



FOR LABOR MARKET RESEARCH

SOUTH CENTRAL COAST

Aerospace & Defense Sector Profile

One of Five Priority Sectors for the South Central Coast under California Jobs First

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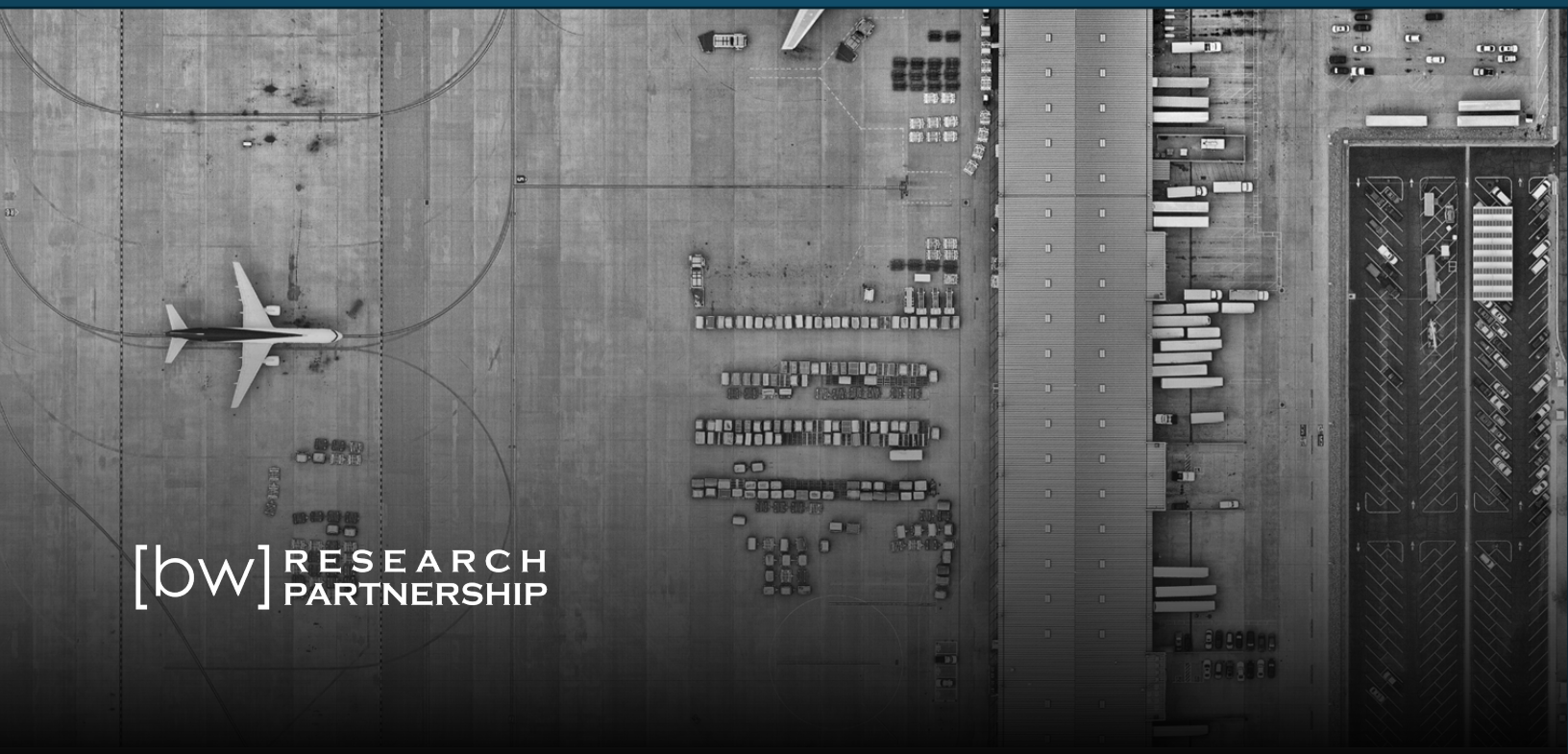


