

WHAT AN OPPORTUNITY POINT IS

The exposure contribution of designated office roles multiplied by the industry's employment share in designated in-person roles, expressed as index points. It does not estimate how much payroll can be removed.

COHORT

83 industries: at least 85% matching coverage in both exposure measures, at least half of employment in the broad in-person proxy, and not in the editorial digital-service candidate set. This cohort and construct differ from the broad exposure ranking; the two scores are not one scale.

CLASSIFICATION LIMIT

NAICS 2382 combines plumbing, HVAC, electrical and other building equipment contracting. This report cannot produce separate rankings for those trades.

FIRST PUBLISHED

October 5, 2026

EDITION

1.0

ANALYSIS PREPARED

October 4, 2026

STAFFING REFERENCE PERIOD

May 2025 (BLS OEWS national industry staffing)

EXPOSURE MEASURE VINTAGE

Felten, Raj and Seamans 2021 and 2023;
Eloundou and coauthors 2023

The staffing data are from May 2025 and the academic exposure measures are older. Neither is a measurement of current AI capability.

Executive finding

Dental offices lead the broad office-opportunity specification among 83 coverage-qualified industries with a majority in designated physical or in-person occupational groups. Physician offices rank second in that specification but fall to forty-first under the narrower definition. Dental offices range from first to seventh. These movements are a central result, not a detail to hide below a winner list.

Building equipment contractors and automotive repair have nearly identical broad opportunity scores: 10.4 points after rounding, a Business Buyer School modeled estimate. Neither category tops the ranking. Their appeal in this report is a visible combination of office work and in-person service, which can be tested against an acquisition target's actual workflows.

Selected industries relevant to acquisition diligence

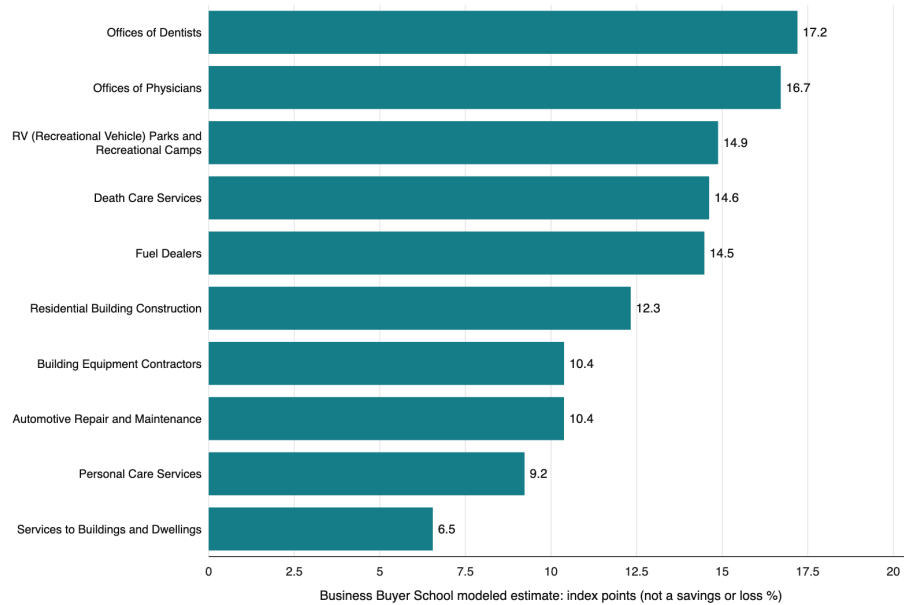
This is an editorial selection from the complete 83-industry qualified cohort, not a ranked list of the best businesses to buy. Every table number is a Business Buyer School modeled estimate.

The full broad ranking includes airlines, utilities, and manufacturing, so the overall cohort should not be marketed as a universe of small acquisition targets.

Selected industries from the 83-industry office-opportunity cohort. Business Buyer School modeled estimate. An editorial selection, not a ranked list of businesses to buy. Opportunity points are index points, not savings, and are not on the same scale as exposure points.

