Trade School Market Size Statistics

Setting the Record Straight



About this report

to know about their future Gen Z students.

This is the latest report in Validated Insights' recurring report series on the market for Trade Schools. In previous editions, we utilized our proprietary taxonomy to correctly assess how many students are enrolled in Trade Schools and we provided an in-depth look at the performance of various types of Trade Schools as well as the trend in Trade School enrollment across the states.

This report seeks to build on this established understanding and seeks to understand Trade Schools as a piece of the broader Technical and Vocational Education market. This report also dives into the latest data from the federal government on the prevalence of vocational certificates in the workforce. And lastly, this report explores the generational change occurring in the market for trade Schools, and explains what these institutions need

Summary of the Trade School Market in Context



Trade Schools Just a Piece of the Puzzle

- → As of 2025, the **Trade School market in the**United States is worth an estimated \$17.81B.

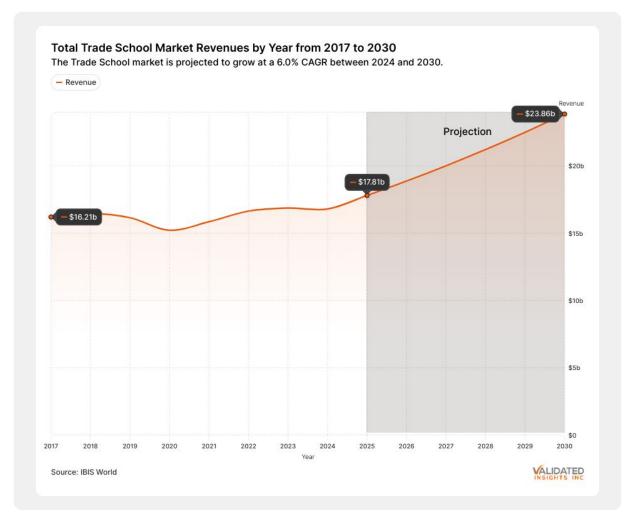
 Trade Schools are just a piece of the broader
 Technical and Vocational Education market which is valued at \$164.31B in 2025 meaning Trade
 Schools represent just 10.8% of the broader market that they are a part of.
- → From 2025 to 2030, the broader Technical and Vocational Education market in the U.S. is projected to grow at an 8.1% CAGR to \$242.0B. During the same time, the Trade School market is projected to grow slightly slower at a CAGR of 6.0% until 2030 when the market will be worth \$23.86B or 9.9% of the total Technical and Vocational Education market
- → By comparison, the aggregate Higher Education market in the U.S. is projected to grow at a 10.3% CAGR and the Community College market is projected to grow at a 2.7% CAGR.
- → The Total Addressable Market (TAM) for Trade Schools is estimated to be 80.6 million individuals. The Serviceable Addressable Market (SAM) is estimated to be 26.1 million individuals.



THE TRADE SCHOOL MARKET

The Size of the Trade School Market

- → The Trade School market is worth an estimated \$17.8B in 2025. This market is projected to grow at a 6.0% CAGR from 2025 to 2030, when the market is projected to be worth \$23.9B.
- → By comparison, the aggregate
 Higher Education market in the
 United States is worth an
 estimated \$301.5B in 2025 and is
 projected to grow at a 10.3% CAGR
 through 2030.

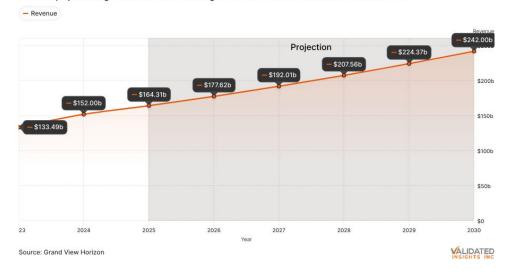


Trade Schools lag behind the aggregate Vocational Education market



Projected Size of the Total Technical and Vocational Education Market

The Total Technical and Vocational Education Market in the US by Year from 2023 to 2030
As of 2025, the total Technical and Vocational Education market in the United States is worth an estimated \$164.31B. This market is projected to grow at an 8.1% CAGR through 2030 when it will be worth an estimated \$242.0B.



