

Life Sciences Sector Profile

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



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Key Findings

1. **The Life Sciences sector represents an investment opportunity for the South Central Coast (SCC).** With nearly 15,000 jobs and an average wage 83% above the regional economy-wide average, the industry offers high-paying workforce opportunities while supporting emerging technologies. Surveyed SCC Life Sciences employers also anticipate employment growth over the next 12 months and the next three years.
2. **However, the Life Sciences sector faces strong headwinds.** Post-pandemic declines in investment, combined with competition from surrounding regions, have contributed to historical job losses in the SCC. Orange County continues to extend its lead in Medical Devices and Diagnostics, while San Diego County and the Bay Area continue to attract Life Sciences firms with stronger industry ecosystems. Consequently, the SCC Medical Devices and Diagnostics industry has shed 11% of jobs over the last five years, and its Healthcare Services and Labs industry has shed 16%; with overall sectoral employment forecasted to shed 1.1% of jobs over the next five years.
3. **Changing skills and automation are likely to impact priority occupations broadly across the Life Sciences sector.** All priority occupations are moderately to highly affected by automation, and many employers report considerable skill changes for key occupations. Community colleges and other training providers must continue to strengthen industry partnerships to adequately respond to evolving skill sets and occupational demand. Ongoing curriculum updates, employer feedback loops, and incumbent-worker upskilling will be crucial to maintaining Life Sciences worker readiness.
4. **Community colleges can play a key role in supporting job readiness for Life Sciences occupations.** Interest in apprenticeships, internships, bootcamps, and job readiness programs is high among surveyed SCC Life Sciences employers, but only about half (46%) of surveyed employers report partnering with community colleges. This suggests an opportunity to better connect employer demand for training models with community college-led workforce pathways.
5. **Training capacity is uneven across the region, with gaps most pronounced in San Luis Obispo County.** San Luis Obispo County offers substantially fewer Life Sciences training programs than Santa Barbara, Ventura, or Northern Los Angeles Counties, which may indicate more pronounced access gaps for Life Sciences students and employers relative to other parts of the region.
6. **Dental Laboratory Technicians, Medical and Clinical Lab Technicians, and Phlebotomists should anchor the region's workforce strategy and community college prioritization.** These occupations have large employment bases and offer moderate to high advancement potential. Prioritizing occupations that are both high-demand and offer the opportunity to advance to high-wage positions represents one of the region's most immediate workforce development opportunities.

Introduction

This Life Sciences Report is part of a larger series that explores “Bet” and “Accelerate” sectors in the South Central Coast (SCC) region, which 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, Life Sciences is 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 Life Sciences industries and workforce pipelines.

This report explores opportunities and challenges in the SCC Life Sciences sector, which is tied to the Healthcare industry but is driven by specific research platforms and product development cycles in medical devices and equipment, biopharmaceuticals and related therapeutics, and R&D in biotech, including genomics, bioinformatics, and proteomics. Additional details on data sources, survey methodology, and occupation prioritization criteria are provided in the Appendices to this report.

Sector Landscape

Life Sciences is an “Accelerate” sector in the South Central Coast due to its strategic importance to the region’s innovation ecosystem, high-wage employment opportunities, and potential for targeted investments.¹ Local R&D and education assets, such as UC Santa Barbara’s biotechnology, neuroscience, and stem cells programs; Cal Poly’s Center for Innovation and Entrepreneurship (CIE) incubator program; and the Conejo Valley 101 BioLabs life sciences incubator, support innovation and workforce development in the SCC Life Sciences sector. Federal pharmaceutical manufacturing initiatives and tax cuts also incentivize investments in domestic Life Sciences R&D and manufacturing and drive domestic demand for biomanufacturing talent.

