



Labor Market Analysis for Grant Purposes

Child Development/Early Childhood Education Occupations

North Bay Subregion

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

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Recommendation

Based on all available data, there appears to be an “undersupply” of Child Development/Early Childhood Education workers compared to the demand for this cluster of occupations in the Bay Region and in the North Bay Subregion (Marin, Napa, Solano, Sonoma counties). There is a projected annual gap of about 239 students in the Bay Region and 47 students in the North Bay subregion.

Introduction

This report provides student outcomes data on employment and earnings for TOP 1305.00 - Child Development/Early Care and Education 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 Child Development/Early Childhood Education Occupations in the 12 county Bay Region and in the North Bay subregion

- **Preschool Teachers, Except Special Education (25-2011):** Instruct preschool-aged students, following curricula or lesson plans, in activities designed to promote social, physical, and intellectual growth.
Typical Entry-Level Educational: Associate’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: 30%

Occupational Demand

Table 1. Employment Outlook for Child Development/Early Childhood Education Occupations in the Bay Region

Occupation	2023 Jobs	2028 Jobs	5-yr Change	5-yr % Change	5-yr Total Openings	Annual Openings	25% Hourly Wage	Median Hourly Wage
Preschool Teachers, Except Special Education	16,322	17,255	933	6%	10,256	2,051	\$21	\$23
Total	16,322	17,255	933	6%	10,256	2,051	\$21	\$23

Source: Lightcast 2025.3

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 Child Development/Early Childhood Education Occupations in the North Bay Subregion

Occupation	2023 Jobs	2028 Jobs	5-yr Change	5-yr % Change	5-yr Total Openings	Annual Openings	25% Hourly Wage	Median Hourly Wage
Preschool Teachers, Except Special Education	2,009	2,048	38	2%	1,207	241	\$19	\$22
Total	2,009	2,048	39	2%	1,207	241	\$19	\$22

Source: Lightcast 2025.3

North Bay Subregion includes: Marin, Napa, Solano, Sonoma Counties

Job Postings in the Bay Region and North Bay Subregion

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

Occupation	Bay Region	North Bay
Preschool Teachers, Except Special Education	3,855	606

Source: Lightcast 2025.3; "Job Posting Analytics." Jan. 2025 - Dec. 2025

Table 4a. Top Job Titles in Job Postings for Child Development/Early Childhood Education Occupations in the Bay Region

Title	Bay	Title	Bay
Preschool Teachers	1,044	Daycare Teachers	88
Teachers	321	Infant Teachers	73
Early Childhood Teachers	236	Toddler/Preschool Teachers	57
Infant/Toddler Teachers	224	After School Teachers	53
Substitute Preschool Teachers	133	Early Childhood Educators	52
Toddler Teachers	128	Infant/Toddler/Preschool Teachers	52
Child Care Teachers	100	Preschool Lead Teachers	48
Child Development Specialists	91	Early Preschool Teachers	38
Directors of Early Childhood Education	91	Early Childhood Music Teachers	37

Source: Lightcast 2025.3; "Job Posting Analytics." Jan. 2025 - Dec. 2025

Table 4b. Top Job Titles in Job Posting for Child Development/Early Childhood Education Occupations in the North Bay Subregion

Title	North Bay	Title	North Bay
Preschool Teachers	151	Child Care Teachers	16
Teachers	53	Summer Teachers	15
Toddler Teachers	32	Infant/Toddler Teachers	13

Title	North Bay	Title	North Bay
Child Development Specialists	26	Academy Teachers	10
Early Childhood Teachers	26	Directors of Early Childhood Education	10
Infant Teachers	25	After School Teachers	9
Substitute Preschool Teachers	20	Early Childhood Education Assistants	8
Daycare Teachers	18	Classroom Assistants	7
Early Childhood Educators	16	Lead Teachers	6

Source: Lightcast 2025.3; "Job Posting Analytics." Jan. 2025 - Dec. 2025

Industry Concentration

Table 5. Industries Hiring for Child Development/Early Childhood Education Occupations in the Bay Region

Industry - 6 Digit NAICS (No. American Industry Classification) Codes	Jobs in Industry (2023)	Jobs in Industry (2028)	% Change (2023-28)	% Occupation Group in Industry (2023)
Child Care Services	10,589	11,746	11%	67%
Elementary and Secondary Schools (Local Government)	1,418	1,330	-6%	8%
Religious Organizations	1,253	1,210	-3%	8%
Elementary and Secondary Schools	1,144	1,119	-2%	7%
Other Individual and Family Services	278	289	4%	2%
Local Government, Excluding Education and Hospitals	291	217	-25%	1%
Civic and Social Organizations	185	213	15%	1%
Child and Youth Services	119	115	-3%	1%
Services for the Elderly and Persons with Disabilities	77	89	17%	0%
Fitness and Recreational Sports Centers	102	81	-21%	0%

Source: Lightcast 2025.3

Table 6. Top Employers Posting Child Development/Early Childhood Education Occupations in the Bay Region and the North Bay Subregion

Employer	Bay	Employer	North Bay
KinderCare Education	521	KinderCare Education	116
Bright Horizons	176	North Bay Children Center	58
Stratford School	126	Bright Horizons	21

Employer	Bay	Employer	North Bay
Nobel Learning Communities	84	Sunny Days	18
North Bay Children Center	58	World YWCA	18
Sunny Days	57	Guidepost Montessori	17

Source: Lightcast 2025.3; "Job Posting Analytics." Jan. 2025 - Dec. 2025

Educational Supply

There are twenty-three community colleges in the Bay Region issuing 2,289 awards on average annually (last 3 years ending 2023-24) on TOP 1305.00 - Child Development/Early Care and Education. In the North Bay subregion, there are four community colleges that issued 194 awards on average annually (last 3 years) on this TOP code.