Trend Analysis & Implications

- → As of 2025, the aggregate market for Technical and Vocational Education in the United States is worth an estimated \$164.31B, up 23.1% over the past two years.
- → From 2025 until 2030, the Technical and Vocational Education market in the United States is projected to grow at an 8.1% CAGR. In 2030, this market is projected to be worth \$242.0B.
- → In 2025, Trade Schools represent 10.8% of all Technical and Vocational Education market revenues. In 2030, Trade Schools are projected to account for 9.9%, as the aggregate Technical and Vocational Education market is projected to grow faster than the Trade School market specifically.

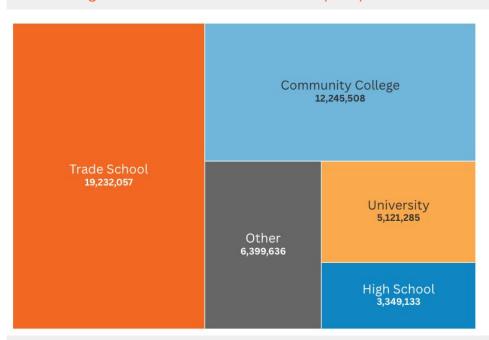
Holon |Q

A 2023 survey by HolonIQ found that providers in the Technical and Vocational Education space were primarily focused on serving their existing markets (53%), followed by launching new products (27%).

Trade schools lead the vocational certification landscape



The Leading Issuers of Vocational Certificates (2022)



41.5% of the total workforce that has a vocational certificate earned that certificate from a Trade School.

- → In 2025 the National Center for Science and Engineering Statistics (NCSES) published the results of a 2022 survey as a part of the National Training, Education and Workforce Survey (NTEWS) pilot program. The survey was a first-of-kind exploration of the workforce and the utilization of alternative educational credentials, including those from trade schools.
- The survey found that, as of 2022, there were 46,347,619 persons between the ages of 16 and 75 that held a vocational certification from any type of provider, that total represented 20.1% of the population in that age group in the United States. Note that this data is not specifically referring to an individual's highest level of educational attainment, but instead addresses the question of if they have said qualification at all.
- → Of those 46.3 million people with a vocational certification, 41.5% received the credential from a trade school, an additional 26.4% received the credential from a community college, an additional 11.0% received the credential from a university, another 7.2% received the credential from a high school, and the remainder received the credential from another type of institution or organization.
- → SHRM reports that 45% of the workforce in the United States has an alternative credential (including vocational certificates), meaning that vocational certificates represent an estimated 45% of all alternative credentials held by Americans. An additional 49% of American workers say they have considered earning an alternative credential.

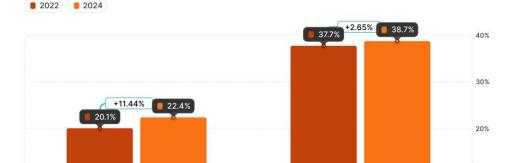
Trade school attainment is surging faster than degree attainment

Bachelor's Degree Attainment



Bachelor's & Trade School Attainment in 2022 & 2024

Bachelor's and Trade School Attainment in 2022 & 2024 Bachelor's attainment grew 2.7% from 2022 to 2024 while trade school attainment grew 11.4%.



Source: U.S. Census Bureau & Global Web Index (GWI)

Trade School Attainment

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The share of workers in the United States with a trade school qualification rose an estimated 11.4% from 2022 to 2024.

