Bay Region Overview

CTE Recovery Since COVID

Link to Download Slides: https://bit.ly/BayOutcomesOct2026

CENTER OF EXCELLENCE FOR LABOR MARKET RESEARCH BAY AREA

POWERED BY BACCC BAY AREA COMMUNITY COLLEGE CONSORTIUM California Community Colleges

Data Sources and Data Caveats

Data Sources

- ***Student Outcome Metrics***: CCCCO DataVista 3.1 Release, July 2026, Snapshot View General Admit
- ***K12 Special Admit:*** CCCCO DataVista 3.1 Release, July 2026, Comprehensive Student Report
- ***Demographic:*** American Consumer Survey 5-Year Data Profiles – US Census.gov
- ***Education Attainment:*** American Consumer Survey 5-Year Data Profiles – US Census.gov; Lightcast Developer Population data
- ***College-Going-Rates for HS Completers:*** CA Department of Education DataQuest CGR Report
- ***TOP6 Program Titles:*** Programs from CCCCO Inventory (COCI)

Data Caveats

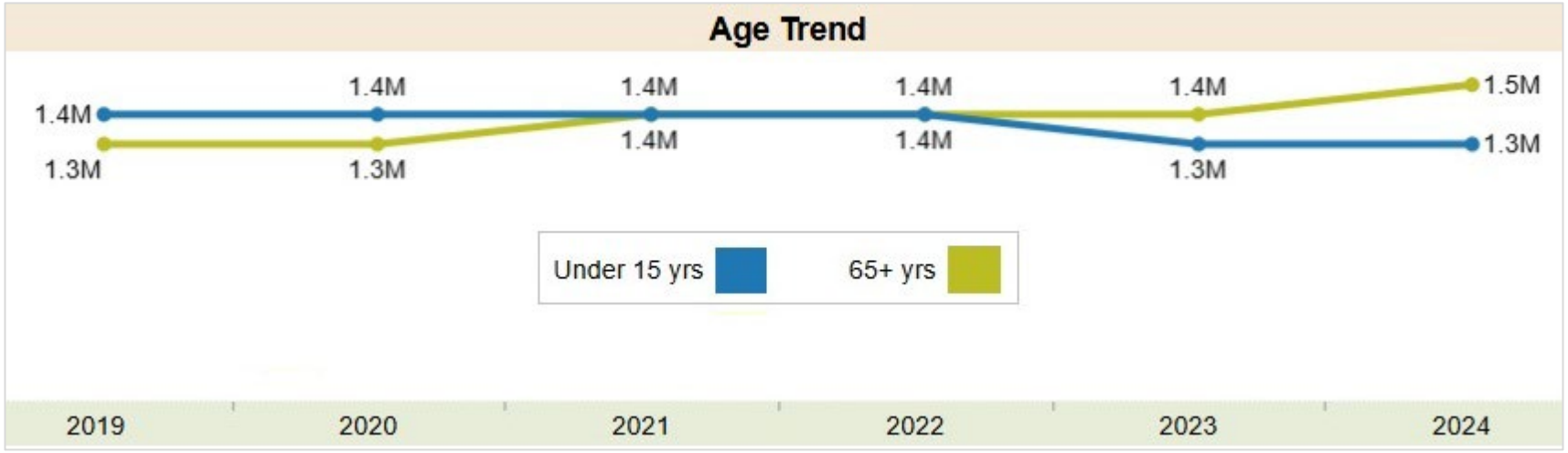
- The latest academic year of data available is used for each data source.
- When possible, 2025 or the latest year of data available is compared to 2020 which is considered the latest pre-COVID year.

Who Are We?

Bay Trends: Demographic, Educational Attainment, Cost of Living

Age Trends in the Bay Region (2020 vs. 2024)

The **65+ cohort** grew to the largest age group at **18%**. The **under-15 population** fell dropping to just 16% with implications for K–12 enrollment and workforce pipeline.



Bay Region's Population Steady but Slight Increase for 65+ and Decrease for Under 15

Note: Working-age adults (35–54) hold at **28%** and young adults (20–29) at **13%**.

Source: Lightcast Developer Population data for Bay Region counties by 2019-2024. Estimates are based on U.S. Census Bureau data and other demographic sources and may differ from official Census population counts.

Race and Ethnic Diversity Shifts in the Bay Region (2020 vs. 2024)

	% of Total in 2024	# in 2020	# in 2024	% Change (2020 vs. 2024)
White	35%	3.2M	2.9 M	-9%
Asian	28%	2.2 M	2.4 M	9%
Hispanic	28%	2.3 M	2.3 M	0%
Black	5%	465K	444K	-5%
Two or More Races	4%	315K	319K	1%
Native Hawaiian or Pacific Islander	1%	48K	47K	-2%
American Indian or Alaskan Native	<1%	23K	22K	-4%

- **White residents** remain the largest group at **35%** but declined -9%
- **Asian** (28%) grew 9% and **Hispanic** (28%) remained the same
- **Black** (5%) decreased by -5%

Source: U.S. Census Bureau data

Subregional Differences In Race Ethnicity (2020 vs. 2024)

East Bay

	% in 2024	# in 2024	Growth %
White	32%	888K	-9%
Asian	29%	814K	9%
Hispanic	26%	719K	2%
Black	9%	253K	-2%
Two or More Races	4%	122K	2%
Native Hawaiian or Pacific Islander	1%	18K	0%
American Indian or Alaskan Native	<1%	7K	0%

North Bay

	% in 2024	# in 2024	Growth %
White	50%	664K	-6%
Asian	10%	131K	9%
Hispanic	30%	393K	7%
Black	6%	76K	-1%
Two or More Races	4%	53K	2%
Native Hawaiian or Pacific Islander	1%	7K	17%
American Indian or Alaskan Native	<1%	6K	0%

Santa Cruz - Monterey

	% in 2024	# in 2024	Growth %
White	36%	277K	-9%
Asian	5%	42K	8%
Hispanic	54%	411K	3%
Black	2%	13K	-7%
Two or More Races	3%	20K	0%
Native Hawaiian or Pacific Islander	<1%	2K	0%
American Indian or Alaskan Native	<1%	2K	-33%

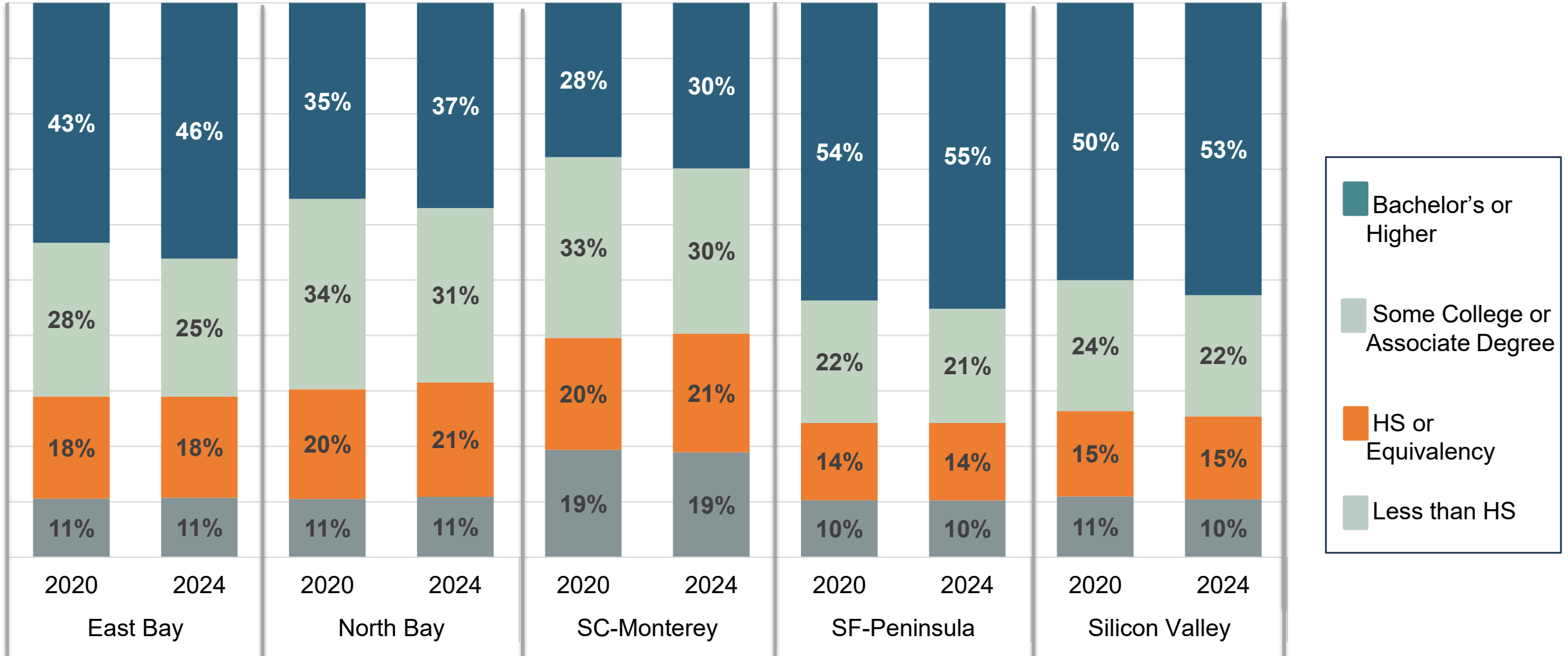
San Francisco - Peninsula

	% in 2024	# in 2024	Growth %
White	36%	563K	-11%
Asian	35%	548K	1%
Hispanic	21%	325K	-1%
Black	4%	57K	7%
Two or More Races	4%	62K	0%
Native Hawaiian or Pacific Islander	1%	12K	-8%
American Indian or Alaskan Native	<1%	3K	0%

