



Labor Market Analysis for Program Recommendation

Phlebotomy Occupations

Silicon Valley Subregion

Prepared by the Bay Region Center of Excellence for Labor Market Research

Associate Program

August 2026

Recommendation Based on Labor Market Data: ☒ Yes ☐ With Reservations ☐ No		
	Earning Wage Meets Living Wage	Meets Demand
Bay Region	Entry Level Hourly Wage- \$31 Mid-Career Hourly Wage- \$37 Mid-Career Hourly Wage at or above the Bay Living Wage (\$27)? ☒ Yes ☐ No	Demand: 920 Supply: 428 (47% of Demand is Met) Gap: 492 In-Demand? ☒ Yes ☐ No
Silicon Valley Subregion	Entry Level Hourly Wage- \$37 Mid-Career Hourly Wage- \$38 Mid-Career Hourly Wage at or above the Subregion Living Wage (\$30)? ☒ Yes ☐ No	Demand: 201 Supply: 63 (31% of Demand is Met) Gap: 138 In-Demand? ☒ Yes ☐ No

Note: An occupation is considered to provide a living wage if the mid-career wage is at or above the amount required for a single adult to be economically self-sufficient within a specified region. In this report, living wage estimates are based on the California Self-Sufficiency Standard. As a rule of thumb, an occupation will be considered **in-demand** when the supply is less than 75% of the demand **and** the labor market gap exceeds 40 openings (a reasonable regional threshold for starting a new program), but this approach may not apply in all cases. For definitions of demand, supply, and living wage, please scroll to the bottom of the report under **Definitions**.

Recommendation

The labor market data supports this proposed program. The occupations meet both the Bay Region and Silicon Valley subregion living wage at the entry and mid-career levels. An additional 492 students are needed in the Bay Region and 138 students in the Silicon Valley subregion to complete their program. Lastly, only 47% of labor market demand is being met in the Bay Region, and 31% of demand is being met in the Silicon Valley subregion overall.

Introduction

This report provides student outcomes data on employment and earnings for TOP 1205.10 - Phlebotomy programs in the state and region. It is recommended that these data be reviewed to better understand how outcomes for students taking courses on this TOP code compare to potentially similar programs at subregion in the state and region.

This report profiles Phlebotomy Occupations in the 12 county Bay Region and in the Silicon Valley subregion. The occupations classified as middle-skill occupations require a certificate, or an associate degree, or it may require a bachelor's degree, but 33% or fewer of current workers in these roles hold one.

- **Clinical Laboratory Technologists and Technicians (29-2018):** Perform routine medical laboratory tests for the diagnosis, treatment, and prevention of disease. May work under the supervision of a medical technologist.
Typical Entry-Level Educational: Bachelor's degree
Skill Level: Middle-Skill
Work Experience Required: None
Percentage of individuals 25+ with an associate degree, certificate, or some postsecondary coursework as their highest level of education attainment: NA
- **Phlebotomists (31-9097):** Draw blood for tests, transfusions, donations, or research. May explain the procedure to patients and assist in the recovery of patients with adverse reactions.
Typical Entry-Level Educational: Postsecondary nondegree award
Skill Level: Middle-Skill
Work Experience Required: None
Percentage of individuals 25+ with an associate degree, certificate, or some postsecondary coursework as their highest level of education attainment: 58%

Occupational Demand

Table 1. Employment Outlook for Phlebotomy Occupations in the Bay Region

Occupation	2025 Jobs	2030 Jobs	5-yr Change	5-yr % Change	5-yr Total Openings	Annual Openings	Entry Level Hourly	Mid-Career Hourly Wage
Clinical Laboratory Technologists and Technicians	8,292	8,607	315	4%	2,979	596	\$33	\$40
Phlebotomists	2,268	2,432	164	7%	1,621	324	\$25	\$28
Total	10,560	11,039	479	5%	4,600	920	\$31	\$37

Source: Lightcast 2026.3

The Bay Region includes: Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano and Sonoma Counties

Table 2. Employment Outlook for Phlebotomy Occupations in the Silicon Valley Subregion

Occupation	2025 Jobs	2030 Jobs	5-yr Change	5-yr % Change	5-yr Total Openings	Annual Openings	Entry Level Hourly	Mid-Career Hourly Wage
Clinical Laboratory Technologists and Technicians	1,958	2,073	114	6%	740	148	\$39	\$40
Phlebotomists	364	395	31	9%	264	53	\$27	\$29
Total	2,322	2,468	146	6%	1,004	201	\$37	\$38

Source: Lightcast 2026.3

Silicon Valley Subregion includes: Santa Clara Counties

Job Postings in the Bay Region and Silicon Valley Subregion

Table 3. Number of Job Postings by Occupation for the latest 12 months

Occupation	Bay Region	Silicon Valley
Clinical Laboratory Technologists and Technicians	4,176	1,146
Phlebotomists	1,744	276