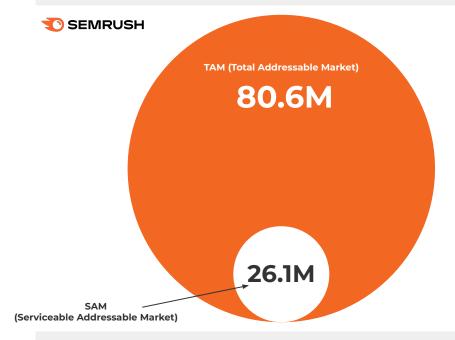
Educational Attainment

- → From 2022 to 2024, the share of the U.S. workforce with a trade school qualification rose sharply from 20.1% to an estimated 22.4% (2024 Trade School attainment data is estimated based on data from GWI).
- → During that same time frame, the share of the U.S. population ages 25 and above that held at least a bachelor's degree as their highest level of educational attainment grew modestly from 37.7% to 38.7%.
- → In January of 2019, just 1.0% of all online job postings (that had an educational requirement) required completion of Trade School or similar programs. By January of 2024, that share had risen modestly to 1.1%). During that same period, the share of online job postings requiring a Bachelor's degree or above shrank, and the share requiring an Associate's degree shrank (Indeed).
- → 81% of employers believe they should prioritize skills rather than degrees when hiring, and 68% agree that employers should proactively hire from non-degree pathways. In spite of this, only 31% of Gen Z'ers believe that non-degree pathways are a better long-term investment than degrees (ASA & JFF).
- → The share of the workforce that holds an occupational licensure or certification has stayed flat at about 25.5% since 2016.

The total addressable market for Trade Schools is 80.6M individuals



Size of the Addressable Trade School Market in 2025



While the total addressable market for trade schools is 80.6 million, the serviceable addressable market is just 26.1 million individuals.

- → Data from SEMRush indicates that there is a total addressable market (TAM) for trade schools of 80.6 million individuals. More specifically, and based on their website navigation behavior, SEMRush estimates that the serviceable addressable market (SAM) for trade schools is 26.1 million.
 - An estimated 35% of the online audience searching for "Trade School" is a member of Gen Z (SparkToro).
- → The SEMRush estimate of a 26.1 million person serviceable addressable market is 52.6% larger than the 17.1 million individuals that are estimated to have the intention to enroll in trade school within the next two years based on CollegeApp data.
- → While Trade School enrollment is growing, interest is growing faster than actual intention
 - From 2018 to 2024 the percentage of teenagers (members of Gen Z) that are considering immediately enrolling in Trade School after graduation doubled from 8% to 16, however respondents indicated that their most likely plan was to enroll in Trade School grew from 4% to 8% (American Student Assistance).
 - From 2019 to 2023, the percentage of prospective adult learners intending to enroll in Trade School grew from 10% to 25%, however the percentage of adult learners actually applying to Trade Schools in 2024 was only 7% (CollegApp, Strada Education Foundation, and Bold.org).

The Emergence of New Competitors

Community Colleges Aren't the Only Alternative



Trade Schools, Community Colleges, and Alternative Providers



Community College Resurgence

- After declining 13.2% from Spring 2020 to Spring 2022, enrollment in High Vocational Community Colleges grew 37.5% from Spring 2022 to Spring 2025.
- → Enrollment at Community Colleges is also becoming increasingly focused on vocational programs, as the share of Community College enrollments that were enrolled in High Vocational Community Colleges grew 15.0% in Spring 2020 to 19.4% in Spring 2025.
- → In spite of this growth, the number of vocational certificates issued to Gen Z'ers by Community Colleges declined 76.4% from 2017 to 2022.
- Members of Gen Z to-date have been more likely to obtain a vocational certificate from a Community College (as opposed to another provider type) than their older counterparts.
- → The Community College market is **projected to grow at a 2.7% CAGR**, and enrollment in Vocational-focused Community College programs is **projected to grow at a ~2% CAGR**.

Emergence of Alternatives

- → From 2017 to 2022, the **number of vocational certificates issued by alternative providers grew 212.7%**. During that time, the number of vocational certificates issued by both Community Colleges and Trade Schools declined.
- Alternatives to Trade School are performing best in training workers for roles in Computer Science/IT roles as well as Healthcare roles.