NAICS	Industry	Opportunity points	Broad rank (of 83)	Best rank	Worst rank
6212	Offices of Dentists	17.2	1	1	7
6211	Offices of Physicians	16.7	2	2	41
7212	RV (Recreational Vehicle) Parks and Recreational Camps	14.9	3	3	7
8122	Death Care Services	14.6	4	3	4
4572	Fuel Dealers	14.5	5	2	5
2361	Residential Building Construction	12.3	13	10	23
2382	Building Equipment Contractors	10.4	23	17	23
8111	Automotive Repair and Maintenance	10.4	24	18	28
8121	Personal Care Services	9.2	38	9	38
5617	Services to Buildings and Dwellings	6.5	68	45	69

Office opportunity: selected in-person service industries



May 2025 national private-industry staffing; older academic exposure measures. See full methodology at businessbuyerschool.com/research.

Office opportunity in selected in-person service industries. Business Buyer School modeled estimate: index points, not a savings or loss percentage. May 2025 national private-industry staffing; older academic exposure measures. Every value in the chart is in the table above.

See all 83 industries in the cohort.

2361 Residential Building Construction 12.3 13 10 23 2382 Building Equipment Contractors 10.4 23 17 23 8111 Automotive Repair and Maintenance 10.4 24 18 28 The rank range covers three models: narrow office/narrow in-person roles, broad office/broad in-person roles, and the broad roles using Eloundou's alternative exposure measure. The cohort stays fixed. These ranges are model sensitivity, not statistical confidence intervals.

How the opportunity measure works

The narrow office definition includes SOC 43, office and administrative support. The broad office definition adds SOC 11 and 13, management and business/financial occupations. Management includes work such as supervision that may not be office automation; its inclusion is an intentionally generous sensitivity assumption.

The narrow in-person proxy includes SOC 31, 35, 37, 39, 45, 47, 49, 51, and 53. The broad proxy adds health practitioners, SOC 29, and protective services, SOC 33. Occupational group membership is not proof that every task is physical or protected from AI. Some transport, production, and service tasks are automated in other ways.

For each industry, first sum occupation employment shares multiplied by their relative language-exposure percentile, restricted to the designated office roles. Multiply that office exposure contribution by the published employment share in the designated physical/in-person roles. Express the result as index points. The product rewards a combination of exposed support work and an in-person delivery base; it does not estimate how much payroll can be removed.

Qualification requires at least 85% matching coverage in both main and alternative measures, at least half of industry employment in the broad in-person proxy, and exclusion from the editorial digital-service candidate set. This screen is not a moat measure, a robotics forecast, or proof that customer demand is protected.

The robust part of the finding

Dental offices rank first in the broad model and seventh in the narrow one; death care ranks between third and fourth. Fuel dealers range from second to fifth. Those are more stable examples than physician offices, which range from second to forty-first, or other ambulatory health services, which range from seventh to seventy-seventh. All ranks are Business Buyer School modeled estimates within the 83-industry cohort.

The healthcare movements reflect a definition change as well as office work. Adding SOC 29 counts practitioners and hygienists as in-person work; excluding them sharply changes the physical share. This illustrates why a physical-office combination is a buyer research construct rather than an official measure of benefit.

Why trades can be promising without topping the table

Building equipment contractors, NAICS 2382, have 10.2% of published employment in office and administrative support and 74.3% in the broad in-person proxy. Automotive repair, NAICS 8111, has corresponding shares of 10.1% and 74.8%. These are Business Buyer School modeled estimates from national staffing, not typical-small-shop staffing.

A lower office share can reduce the size of an administrative opportunity even when frontline work is difficult for language software to perform. For a small shop, the owner's unrecorded estimating or scheduling work may be the bottleneck. OEWS cannot reveal that work because self-employed owner labor is excluded. A low national score therefore cannot rule out a valuable local improvement.

NAICS 2382 includes plumbing, HVAC, electrical, and other building equipment contracting. This four-digit report cannot produce separate HVAC, plumbing, or electrical rankings. Services to buildings and dwellings, NAICS 5617, similarly combines different activities. National industry mix should guide questions, then yield to target-company facts.

What an acquisition buyer should test

Workflows a buyer can test in a target business. Author-proposed, not observed savings from the staffing model.

Workflow	Potential operating change	Required evidence	Measure after a pilot
Lead response and scheduling	Draft replies, classify requests, and suggest appointments	Call and inquiry history; escalation rules	Qualified lead response time and booked appointments
Estimating	Assemble quote drafts from approved price books	Job scope, labor standards, parts records, and reviewer authority	Quote cycle time, corrections, and realized gross margin
Billing and collections	Draft invoices and follow-up messages	Completion records, payment terms, and dispute history	Days to invoice, rework, and overdue balances
Dispatch	Summarize job information and suggest assignments	Skill requirements, location data, customer windows	Travel time, repeat visits, and schedule changes
Customer service	Retrieve approved information and prepare responses	Knowledge quality and exception rules	Resolution quality, escalation, and complaint rates
Documentation	Draft job or visit summaries for human review	Reliable source notes and required approvals	Review time and error rates

These are author-proposed workflows, not observed savings from the staffing model. Correctness and accountability remain part of the process. Clinical or safety decisions require applicable professional oversight; an administrative opportunity does not authorize automating regulated decisions.