Source: Lightcast 2026.3; "Job Posting Analytics." Aug. 2025 - Jul. 2026

Table 4a. Top Job Titles in Job Postings for Phlebotomy Occupations in the Bay Region

Title	Bay	Title	Bay
Phlebotomists	891	Cytotechnologists	71
Clinical Laboratory Scientists	750	Histotechnologists	70
Laboratory Technicians	721	Travel Medical Technologists	65
Laboratory Assistants	308	Histology Technologists	53
Mobile Phlebotomists	171	Histotechnicians	53
Certified Phlebotomy Technicians	129	Laboratory Phlebotomists	52
Histology Technicians	98	Clinical Laboratory Technicians	49
Medical Laboratory Technicians	88	Hardware Technicians	46
Phlebotomy Technicians	77	Polysomnographers	43

Source: Lightcast 2026.3; "Job Posting Analytics." Aug. 2025 - Jul. 2026

Table 4b. Top Job Titles in Job Posting for Phlebotomy Occupations in the Silicon Valley Subregion

Title	Silicon Valley	Title	Silicon Valley
Laboratory Technicians	236	Travel Medical Technologists	19
Clinical Laboratory Scientists	202	Cytotechnologists	18
Phlebotomists	135	Clinical Laboratory Specialists	18
Laboratory Assistants	88	Histotechnicians	18

Title	Silicon Valley	Title	Silicon Valley
Mobile Phlebotomists	41	Life Science Research Professionals	15
Hardware Technicians	33	Clinical Laboratory Assistants	14
Certified Phlebotomy Technicians	32	Formulation Technicians	14
Clinical Laboratory Technicians	27	Sleep Technicians	13
Medical Laboratory Technicians	20	Life Science Technicians	13

Source: Lightcast 2026.3; "Job Posting Analytics." Aug. 2025 - Jul. 2026

Industry Concentration

Table 5. Industries Hiring for Phlebotomy Occupations in the Bay Region

Industry - 6 Digit NAICS (No. American Industry Classification) Codes	Jobs in Industry (2025)	Jobs in Industry (2030)	% Change (2025-30)	% Occupation Group in Industry (2025)
Medical Laboratories	2,222	2,256	2%	21%
General Medical and Surgical Hospitals	2,155	2,046	-5%	20%
Hospitals (Local Government)	1,073	1,173	9%	10%
HMO Medical Centers	734	834	14%	7%
Offices of Physicians (except Mental Health Specialists)	633	636	0%	6%
Diagnostic Imaging Centers	525	559	6%	5%
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	387	414	7%	4%
Hospitals (State Government)	338	406	20%	3%
All Other Miscellaneous Ambulatory Health Care Services	310	385	24%	3%
Research and Development in Biotechnology (except Nanobiotechnology)	269	304	13%	3%

Source: Lightcast 2026.3

Table 6. Top Employers Posting Phlebotomy Occupations in the Bay Region and the Silicon Valley Subregion

Employer	Bay	Employer	Silicon Valley
Stanford Health Care	226	Stanford Health Care	201
Quest Diagnostics	202	El Camino Hospital	54
K&A Recruiting	179	Stanford University	46
Sutter Health	156	Quest Diagnostics	31

Employer	Bay	Employer	Silicon Valley
Labcorp	140	Sutter Bay Medical Foundation	30
Kaiser Permanente	136	K&A Recruiting	25

Source: Lightcast 2026.3; "Job Posting Analytics." Aug. 2025 - Jul. 2026

Educational Supply

There are three community colleges in the Bay Region issuing 89 awards on average annually (last 3 years ending 2024-25) on TOP 1205.10 - Phlebotomy. In the Silicon Valley subregion, there is one community college that issued 28 awards on average annually (last 3 years) on this TOP code.

There are three other CTE educational institutions in the Bay Region issuing 339 awards on average annually (last 3 years ending 2023-24) on CIP 51.1009- Phlebotomy Technician/Phlebotomist. There is one other CTE educational institution in the Silicon Valley subregion issuing 35 awards on average annually (last 3 years) on this CIP code.

Table 7a. Community College Awards on TOP 1205.10 - Phlebotomy in the Bay Region

College	Subregion	Low unit Certificate	Total
Cabrillo	SC-Monterey	19	19
Deanza	Silicon Valley	28	28
San Francisco	Mid-Peninsula	42	42
Total	-	89	89

Source: Data Mart

Note: The annual average for awards is 2022-23 to 2025-25.

Table 7b. Other CTE Institutions Awards on CIP 51.1009- Phlebotomy Technician/Phlebotomist. in the Bay Region

College	Subregion	Certificates of less than 1 year	Total
Central Coast College	SC-Monterey	51	51
Contra Costa Medical Career College	East Bay	253	253
Institute for Business and Technology	Silicon Valley	35	35
Total	-	339	339

Source: IPEDS

Note: The annual average for awards is 2021-22 to 2023-24.