Computer Science/IT Providers

- → Grow with Google's Career Certificates, first launched in 2018, reached 70,000 American completers in 2021, and then 350,000 in 2024.
- → There were estimated to have been 69,176 graduates of coding bootcamps in 2024, 5.0% larger than in 2023, and a little more than double the amount estimated for 2019 (CareerKarma).

Healthcare Providers

Stepful providers entry-level training for healthcare support occupations and was just named TIME Magazine's number 1 educational technology company in the United States for 2025. The company grew rapidly from just 50 students in its first year in 2021, to 30,000 students in 2024, making it larger than the largest Healthcare Specialty Trade School.

Trade School Growth with Gen Z is Slow

- Trade School enrollment grew at a 3.2% CAGR from Fall 2019 to Fall 2024 and is projected to further grow at a 6.6% CAGR through 2030.
- From 2017 to 2022, the number of vocational certificates issued by Trade Schools to Gen Z'ers declined 6.8%.
- → The Trade School market is projected to grow at a 6.0% CAGR, which is faster than the projected CAGR of 2.7% for Community Colleges, but slower than the 7.3% CAGR projected for alternative providers.
- → While alternative providers are the most popular audience for upskilling Gen Z'ers, Trade Schools are a less popular option among this generation relative to their popularity among Millennials.

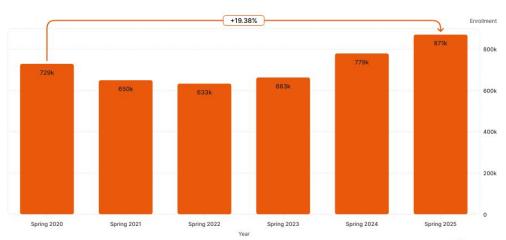
Vocational enrollment in Community Colleges is up



Vocational Community College Enrollment by Spring since 2020

Trend in Enrollment at High Vocational Community Colleges from Spring 2020 to Spring 2025 Enrollment at High Vocational Community Colleges grew 19.4% from Spring 2020 to Spring 2025.





Source: National Student Clearinghouse (NSC) Research Center



From Fall 2019 to Fall 2024, enrollment in common Trade School programs at all Community Colleges grew at a 1.3% CAGR.

- → After a period of decline, enrollment in High Vocational Community Colleges has resumed a growth trajectory. From Spring 2020 to Spring 2022, these enrollments declined 13.2%. From Spring 2022 to Spring 2025, however, these enrollments grew 37.5%. As of Spring 2025, these enrollments are 19.4% larger than in Spring 2020.
 - In Spring 2020, High Vocational Community Colleges represented 15.0% of all Community College enrollments. In Spring 2025, that share had grown to 19.4%.
- The aggregate Community College market in the United States is worth an estimated \$75.2B in 2025, and the market has grown at a 0.9% CAGR since 2020 (IBIS World).
- → Going forward, the Community College market is projected to grow at just a 2.7% CAGR (Technavio). From 2021 to 2031, enrollment at all Community Colleges is projected to grow at a 1.2% CAGR. Given that Vocational-focused Community Colleges are outgrowing Transfer-focused Community Colleges, Vocational enrollment in Community Colleges is projected to grow at a ~2% CAGR (NCES).

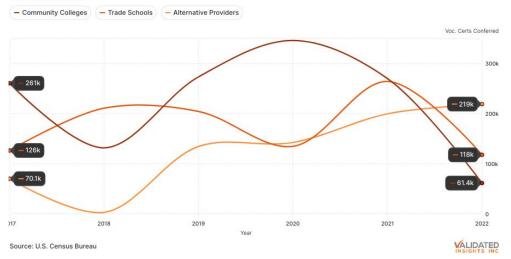
Gen Z'ers are increasingly turning to alternative providers



Most Popular Issuers of Voc. Certs by Provider Type to Gen Z'ers

Issuers of Vocational Certifications to Gen Z'ers by Year from 2017 to 2022

The number of vocational certificates issued by Trade Schools to members of Gen Z declined 6.8% from 2017 to 2022. During the same time, the number issued by Community Colleges declined 76.4% and the number issued by Alternative Providers grew 212.7%.



