



Labor Market Analysis for Program Recommendation Nursing Occupations Santa Cruz and Monterey 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 Nursing workers compared to the demand for this cluster of occupations in the Bay Region and in the Santa Cruz and Monterey subregion (Monterey, San Benito, Santa Cruz counties). There is a projected annual gap of about 3,134 students in the Bay Region and 176 students in the Santa Cruz and Monterey subregion.

Introduction

This report provides student outcomes data on employment and earnings for TOP 1230.10 - Registered Nursing 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 includes occupations with three different skill levels. The occupations classified as below middle-skill typically require a high school diploma or equivalent. 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. In contrast, above middle-skill occupations require a bachelor’s degree or higher.

This report profiles Nursing Occupations in the 12 county Bay Region and in the Santa Cruz and Monterey subregion.

- Registered Nurses (29-1141):** Assess patient health problems and needs, develop and implement nursing care plans, and maintain medical records. Administer nursing care to ill, injured, convalescent, or disabled patients. May advise patients on health maintenance and disease prevention or provide case management. Licensing or registration required.
 - 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: 32%

Occupational Demand

Table 1. Employment Outlook for Nursing 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
Registered Nurses	78,237	85,164	6,927	9%	28,975	5,795	\$66	\$84

Occupation	2023 Jobs	2028 Jobs	5-yr Change	5-yr % Change	5-yr Total Openings	Annual Openings	25% Hourly Wage	Median Hourly Wage
Total	78,237	85,164	6,927	9%	28,975	5,795	\$66	\$84

Source: Lightcast 2025.1

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 Nursing Occupations in the Santa Cruz and Monterey Subregion

Occupation	2023 Jobs	2028 Jobs	5-yr Change	5-yr % Change	5-yr Total Openings	Annual Openings	25% Hourly Wage	Median Hourly Wage
Registered Nurses	4,710	5,154	445	9%	1,776	355	\$55	\$65
Total	4,710	5,154	444	9%	1,776	355	\$55	\$65

Source: Lightcast 2025.1

Santa Cruz and Monterey subregion includes: Monterey, San Benito, Santa Cruz Counties

Job Postings in the Bay Region and Santa Cruz and Monterey Subregion

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

Occupation	Bay Region	Santa Cruz and Monterey
Registered Nurses	49,458	5,501

Source: Lightcast 2025.4; "Job Posting Analytics." Oct. 2024 - Sep. 2025

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

Title	Bay	Title	Bay
Registered Nurses	2,776	Operating Room Registered Nurses	912
Labor and Delivery Registered Nurses	1,977	Medical Surgical Registered Nurses	868
Travel Registered Nurses	1,757	Telemetry Travel Registered Nurses	808
Home Health Registered Nurses	1,275	ICU Travel Registered Nurses	746
Registered Nurse Case Managers	1,186	PACU Registered Nurses	694
Labor and Delivery Travel Registered Nurses	1,072	Emergency Room Registered Nurses	665
ICU Registered Nurses	1,060	Telemetry Registered Nurses	570
Staff Nurses	1,010	Emergency Room Travel Registered Nurses	554
NICU Registered Nurses	915	Licensed Vocational Nurses	553

Source: Lightcast 2025.4; "Job Posting Analytics." Oct. 2024 - Sep. 2025

Table 4b. Top Job Titles in Job Posting for Nursing Occupations in the Santa Cruz and Monterey Subregion

Title	Santa Cruz and Monterey	Title	Santa Cruz and Monterey
Labor and Delivery Registered Nurses	361	ICU Travel Registered Nurses	115
Registered Nurses	357	Medical Surgical Registered Nurses	110
Travel Registered Nurses	282	PACU Registered Nurses	103
Labor and Delivery Travel Registered Nurses	206	Cardiovascular ICU Registered Nurses	83
Staff Nurses	176	Home Health Registered Nurses	83
ICU Registered Nurses	148	Emergency Department Travel Registered Nurses	72
Operating Room Registered Nurses	147	NICU Registered Nurses	67
Emergency Room Travel Registered Nurses	128	Progressive Care Unit Registered Nurses	67
Emergency Room Registered Nurses	120	Cardiac Cath Lab Registered Nurses	66

Source: Lightcast 2025.4; "Job Posting Analytics." Oct. 2024 - Sep. 2025

Industry Concentration

Table 5. Industries Hiring for Nursing 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)
General Medical and Surgical Hospitals	26,626	26,014	-2%	33%
Hospitals (Local Government)	9,584	10,545	10%	12%
HMO Medical Centers	9,214	10,476	14%	12%
Hospitals (State Government)	3,992	4,820	21%	5%
Offices of Physicians (except Mental Health Specialists)	3,488	3,452	-1%	4%
Nursing Care Facilities (Skilled Nursing Facilities)	2,393	2,815	18%	3%
Home Health Care Services	2,118	3,090	46%	3%
Temporary Help Services	2,073	1,873	-10%	3%
All Other Outpatient Care Centers	1,726	2,261	31%	2%
Federal Government, Civilian, Excluding Postal Service	1,517	1,378	-9%	2%

Source: Lightcast 2025.4

Table 6. Top Employers Posting Nursing Occupations in the Bay Region and the Santa Cruz and Monterey Subregion

Employer	Bay	Employer	Santa Cruz and Monterey
Kaiser Permanente	2,233	AMN Healthcare	146
AMN Healthcare	1,709	Talent4Health	140
Sutter Health	1,076	CoreMedical Group	135
Fusion Medical Staffing	966	Ascension	131
Providence	848	CommonSpirit Health	109
Stability Healthcare	803	Nomad Health	100

Source: Lightcast 2025.4; "Job Posting Analytics." Oct. 2024 - Sep. 2025

Educational Supply

There are eighteen community colleges in the Bay Region issuing 762 awards on average annually (last 3 years ending 2023-24) on TOP 1230.10 - Registered Nursing. In the Santa Cruz and Monterey subregion, there are three community colleges that issued 117 awards on average annually (last 3 years) on this TOP code.