Silicon Valley

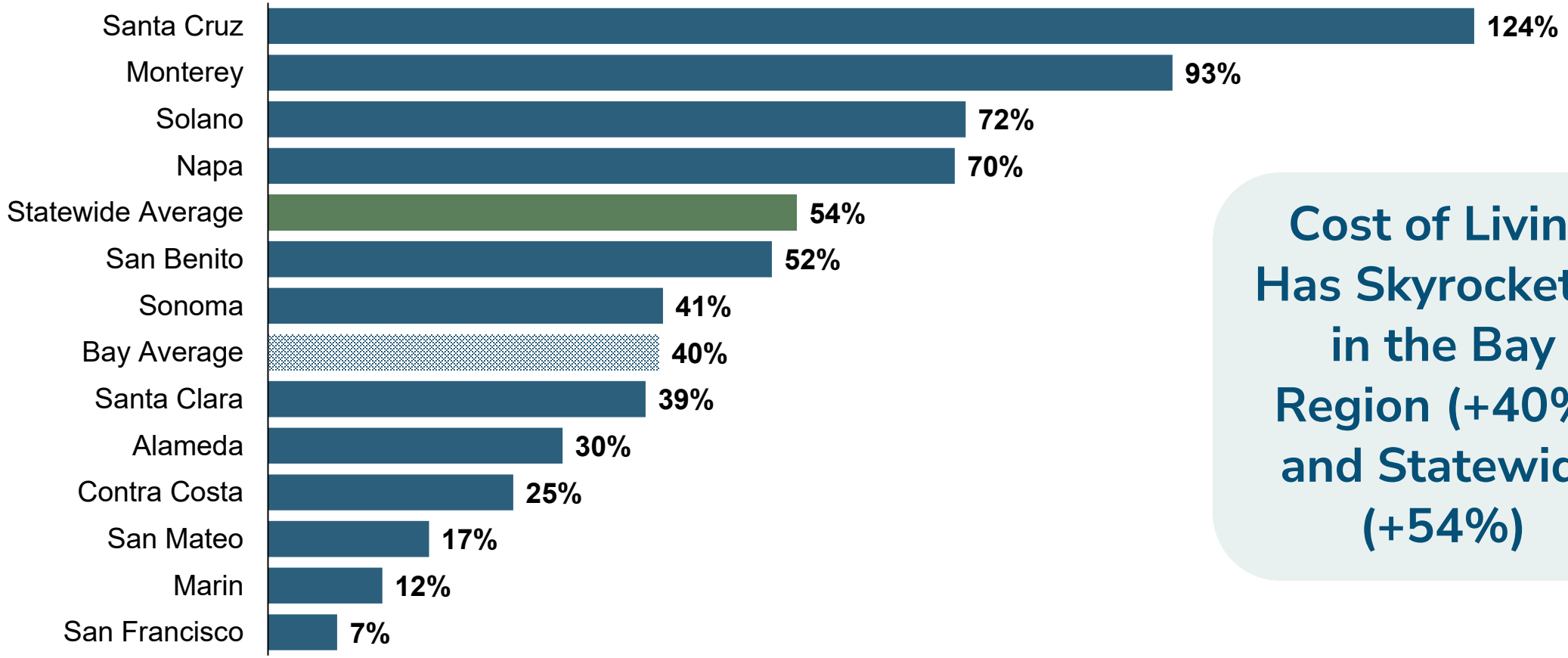
	% in 2024	# in 2024	Growth %
White	27%	510K	-10%
Asian	43%	820K	9%
Hispanic	25%	477K	-2%
Black	2%	46K	2%
Two or More Races	3%	62K	0%
Native Hawaiian or Pacific Islander	<1%	7K	0%
American Indian or Alaskan Native	<1%	4K	0%

Subregional Differences In Educational Attainment for 18+ (2020 vs. 2024)



Source: American Consumer Survey 5-Year Data Profiles – Census.gov

% Change in Living Wage for a Single Adult in Bay Counties (2018 vs. 2024)



Cost of Living Has Skyrocketed in the Bay Region (+40%) and Statewide (+54%)

***Note**: Living wage data is not available for 2020; so, 2018 was used for comparison to 2024.*

Source: Self-Sufficiency Standard for California, Center for Women's Welfare, University of Washington.

Self-Sufficiency vs MIT

Subregion	County	SS Living Wage (2024)	MIT Living Wage (2026)
Total		$55,680	$69,120
East Bay	Total	$54,040	$67,935
	Alameda	$53,685	$67,205
	Contra Costa	$54,370	$68,660
North Bay	Total	$50,440	$65,250
	Marin	$68,100	$75,630
	Napa	$52,605	$65,395
	Solano	$47,925	$57,970
	Sonoma	$48,280	$65,105
SC-Monterey	Total	$56,990	$75,005
	Monterey	$56,990	$69,555
	San Benito	$50,190	$75,005
	Santa Cruz	$73,050	$89,400
SF-Peninsula	Total	$65,125	$73,715
	San Francisco	$58,925	$67,475
	San Mateo	$71,300	$79,955
Silicon Valley	Total	$64,000	$79,040
	Santa Clara	$64,000	$79,040

COE plans to transition to the MIT Living Wage Calculator which generally reports higher living wage estimates

Key takeaways · Demographic Shifts and Cost of Living

Aging

65+ population: +15%

Under 15 population: -7%

The Bay Region is **aging** - implications for education, workforce planning, and future talent supply.

More Diverse

35% White

28% Asian

28% Hispanic

White population remains the largest group but has **declined** by -9%. **Asian** grew by +9% and **Hispanic** remained consistent.

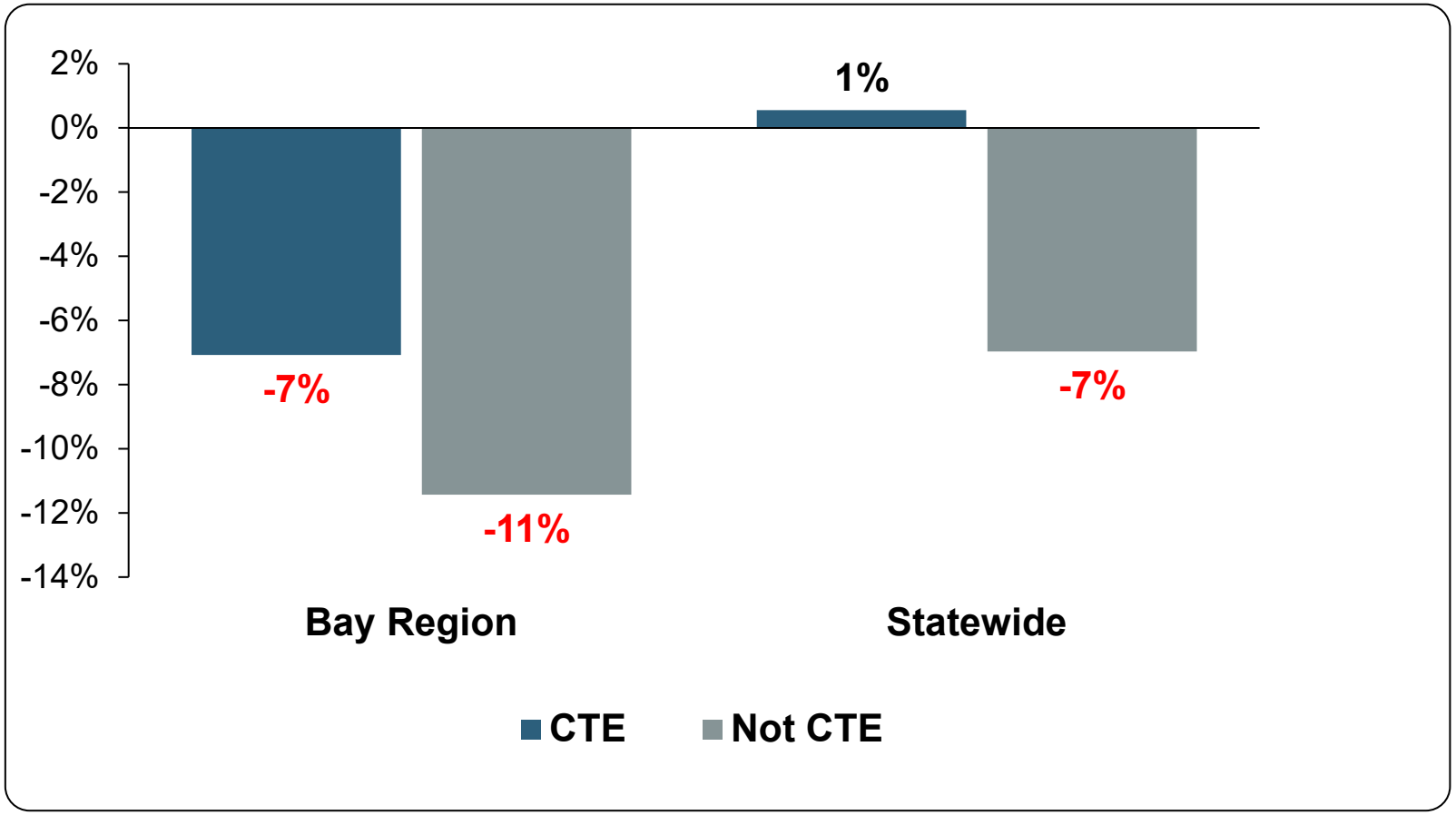
More Expensive

+40%

Average cost of living increase in the Bay region between 2018 and 2024 with **Santa Cruz** increasing by +124% and **Monterey** by +93%.

