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 cyber 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.[1] This foundation has enabled local companies to diversify and expand into consumer markets, fulfilling the needs of private businesses.

HIGHLIGHTS

» **Talent:** Each year, San Diego's higher education system graduates 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.[2]

» **Jobs:** As of 2015, there were 7,620 total jobs in the known cyber universe, up 14.7 percent from 2014.[2]

» **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.[2]

KEY COMPANIES

» Attack IQ
» Booz Allen Hamilton
» ESET
» FICO
» Leidos
» Northrop Grumman

» PacketSled
» Proficio
» Quibitekk
» Sentek Global
» SPAWAR
» Webroot

INNOVATION   MILITARY   TOURISM   LOCAL   INTELLECT

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 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 cyber talent, and create new opportunities for cyber business.
sdccoe.org

ISACA
The San Diego Chapter of ISACA is dedicated to helping its members develop strong competencies in the areas if information systems audit, governance, risk management, privacy, and security.
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
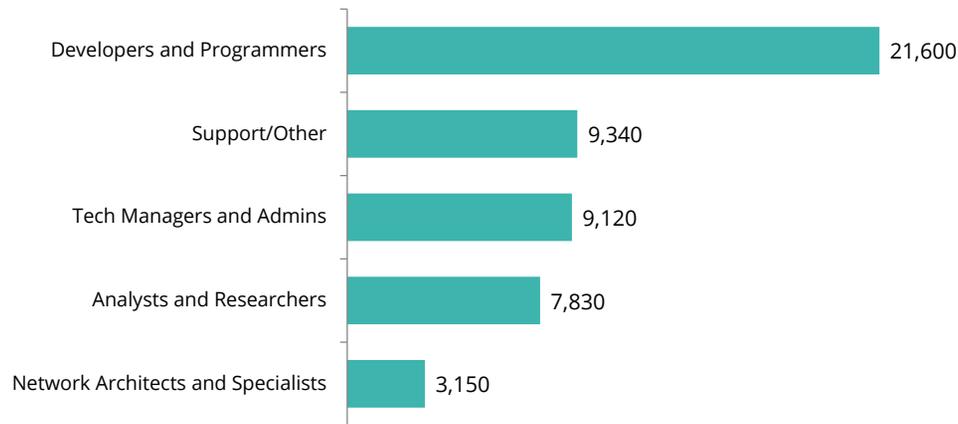
San Diego Military Advisory Council
SDMAC supports, promotes, and represents the common business and other interests of the military, its quality of life issues, and the defense industry community in the San Diego area.
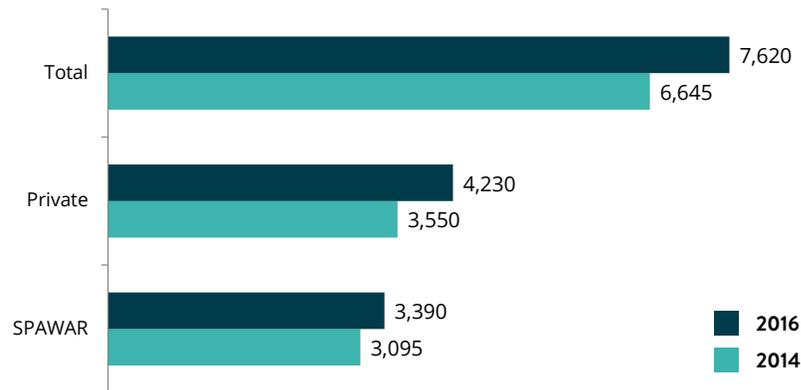*sdmac.org*

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.[3]

Tech Talent by Occupation Group

Occupation Group	Number
Developers and Programmers	21,600
Support/Other	9,340
Tech Managers and Admins	9,120
Analysts and Researchers	7,830
Network Architects and Specialists	3,150

Cybersecurity Jobs Identified: 2014 vs 2016

	2016	2014
Total	7,620	6,645
Private	4,230	3,550
SPAWAR	3,390	3,095

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 or14 Comic-Cons every year.[3]

Economic Impact of Known Cyber Universe

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

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

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Sources: 1. San Diego Regional EDC & San Diego Cyber Center of Excellence, "San Diego's Cybersecurity Industry", 2016 2. San Diego Regional EDC & San Diego Cyber Center of Excellence, "San Diego's Cybersecurity Industry", 2016 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