



CYBERSECURITY IN THE SAN DIEGO REGION

Research by:



Cybersecurity in San Diego

BY THE NUMBERS



\$3.5B

ANNUAL
ECONOMIC IMPACT

nearly 15% more than
in 2019

23.4K

TOTAL JOBS
IMPACTED

10% increase since 2019

874

CYBER FIRMS CALL
SAN DIEGO HOME

3 in 5 expect to increase
employment in next year



12.4K

TECH WORKERS
ENGAGED IN CYBER

7.5% more than in 2019

\$106.4K

AVG SALARY FOR
TECH & CYBER
WORKERS

nearly 12% above national avg

22.2K

CYBER-RELATED
DEGREE COMPLETIONS

across 118 local programs

Cybersecurity in San Diego

The economic impact of San Diego's cybersecurity industry is GREATER than hosting...



23 Comic Cons

or



9 Super Bowls

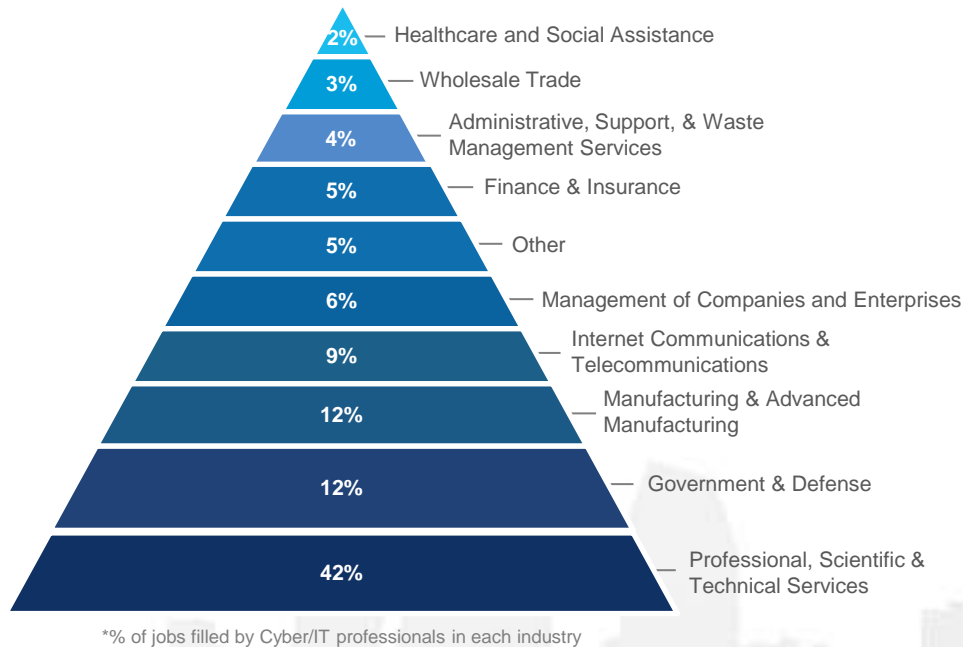
each year!



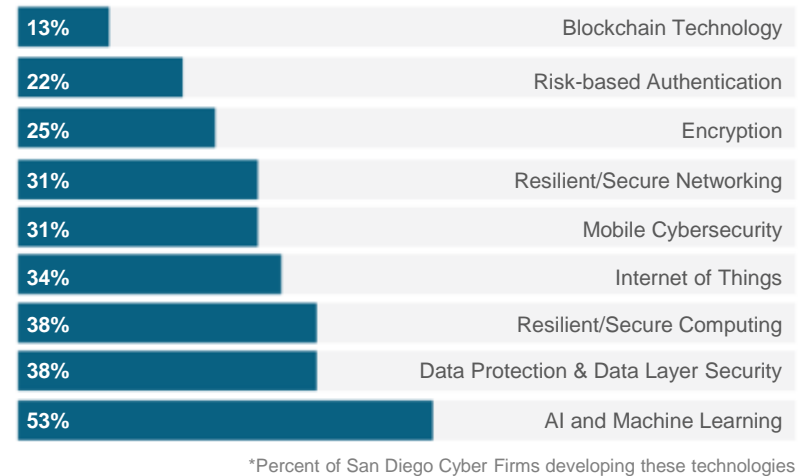
Industry Profile

San Diego's cybersecurity firms operate in a variety of industries and are actively using, developing and accelerating cutting edge technologies.