Headcount and Persistence in the Bay Region

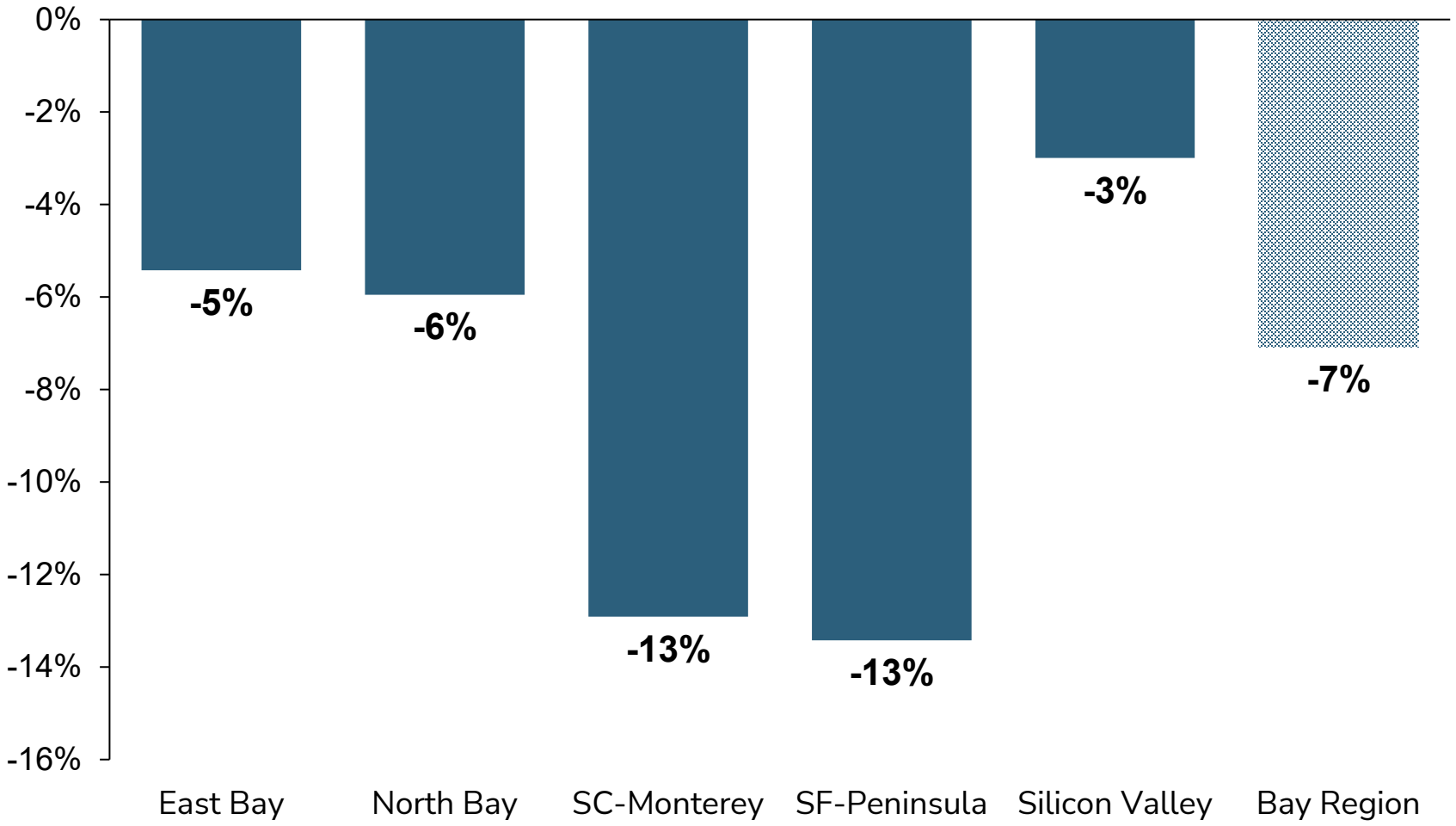
CTE and Not CTE Headcount (2020 vs. 2025)



CTE Headcount rebounded faster than Non-CTE (2020 vs. 2025) - However trails CTE Statewide

Source: DataVista, 3.1 Release, July 2026. Snapshot view of General Admit Students

% Change in CTE Headcount (2020 vs. 2025)



Silicon Valley is down -3% for CTE headcount compared to SC-Monterey and SF-Peninsula who are down -13%.

Source: DataVista, 3.1 Release, July 2026. Snapshot view of General Admit Students

Bright Spots in Headcount Trends in the Bay

Examples of Increasing Headcount (2020 vs. 2025)

By Population

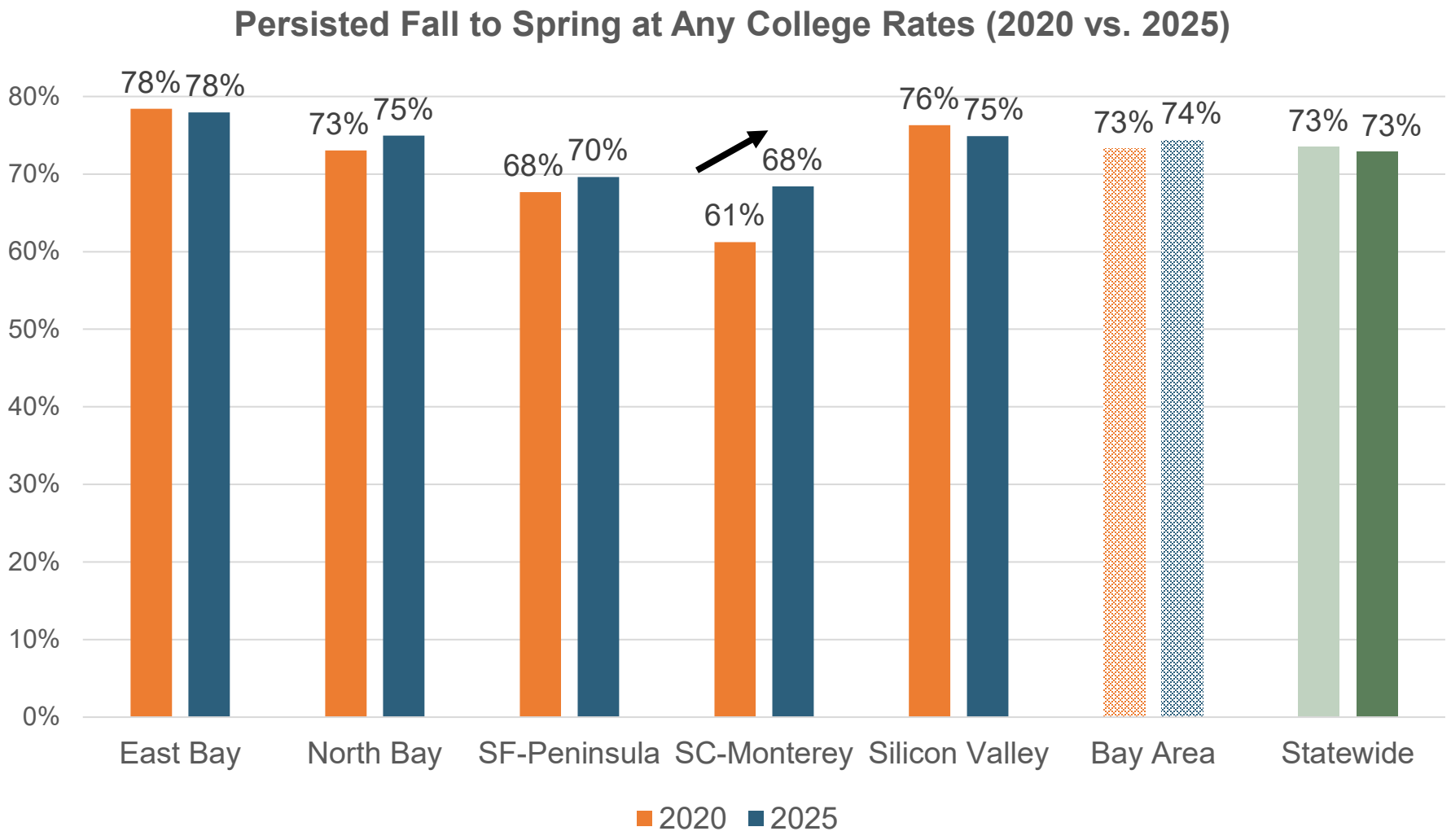
- Hispanic: +4% in the Bay Region
- Two or more races: +4% in the Bay Region

By Sector

- Unassigned*: +9% in the Bay Region
- Ag, Water & Environmental Resources: +4% in the Bay Region
- Health: +3% in the Bay Region

**Note: Unassigned sector in the Bay region includes Applied Design, Court Reporting, Fitness Trainer, Human Services, Paralegal, Technical Theater, and other TOP6 programs*

CTE Persistence Fall to Spring (2020 vs. 2025)

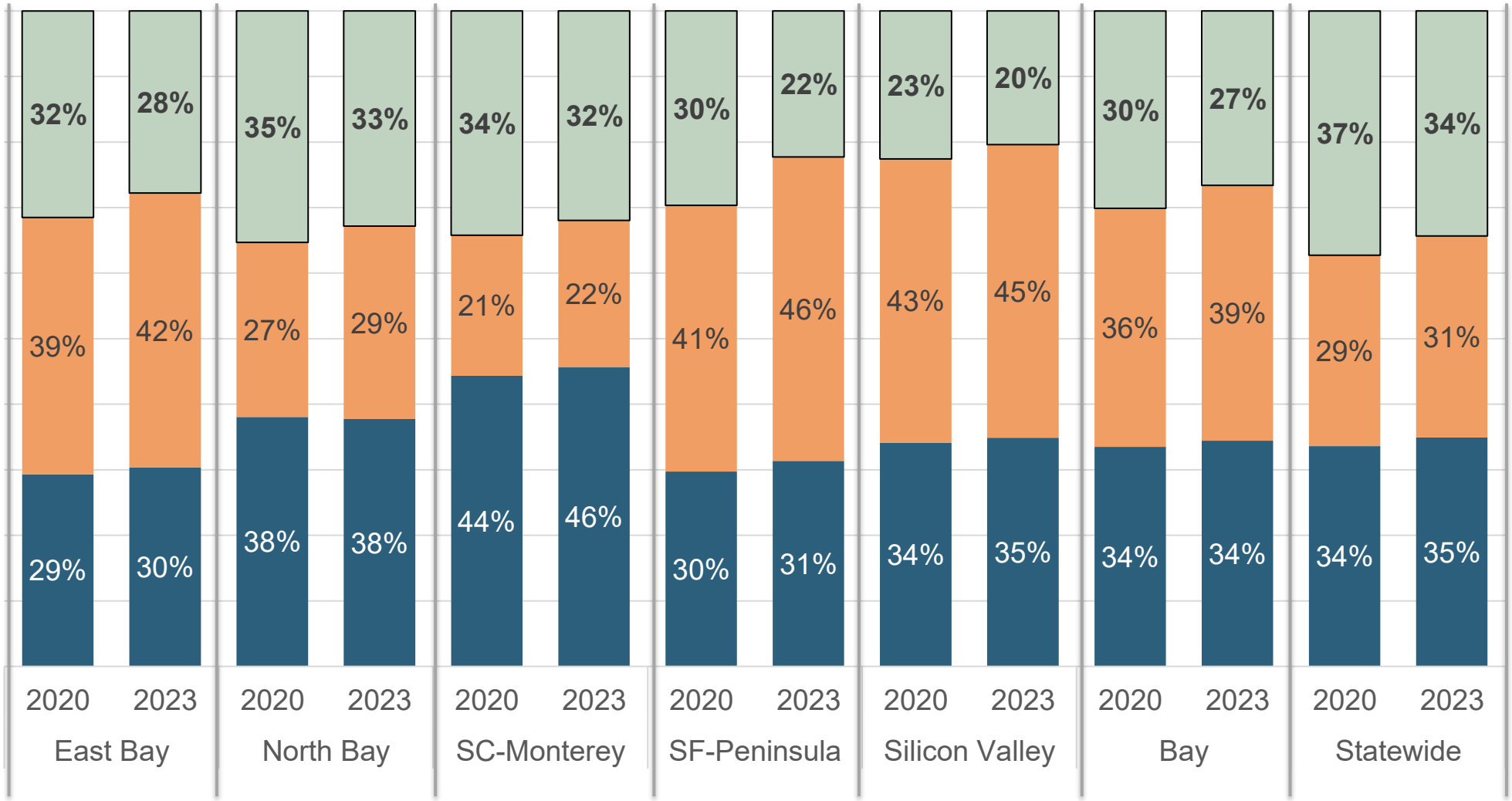


Keeping the students we have:

- **East Bay** highest persistence rate at **78%** in 2025
- **SC-Monterey** lowest at 68% but rate increased by **+7%** from 2020

Source: DataVista, 3.1 Release, July 2026. Snapshot view of General Admit Students

High School Completer College-Going Rates (CGR) and Not Enrolled Rate (2020 vs. 2023)

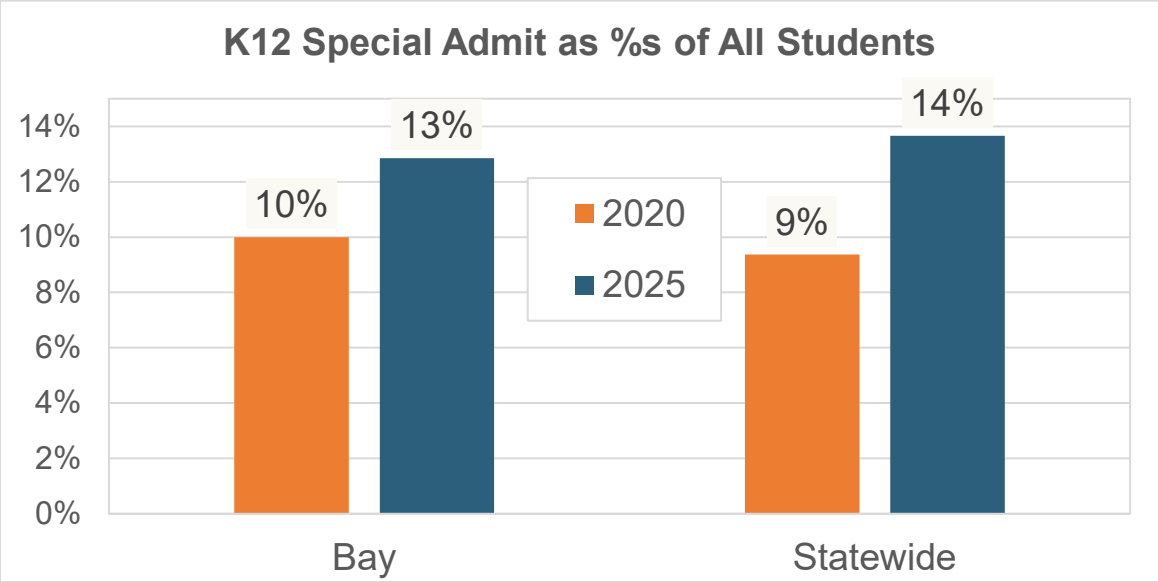


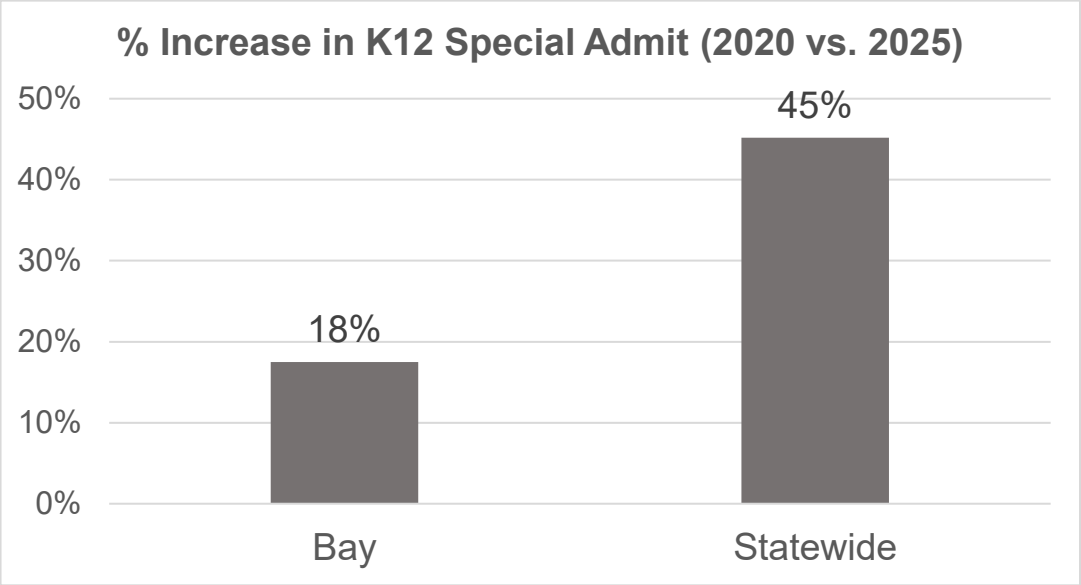
No. of 2022-23 HS Completers Who Did Not Enroll in Any Postsecondary in the Bay Region

21,644

Source: College-Going-Rate (CGR) is for HS students who completed in 2022-23 and enrolled in a CCC or All Other Postsecondary which is the latest year available from CDE's DataQuest CGR Report

K12 Special Admit: % of Total Students and % Increase (2020 vs. 2025)



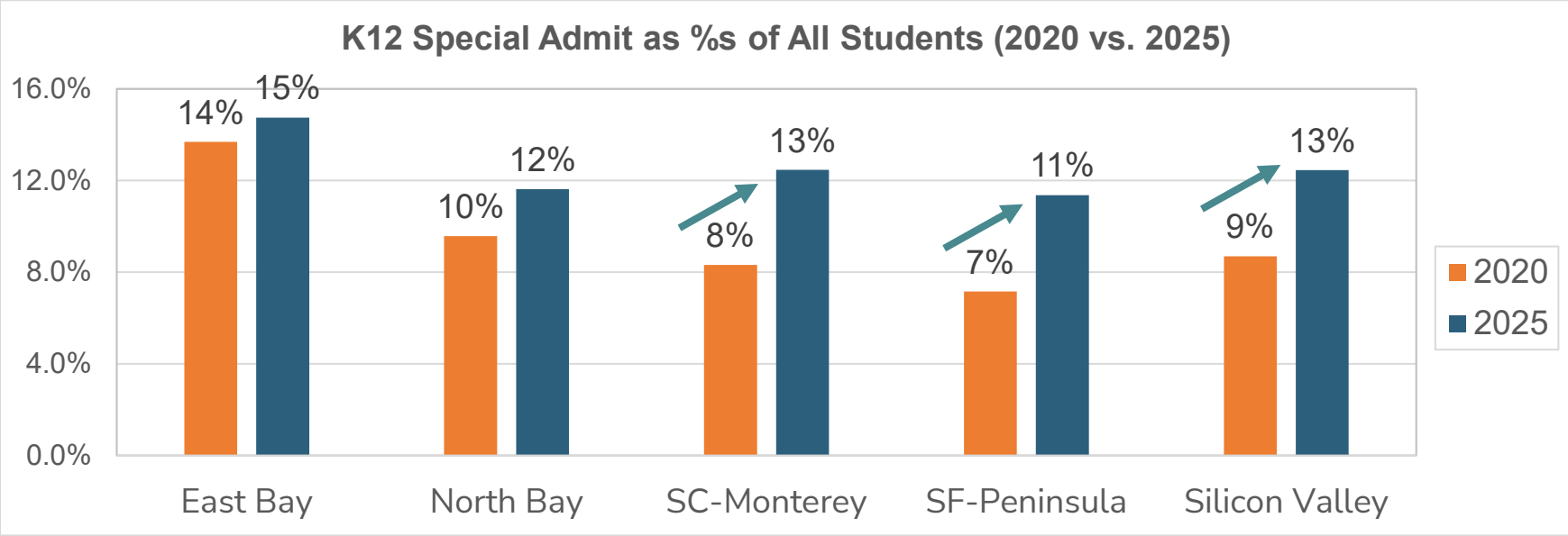


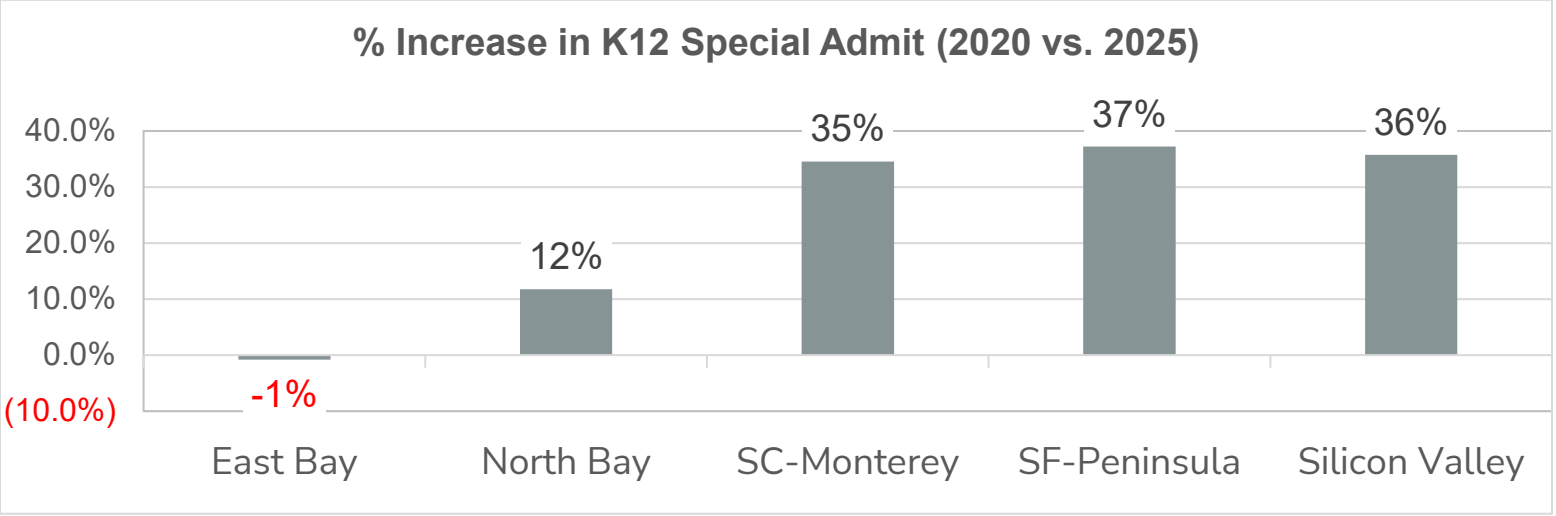
K12 Special Admit are all students enrolled in the CCC system who are special admits or dually enrolled in K12. Special admits receive special permission to be admitted and enroll in college level coursework without having earned a HS diploma or equivalent.