Gap Analysis

Based on the data included in this report, there is a labor market gap in the Bay Region with 920 annual openings for the Phlebotomy occupational cluster and 428 annual (3-year average) awards for an annual undersupply of 492 students. In the Silicon Valley subregion, there is also a gap with 201 annual openings and 63 annual (3-year average) awards for an annual undersupply of 138 students.

Student Outcomes

Table 8. Four Employment Outcomes Metrics for Students Who Took Courses on TOP 1205.10 - Phlebotomy

Metric Outcomes	Bay All CTE Program	State 1205.10	Bay 1205.10	Silicon Valley 1205.10
Students with a Job Closely Related to Their Field of Study	75%	78%	NA	NA
Median Annual Earnings for SWP Exiting Students	\$58,379	\$44,333	\$50,395	\$52,064

Metric Outcomes	Bay All CTE Program	State 1205.10	Bay 1205.10	Silicon Valley 1205.10
Median Change in Earnings for SWP Exiting Students	31%	55%	135%	NA
Exiting Students Who Attained the Living Wage	50%	34%	30%	NA

Source: DataVista Program Median of 2020 to 2022.

Skills, Certifications and Education

Table 9. Top Skills in Job Postings for Phlebotomy Occupations in the Bay Region

Skill	Posting	Skill	Posting
Phlebotomy	1,976	Venipuncture	687
Medical Laboratory	1,369	Packaging And Labeling	636
Laboratory Equipment	1,290	CPT Coding	587
Laboratory Testing	1,256	Laboratory Experience	571
Biology	1,170	Medical Assistance	566
Clinical Laboratory Science	922	Billing	534
Data Entry	889	Pediatrics	528
Chemistry	880	Standard Operating Procedure	528
Workflow Management	800	Laboratory Safety	503
Specimen Processing	784	Microbiology	497

Source: Lightcast 2026.3; "Job Posting Analytics." Aug. 2025 - Jul. 2026

Table 10. Certifications in Job Postings for Phlebotomy Occupations in the Bay Region

Certification	Posting	Certification	Posting
Phlebotomy Certification	594	American Medical Technologists (AMT) Certification	97
Basic Life Support (BLS) Certification	447	Advanced Cardiovascular Life Support (ACLS) Certification	47
American Society For Clinical Pathology (ASCP) Certification	427	Cardiopulmonary Resuscitation (CPR) Certification	46

Source: Lightcast 2026.3; "Job Posting Analytics." Aug. 2025 - Jul. 2026

Table 11. Education Requirements for Phlebotomy Occupations in the Bay Region

Education Level	Job Postings	% of Total
High school or GED	1,814	39%
Associate degree	867	19%
Bachelor's degree & higher	2,005	43%

Source: Lightcast 2026.3; "Job Posting Analytics." Aug. 2025 - Jul. 2026

Education Level	Job Postings	% of Total
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Note: 36% of records have been excluded because they do not include a degree level. As a result, the chart above may not be representative of the full sample.

Methodology

Occupations for this report were identified by use of job descriptions and skills listed in O*Net. Labor demand data is sourced from Lightcast occupation and job postings data. Educational supply and student outcomes data is retrieved from multiple sources, including CCCCCO Data Mart and CTE Launchboard.

Definitions

Demand refers to average annual openings which includes a combination of both [new jobs and replacement jobs](#) between 2025 to 2030. New jobs represent the total number of additional workers required in an occupation, calculated as the difference between the current number of workers and the projected number of unfilled positions. Replacements are jobs that will need to be filled by [new hires](#) due to existing workers leaving the occupation. The average annual openings figure is derived by dividing total openings (2025 to 2030) by five years.

Supply refers to the average number of [graduates](#) between academic years 2021–2022 and 2023–2024. Graduates include students from community colleges, other two-year private and public institutions, as well as four-year institutions.

Living wage refers to the amount of income required for working families to meet basic needs at a minimally adequate level, considering family composition, ages of children, and geographic differences in costs based on the Self-Sufficiency Standard methodology.

Entry-level wages are the hourly earnings paid to workers who are newly entering an occupation.

Mid-career wages are the hourly earnings paid to workers who have accumulated several years of experience in an occupation, reflecting increased productivity, skill proficiency, and responsibility beyond entry-level roles but short of late-career or senior positions.

Sources

O*Net Online

Lightcast

CTE LaunchBoard www.calpassplus.org

Statewide CTE Outcomes Survey

Employment Development Department Unemployment Insurance Dataset

CCCCCO Data Mart

Contacts

For more information, please contact:

- Yumi Huang, Research Analyst, Bay Region Center of Excellence, yumi@baccc.net or (831) 275-0043
- Marcela Reyes, Director, Research and Center of Excellence, marcela@baccc.net or (831) 219-8875