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Key Findings

1. **The Aerospace & Defense sector provides a valuable workforce and economic development investment opportunity for the South Central Coast (SCC) region.** With over 23,000 jobs and an average wage 64% above the regional economy-wide average, the industry is core to the nation's national defense and emerging transportation aspirations, while also providing high-paying workforce opportunities, and supporting emerging technologies. The sector is also growing and evolving, with employers anticipating continued workforce growth over both the next 12 months and the next three years.
2. **The SCC Aerospace & Defense sector is made up of four industries, with a high concentration of employment in three of those four industries.** Aircraft, Space, and Marine Systems, which includes satellite systems, unmanned aerial systems, and related component manufacturing, has almost 50% higher employment than the national average for the industry and has been growing by over 20% over the last five years from 2021 to 2025. Defense Manufacturing, including aeronautical systems manufacturing, has employment 26% higher than the national average, and Defense Operations and related professional services has employment 21% higher than the national average. Maintenance and Support Services is the only Aerospace & Defense industry with a lower share of regional employment than the national average.
3. **Evolving technologies, an aging workforce, and automation are likely to impact priority occupations broadly across the Aerospace & Defense sector.** Priority occupations in this sector are moderately to highly affected by automation, and many employers report considerable skill changes in key occupations. Employers are also concerned about preparing a new generation of workers to assume the duties of aging workers nearing retirement. Community colleges and other training providers must continue to strengthen industry partnerships to adequately respond to evolving skill sets and increasing occupational demand. Ongoing curriculum updates, employer feedback loops, and incumbent-worker upskilling will be crucial to maintaining Aerospace & Defense worker readiness.
4. **Community colleges can play a valuable role in supporting the talent pipeline for Aerospace & Defense occupations.** Employers emphasized the importance of technical skills for priority occupations that can often be developed at community colleges and high levels of interest in apprenticeship programs that offer a pipeline of future employees and job readiness programs that prepare new employees with key workplace skills. This suggests an opportunity to better connect employer demand for training models with community college-led workforce pathways.

Introduction

This Aerospace & Defense Report is part of a larger series that explores “Bet” and “Accelerate” sectors in the SCC region. The SCC region includes San Luis Obispo, Santa Barbara, Ventura, and Northern Los Angeles Counties.

Under California Jobs First, which presents a comprehensive approach to advancing the state’s economy, Aerospace & Defense is classified as an “Accelerate” sector due to its projected growth and strategic importance to the region’s innovation ecosystem. This designation signals state-level commitment to expanding Aerospace & Defense industries and workforce pipelines.

This report explores opportunities and challenges in the SCC Aerospace & Defense sector. However, some data limitations exist as North American Industry Classification System (NAICS) codes lack granularity and may not accurately reflect emerging industries in advanced air mobility, uncrewed aircraft systems, and other defense technologies. A full list of NAICS codes included in the Aerospace & Defense sector definition is available in Appendix A.

Sector Landscape

Aerospace & Defense is an “Accelerate” sector in the South Central Coast, signaling state-level recognition of the sector’s growth potential and the need to strengthen related industry and workforce pipelines. The region’s established Aerospace & Defense assets, including Vandenberg Space Force Base in Santa Barbara County, a strong employer ecosystem, and proximity to major Aerospace & Defense activity in Southern California, position the region to support continued growth in the sector.

Recent investments into Vandenberg Space Force Base, including a recent \$9.5 million investment from the state of California¹ and a planned \$900 million infrastructure overhaul² to boost launch capacities, are likely to drive further workforce demand for high-skill design and engineering roles and middle-skill fabrication, maintenance, and repair roles. Additionally, proposed increases to the national defense budget will further accelerate macroeconomic growth and workforce demand in the sector.

Aerospace & Defense presents growth opportunities, though workforce development may be limited by sector-specific barriers. Federal procurement cycles, contract awards, and defense budget decisions can shift hiring demand quickly, making it difficult for training providers to plan around long-term workforce needs. Security clearance requirements and other restrictions can also limit the available talent pool for some occupations. In addition, specialized equipment and facility requirements may exacerbate the difficulty of rapidly scaling training programs in areas such as aviation maintenance, avionics, and emerging aerospace technologies.