Trend Analysis & Implications

- → From 2017 to 2022, the number of vocational certificates issued by Trade Schools to members of Gen Z declined 6.8%. During that same time, the number of vocational certificates issued by Community Colleges to Gen Z'ers declined 76.4%. Alternative Providers, on the other hand, increased the number of vocational certificates they issued to Gen Z'ers by 212.7%.
- → Among Americans interested in upskilling, 41% indicate that "educational institutions" are the best organization for providing training and 35% indicate that "private companies" are the best organizations for this (McKinsey).

Grow with Google

Google launched their first Career Certificate in 2018 in the field of IT Support, and has since expanded to offer certificates in other digital fields. As of 2021, 70,000 students in the U.S. had completed one of these programs. As of 2024, that total reached 350,000.

Alternative providers have surpassed Trade Schools



2025 Market Size

\$17.8B

Projected CAGR



6.0%

2025 Market Size

\$5.8B

Projected CAGR



7.3%

Traditional Trade Schools



- Just 2.0% of Gen Z'ers are enrolled in Trade School.
- Over the past ten years (2012 to 2022), the number of vocational certificates issued by Trade Schools grew 22.3% from 352,319 to 431,040.

Alternative **Providers**



- 20% of Gen Z'ers (that are not currently students at a post-secondary institution) are taking an online course, 10X more than are enrolled in Trade School (GWI).
- Over the past ten years (2012 to 2022), the number of vocational certificates issued by Trade School alternatives grew 839.7%, from 64,586 to 606,927.

Gen Z has higher relative interest for alternative providers



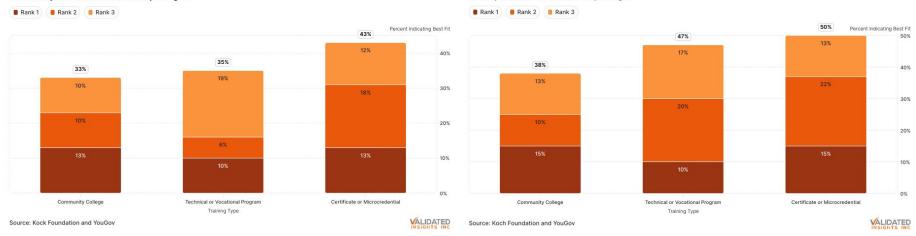
Members of Gen Z are less likely to look to Alternative Credential providers, Community Colleges, or Trade Schools for their upskilling needs than Millennials. Gen Z'ers do, however, have a disproportionately higher relative appetite for Alternative Providers.

Percentage of Gen Z'ers Ranking Best Types of Upskilling for Their Needs

Among Gen Z'ers, 43% of of those looking to upskill rank Certificates or Microcredentials (Alternative Providers) as one of the top three best fits for their upskilling needs, 35% say the same about Technical or Vocational Programs (Trade Schools), and 33% say the same about Community Colleges.

Percentage of Millennials Ranking Best Types of Upskilling for Their Needs

Among Millennials, 50% of those looking to upskill rank Certificates or Microcredentials (Alternative Providers) as one of the top three best fits for their upskilling needs, 47% say the same about Technical or Vocational Programs (Trade Schools), and 38% say the same about Community Colleges.



The leading choice of education type for Gen Z upskillers is 4-year universities, with 51% indicating that it is one of the top three options. Among members of Gen Z opting not to pursue higher education, 25% indicated that it is because they are seeking a career path that does not require higher education and instead are opting for a career in fields that more align with Technical or Vocational Education (Deloitte).

Platforms like MedCerts & Stepful are gaining popularity





MedCerts
HQ: Livonia, MI

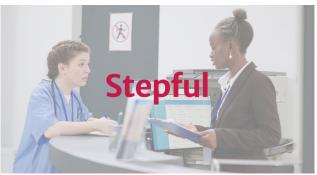
Founded: 2009

Funding: \$0

Valuation (2020): \$81M (Acquisition)

Enrollment (2022): ~50,000

Founded in 2009 and acquired by Stride, Inc. (NYSE: LRN) at a valuation of \$81M in 2020, MedCerts offers online healthcare certifications in fields like Medical Assisting, Phlebotomy, and Medical Billing & Coding. It took eight years for the provider to eclipse 10,000 students (in 2017), and then just five years later, the platform eclipsed 50,000 enrollments (in 2022) - twice the size of the largest healthcare specialty trade school (Ultimate Medical Academy enrolled ~26,000 students that year).