The SCC has nearly 15,000 Life Sciences jobs as of 2025 that offer an average wage significantly above the regional average. The average Life Sciences wage in the SCC is \$128,196, 83% higher than the region's economy-wide average of \$70,054. The concentration of Life Sciences workers in the region is consistent with the greater national distribution of Life Sciences workers.²

The region is home to Life Sciences employers who drive demand for skilled talent, such as Inogen Inc., Takeda Pharmaceutical Co. Ltd., Amgen Inc., and Agilent Technologies Inc. Amgen has made significant investments in manufacturing and R&D at its U.S. sites since 2017, including nearly \$5 billion in domestic capital projects. In October 2025 Amgen broke ground on a new \$600 million center for science and

¹ The “Accelerate” designation reflects the sector’s strategic importance to the regional economic and innovation ecosystem, and its investment potential, and does not necessarily reflect broad-based historical employment growth across all industries in the sector.

² JobsEQ. U.S. Bureau of Labor Statistics. Quarterly Census of Employment and Wages, 2025Q3.

innovation in Thousand Oaks, which will incorporate advanced automation and digital capabilities to accelerate the path to commercialization for transformative therapeutics.³

However, the SCC Life Sciences sector faces strong headwinds. Post-pandemic declines in investment, combined with competition from surrounding regions, have contributed to historical job losses in the SCC over the last five years. Orange County continues to extend its lead in Medical Devices and Diagnostics, while San Diego County and the Bay Area continue to draw Life Sciences firms with stronger industry ecosystems. Consequently, the SCC Medical Devices and Diagnostics industry has shed 11% of jobs over the last five years, and its Healthcare Services and Labs industry has shed 16% of jobs. Overall sectoral employment is projected to decline by 1.1% over the next five years.

Industry Landscape

The Life Sciences sector is classified into four industries:

- **Biopharma and Therapeutics**, including the manufacture of pharmaceuticals and medicines.
- **Biotech R&D and Platforms**, including research into genomics, bioinformatics, and proteomics.
- **Healthcare Services and Labs**, including medical and diagnostic services performed in medical laboratories and imaging centers, and other ambulatory healthcare services.
- **Medical Devices and Diagnostics**, including the manufacture of medical, dental, and hospital equipment and supplies.

Biopharma and Therapeutics, and Medical Devices and Diagnostics workers each constitute approximately one-third of the SCC Life Sciences workforce. Biotech R&D and Platforms (17%) and Healthcare Services and Labs (13%) account for the remainder.⁴

Biotech and R&D Platforms workers earn the highest salaries in the region's Life Sciences sector, at over \$151,000 annually. Medical Devices and Diagnostics workers and Biopharma and Therapeutics workers also earn high wages, at over \$146,400 and over \$119,000, respectively.⁵

Five-year job growth varies significantly by industry. Biotech and R&D Platforms recorded the highest rate of job growth across all Life Sciences industries, at 33%, followed by Biopharma and Therapeutics, at 14%. Employment in Medical Devices and Diagnostics, and Healthcare Services and Labs, has declined over the last five years, falling by -11% and -16%, respectively.

Demand Expectations

Despite historical job losses, surveyed SCC Life Sciences employers predict growth.⁶ Over half (56%) of surveyed SCC Life Sciences employers predict headcount growth within the next 12 months, with 28% anticipating a 10% or higher increase. Expectations are even stronger over the three-year time frame,

³ [Amgen Press Release](#), October 31, 2025.

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 Forecasted job losses reflect historical industry trends, while employer survey responses capture near-term hiring plans.

with three-fifths (61%) of surveyed SCC Life Sciences employers predicting headcount growth, and nearly half (47%) anticipating growth over 10%.⁷

Despite growing bipartisan support for increasing Life Sciences manufacturing, significant structural constraints limit broad expansion. While federal pharmaceutical manufacturing initiatives and tax cuts are expected to drive investments in domestic R&D and manufacturing and domestic demand for biomanufacturing talent, the domestic Life Sciences industry faces significant competitive pressure from countries with more favorable tax environments, targeted subsidies, and more streamlined regulatory processes.

While technology-enabled solutions such as continuous manufacturing and AI-enabled process optimization offer long-term opportunities to reduce the cost and complexity of increased domestic production, widespread adoption of these innovations remains limited by significant capital requirements, workforce skills gaps, and regulatory complexity. Workforce development efforts that support AI literacy and digital upskilling can help address some of the major constraints to Life Sciences sector expansion.