Bright Spot for K12 Special Admit - Bay Region Increasing, Not as Fast as Statewide, but Now Represent 13% of All Bay Students

Source: DataVista, 3.1 Release, July 2026, Comprehensive Student Report

Variation Across Subregions for K12 Special Admit (2020 vs. 2025)





For SC-Monterey, SF-Peninsula and Silicon Valley: large % increases in both K12 Special Admit as a % of all students and % increase in K12 Special Admit (+35% to +37%)

Source: DataVista, 3.1 Release, July 2026, Comprehensive Student Report

Key takeaways · Bay Region CTE Headcount

CTE Headcount

-7%

Bay CTE – Recovering Faster than Not CTE (-11%) 2020 vs. 2025

CTE Persistence

74%

Bay CTE Persistence rate in 2025 - Statewide at 73%

HS Completers Not Enrolled

21,644

Number of Bay HS Completers in 2023 **who did not enroll** in any postsecondary

46%

Highest CCC College-Going-Rate (CGR) in **SC-Monterey**

CTE Student Populations

+4%

Hispanic and Two or More Races increase 2020 vs. 2025

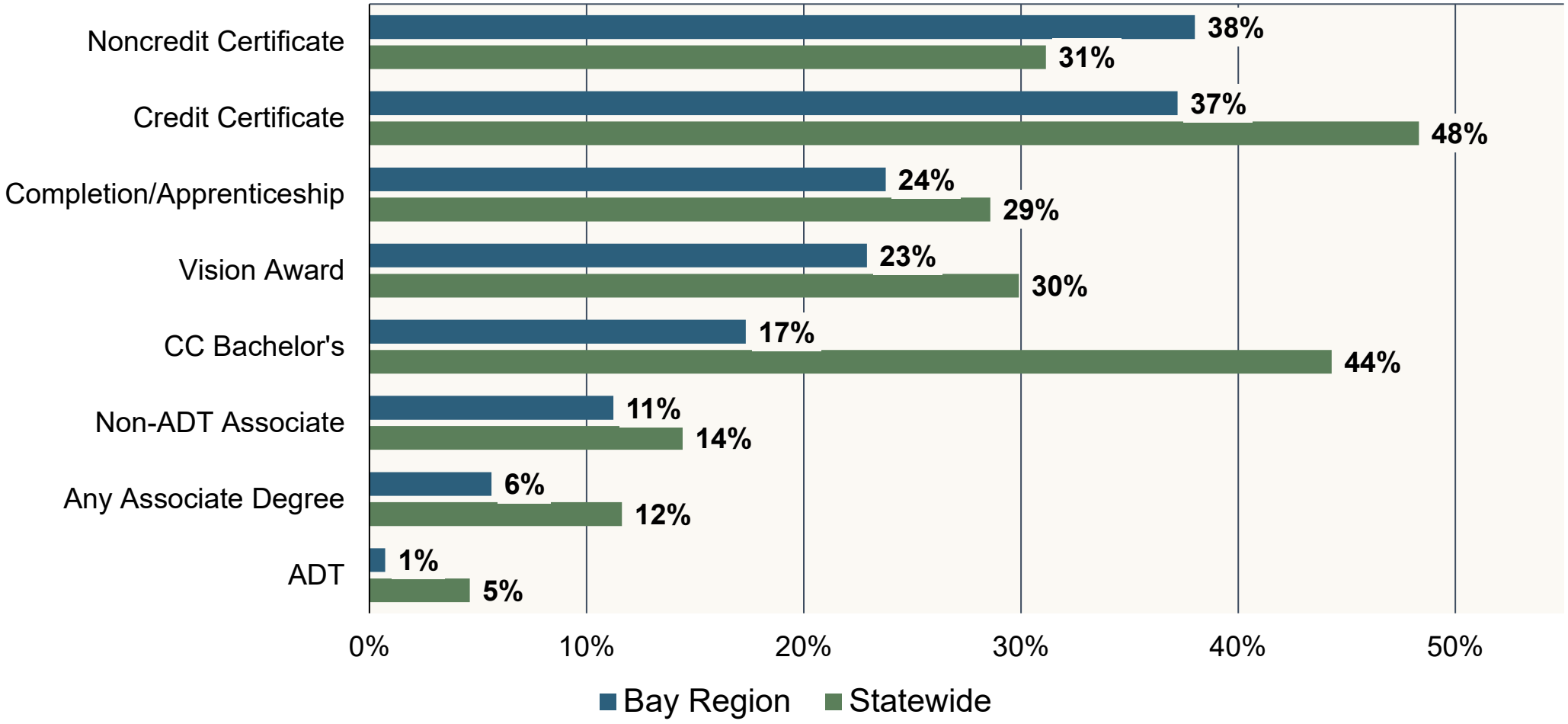
Declines in Asian & Pacific Islander -18%, American Indian -11%, White & Filipino -9%

+18%

K12 Special Admit increase (CTE and Not CTE)

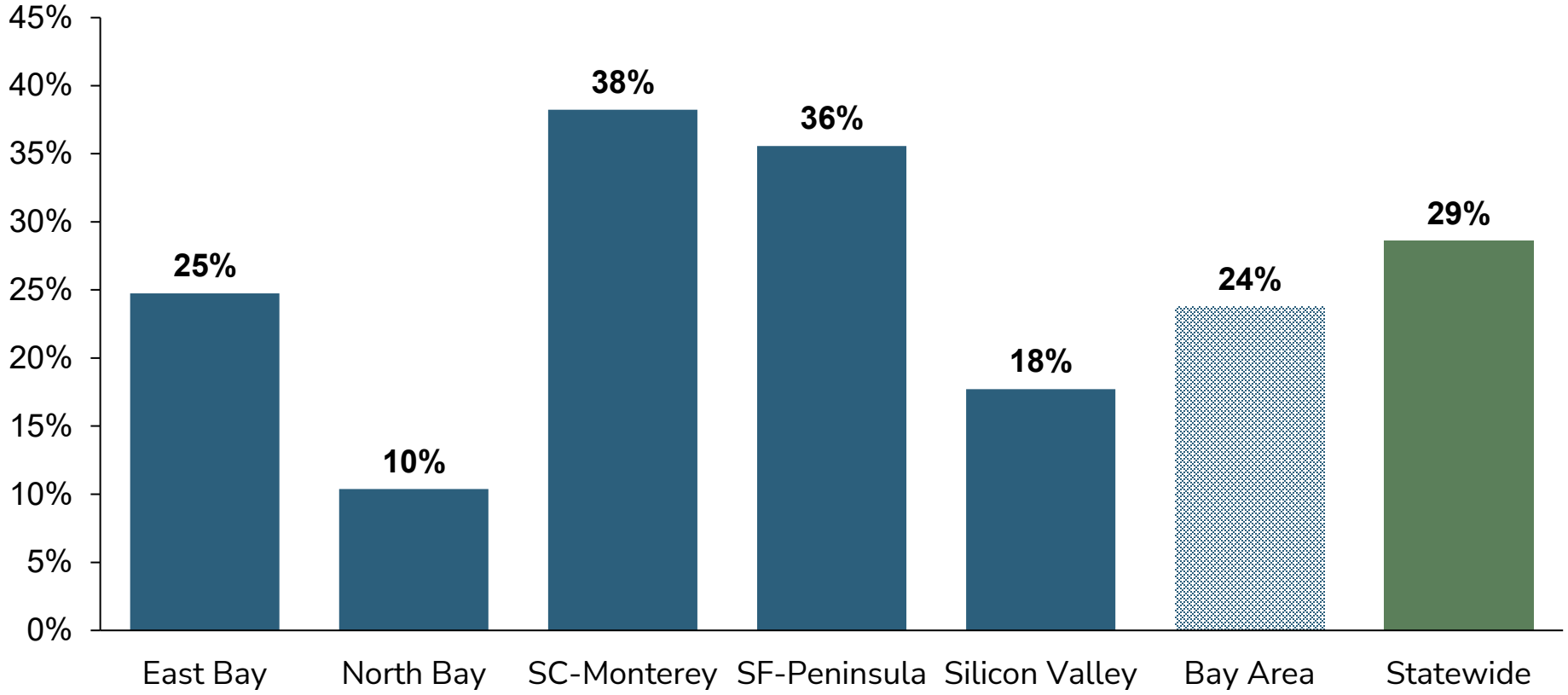
Completions in the Bay Region

Completers % Increase by Award Level (2020 vs. 2025)



Source: DataVista, 3.1 Release, July 2026. Snapshot view of General Admit Students

Completers* % Increase by Subregion (2020 vs. 2025)