Industry Breakdown



Technologies & Capabilities



NAVWAR is San Diego's Cyber Juggernaut

NAVWAR'S ECONOMIC IMPACT



5.2K

**FEDERAL EMPLOYEES
IN SAN DIEGO**
11K+ worldwide



\$800M

**IN WAGES AND
BENEFITS**
2020



3.7K

**CYBER EMPLOYEES
IN SAN DIEGO**
1/3 of all Cyber workers



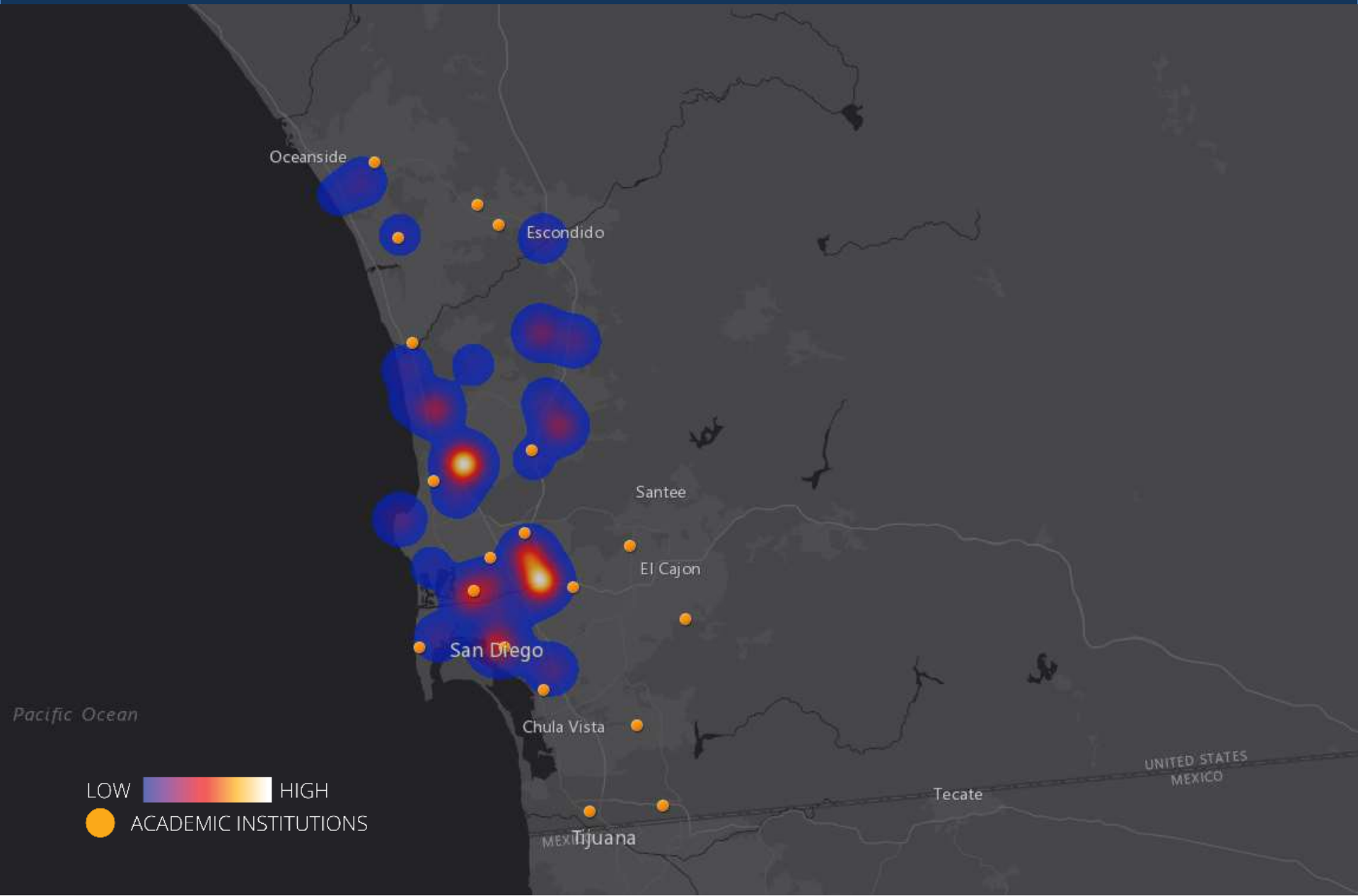
\$1.6B

**IN SD-SPECIFIC
CONTRACTS**
\$530M for small
businesses

SAN DIEGO'S MILITARY FOOTPRINT



Concentration of San Diego's Cyber Firms



AI and San Diego's Cyber Cluster