The SCC has just over 23,000 Aerospace & Defense jobs as of 2025, offering average wages well above the regional average. The average Aerospace & Defense wage in the SCC is \$114,997, 64% higher than

¹ [REACH Central Coast. Space Vandenberg Initiative.](#)

² [Los Angeles Times. Vandenberg Space Force Base is ready to take off, 2026.](#)

the region's economy-wide average of \$70,054. The concentration of Aerospace & Defense workers in the SCC is 11% higher than the nationwide average.³ Key Aerospace & Defense employers in the region include SpaceX, Lockheed Martin, Northrop Grumman, and RTX.

Industry Landscape

The Aerospace & Defense sector is classified into four industries:

- **Defense Manufacturing**, including aeronautical systems manufacturing.
- **Aircraft, Space, and Marine Systems**, including aircraft, spacecraft, satellite systems, unmanned aerial systems and components manufacturing.
- **Maintenance and Support Services**, including aircraft and spacecraft maintenance, repair and operations services and air transportation support.
- **Defense Operations and Professional Services**, including national security, mission support, and R&D in advanced components, systems, and emerging technologies.

Defense Operations and Professional Services is the largest industry in the region's Aerospace & Defense sector, representing 37% of the total sectoral workforce. Defense Manufacturing represents 32% of the Aerospace & Defense workforce, followed by Aircraft, Space, and Marine Systems (19%) and Maintenance and Support Services (12%).⁴

Defense Operations and Professional Services workers earn the highest salaries among the four industries, exceeding \$127,200 annually. Aircraft, Space, and Marine Systems and Defense Manufacturing also offer high wages, at approximately \$116,200 and \$108,100, respectively, while the Maintenance and Support Services industry offers the lowest annual wages, at approximately \$71,000.⁵

Aircraft, Space, and Marine Systems experienced the strongest job growth over the past five years, at 22%. Maintenance and Support Services exhibited more modest employment growth of 7% during this period, while Defense Operations and Professional Services and Defense Manufacturing experienced declines of -3% and -8%, respectively.⁶

Demand Expectations

Surveyed SCC Aerospace & Defense employers anticipate future growth. Over half (59%) of surveyed SCC Aerospace & Defense employers predicted headcount growth in the next 12 months, with 33% anticipating a 10% or greater increase in headcount. Surveyed employers' growth expectations were even stronger for the next three years, with 61% predicting headcount growth at their firm; of those employers, over two in five (41%) anticipated growth over 10%.

³ JobsEQ. U.S. Bureau of Labor Statistics. Quarterly Census of Employment and Wages, 2025Q3.

⁴ JobsEQ. U.S. Bureau of Labor Statistics. Quarterly Census of Employment and Wages, 2025Q3.

⁵ JobsEQ. U.S. Bureau of Labor Statistics. Quarterly Census of Employment and Wages, 2025Q3.

⁶ JobsEQ. U.S. Bureau of Labor Statistics. Quarterly Census of Employment and Wages, 2025Q3.

Stakeholders see robotics, autonomous human interface, and machine learning play a growing role, particularly in emerging industries in the sector. Biocommunications and biomedical technologies present longer-term emerging opportunities in Aerospace & Defense, while traditional elements of the sector, including cybersecurity, information technology, and material sciences continue to play an important role.

From a workforce and talent perspective, engineers in mechanical, electrical and aerospace remain in high demand. Project managers who demonstrate industry expertise and provide effective communication and problem-solving skills are also in high demand. Engineers and technicians with expertise in RF (Radio Frequency), Communications, and thermodynamics are emerging as key areas of occupational demand in the sector.

Occupational Findings

Team Assemblers, Project Management Specialists, Mechanical Engineers, and General and Operations Managers are among the largest Aerospace & Defense occupations in the SCC. These occupations reflect the sector's mix of production, engineering, project management, and operations activity. The sector employed approximately 700 Team Assemblers, over 600 Project Management Specialists, nearly 600 Mechanical Engineers, and over 500 General and Operations Managers as of 2025 Q3. Other high-employment Aerospace & Defense occupations include Aerospace Engineers, Management Analysts, and Machinists.⁷

Stakeholder-identified occupational priorities center on key Aircraft, Space, and Marine Systems occupations, including Airframe and Powerplant Technicians, Aviation Maintenance Technicians, and Avionics Technicians. These priorities are driven by workforce aging and retirements, as well as the growing use of automation and electronic systems across aircraft and aerospace operations.