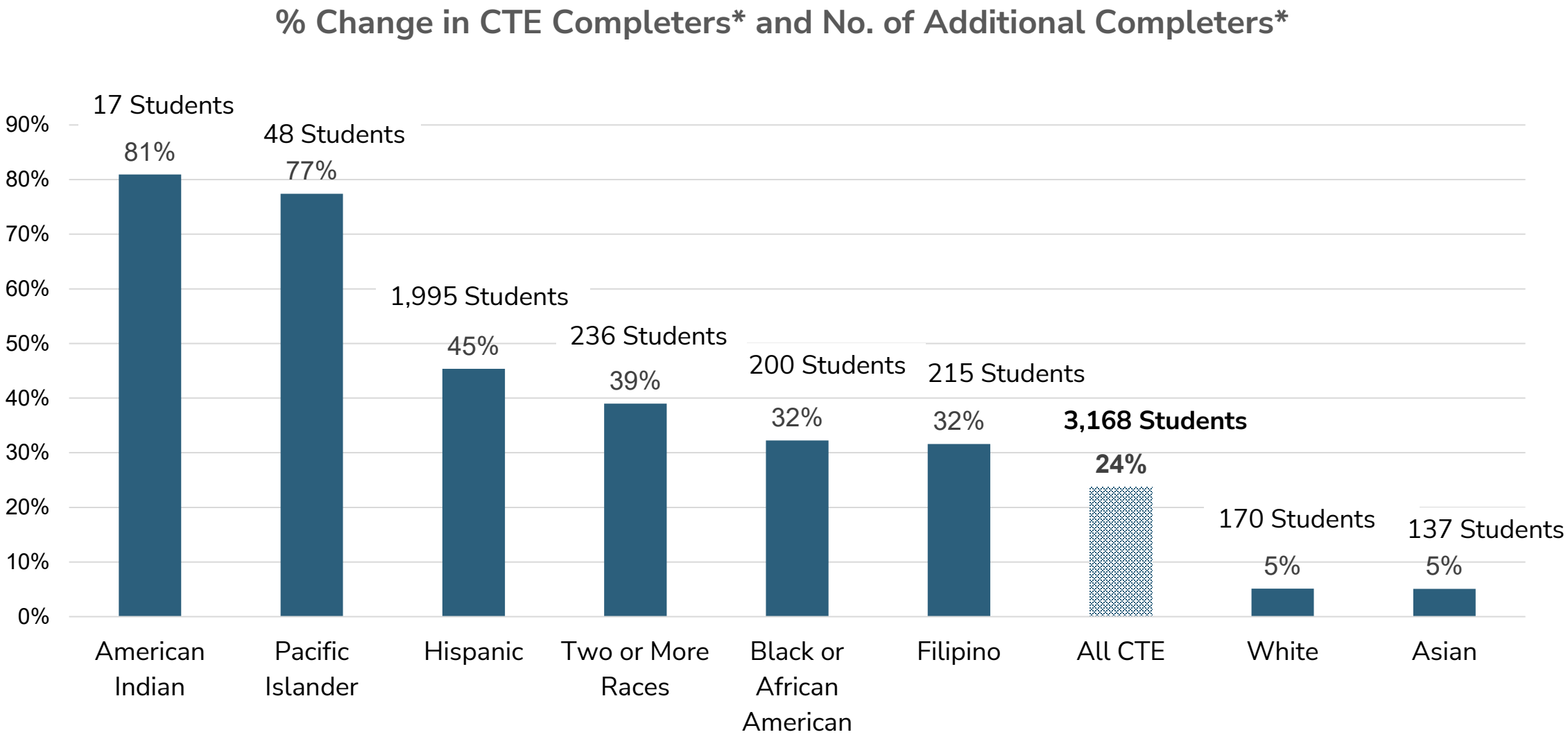


% Increase in CTE Completers in SC-Monterey (+38%) and SF-Peninsula at (+36%) Outpace the Bay.

* Includes students who completed any certificate or degree or who attained apprenticeship journey level status

Source: DataVista, 3.1 Release, July 2026. Snapshot view of General Admit Students

Completers* % Increase by Race and Ethnicity (2020 vs. 2025)



* Includes students who completed any certificate or degree or who attained apprenticeship journey level status

Source: DataVista, 3.1 Release, July 2026. Snapshot view of General Admit Students

Key Takeaways · CTE Completions or Attained Apprenticeship

CTE Completers
+24%

Increase in Bay CTE Completers since 2020 even with declining CTE headcount

SC-Monterey (+38%) and SF-Peninsula (+36%) outpacing the other subregions

CTE Award Levels
+38%

Noncredit CTE certificates increase since 2020 outpacing Statewide (+31%)

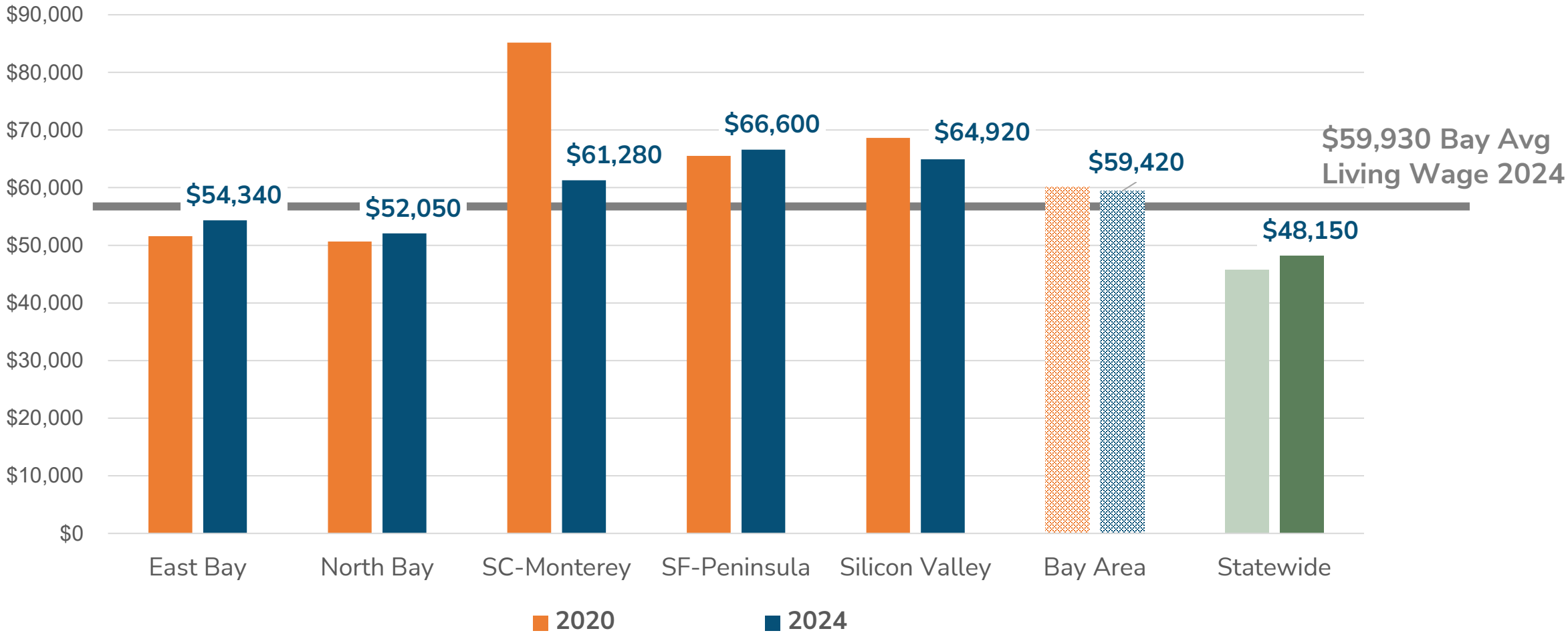
Credit certificates in the region increased at similar rates (+37%)

CTE Student Populations
+2,711

Additional Bay CTE Completers from **historically underrepresented populations** (American Indian, Pacific Islander, Hispanic, Two or More Races, Black, and Filipino) with completion rates between **+32% and +81%**

Earnings and Living Wage in the Bay Region

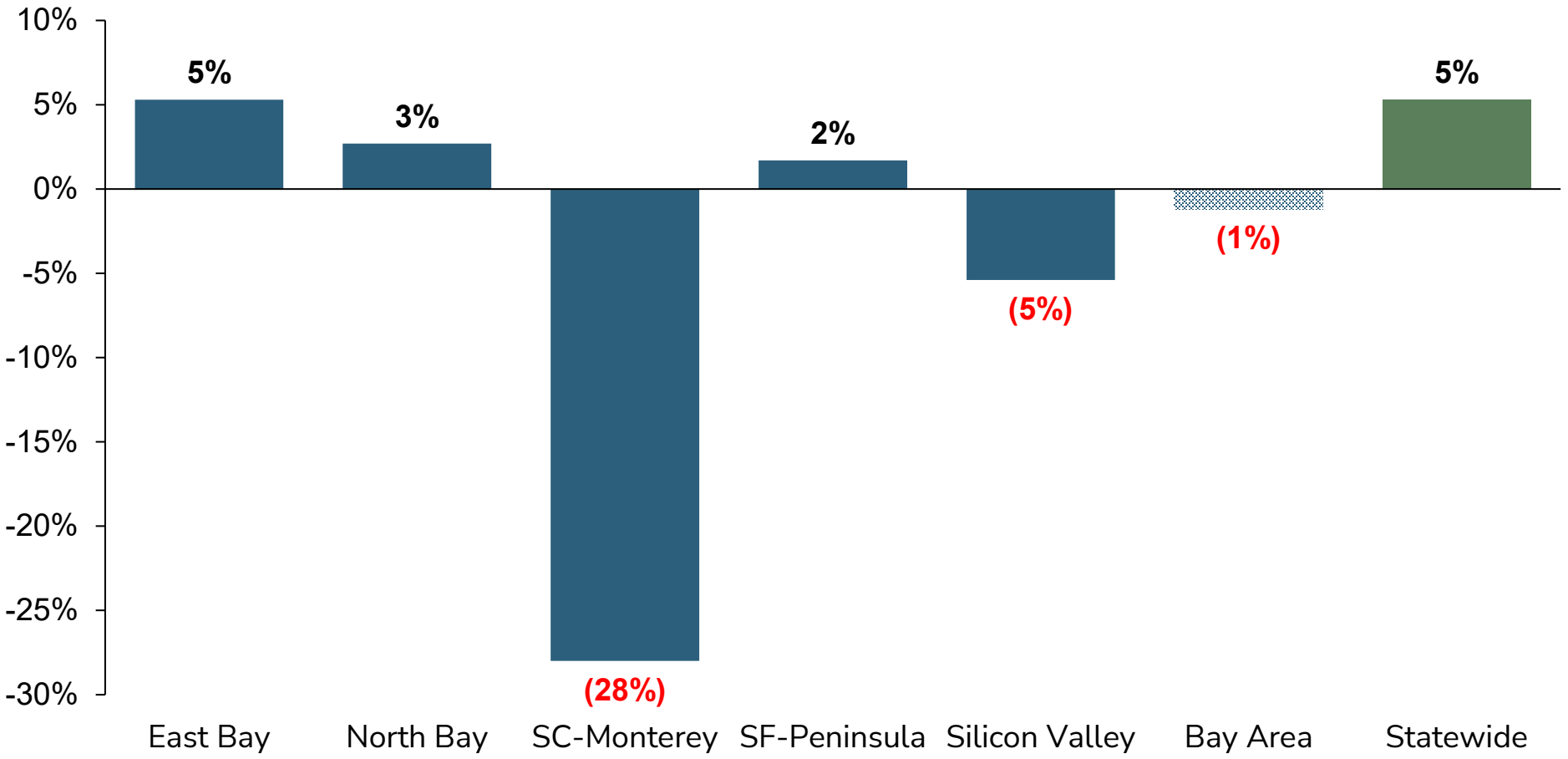
Bay CTE Exiter Median Annual Earnings (2020 vs. 2024)