There are seven other CTE educational institutions in the Bay Region issuing 1,271 awards on average annually (last 3 years ending 2022-23) on CIP 51.3801- Registered Nursing/Registered Nurse. There are no other CTE educational institutions in the Santa Cruz and Monterey subregion issuing awards on average annually (last 3 years) on this CIP code.

There are five four-year institutions in the Bay Region which issuing 628 bachelor's degrees on average annually (last 3 years ending 2022-23) on CIP 51.3801- Registered Nursing/Registered Nurse. There is one four-year institution in the Santa Cruz and Monterey subregion issuing 62 bachelor's degrees on this CIP code.

Table 7a. Community College Awards on TOP 1230.10 - Registered Nursing in the Bay Region

College	Subregion	Associate Degree	Total
Cabrillo	Santa Cruz and Monterey	43	43
Chabot	East Bay	18	18
Contra Costa	East Bay	38	38
Deanza	Silicon Valley	43	43
Evergreen Valley	Silicon Valley	66	66
Gavilan	Silicon Valley	20	20
Hartnell	Santa Cruz and Monterey	42	42
Los Medanos	East Bay	26	26
Marin	North Bay	42	42
Merritt	East Bay	26	26
Mission	Silicon Valley	27	27
Monterey	Santa Cruz and Monterey	32	32
Napa	North Bay	37	37
Ohlone	East Bay	38	38
San Francisco	Mid-Peninsula	81	81
San Mateo	Mid-Peninsula	47	47
Santa Rosa	North Bay	101	101
Solano	North Bay	35	35
Total	-	762	762

College	Subregion	Associate Degree	Total
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Source: Data Mart

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

Table 7b. Other CTE Institutions Awards on CIP 51.3801- Registered Nursing/Registered Nurse. in the Bay Region

College	Subregion	Associate degree	Bachelor's degree	Total
Dominican University of California	North Bay	0	115	115
Gurnick Academy of Medical Arts	Mid-Peninsula	97	61	158
Pacific Union College	North Bay	84	44	128
Samuel Merritt University	East Bay	0	508	508
Unitek College	East Bay	1	115	116
University of San Francisco	Mid-Peninsula	0	236	236
Total	-	182	1,079	1,261

Source: Data Mart

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

Table 7c. Bachelor's Degree Awards on CIP 51.3801- Registered Nursing/Registered Nurse. in the Bay Region

College	Subregion	Bachelor's degree	Total
California State University-East Bay	East Bay	154	154
California State University-Monterey Bay	Santa Cruz and Monterey	62	62
San Francisco State University	Mid-Peninsula	165	165
San Jose State University	Silicon Valley	189	189
Sonoma State University	North Bay	58	58
Total	-	628	628

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 5,795 annual openings for the Nursing occupational cluster and 2,661 annual (3-year average) awards for an annual undersupply of 3,134 students. In the Santa Cruz and Monterey subregion, there is also a gap with 355 annual openings and 179 annual (3-year average) awards for an annual undersupply of 176 students.

Student Outcomes

Table 8. Four Employment Outcomes Metrics for Students Who Took Courses on TOP 1230.10 - Registered Nursing

Metric Outcomes	Bay All CTE Program	State 1230.10	Bay 1230.10	Santa Cruz and Monterey 1230.10
Students with a Job Closely Related to Their Field of Study	74%	95%	94%	92%
Median Annual Earnings for SWP Exiting Students	\$53,090	\$62,855	\$63,494	\$73,599
Median Change in Earnings for SWP Exiting Students	24%	67%	39%	102%
Exiting Students Who Attained the Living Wage	54%	72%	65%	73%

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

Skills, Certifications and Education

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

Skill	Posting	Skill	Posting
Nursing	24,217	Emergency Departments	3,266
Nursing Care	7,793	Pediatrics	3,260
Medication Administration	5,761	Patient Education And Counseling	3,094
Nursing Process	5,273	Direct Patient Care	2,891
Intensive Care Unit	4,782	Medical Telemetry	2,807
Home Health Care	4,619	Case Management	2,798
Acute Care	4,444	Clinical Nursing	2,734
Care Coordination	4,311	Nursing Diagnosis	2,715
Nursing Practices	4,069	Operating Room (OR)	2,614
Medical Records	3,523	Vital Signs	2,498

Source: Lightcast 2025.4; "Job Posting Analytics." Oct. 2024 - Sep. 2025

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

Certification	Posting	Certification	Posting
Basic Life Support (BLS) Certification	17,117	Cardiopulmonary Resuscitation (CPR) Certification	3,330

Certification	Posting	Certification	Posting
Advanced Cardiovascular Life Support (ACLS) Certification	8,808	Neonatal Resuscitation Program Certification (NRP)	2,755

Source: Lightcast 2025.4; "Job Posting Analytics." Oct. 2024 - Sep. 2025

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

Education Level	Job Postings	% of Total
High school or GED	1,940	11%
Associate degree	4,343	24%
Bachelor's degree & higher	11,820	65%

Source: Lightcast 2025.4; "Job Posting Analytics." Oct. 2024 - Sep. 2025

Note: 72% 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.

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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