Dental offices

The industry combines substantial support employment with services performed in person. Scheduling, reminder preparation, claim-document organization, and routine correspondence are candidates for examination. Verify cancellations, collection delays, staffing, system access, and actual process quality. Do not infer clinical automation, a transferable patient relationship, or ownership eligibility from the score.

Building equipment contractors

An AI drafting tool can help assemble a quote, but it does not inspect the site or establish that the labor allowance is correct. Require review against actual job costs. Quoting faster without accuracy can accelerate margin leakage. For an acquisition, documented estimate-to-actual performance matters more than a demonstration of fluent prose.

Automotive repair

Customer communication and invoice preparation may be exposed support work. The value depends on reliable diagnostic and parts information, technician availability, approvals, and repair quality. The broad industry includes shops with different equipment and service models; no index replaces diligence on technician retention and bay utilization.

Death care and recreation

Death care and RV parks/recreational camps appear relatively high in the broad model. Scheduling and correspondence may be candidates, but customer trust, seasonal demand, property maintenance, and the sensitivity of interactions still shape performance. The RV-park result must not be transferred to manufactured-housing communities; those are different industry categories and business models.

A savings bridge with explicit assumptions

Exposure scores do not supply a time-saving rate. Build a workflow-specific scenario using eligible labor cost, the share of time spent on the selected tasks, an assumed task-time improvement, a realization factor, and recurring implementation costs. The realization factor measures whether saved time can actually reduce cost or support paid additional work.

Illustrative formula: net annual cash benefit = eligible annual labor cost x task-time share x assumed time improvement x cash realization - recurring software, review, and integration

costs. Treat implementation spending separately when calculating first-year cash flow. This formula is an educational scenario, not a valuation recommendation.

In an intentionally hypothetical example, annual eligible labor cost of \$200,000, a task-time share of 30%, assumed improvement of 25%, and cash realization of 50% yield \$7,500 before recurring costs. If those costs are \$6,000, annual net cash benefit is \$1,500. Every dollar and percentage in this example is a Business Buyer School modeled estimate based on invented inputs, not an industry benchmark. At zero cash realization, net recurring benefit becomes negative \$6,000.

The lesson is that reduced task time is not automatically reduced payroll. Savings can disappear into review work, unused capacity, integration costs, or customer price concessions. Additional revenue requires demonstrated demand and delivery capacity; do not count both labor removal and extra output from the same released hours without reconciliation.

Evidence for benefit, and evidence against overconfidence

A study of a customer-support AI deployment reported a 15% average productivity improvement measured by issues resolved per hour, with heterogeneous effects. That is measured evidence in a particular setting, not a coefficient for dental offices or contractors. [S8]

An experiment on knowledge work found improvement on some tasks and worse correctness on a task outside the tested technology's capability frontier. That supports workflow-specific testing and human review, not blanket automation. Neither study establishes the cash conversion assumed in the example above. [S9]

Acquire the current business, evaluate the improvement separately

Underwrite verified current cash flow. List proposed AI improvements as a separate plan with owners, process changes, costs, operational measures, and downside cases. If the seller already captured a gain, reconcile it to payroll and expenses before crediting it again. If the gain is unproven, the score alone does not justify including it in debt-service coverage.

An office-opportunity score is useful for choosing where to investigate. It cannot establish purchase price, financing eligibility, the amount of an add-back, or a buyer's ability to implement

the system.

Actual adoption is a separate question

For the period ending May 3, 2026, Census reported business AI use of 19.8% nationally, 39.7% in information, and 33.9% in finance and insurance. These are dated measured survey estimates, not four-digit industry forecasts. [S6]

Census broadened its AI-use question on November 17, 2025 to cover any business function. Earlier and later series should not be compared as though the question stayed constant. [S6 question-change documentation]

We do not merge those rates into the industry model. Exposure, reported use, successful implementation, and captured profit remain separate quantities. This edition does not report the latest October adoption wave or estimate an adoption gap.

