



# SAN DIEGO'S CYBERSECURITY INDUSTRY

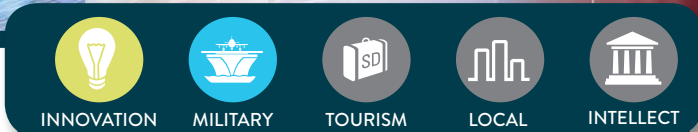
In a world where Internet-enabled devices have become embedded in everyday objects, the need for cybersecurity has never been more vital. San Diego's entrepreneurial talent and proximity to customers have enabled its cybersecurity companies to become leaders in the industry. Most of the region's innovations are attributed to its close ties to the federal government where key branches of the military, such as the United States Navy Space and Naval Warfare Systems Command (SPAWAR), employ an estimated 3,390 cybersecurity professionals.<sup>1</sup> This foundation has enabled local companies to diversify and expand into the consumer market and fulfill the needs of private businesses.

## HIGHLIGHTS

- » **Talent:** San Diego's universities and colleges annually graduate 3,000 students in the computer science and engineering fields and recently launched two new cybersecurity masters programs at University of San Diego and California State University San Marcos.<sup>2</sup>
- » **Jobs:** In total, there were 7,620 total jobs in the known cyber universe in 2015, up 14.7 percent from 2014.<sup>2</sup>
- » **Economic impact:** When accounting for the total direct, indirect and induced impacts, cybersecurity activities generate more than \$1.9 billion in GDP and impact 16,580 jobs every year.<sup>2</sup>

## KEY COMPANIES

- |                       |                    |                 |
|-----------------------|--------------------|-----------------|
| » Attack IQ           | » Leidos           | » Sentek Global |
| » Booz Allen Hamilton | » Northrop Grumman | » SPAWAR        |
| » ESET                | » PacketSled       | » Webroot       |
| » iboss               | » Proficio         |                 |



## SPOTLIGHT

### ESET

Through innovation and best-in-class technology, ESET secures more than 100 million people around the world every day. ESET's technology is deployed in more than 200 countries world-wide and remains one of the most prominent consumer and business facing cyber tools on the market. ESET's North America headquarters was strategically based in San Diego because of its world-class local talent pool.



## RESOURCES

### Cyber Center of Excellence

CCOE is a nonprofit organization that works to connect the region's cyber companies, attract and nurture niche cyber talent, and create new opportunities for cyber business.  
[sdccoe.org](http://sdccoe.org)

### ISACA

The San Diego Chapter of ISACA is dedicated to helping its members develop strong competencies in the areas of information systems audit, governance, risk management, privacy and security.  
[isaca-sd.org](http://isaca-sd.org)

### CyberHive

CyberHive is a unique, innovative shared workspace and incubator program that delivers business and technical support to early stage companies providing cybersecurity and high tech related products and services.  
[cybertechnetwork.org](http://cybertechnetwork.org)

### San Diego Military Advisory Council

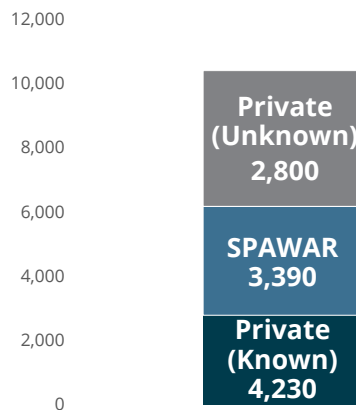
SDMAC supports, promotes and represents the common business and other interests of the military, its quality of life issues and the defense industry community in the San Diego area.  
[sdmac.org](http://sdmac.org)

# BY THE NUMBERS

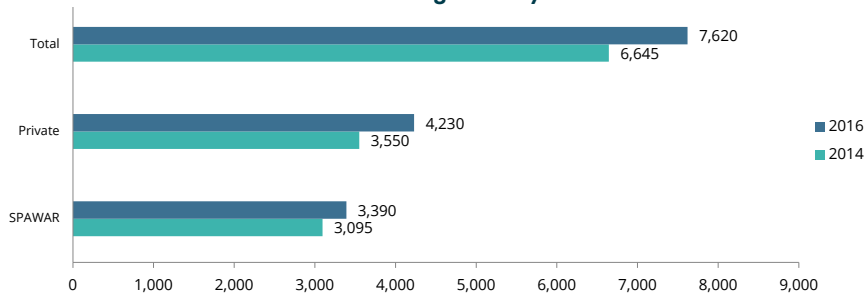
## Employment Numbers

In 2016, San Diego Regional EDC and the San Diego Cyber Center of Excellence released a research study analyzing the economic impact of the cybersecurity industry. As of 2016, the known cybersecurity universe was responsible for **7,620** jobs, with an additional **2,800** being employed by the unknown universe.<sup>3</sup>

**Total Cybersecurity Jobs (including unknown universe)  
San Diego County<sup>3</sup>**



**Cybersecurity Jobs Identified: 2014 vs 2016  
San Diego County<sup>3</sup>**



## Economic Impact

Cybersecurity activities generate a significant economic impact. Direct activities in the known cybersecurity universe generated roughly \$1 billion in gross domestic product (GDP) in the region in 2016. The total economic impact of cybersecurity is nearly the equivalent of hosting four Super Bowls or 14 Comic-Cons every year.

**Economic Impact  
of Known Cyber Universe<sup>3</sup>**

Impact Type	Employment	Value Added (\$millions)
<b>Private Sector</b>		
Direct Effect	4,230	\$625.5
Indirect/Induced	5,570	\$517.2
<b>Total Effect</b>	<b>9,800</b>	<b>\$1,142.7</b>
Multiplier	2.3	1.8
<b>SPAWAR</b>		
Direct Effect	3,390	\$479.5
Indirect/Induced	3,390	\$292.5
<b>Total Effect</b>	<b>6,780</b>	<b>\$772.0</b>
Multiplier	2.0	1.6
<b>Total</b>		
Direct Effect	7,620	\$1,105.0
Indirect/Induced	8,960	\$809.7
<b>Total Effect</b>	<b>16,580</b>	<b>\$1,914.7</b>
Multiplier	2.2	1.7

For more information on San Diego's cybersecurity industry, please contact:

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Sources: Introduction: 1. San Diego Regional EDC & San Diego Cyber Center of Excellence, "San Diego's Cybersecurity Industry", 2016  
Highlights: 2. San Diego Regional EDC & San Diego Cyber Center of Excellence, "San Diego's Cybersecurity Industry", 2016  
By the numbers: 3. San Diego Regional EDC & San Diego Cyber Center of Excellence, "San Diego's Cybersecurity Industry," Data and research by CBRE, BW Research & IMPLAN group, 2016