AI IN CYBER

66%

SHARE OF SAN
DIEGO CYBER
FIRMS ENGAGED
WITH AI

50%

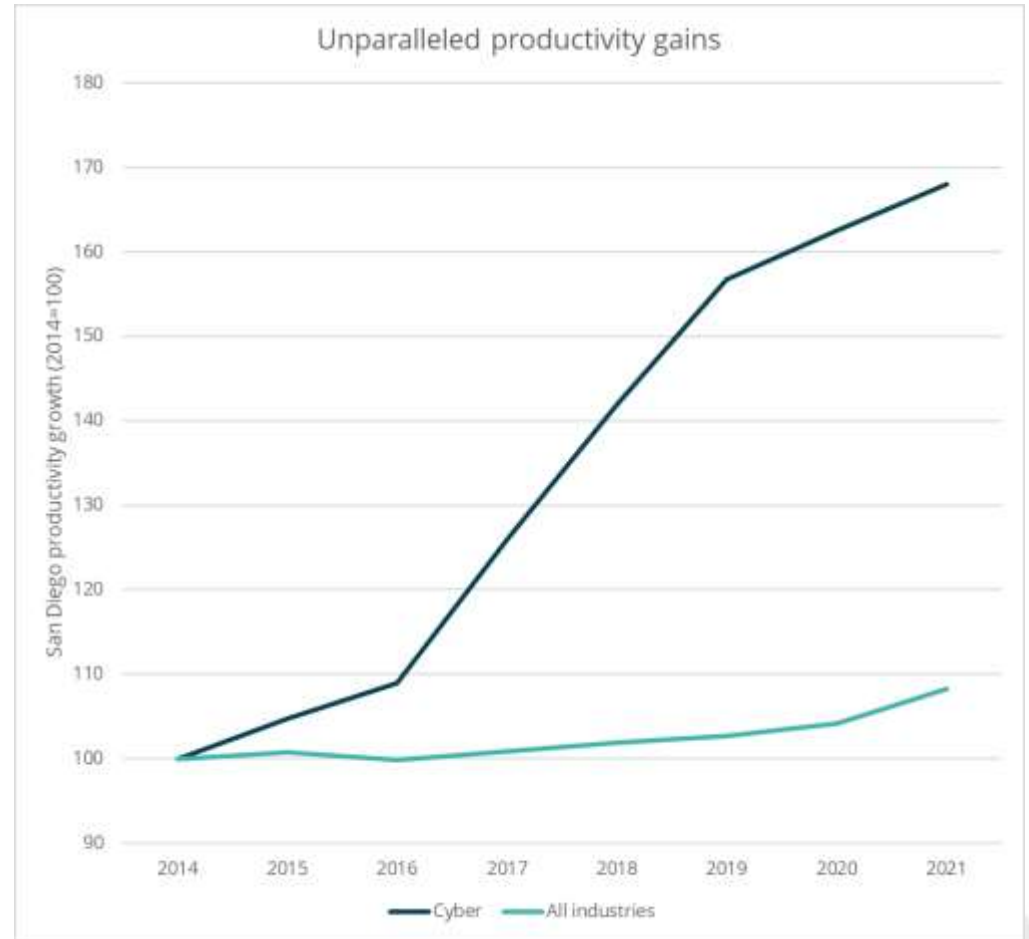
ENGAGED WITH
AI FOR *AT
LEAST 3 YEARS*

3x

PRODUCTIVITY WAS
TRIPLE THE
REGIONAL AVERAGE
(2018-2021)

61%

% OF CYBER FIRMS
HIRING IN THE NEXT
12 MONTHS



Sources: BLS, BEA, California EDD, San Diego
Regional EDC

How Cyber Firms Use AI

- Systems can self-regulate and self-heal
- Increase a system's ability to withstand cyberattacks
- Detect and escalate cyber threats in real time