There is one other CTE educational institution in the Bay Region issuing 1 award on average annually (last 3 years ending 2022-23) on CIP 13.1210- Early Childhood Education and Teaching.

Table 7a. Community College Awards on TOP 1305.00 - Child Development/Early Care and Education in the Bay Region

College	Subregion	Associate Degree	High unit Certificate	Low unit Certificate	Noncredit award	Total
Cabrillo	SC-Monterey	23	69	7	12	111
Canada	Mid-Peninsula	25	0	21	0	46
Chabot	East Bay	32	0	88	0	120
Contra Costa	East Bay	28	17	4	0	49
Deanza	Silicon Valley	54	0	63	0	117
Diablo Valley	East Bay	34	24	122	0	180
Foothill	Silicon Valley	18	0	5	0	23
Gavilan	Silicon Valley	12	0	11	0	23
Hartnell	SC-Monterey	23	6	5	0	34
Las Positas	East Bay	20	0	24	0	44
Los Medanos	East Bay	28	20	53	0	101
Marin	North Bay	3	1	0	0	4
Merritt	East Bay	40	26	170	0	236
Mission	Silicon Valley	27	12	33	0	72
Monterey	SC-Monterey	17	9	0	0	26
Napa	North Bay	11	0	0	0	11
Ohlone	East Bay	7	5	0	0	12
San Francisco	Mid-Peninsula	92	0	693	0	785
San Jose City	Silicon Valley	12	6	41	0	59
Santa Rosa	North Bay	34	17	67	14	132
Skyline	Mid-Peninsula	30	0	0	0	30
Solano	North Bay	20	1	26	0	47
West Valley	Silicon Valley	15	1	11	0	27
Total	-	605	214	1,444	26	2,289

Source: Data Mart

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

Table 7b. Other CTE Institutions Awards on CIP 13.1210- Early Childhood Education and Teaching. in the Bay Region

College	Subregion	Associate degree
Pacific Union College	North Bay	1

College	Subregion	Associate degree
Total	-	1

Source: Data Mart

Note: The annual average for awards is 2020-21 to 2022-23.

Gap Analysis

Based on the data included in this report, there is a labor market gap in the Bay Region with 2,051 annual openings for the Child Development/Early Childhood Education occupational cluster and 2,290 annual (3-year average) awards for an annual undersupply of 239 students. In the North Bay subregion, there is also a gap with 241 annual openings and 194 annual (3-year average) awards for an annual undersupply of 47 students.

Student Outcomes

Table 8. Four Employment Outcomes Metrics for Students Who Took Courses on TOP 1305.00 - Child Development/Early Care and Education

Metric Outcomes	Bay All CTE Program	State 1305.00	Bay 1305.00	North Bay 1305.00
Students with a Job Closely Related to Their Field of Study	74%	74%	80%	69%
Median Annual Earnings for SWP Exiting Students	\$53,090	\$28,400	\$34,422	\$32,333
Median Change in Earnings for SWP Exiting Students	24%	26%	28%	39%
Exiting Students Who Attained the Living Wage	54%	35%	26%	38%

Source: Launchboard Strong Workforce Program Median of 2018 to 2021.

Skills, Certifications and Education

Table 9. Top Skills in Job Postings for Child Development/Early Childhood Education Occupations in the Bay Region

Skill	Posting	Skill	Posting
Preschool Education	2,292	Curriculum Development	199
Child Development	2,001	Parent Communication	197
Early Childhood Education	1,011	Early Intervention	190
Lesson Planning	715	Special Education	186
Lifting Ability	528	Developmental Psychology	181
Classroom Management	480	Pediatrics	176
Working With Children	444	Pediatric First Aid	170
Cardiopulmonary Resuscitation (CPR)	267	Toileting	170
Diaper Changing	253	Montessori Education	168

Skill	Posting	Skill	Posting
Safety Training	230	Developmental Assessment	163

Source: Lightcast 2025.3; "Job Posting Analytics." Jan. 2025 - Dec. 2025

Table 10. Certifications in Job Postings for Child Development/Early Childhood Education Occupations in the Bay Region

Certification	Posting	Certification	Posting
Teaching Certificate	60	ServSafe Certification	4
Mandated Reporter Certification	10	Speech-Language Pathology License	1

Source: Lightcast 2025.3; "Job Posting Analytics." Jan. 2025 - Dec. 2025

Table 11. Education Requirements for Child Development/Early Childhood Education Occupations in the Bay Region

Education Level	Job Postings	% of Total
High school or GED	708	24%
Associate degree	830	28%
Bachelor's degree & higher	1,466	49%

Source: Lightcast 2025.3; "Job Posting Analytics." Jan. 2025 - Dec. 2025

Note: 47% 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.

Middle-skill occupations as those typically requiring more than a high school diploma, but less than a bachelor's degree—except in cases where a bachelor's degree is required, but more than one-third of the workforce has less than a bachelor's degree.

Sources

O*Net Online

Lightcast

CTE LaunchBoard www.calpassplus.org

Statewide CTE Outcomes Survey

Employment Development Department Unemployment Insurance Dataset

CCCCCO Data Mart

Contacts

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