Occupational Findings

Phlebotomists and Medical and Clinical Lab Technicians constitute a large portion of the regional Life Sciences workforce and constitute core workforce development priorities. As of the third quarter of 2025, the SCC Life Sciences sector employed over 200 Phlebotomists and nearly 200 Medical and Clinical Lab Technicians.⁸ According to SCC stakeholder interviews, demand for Phlebotomists is anticipated to grow in the short term. Stakeholders also anticipate job growth for Bioengineers and Biomedical Engineers, Medical Appliance Technicians, Chemists, Biochemists and Biophysicists, and Compliance Officers.

Job Advancement

Almost all (88%) priority Life Sciences occupations offer high wages or strong advancement potential, underscoring the role these jobs can play in supporting economic mobility. Seventeen occupations were selected as priority Life Sciences occupations due to their importance to Life Sciences 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.⁹ Among the remaining occupations, six have high

⁷ Employer hiring expectations should, however, be interpreted in context: respondents were concentrated in the Biotech R&D and Platforms industry, which has experienced the highest historical job growth rate among SCC Life Sciences industries.

⁸ JobsEQ. U.S. Bureau of Labor Statistics. Occupational Employment and Wage Statistics, 2025Q3.

⁹ These occupations include Compliance Officers; Biochemists and Biophysicists; Medical and Clinical Laboratory Technologists and Technicians; Registered Nurses; Diagnostic Related Technologists and Technicians; Bioengineers and Biomedical Engineers; Medical Scientists, Except Epidemiologists; and Chemists.

advancement potential, meaning they are especially well positioned to help workers advance their careers and increase their earnings.¹⁰ These include:

- Biological Technicians;
- Dental Laboratory Technicians;
- Medical Appliance Technicians;
- Medical Equipment Repairers;
- Medical Secretaries and Administrative Assistants;
- Ophthalmic Laboratory Technicians.

Automation

Approximately three-quarters of priority Life Sciences occupations (76%) are expected to be moderately to highly affected by automation. Eleven of the priority occupations are moderately automatable, and two (Electrical, Electronic and Electromechanical Equipment Assemblers and Ophthalmic Laboratory Technicians) are highly automatable.¹¹

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

Skills

Surveyed SCC Life Sciences employers report considerable changes in the skills and abilities required for Life Sciences workers due to evolving technologies, market conditions, or expectations.¹² The occupations with the most acute changes in skills, or at least two-thirds of surveyed employers reporting considerable skill changes, include:

- Medical and Clinical Laboratory Technologists and Technicians;
- Medical Appliance Technicians;
- Medical Scientists;
- Medical Secretaries and Administrative Assistants.

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

¹⁰ 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.

¹¹ 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.

¹² Since survey responses were limited, these findings should be interpreted directionally rather than as strict quantitative findings.

curriculum and 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 SCC Life Sciences employers reported strong interest in training programs to strengthen workforce pipelines. Nearly all surveyed SCC Life Sciences employers expressed interest in apprenticeship programs, with 95% indicating they were very or somewhat interested and nearly two-thirds (64%) reporting they were very interested. Interest was also high for job readiness programs (94%), technical bootcamps (92%), and internship programs (91%).

Less than half (46%) of respondents 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 60%.

Findings suggest that SCC Life Sciences employers are receptive to training partnerships, but opportunities remain to better align high-interest training models with existing education and workforce relationships. Community colleges already serve as an important partner for many SCC Life Sciences 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 SCC offers 170 Life Sciences training programs.^{13, 14} Of these, 100, or 59% are offered by community colleges. Training opportunities are distributed throughout the region, with some county-specific concentration. Santa Barbara County offers the most training opportunities, with 55 programs, followed by Ventura County with 48 programs, and Northern Los Angeles County with 46. San Luis Obispo County trails with 21 training programs.

Available associate's degree opportunities include nursing, medical assisting, radiologic technician, and paramedic pathways, with biology, chemistry, and nutrition programs that build the foundations needed for Life Sciences transfer paths.¹⁵ Certificate programs are also available in nursing, medical and dental assisting, medical billing, emergency medical care, phlebotomy, biotechnology, biomedical sciences, biomedical device manufacturing, and healthcare data analytics.