Stepful HO: Detroit. MI

Founded: 2021

Funding: \$56.1M

Valuation (2024): ~\$160M (Dealroom)

Enrollment (2024): ~30,000

Stepful, founded in 2021, offers online healthcare training programs preparing students to be medical assistants, pharmacy technicians, dental assistants, and other similar healthcare support roles. The company grew rapidly from 50 students in its first year (2021) to 30,000 just three years later in 2024 (MedCerts took twelve years to reach that same milestone). TIME Magazine recently named Stepful the number one edtech company in the United States in 2025.

In recent years, bootcamp providers like QuickStart and Springboard have expanded beyond their traditional STEM offerings to include programs in healthcare fields like medical assisting.

Generational Trends in the Trade School Market

What Does Gen Z Think About Trade School?



GEN Z AND TRADE SCHOOLS

Summary of Gen Z and Trade Schools



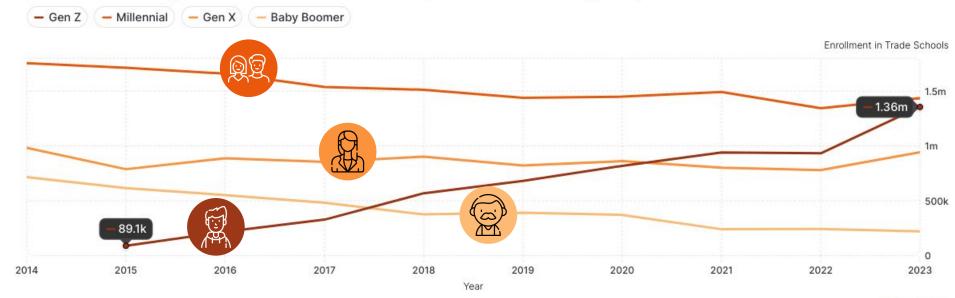
- Gen Z represents the largest share of Trade School enrollments of any generation, but they are only the third largest generation in the workforce.
- → Gen Z is the least likely generation to recommend Trade School to someone just out of high school, at the same time, Gen Z'ers are more likely than any other generation to indicate that a college degree is a waste of money.
- Gen Z is more likely to look to providers other than Trade Schools for vocational certificates.
- Gen Z represents almost half of the online audience that is searching for Trade Schools.
- → Gen Z has a high degree of desire for entrepreneurship, which corresponds well with many of the occupations Trade Schools train for.

Gen Z is the future of enrollment in Trade Schools



Trend in Enrollment in Trade Schools by Generation and Year from 2014 to 2023

From 2015 until 2023, Gen Z enrollment in Trade Schools (and related institutions) grew 1,421%. Millennial enrollment fell 18.2%.



Source: U.S. Census Bureau School Enrollment Supplement



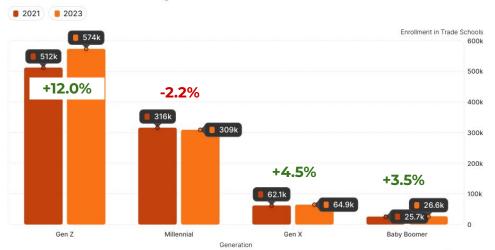
Gen Z's share of Trade School enrollment is growing



Trend in Trade School Enrollment by Generation in 2021 & 2023

Enrollment in Trade Schools by Generation in 2021 & 2023

Gen Z enrollment in trade schools grew 12.0% from 2021 to 2023. Millennial enrollment fell 2.2%.