Limits that must travel with the ranking

Exposure measures were constructed earlier than the staffing release. This is a 2026 publication using May 2025 staffing and older academic capability measures, not a new evaluation of October 2026 models. National industry staffing includes firms of many sizes. Outsourced administrative work and owner labor may be absent. The proxy does not measure competitive entry, customer bargaining power, data readiness, implementation skill, robotics, regulation, or the quality of a particular provider.

Matched employment is an incomplete subset. The download includes an opportunity upper envelope obtained by assigning the highest possible exposure to all uncovered employment before applying the same observed in-person factor. It is deliberately conservative and is not a confidence interval. Rankings based on the observed contribution may change under missing-data assumptions.

What the data measure

The original proposal treated government data and academic data as opposites. They are different kinds of primary evidence: BLS and Census supply official statistics, while the exposure researchers supply original academic measures. Neither government staffing nor academic exposure by itself predicts business failure.

Felten's occupational index connects AI applications to O*NET abilities. Eloundou's alternative evaluates tasks. We convert each occupational exposure measure to its percentile within that source's occupation list, then weight it by published industry employment. A percentile is a relative standing, not a percentage of tasks that AI can perform. The two measures retain different concepts even after normalization. [S2-S4, S7]

BLS supplies staffing by industry, not an acquisition-target sample. We use May 2025 national private-ownership estimates and detailed occupations, avoiding overlapping total, major, minor, and broad rows. OEWS excludes self-employed workers and does not isolate small firms. Owner work, outsourced bookkeeping, subcontractors, and differences between branches and firms can materially alter a real target's exposure. [S1]

The raw BLS file contains 247 industry groups. After removing composites, broader groups, and government designations, 211 strict four-digit private industries remain. Of those, 137 pass the joint 85% employment-matching gate for the main language measure and the independent task-based alternative. The full download retains the other industries with unranked flags. These counts describe this analysis, not the earlier 152-industry series. The supplied earlier research pack does not include that roster; this edition must not be presented as covering the same 152 industries.

The government employment counts are source statistics. All calculated scores, shares, ranks, rank ranges, and coverage measures are labeled Business Buyer School modeled estimate. Excluded observations are missing, not zero. The reported rank ranges reflect specified model changes; they are not statistical confidence intervals.

Educational scope and disclosure

Business Buyer School is an educational research site. This report provides general information and modeled comparisons, not individualized investment, lending, legal, tax, employment, or acquisition advice. It does not recommend purchasing or avoiding a particular business. Industry averages do not establish a target company's results. Verify material assumptions with company records and qualified professionals before acting.

Business Buyer School produces acquisition education and may benefit commercially from readership. The model was prepared with AI assistance and programmatic calculations from public sources. It has not received independent practitioner or academic review. No transaction, employee, customer, or private-company data were used. No causal effect of AI on revenue, enterprise value, or employment is estimated.

Suggested citation

Business Buyer School (2026). AI Office-Efficiency Opportunity in Physical-Service Businesses, edition 1.0, October 4. Business Buyer School modeled estimates using BLS OEWS May 2025 and Felten et al. occupational exposure, with Eloundou et al. sensitivity. Cite the public report URL and dataset version once published.

All 83 industries in the cohort

All 83 industries in the office-opportunity cohort, broad specification. Business Buyer School modeled estimate. Best and worst rank cover three model specifications and are model sensitivity, not confidence intervals. The cohort includes airlines, utilities and manufacturing and is not a list of small acquisition targets.

Broad rank	NAICS	Industry	Opportunity points	Best rank	Worst rank	Office and administrative support share (%)	Broad in-person share (%)
1	6212	Offices of Dentists	17.2	1	7	28.1	68.7
2	6211	Offices of Physicians	16.7	2	41	25.0	64.8
3	7212	RV (Recreational Vehicle) Parks and Recreational Camps	14.9	3	7	20.8	56.6
4	8122	Death Care Services	14.6	3	4	18.6	63.4
5	4572	Fuel Dealers	14.5	2	5	22.1	61.1
6	2213	Water, Sewage and Other Systems	13.8	6	6	20.0	58.7