Several priority occupations expected to experience moderate to high rates of skill changes are already supported by strong regional community college training capacity. Medical Assistants have the largest

¹³ Training programs include foundational, adjacent, and transfer-oriented programs designed to support the Life Sciences sector, as well as programs intended to create direct pathways into entry-level Life Sciences occupations.

¹⁴ 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.

¹⁵ While most community college programs in the SCC do not offer bachelor's degrees in Life Sciences, Antelope Valley College offers a bachelor's degree in respiratory care, and Moorpark College offers a bachelor's degree in biomanufacturing.

community college program footprint, with 24 programs across the region. Registered Nurses have 15 programs, while Biochemists and Biophysicists have 14, and Medical Secretaries and Administrative Assistants have 11. 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. Registered Nurses, Biochemists, and Biophysicists earn high wages at entry, and Medical Secretaries and Administrative Assistants have high advancement potential.

Five priority occupations remain underserved despite high wages and/or strong career advancement potential. Medical Equipment Repairers, Medical Scientists, and Bioengineers and Biomedical Engineers have no identified community college training programs in the region, and Medical Appliance Technicians and Medical and Clinical Lab Technicians each have only one community college training program in the region. Each of these occupations is expected to experience rapidly changing skill requirements, underscoring the need for more accessible local training opportunities that prepare new workers and support upskilling for incumbent workers. In addition, all occupations that do not already offer a high wage at entry have high advancement potential, strengthening the case for expanded pathways into these careers.

Community College Prioritization

Based on employment scale, sector relevance, educational requirements at entry, and advancement potential, three occupations emerge as the highest priorities for community college development:

- **Dental Laboratory Technicians;**
- **Medical and Clinical Lab Technicians;**
- **Phlebotomists.**

These occupations have moderate to high regional demand, employing over 175 workers in the region; have moderate to high advancement potential; require less than a four-year degree at entry; and are central to the Life Sciences sector.

Two occupations represent medium-priority occupations:

- **Medical Appliance Technicians;**
- **Medical Secretaries and Administrative Assistants.**

These occupations have a moderate employment footprint of 50+ workers in the region, high advancement potential, and require less than a four-year degree at entry.

Medical Assistants represent a growing priority for community colleges. This entry-level occupation offers an accessible entry point into Life Sciences pathways, offers moderate advancement potential, and is expected to experience changing skill requirements.

Key Constraints to Workforce Development

While the region is well-positioned to support growth in the Life Sciences sector, several constraints may limit the impact of workforce development efforts. Strong regional competition from established regions with Life Sciences sectors that have specializations in Medical Devices and Diagnostics limit regional growth potential. These challenges are compounded by rapid skill changes and emerging technologies, underscoring the need for stronger employer-educator feedback loops.

In addition, high costs of lab equipment and specialized training infrastructure and faculty recruitment and retention challenges also constrain sectoral growth. Life Sciences programs often require specialized equipment, lab space, safety protocols, and ongoing curriculum updates, making them relatively expensive to launch and sustain compared to other education and training programs. Furthermore, while qualified instructors with current industry experience are needed, colleges face significant hiring and retention challenges, as experienced professionals typically earn higher wages in industry roles. Together, these constraints can limit the scale, effectiveness, and geographic reach of Life Sciences training programs.

Recommendations

The Life Sciences sector offers strong opportunities to sustain the state's leadership position in medical technology innovation, 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 Life Sciences include:

- **Coordinate Life Sciences advisory structures to share insights, reduce duplication of effort, and align training with sector-specific needs.** Stakeholders reported duplication of training efforts across the region, creating confusion among employers, training providers, and prospective workers. A more coordinated advisory structure could help partners share labor market insights, identify common training priorities, and clarify which institutions are best positioned to serve different Life Sciences subsectors.
- **Develop shared employer engagement strategies for Life Sciences employers to streamline outreach and expand work-based learning.** Shared engagement strategies can streamline outreach, facilitate communication of employer hiring and skill needs, and support the expansion of apprenticeships, internships, and other work-based learning opportunities, particularly for specialized technical and laboratory roles.
- **Expand shared lab and training infrastructure.** Connect community colleges to university research centers and industry partners to support hands-on learning.