Job Advancement

Nearly three-quarters (73%) of priority Aerospace & Defense occupations offer high wages or strong advancement potential, underscoring the role these jobs can play in supporting economic mobility. Fifteen occupations were selected as priority Aerospace & Defense occupations due to their importance to sector activities, high employment levels, and relevance to the region (see full occupation list in Appendix A).

Eight of these occupations already offer high wages and are not included in job advancement metrics because they are considered top-tier roles.⁸ Among the remaining occupations, one has high

⁷ JobsEQ. U.S. Bureau of Labor Statistics. Occupational Employment and Wage Statistics, 2025Q3.

⁸ These occupations include Aerospace Engineers; Avionics Technicians; Aircraft Mechanics and Service Technicians; Computer Numerically Controlled Tool Operators and Programmers; General and Operations Managers; Project Management Specialists; Management Analysts; Mechanical Engineers.

advancement potential (**Mobile Heavy Equipment Mechanics**), meaning workers in this occupation are especially well positioned to advance their careers and increase their earnings.⁹

Automation

Aerospace & Defense jobs are more exposed to automation than jobs in the regional economy overall.

Approximately 29% of Aerospace & Defense sector jobs are highly likely to be affected by automation, compared to about 20% of jobs across all industries in the region.

Among priority Aerospace & Defense occupations, only two are expected to be least affected by automation: **General and Operational Managers** and **Management Analysts**. The remaining 13 priority occupations are expected to be moderately to highly affected by automation, including assembly, fabrication, and maintenance and repair-related occupations.¹⁰

As automation changes the tasks, tools, and skill requirements associated with these occupations, training programs must maintain close partnerships with employers to ensure workers are prepared for evolving industry needs and potential shifts in demand.

Skills

Most surveyed Aerospace & Defense employers report considerable changes in the skills and abilities required for their Aerospace & Defense workers due to evolving technologies, market conditions, or expectations.¹¹ The occupations with the most acute changes in skills, or at least two-thirds of surveyed employers reporting considerable skill changes, include:

- Aerospace Engineers;
- Aircraft Mechanics and Service Technicians;
- Aircraft Structure, Surfaces, Rigging, and Systems Assemblers;
- Avionics Technicians;
- CNC Tool Operators and Programmers;
- Industrial Machinery Mechanics;
- Machinists.

As with automation, occupations experiencing considerable skill changes require workforce development partners to maintain close connections with employers to ensure that curriculum and

⁹ BW Research. Job Advancement Index, 2026. The Job Advancement Index classifies occupations into three categories based on workers' potential to advance to higher-paying job opportunities. These high advancement potential occupations are classified as Category 1 occupations that are most likely to provide higher-paying job opportunities. See Appendix D for more details.

¹⁰ BW Research. Job Automation Index, 2026. The Job Automation Index classifies occupations into three levels based on the proportion of skills and tasks that can be automated within a particular occupation. These highly automatable occupations are classified as Level 3 occupations that are most likely to experience automation and AI-related employment effects. See Appendix D for more details.

¹¹ Since survey responses were limited, these findings should be interpreted directionally rather than as strict quantitative findings.

training pathways reflect industry needs. Employers also highlighted a need for AI literacy skills and hands-on technical skills, as well as an understanding of regulatory requirements.

Training Landscape

Surveyed Aerospace & Defense employers indicated strong interest in training programs to strengthen workforce pipelines. Nearly all surveyed employers (98%) expressed interest in job readiness programs. Interest was also high for apprenticeship programs (96%), internship programs (93%), technical bootcamps (89%), and mentorship programs (89%).

Nearly half (47%) of Aerospace & Defense employers surveyed reported partnering with community colleges to recruit, hire, and train workers. Partnership rates are higher for community colleges than unions, workforce development boards, and nonprofits or community organizations; however, they lag four-year colleges, with a partnership rate of 66%, and high school, technical, or vocational schools at 52%.