Broad rank	NAICS	Industry	Opportunity points	Best rank	Worst rank	Office and administrative support share (%)	Broad in-person share (%)
7	6219	Other Ambulatory Health Care Services	13.8	7	77	13.8	67.2
8	4884	Support Activities for Road Transportation	13.7	3	8	18.5	72.1
9	4811	Scheduled Air Transportation	13.4	1	9	24.9	68.6
10	4812	Nonscheduled Air Transportation	13.3	10	19	12.3	62.2
11	4889	Other Support Activities for Transportation	12.7	8	11	19.6	58.8
12	4883	Support Activities for Water Transportation	12.7	12	16	11.4	70.1
13	2361	Residential Building Construction	12.3	10	23	12.1	57.3
14	6213	Offices of Other Health Practitioners	12.0	14	54	20.9	55.0
15	2362	Nonresidential Building Construction	11.8	9	58	7.2	55.1
16	8134	Civic and Social Organizations	11.3	16	32	11.9	59.3

Broad rank	NAICS	Industry	Opportunity points	Best rank	Worst rank	Office and administrative support share (%)	Broad in-person share (%)
17	5629	Remediation and Other Waste Management Services	11.2	15	20	11.0	67.5
18	8114	Personal and Household Goods Repair and Maintenance	11.1	10	19	14.0	70.4
19	4245	Farm Product Raw Material Merchant Wholesalers	10.8	16	21	13.9	60.2
20	7113	Promoters of Performing Arts, Sports, and Similar Events	10.8	20	64	8.7	52.1
21	7213	Rooming and Boarding Houses, Dormitories, and Workers' Camps	10.6	12	30	13.3	71.4
22	3231	Printing and Related Support Activities	10.5	14	22	16.0	60.8
23	2382	Building Equipment Contractors	10.4	17	23	10.2	74.3

Broad rank	NAICS	Industry	Opportunity points	Best rank	Worst rank	Office and administrative support share (%)	Broad in-person share (%)
24	8111	Automotive Repair and Maintenance	10.4	18	28	10.1	74.8
25	8129	Other Personal Services	10.3	25	38	9.2	73.9
26	8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	10.2	24	32	10.7	67.9
27	3111	Animal Food Manufacturing	10.1	27	35	10.0	69.8
28	5621	Waste Collection	10.1	13	28	11.4	79.4
29	2389	Other Specialty Trade Contractors	10.0	27	30	8.4	77.6
30	2383	Building Finishing Contractors	9.9	23	30	8.8	76.3
31	2381	Foundation, Structure, and Building Exterior Contractors	9.8	24	36	7.9	77.4

Broad rank	NAICS	Industry	Opportunity points	Best rank	Worst rank	Office and administrative support share (%)	Broad in-person share (%)
32	2379	Other Heavy and Civil Engineering Construction	9.8	25	52	5.9	71.9
33	4852	Interurban and Rural Bus Transportation	9.7	11	33	13.1	76.5
34	8112	Electronic and Precision Equipment Repair and Maintenance	9.7	34	38	13.0	50.9
35	5622	Waste Treatment and Disposal	9.5	31	37	10.4	66.8
36	3149	Other Textile Product Mills	9.5	22	36	12.3	67.7
37	2371	Utility System Construction	9.3	31	46	6.2	76.7
38	8121	Personal Care Services	9.2	9	38	11.9	80.7
39	4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	9.1	39	40	13.6	51.0
40	3241	Petroleum and Coal Products Manufacturing	9.1	40	70	5.5	63.3

Broad rank	NAICS	Industry	Opportunity points	Best rank	Worst rank	Office and administrative support share (%)	Broad in-person share (%)
41	5612	Facilities Support Services	8.9	41	47	7.9	71.4
42	2123	Nonmetallic Mineral Mining and Quarrying	8.9	33	47	9.3	78.2
43	7139	Other Amusement and Recreation Industries	8.9	28	45	9.6	71.2
44	3112	Grain and Oilseed Milling	8.8	44	51	7.1	72.4
45	2373	Highway, Street, and Bridge Construction	8.8	39	56	5.2	79.5
46	3152	Cut and Sew Apparel Manufacturing	8.8	34	46	12.2	59.5
47	4851	Urban Transit Systems	8.6	25	47	8.3	82.8
48	3222	Converted Paper Product Manufacturing	8.6	42	48	8.2	76.1
49	2131	Support Activities for Mining	8.5	48	56	6.0	74.9
50	4862	Pipeline Transportation of Natural Gas	8.4	50	79	3.7	63.9