Note: All Median Earnings are adjusted for inflation Consumer Price Index (CPI) from the CA Department of Finance

Source: DataVista, 3.1 Release, July 2026. Snapshot view of General Admit Students

% Change in CTE Exiter Median Annual Earnings (2020 vs. 2024)

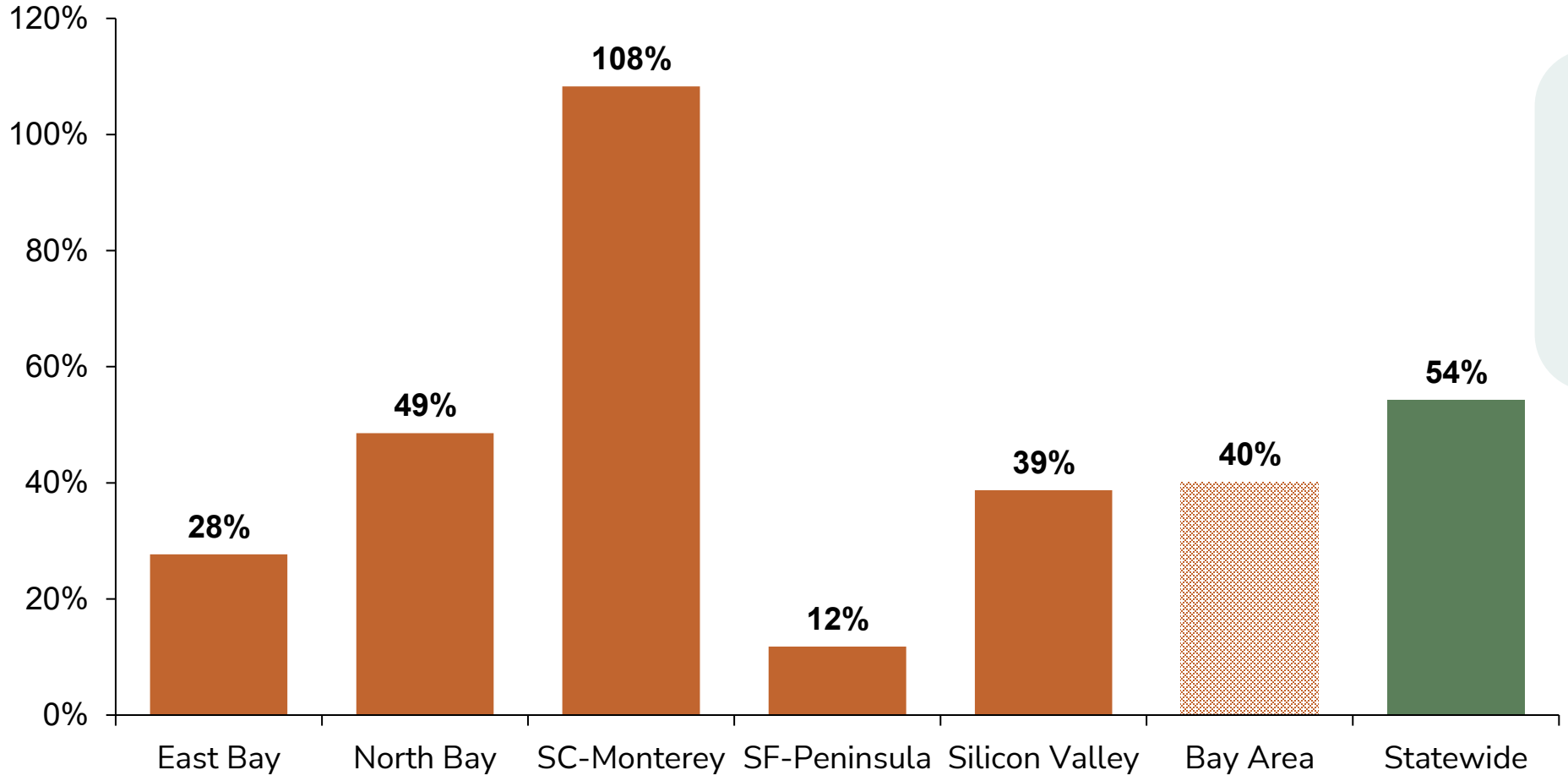


Wages have stagnated and fallen in two subregions with a 5% increase for East Bay similar to Statewide

Note: All Median Earnings are adjusted for inflation Consumer Price Index (CPI) from the CA Department of Finance

Source: DataVista, 3.1 Release, July 2026. Snapshot view of General Admit Students

% Change in the Living Wage for a Single Adult (2018 vs. 2024)*

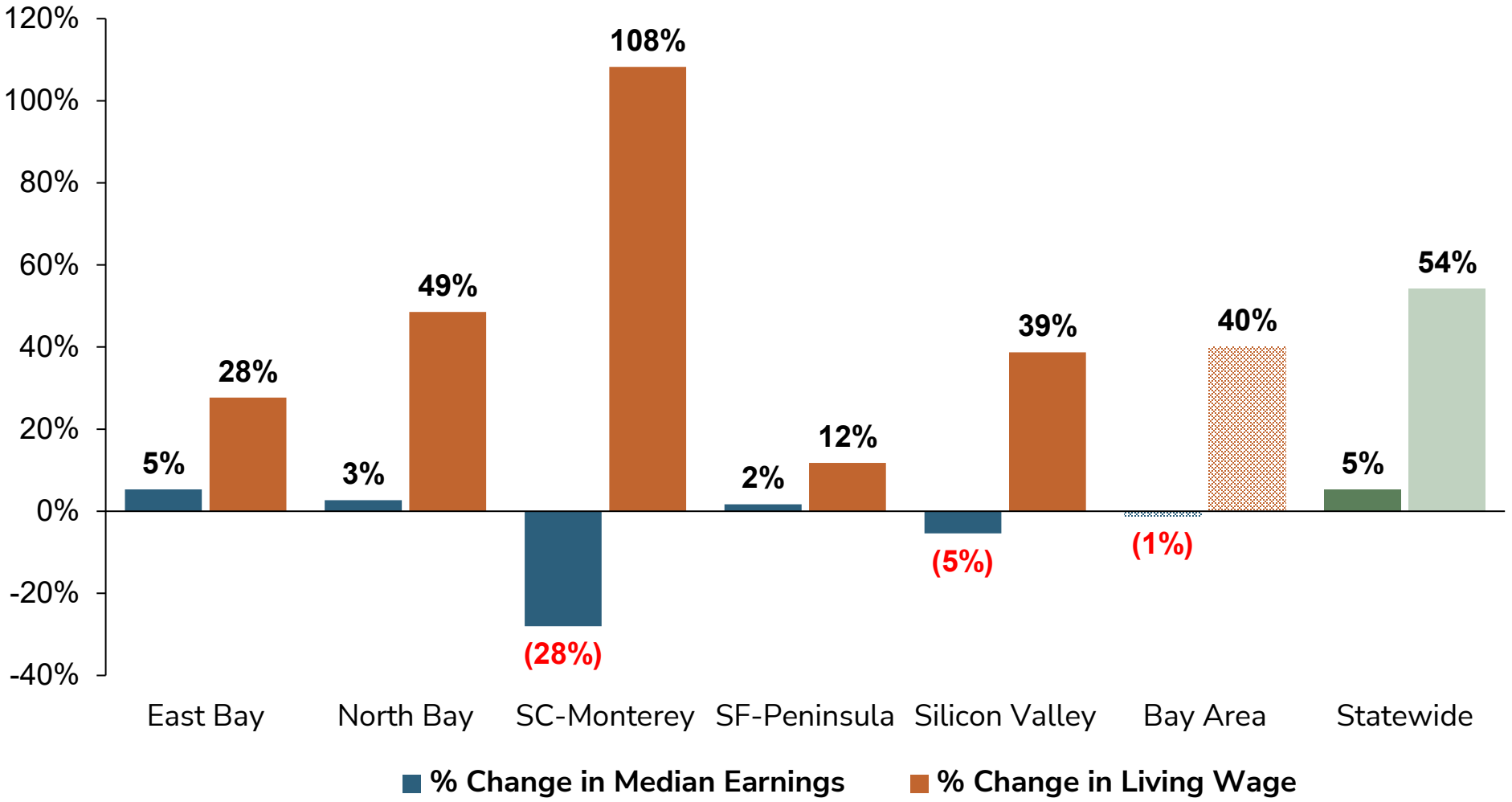


Dramatic Increase in the Cost of Living for SC-Monterey +108%

**Note: Living wages are not available for 2020; so, 2018 living wages are used. Bay Area and Statewide are averages.*

Source: Self-Sufficiency Standard for California, Center for Women's Welfare, University of Washington