Findings suggest that SCC Aerospace & Defense employers are receptive to training partnerships, but that opportunity remains to better align high-interest training models with existing education and workforce relationships. Community colleges are already an important partner for many Aerospace & Defense employers, positioning them to play a larger role in expanding apprenticeships, internships, bootcamps, and job readiness programs that respond directly to employer needs.

Training Inventory

The South Central Coast offers 204 Aerospace & Defense training programs.¹² Of these, nearly two in three (133, or 65%) are offered by community colleges. Training opportunities are distributed throughout the region, with some county-specific concentration. Los Angeles County offers the most training opportunities (74), followed by Ventura County (64) and Santa Barbara County (40). San Luis Obispo County trails with 26 training programs.

Available associate's degree opportunities include fabrication, assembly, general operations, and project management pathways, along with key aerospace, mechanical, and general engineering transfer programs that lay the foundation for Aerospace & Defense transfer paths. Certificate programs are available in welding, aviation technician, and other maintenance and repair occupations, as well as general operations and project management programs that serve multiple sectors and industries.

Several priority occupations expected to experience moderate to high rates of skill changes are already supported by strong regional community college training capacity. General and Operations Managers have the largest community college program footprint, with 24 community college programs across the

¹² Training inventory reflects major public institutions and a sample of private and union programs and does not constitute a comprehensive list of all providers in the region.

region. Welders, Cutters, Solderers, and Brazers have 21 programs, while Mechanical Engineers have 15, and Aircraft Mechanics and Service Technicians have 7.

These occupations are also expected to undergo moderate to high rates of skill change, underscoring the importance of maintaining alignment between existing training programs and evolving industry needs. General and Operations Managers and Mechanical Engineers earn high wages at entry, and Welders have moderate advancement potential, suggesting they can serve as important entry points into higher-paying career pathways.

Five priority occupations remain underserved despite strong career advancement potential. Avionics Technicians; Aircraft Structure, Surfaces, Rigging, and Systems Assemblers; Industrial Machinery Mechanics; Electrical, Electronic, and Electromechanical Equipment Assemblers; and Team Assemblers are each served by less than ten identified community college training programs. Most of these occupations are also expected to experience changing skill requirements, underscoring the need for more accessible local training opportunities that prepare new workers and support upskilling for incumbent workers.

Community College Prioritization

The following occupations represent the highest priority for community college development, based on regional demand (100+ workers in the region), high entry-level wages, the requirement of less than a four-year degree at entry, and their centrality to Aerospace & Defense:

- Aircraft Mechanics and Service Technicians;
- CNC Tool Operators and Programmers;
- Electrical, Electronic, and Electromechanical Equipment Assemblers.

The following occupations represent a medium priority for community college development, based on regional demand (100+ workers), moderate advancement potential, the requirement of less than a four-year degree at entry, and their centrality to Aerospace & Defense:

- Aircraft Structure and Systems Assemblers;
- Industrial Machinery Mechanics;
- Machinists;
- Welders.

Emerging occupations for community colleges include:

- Airframe and Powerplant Technicians;
- Aviation Maintenance Technicians;
- Avionics Technicians.

These occupations were cited as emerging short- to medium-term hiring needs according to stakeholder interviews and typically require less than a four-year degree at entry.

Key Constraints to Workforce Development

The SCC is well-positioned to support employment opportunities and pathways in Aerospace & Defense, with the understanding that there will be challenges in any sector-specific workforce development efforts. These workforce development challenges in the SCC region for Aerospace & Defense include:

- **Dependence on federal funding, planning, and procurement cycles**, that are more focused on the immediate needs of the Department of Defense and less focused on long-term planning, where workforce development can be more effective, according to industry experts. This challenge signals the need for flexible foundational training and education that allow employers and their workforce to pivot quickly between priorities.
- **Security clearance requirements and other related restrictions** can limit the availability of the talent pool for more defense-focused occupations and employers.
- **Specialized equipment and facility requirements** to train and develop workers in aviation maintenance, avionics, and emerging aerospace technologies can limit the bandwidth of traditional education and training providers. This challenge underscores the need for more robust partnerships between employers and education and training providers.