\$8.6M

**AVERAGE BUSINESS COST OF
A CYBERATTACK IN THE U.S.**

40%

OF THAT \$8.6M IS DUE TO
CUSTOMER ATTRITION AND
REPUTATIONAL DAMAGE

29%

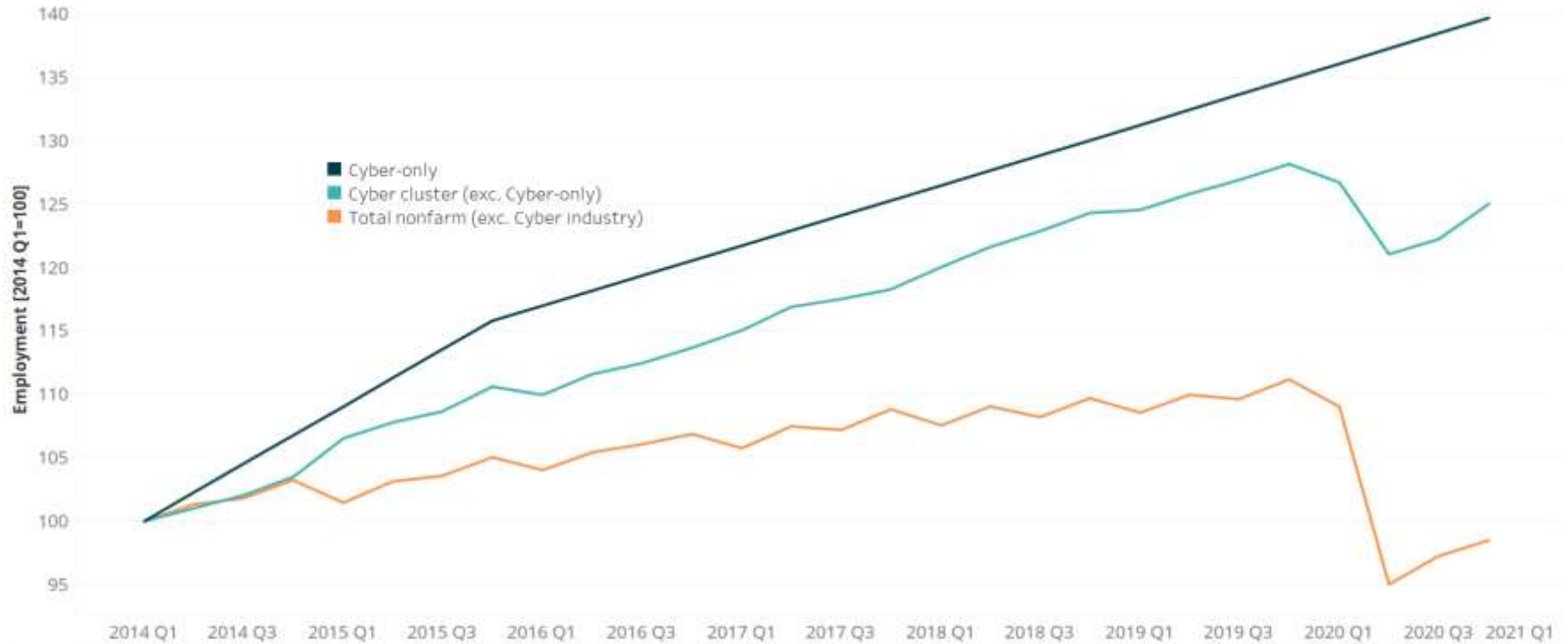
DUE TO DETECTION
AND ESCALATION

26%

EX-POST RESPONSE
TO CYBERATTACK(S)

AI is Creating Jobs, Not Destroying Them

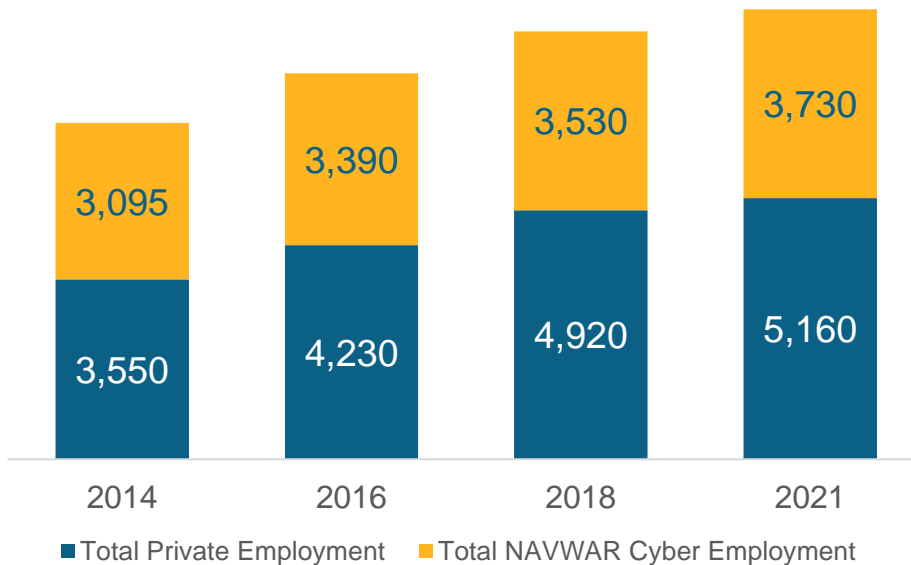
Cyber-specific employment growth has outpaced that in other San Diego industries



Sources: BW Research Partnership, U.S. Bureau of Labor Statistics, U.S. Navy Naval Information Warfare Systems Command (NAVWAR), San Diego Regional EDC

Employment Breakdown

Historical Cyber Employment



60% of firms surveyed expect to grow their cyber employment over the next 12 months



7.4% Employment growth* even during the pandemic

*Since CCOE's 2019 San Diego Cybersecurity Industry Economic Impact Study

Talent



TODAY, THERE ARE **60,000**
TECHNOLOGY SPECIALISTS
IN SAN DIEGO



TOP 5
IN-DEMAND
CERTIFICATIONS

Key Cybersecurity Occupations

KEY OCCUPATION	2021	MEDIAN SALARY
Software Developers	19,783	\$118,934
Computer Systems Analysts	6,290	\$91,187
Computer User Support Specialists	4,243	\$59,030
Network & Computer Systems Administrators	2,770	\$96,450
Computer Network Architects	1,907	\$106,954
Information Security Analysts	1,285	\$108,035

- 1 Certified Information Systems Security Professional (CISSP)
- 2 SANS/GIAC Certification
- 3 Security+
- 4 GIAC Security Essentials Certification (CSEC)
- 5 CISCO Certified Networking Professional (CCNP)