Case Study: Moorpark College

Moorpark College's Biotechnology program serves as an example of industry-aligned workforce development. The program was designed in consultation with key local employers, including Amgen, Takeda, Thermo Fisher Scientific, and others, to provide the essential technical skills and training needed for success in biomanufacturing careers. The curriculum balances basic science courses with practical laboratory applications and offers online and evening classes to accommodate working students.

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

- **Continue to scale the most high-value programs.** Community colleges can build on existing phlebotomy and medical and clinical lab technician pathways 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 higher-wage Life Sciences 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 Life Sciences industries. These models are especially valuable when co-designed by employers and tied to clear hiring needs, workplace expectations, and opportunities for continued advancement.
- **Facilitate the regional advisory structure to deepen alignment across the region.** Community colleges can strengthen and scale advisory structures, employer engagement, and regional coordination to keep programs aligned with evolving Life Sciences needs. Sustained feedback loops with employers can help colleges update curricula, avoid duplicative efforts, and respond more quickly to changes in technology, project timelines, and occupational demand.

For the South Central Coast Center of Excellence for Labor Market Research, the central opportunity is to translate these findings into coordinated labor market intelligence, shared employer engagement, and targeted community college program alignment across the region.

Appendix A: NAICS Industry Definition

Classification	Industry	NAICS	Description
Primary	Biopharma and Therapeutics	325411	Medicinal and Botanical Manufacturing
		325412	Pharmaceutical Preparation Manufacturing
		325413	In-Vitro Diagnostic Substance Manufacturing
		325414	Biological Product except Diagnostic Manufacturing
	Medical Devices and Diagnostics	334510	Electromedical and Electrotherapeutic Apparatus Manufacturing
		334516	Analytical Laboratory Instrument Manufacturing
		334517	Irradiation Apparatus Manufacturing
		339112	Surgical and Medical Instrument Manufacturing
		339113	Surgical Appliance and Supplies Manufacturing
		339114	Dental Equipment and Supplies Manufacturing
		339115	Ophthalmic Goods Manufacturing
		339116	Dental Laboratories
		423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers
	Biotech R&D and Platforms	541714	Research and Development in Biotechnology (except Nanobiotechnology)
Secondary	Healthcare Services and Labs	621511	Medical Laboratories
		621512	Diagnostic Imaging Centers
		621991	Blood and Organ Banks
		621999	All Other Miscellaneous Ambulatory Health Care Services
	Biopharma and Therapeutics	334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables
		334519	Other Measuring and Controlling Device Manufacturing
		541330	Engineering Services
	Biotech R&D and Platforms	541380	Testing Laboratories and Services
		541713	Research and Development in Nanotechnology
		541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)

Appendix B: Priority Occupations

Industry	SOC	Description
Biopharma and Therapeutics	13-1041	Compliance Officers
	19-1021	Biochemists and Biophysicists
	19-4021	Biological Technicians
	29-2011	Medical and Clinical Laboratory Technologists and Technicians
Healthcare Services and Labs	29-1141	Registered Nurses
	29-2030	Diagnostic Related Technologists and Technicians
	31-9092	Medical Assistants
	31-9097	Phlebotomists
	43-6013	Medical Secretaries and Administrative Assistants
Medical Devices and Diagnostics	49-9062	Medical Equipment Repairers
	51-2028	Electrical, Electronic, and Electromechanical Equipment Assemblers, Except Coil Winders, Tapers, and Finishers
	51-9081	Dental Laboratory Technicians
	51-9082	Medical Appliance Technicians
	51-9083	Ophthalmic Laboratory Technicians
Biotech R&D and Platforms	17-2031	Bioengineers and Biomedical Engineers
	19-1042	Medical Scientists, Except Epidemiologists
	19-2031	Chemists

Appendix C: Life Sciences Employer Survey Methodology

Method	Online Survey (Email and Panel Respondents)
Universe	5,913 establishments in Santa Barbara, San Luis Obispo, Ventura, and Los Angeles Counties
Number of Respondents	98 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.