Recommendations

The Aerospace & Defense sector offers valuable opportunities for higher-paying employment opportunities and career pathways, while advancing the core mission of California's community colleges: to advance economic growth through accessible workforce training and career education.

Regional recommendations to facilitate workforce opportunities in Aerospace & Defense include:

- **Coordinate Aerospace & Defense sector advisory structures with precision and advanced manufacturing to share insights, reduce duplication of effort, and align training with sector-specific needs.** Employers identified a need for specific technical skills and deeper understanding of both the aerospace and defense industries and their relationship with precision manufacturing and related supply chains. A more coordinated advisory structure could help partners share technology advancements and labor market insights, identify common training priorities, and clarify which institutions are best positioned to serve different Aerospace & Defense industries.
- **Align curriculum development timelines for emerging technologies to prepare for evolving skills needs.** This is particularly relevant for defense manufacturing and aircraft, space and marine systems, where uncertain development timelines make it difficult to determine when to launch new programs. Earlier coordination among employers, educators, and industry partners can help identify transferable skills, sequence training investments, and prepare scalable curriculum models as these industries evolve.

In addition to the region-wide recommendations, there are various opportunities for community colleges specifically to best support Aerospace & Defense workforce growth:

- **Expand and update the most high-value programs, especially in manufacturing and aircraft, space, and marine systems.** Community colleges can leverage and scale existing program strengths in project management, welding, pre-engineering, and advanced manufacturing to support occupations with strong employer demand, changing skill requirements, and advancement potential. Expanding capacity in these areas can help meet near-term workforce needs while strengthening pathways into Aerospace & Defense careers.
- **Close skills gaps through work-based learning.** Internships, short-term credentials, pre-apprenticeships, and job readiness programs can help address cross-cutting foundational and technical skill gaps across Aerospace & Defense, which can overlap with other sectors such as the Clean Economy. These models are especially valuable when co-designed by employers and tied to clear hiring needs, workplace expectations, and opportunities for continued advancement.

Appendix A: NAICS Industry Definition

Classification	Industry	NAICS	Description
Primary	Aircraft, Space, and Marine Systems	336411	Aircraft Manufacturing
		336412	Aircraft Engine and Engine Parts Manufacturing
		336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing
		336414	Guided Missile and Space Vehicle Manufacturing
		336415	Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing
		336419	Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing
	Defense Manufacturing	334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing
		332992	Small Arms Ammunition Manufacturing
		332994	Small Arms, Ordnance, and Ordnance Accessories Manufacturing
	Maintenance and Support Services	488119	Other Airport Operations
		488190	Other Support Activities for Air Transportation
		611512	Flight Training
	Defense Operations and Professional Services	928110	National Security
Secondary	Defense Manufacturing	334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables
		335311	Power, Distribution, and Specialty Transformer Manufacturing
		335313	Switchgear and Switchboard Apparatus Manufacturing
		335314	Relay and Industrial Control Manufacturing
		335931	Current-Carrying Wiring Device Manufacturing
		335932	Noncurrent-Carrying Wiring Device Manufacturing
		331315	Aluminum Sheet, Plate, and Foil Manufacturing
		331318	Other Aluminum Rolling, Drawing, and Extruding
		331523	Nonferrous Metal Die-Casting Foundries
		331524	Aluminum Foundries (except Die-Casting)
		331529	Other Nonferrous Metal Foundries (except Die-Casting)
		332111	Iron and Steel Forging
		332112	Nonferrous Forging
		332114	Custom Roll Forming
		332117	Powder Metallurgy Part Manufacturing
		332313	Plate Work Manufacturing
		332322	Sheet Metal Work Manufacturing
		332721	Precision Turned Product Manufacturing
		332722	Bolt, Nut, Screw, Rivet, and Washer Manufacturing
		332811	Metal Heat Treating