Broad rank	NAICS	Industry	Opportunity points	Best rank	Worst rank	Office and administrative support share (%)	Broad in-person share (%)
51	3122	Tobacco Manufacturing	8.2	50	55	7.8	64.4
52	4931	Warehousing and Storage	8.2	37	52	10.7	80.4
53	3119	Other Food Manufacturing	8.2	49	53	7.0	76.5
54	3314	Nonferrous Metal (except Aluminum) Production and Processing	7.8	54	65	6.3	72.5
55	3312	Steel Product Manufacturing from Purchased Steel	7.6	55	61	6.8	73.7
56	3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	7.5	56	58	6.1	80.4
57	1152	Support Activities for Animal Production	7.5	40	63	7.5	73.3
58	4821	Rail Transportation	7.5	58	66	4.2	83.5
59	3115	Dairy Product Manufacturing	7.4	53	59	6.6	78.5
60	3221	Pulp, Paper, and Paperboard Mills	7.4	60	72	5.1	74.4

Broad rank	NAICS	Industry	Opportunity points	Best rank	Worst rank	Office and administrative support share (%)	Broad in-person share (%)
61	3262	Rubber Product Manufacturing	7.3	59	61	6.2	76.1
62	4922	Local Messengers and Local Delivery	7.2	29	62	13.6	81.0
63	3313	Alumina and Aluminum Production and Processing	7.1	62	67	5.8	74.6
64	1133	Logging	7.1	21	70	8.8	83.1
65	4832	Inland Water Transportation	7.1	59	65	4.7	83.2
66	3121	Beverage Manufacturing	6.9	66	74	4.5	69.4
67	3132	Fabric Mills	6.7	63	67	6.2	75.5
68	5617	Services to Buildings and Dwellings	6.5	45	69	5.8	85.7
69	6231	Nursing Care Facilities (Skilled Nursing Facilities)	6.5	69	74	4.3	89.1
70	3315	Foundries	6.5	67	70	5.1	79.7
71	8123	Drycleaning and Laundry Services	6.5	43	71	7.1	76.1

Broad rank	NAICS	Industry	Opportunity points	Best rank	Worst rank	Office and administrative support share (%)	Broad in-person share (%)
72	3113	Sugar and Confectionery Product Manufacturing	6.4	71	72	5.4	69.2
73	3211	Sawmills and Wood Preservation	6.2	50	73	5.6	84.8
74	3311	Iron and Steel Mills and Ferroalloy Manufacturing	6.2	72	78	4.4	73.5
75	4921	Couriers and Express Delivery Services	5.6	44	75	7.5	88.5
76	2122	Metal Ore Mining	5.5	76	81	3.0	73.2
77	5616	Investigation and Security Services	5.4	76	83	5.0	86.0
78	3118	Bakeries and Tortilla Manufacturing	5.2	69	78	4.7	78.3
79	1151	Support Activities for Crop Production	4.9	62	79	4.5	89.6
80	3116	Animal Slaughtering and Processing	4.6	75	80	3.8	90.0

Broad rank	NAICS	Industry	Opportunity points	Best rank	Worst rank	Office and administrative support share (%)	Broad in-person share (%)
81	3131	Fiber, Yarn, and Thread Mills	4.3	76	81	4.0	86.9
82	4854	School and Employee Bus Transportation	3.6	80	82	2.8	94.4
83	7224	Drinking Places (Alcoholic Beverages)	3.5	82	83	1.3	91.0

Sources and attribution

[S1] U.S. Bureau of Labor Statistics, Occupational Employment and Wage Statistics, May 2025 national industry staffing tables. bls.gov/oes/tables.htm; downloaded file: [oesm25in4.zip](#). Private ownership, detailed occupations, strict four-digit NAICS only.

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[S4] Eloundou, T., Manning, S., Mishkin, P., and Rock, D. (2023). GPTs are GPTs: An Early Look at the Labor Market Impact Potential of Large Language Models. arxiv.org/abs/2303.10130. Author replication data: github.com/openai/GPTs-are-GPTs. Sensitivity uses human_rating_beta from data/occ_level.csv, restricted to .00 occupational records; no averaging of O*NET specialties without employment weights.

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How to cite this research

Business Buyer School (2026). *AI Office-Efficiency Opportunity in Physical-Service Businesses*, edition 1.0, prepared October 4, 2026. First published October 5, 2026. <https://businessbuyerschool.com/research/ai-office-opportunity/>. Business Buyer School modeled estimates using BLS OEWS May 2025 staffing and published occupational exposure measures.

- **Author and publisher:** Business Buyer School Research (businessbuyerschool.com), operated by Dig Inc LLC. Organizational authorship; no individual author is named.
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