Source: National Center for Education Statistics (NCES) IPEDS, Validated Insights analysis

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As of Q2 2024, Gen Z is now the third largest generation in the U.S. labor force, comprising 18% of all workers. In 2030, that share will grow to 30%.

- From 2021 to 2023, Gen Z enrollment in trade schools grew 12.0% (CAGR of 5.8%) from 512,322 to 573,674. During that same time period, the number of Millennials enrolled in trade schools declined 2.2% from 316,151 to 309,247 (CAGR of -1.1%). Gen X and Baby Boomer enrollment in trade schools both saw growth over that span as well.
- → From 2021 to 2023 the number of Gen Z'ers (not enrolled in school) that took an online class grew 63.0% while the number of Millennials that did the same grew just 10.6%. As of 2023, there were 3.4 times as many Millennials (not enrolled in school) taking an online class as there were Gen Z'ers taking an online class.
- → In Fall 2021, Gen Z represented 55.6% of all students enrolled at Trade Schools. By 2023 that share had grown to 58.4%.
 - EAB projects that the share of adult learners in all of higher education will grow from 31% in 2024 to 60% in 2031.
- → From 2023 to 2030, Fall enrollment in Trade Schools is projected to grow at a 6.6% CAGR, most all of that growth coming from Gen Z'ers, and then members of Gen Alpha.

33% of adults recommend trade school, only 7% of teens plan to attend



Recommendation for Post-High School Plans vs. Actual Plans

33% of adults recommend attending trade school immediately after high school.

Graduating Seniors Should	All Ages	Gen Z	Gener Millennial	ration Gen X	Baby Boomer	Actual Plans
Attend Trade School	33%	22%	31%	37%	41%	7%
Pursue a Four-Year Degree	28%	36%	27%	27%	24%	33%
Enter the Workforce	13%	22%	17%	14%	4%	16%
Enter an Apprenticeship	11%	10%	14%	9%	12%	3%
Other	4%	4%	4%	9%	4%	33%
Not Sure	10%	7%	8%	10%	15%	8%

Source: American Staffing Association & American Student Assistance





Gen Z sees Trade School as a way to make a career change



Reasons Gen Z Pursued Trade School

Reasons Gen Z Workers Pursued Trade School

2/3 (66.0%) of Gen Z workers that completed Trade School did so because they wanted to explore their interest in a new field.

T Reason	# Percent of Gen Z Citing Reason	
Explore Interest in New Field	4.25m	
Pursue a Passion	4.06m	
Required for Desired Job	3.37m	
Increase Earnings	2.94m	
Free of Inexpensive Program	2.88m	
Recommendation	2.24m	
Do More in Current Job	1.77m	

Source: U.S. Census Bureau



Gen Z is a generation of "digital natives" that prioritizes personalized and relevant curriculum. They are driven by a desire for financial security and desire to pursue individual passion and impactful careers.

- Among members of Gen Z in the workforce that completed Trade School, the leading motivation for doing so was to "explore interest in a new field" with 66.0% of this population citing that reason. Only 46.9% of Trade School graduates older than Gen Z (up to the age of 64) pursued Trade School for the same reason.
- → 46.9% of Gen Z Trade School graduates reported that they pursued Trade School in order to pursue a passion of theirs, making this the second leading reason that this population chose to pursue Trade School.
 - A 2023 survey of adult and graduate learners (in colleges and universities) by EAB found that the pursuit of a personal passion was also the 2nd leading reason driving these students to post-secondary education, behind only career advancement.
- Gen Z'ers that are still in high school report that the most important factors they consider when making post-high school educational plans are:
 - [Alignment[with their intended career (90%),
 - ◆ Long-term earning potential (88%),
 - Mental health (86%), and
 - Having a direct path to employment (82%) (EMC Foundation).

Gen Z'ers are more motivated by personal passions and earnings



Motivations for Furthering One's Education by Generation

Members of Gen Z are 64% more likely to be motivated to further their education by their desire to pursue their passions than older counterparts.



Source: EAB



Gen Z'ers want to be entrepreneurs







Entrepreneurship

50% of Gen Z'ers indicate that their ideal career path is "becoming an entrepreneur or starting their own business".