Classification	Industry	NAICS	Description
Secondary	Defense Manufacturing	332812	Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers
		332813	Electroplating, Plating, Polishing, Anodizing, and Coloring
		332911	Industrial Valve Manufacturing
		332912	Fluid Power Valve and Hose Fitting Manufacturing
		332919	Other Metal Valve and Pipe Fitting Manufacturing
		332991	Ball and Roller Bearing Manufacturing
		332996	Fabricated Pipe and Pipe Fitting Manufacturing
		333914	Measuring, Dispensing, and Other Pumping Equipment Manufacturing
		333992	Welding and Soldering Equipment Manufacturing
		333995	Fluid Power Cylinder and Actuator Manufacturing
		333996	Fluid Power Pump and Motor Manufacturing
		334220	Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing
		334290	Other Communications Equipment Manufacturing
		336999	All Other Transportation Equipment Manufacturing
	Maintenance and Support Services	423830	Industrial Machinery and Equipment Merchant Wholesalers
		561210	Facilities Support Services
		561621	Security Systems Services (except Locksmiths)
	Defense Operations and Professional Services	541330	Engineering Services
		541715	Research and Development in the Physical, Engineering, and Life Sciences

Appendix B: Priority Occupations

Industry	SOC	Description
Aircraft, Space, and Marine Systems	17-2011	Aerospace Engineers
	49-2091	Avionics Technicians
	49-3011	Aircraft Mechanics and Service Technicians
	51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers
	51-4041	Machinists
Defense Manufacturing	51-2028	Electrical, Electronic, and Electromechanical Equipment Assemblers, Except Coil Winders, Tapers, and Finishers
	51-2092	Team Assemblers
	51-4121	Welders, Cutters, Solderers, and Brazers
	51-9160	Computer Numerically Controlled Tool Operators and Programmers
Maintenance and Support Services	11-1021	General and Operations Managers
	49-3042	Mobile Heavy Equipment Mechanics, Except Engines
	49-9041	Industrial Machinery Mechanics
Defense Operations and Professional Services	13-1082	Project Management Specialists
	13-1111	Management Analysts
	17-2141	Mechanical Engineers

Appendix C: Aerospace & Defense Employer Survey

Methodology

Method	Online Survey (Email & Panel Respondents)
Universe	6,066 establishments in Santa Barbara, San Luis Obispo, Ventura, and Los Angeles Counties
Number of Respondents	99 total completes by firms in Santa Barbara, San Luis Obispo, Ventura, and Los Angeles Counties
Average Length	Online Survey – 17 minutes
Field Dates	April 15, 2026 through May 11, 2026

Appendix D: Data Sources

Data Element	Data Source
Sector Employment	United States Bureau of Labor Statistics. Quarterly Census of Employment and Wages, 2025.
Sector Wages	
Occupational Employment	United States Bureau of Labor Statistics, Occupational Employment and Wage Statistics, 2025.
Occupational Wages	
Job Advancement	BW Research. Job Advancement Index, 2026. BW's Job Advancement Index measures workers' potential to advance to higher-paying job opportunities using longitudinal worker advancement data from the U.S. Census Bureau's Current Population Survey (CPS) (2000-2025). Advancement potential is not applicable for occupations already paying high wages. Category 1 occupations are most likely to provide higher-paying job opportunities. Category 2 occupations are somewhat likely to provide higher-paying job opportunities. Category 3 occupations are the least likely to provide higher-paying job opportunities.
Job Automation	BW Research. Job Automation Index, 2026. BW's Job Automation Index measures the proportion of skills and tasks that can be automated within a particular occupation using detailed knowledge, skills, and abilities (KSA) and work activity data from O*NET OnLine, 30.0 Database (2025). Level 1 occupations are the least likely to experience automation and AI-related employment effects. Level 2 occupations are somewhat likely to experience automation and AI-related employment effects. Level 3 occupations are most likely to experience automation and AI-related employment effects.
Employer Demand Expectations	BW Research. Regional Employer Survey, 2026.
Skills Change Expectations	
Employer Partnerships	
Stakeholder Insights	BW Research. Executive Interviews, 2026.
Training Inventory	BW Research. Regional Training Inventory, 2026.