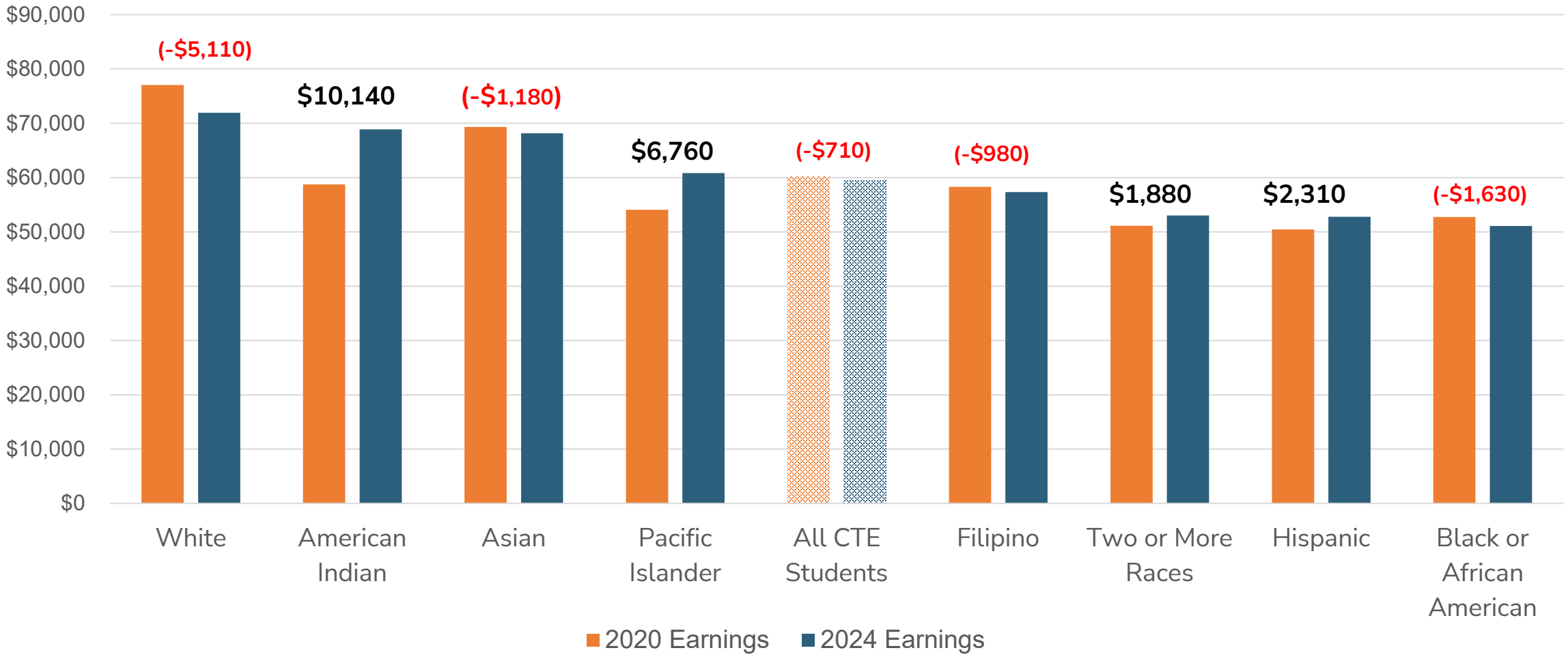
% Change in CTE Exiter Median Earnings (2020 vs. 2024) vs % Change in Living Wage (2018 vs. 2024)



The Squeeze — Wage Growth Is Not Keeping Pace With the Cost of Living Increases

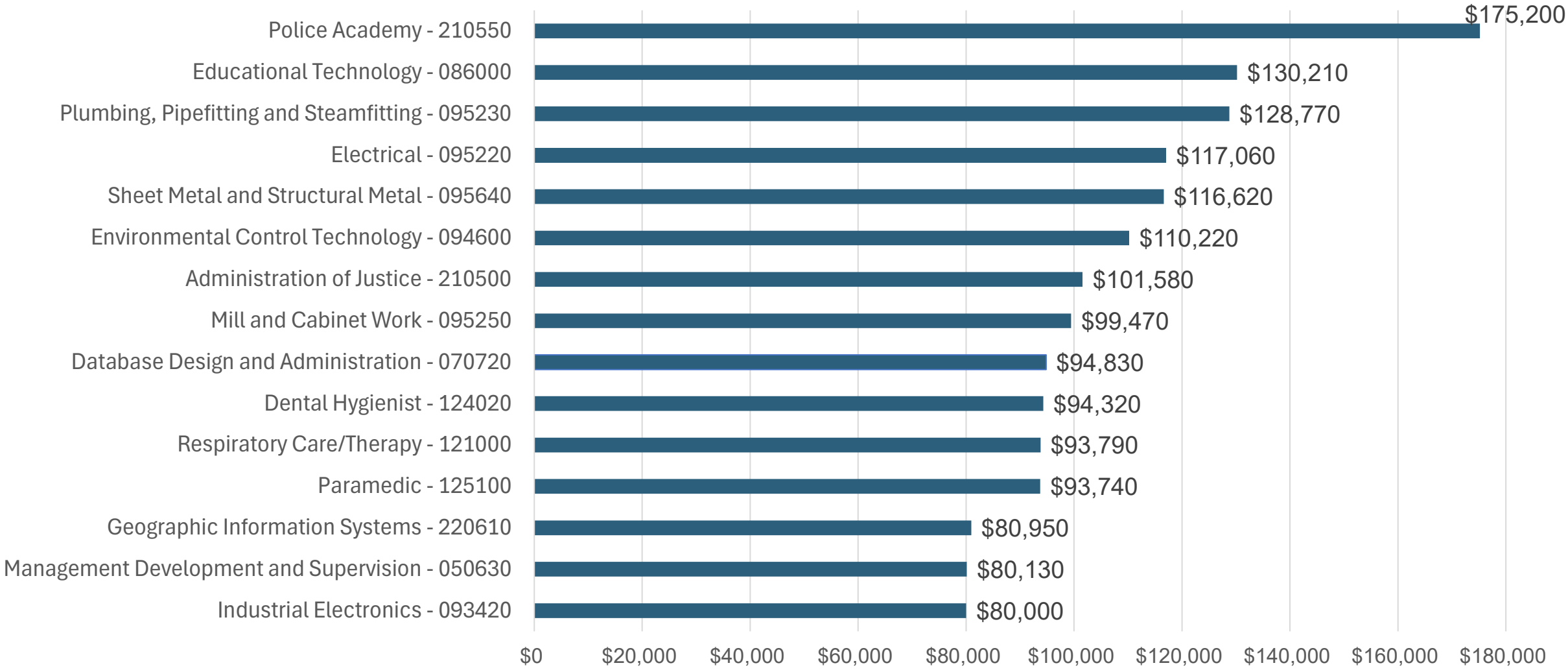
Source: DataVista, 3.1 Release, July 2026. Snapshot view of General Admit Students and Self-Sufficiency Standard for California, Center for Women's Welfare, University of Washington

CTE Exiter Median Annual Earnings by Student Population with $ Differences (2020 vs. 2024)



Source: DataVista, 3.1 Release, July 2026. Snapshot view of General Admit Students

Top 15 CTE Programs for Bay Exiter Median Annual Earnings in 2024



Note: Includes only those TOP6 programs with 20+ students in 2024 as the denominator or population size.

Source: DataVista, 3.1 Release, July 2026. Snapshot view of General Admit Students

Examples of Active Award Titles from COCI for Some Top 15 Programs: Median Annual Earnings

Educational Technology – 086000: $130,210
- Online Teaching and Educational Technology (Evergreen)
- Artificial Intelligence Empowered Instruction (Foothill)

Plumbing, Pipefitting & Steamfitting – 095230: $128,770
- HVAC Refrigeration Apprentice (Santa Rosa)
- Plumbing (Diablo Valley)
- Sprinkler Fitter Technology (Chabot)
- Steamfitting and Pipefitting Technology (Foothill)

Electrical - 095220: $117,060
- Apprenticeship: Electrical Technology: Inside Wireman (San Mateo)
- Electrical Apprentice (Hartnell)
- Electrical Construction (Chabot)
- Electrical Union Apprentice (Santa Rosa)

Sheet Metal and Structural Metal - 095640: $116,620
- Sheet Metal Technology (Chabot)
- Sheet Metal Building Trades (Foothill)

Environmental Control Technology - 094600: $110,220
- Air Conditioning & Refrigeration (San Jose City)
- Air Conditioning Mechanic (Foothill)
- Heat-Pump Systems (Cabrillo)
- HVAC (Gavilan) and HVACR Fundamentals (Santa Rosa)
- Refrigeration Technology (Laney)

Database Design and Administration - 070720: $94,830
- Database Administration (CCSF and Ohlone)
- Database Development Practitioner (De Anza)
- Database Management with SQL (Laney)

Geographic Information Systems - 220610: $80,950
- Drone Technology (Diablo Valley)
- Geographic Information Systems (Napa Valley)
- Geospatial Technology (Santa Rosa and West Valley)

Management Development & Supervision - 050630: $80,130
- Customer Service (Las Positas)
- First Line Supervisor (Hartnell)
- Management and Supervision: Business (Los Medanos)

Source: Chancellor's Office Curriculum Inventory System (COCI) for Programs

Key takeaways · Bay Region CTE Earnings and Living Wage

The Squeeze

-1%

Decrease in Bay CTE median annual earnings in 2020 vs. 2024 while living wage up **+40%** in the Bay

+5%

Increase in **East Bay** CTE median annual earnings in 2020 vs. 2024

CTE Programs

$59,420

Median annual earnings across all CTE Programs in 2024

CTE Programs with the **highest 2024 earnings**:

- Police Academy
- Educational Technology
- Plumbing, Pipefitting
- Electrical
- Sheet Metal & Structural Metal
- Environmental Control Tech

CTE Wage Gaps

-$20,000/yr

Difference between **White vs Black and Hispanic** CTE Exiter earnings in the Bay in 2020 vs. 2024

CTE Student Populations with **higher earnings increases (2020 vs. 2024):**

- American Indian (+19%)
- Hispanic (+6%)
- Pacific Islander (+14%)
- Two or More Races (+5%)

Pre-Work Discussion Questions

1. Does this data reflect what you are seeing on your campus? What stands out to you?
2. What successes have you noticed, and what lessons can we learn from them?
3. Are there any specific strategies or approaches that have worked well at your college that you can share?

Given the data, do you see any strategies for improving outcomes?

Outcome	Improvement Strategies		
	Local	Subregional	Regional
Headcount			
DE / K12 enrollment			
Completions			
Earnings / Living Wage			
Other			