24% of Gen Z'ers that are interested in starting a business are primarily interested in starting a business that requires some vocational training (Jobber).





Creative Arts & Media

44% of Gen Z'ers indicate that their ideal career path involves "working in the creative arts & media".

Globally, **13%** of members of Gen Z are actively involved in learning or professional development on the topic of "Design or Art-related Skills" (Preply).





STEM Jobs

28% of Gen Z'ers indicate that their ideal career path includes "pursuing a career in STEM-related fields".

The most sought-after STEM skills among Gen Z'ers are (1) 3D Printing, (2) 3D Modeling, (3) AI, (4) Robotics, (5) Virtual Reality, (6) Computer Assisted Design, and (7) Augmented Reality (Thumbtack).

Gen Z'ers look to Trade schools for Cosmetology, Auto Repair, & More



Most Popular Vocational Certificates Among Gen Z

The Ten Most Popular Vocational Certifications for Gen Z and Share Issued by Trade Schools
Cosmetology, Auto Repair, and Medical Assisting are the three most popular fields of study for members of Gen Z that have a vocational certificate.

T Field of Study	% Gen Z Share	% Proportion from Trade Schoo
Cosmetology	8.7%	46.2%
Auto Repair	7.6%	22.2%
Medical Assisting	7.1%	25.3%
Culinary Arts	5.3%	32.4%
Metal Working	3.7%	42.7%
Practical Nursing	3.7%	38.5%
Criminal Justice	3.5%	26.3%
Ground Transport	3.2%	15.3%
Dental Support	2.9%	77.8%
Health Aide	2.8%	52%

Source: U.S. Census Bureau

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Among Gen Z workers, only 29.4% of earned vocational certificates were issued by a Trade School. Across all workers, that share is 41.5%.

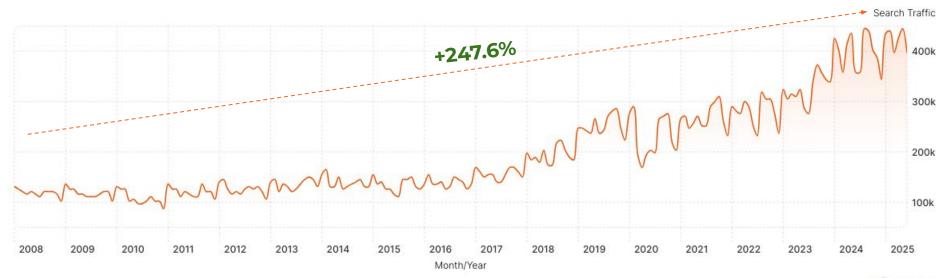
- → 8.7% of workers that are members of Gen Z and have a vocational certificate earned that certificate in Cosmetology, making it the most popular Trade School program among Gen 7'ers
 - 46.2% of vocational certificates in the field of Cosmetology held by Gen Z workers were issued by Trade Schools.
 - A recent analysis of Instagram posts found that, among Gen Z, "Make-up Artist" is the 4th most sought-after career, "Hairdresser" is the 19th most sought-after career, and "Nail Artist" is the 20th most sought-after career (Newsweek).
- → Auto Repair is the second most popular field of study for Gen Z workers with a vocational certificate, however only 22.2% of vocational certificates in Auto Repair held by Gen Z workers were issued by a Trade School
 - ◆ 79% of Automotive Repair technicians have received on-the-job training and 69% have received training from the manufacturer, while only 57% have received training from a college (or similar) institution (ASE).
- → Medical Assisting is the third most common field of study for Gen Z vocational certificate holders. Only 25.3% of Gen Z'ers with a vocational certificate in Medical Assisting received their credential from a Trade School

Search traffic for trade schools is booming



Trend in Search Traffic for Trade Schools Since 2008

Search traffic for trade schools grew 247.6% from 1H 2008 to 1H 2025.



Source: Google Trends via Glimpse





Appendix & Sources



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