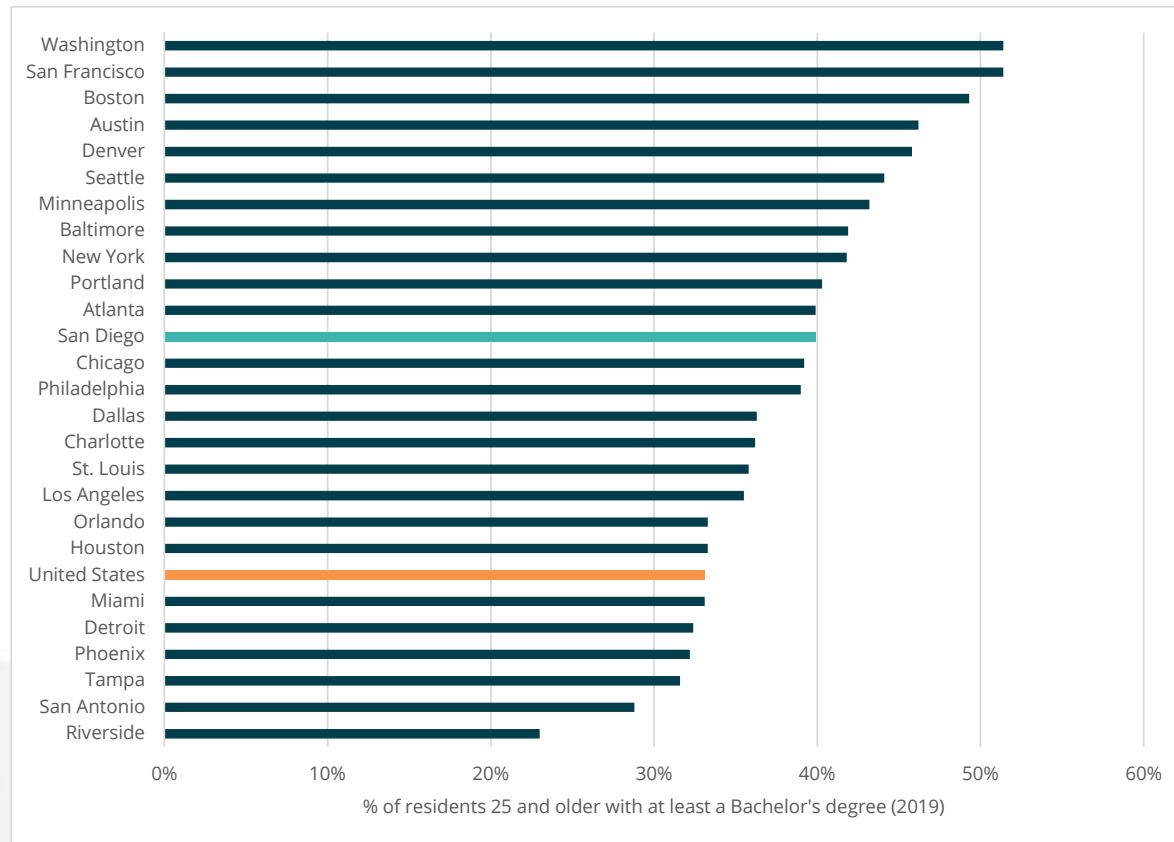
A Growing Talent Pool

San Diego's academic institutions are supplying the cyber workforce of tomorrow

22,270 cyber-related degrees each year across 118 programs

82% of firms believe it is important to be near universities doing cyber work

San Diego AN EDUCATED WORKFORCE



CCOE Programs

Seeding & Diversifying the Talent Pipeline

- Job Board, Career Map & Link2Cyber
- Internships & Apprenticeships
- CyberHire, NFAR Cyber and Women in Cyber Programs

Creating New Business Opportunities

- Secure San Diego
- Thought Leadership, including FBI Briefing Series
- Global Delegations & Partnerships

Fostering Collaboration in the Cyber Community

- Research
- Stakeholder Forums
- CADENCE – Strengthening National Securing Innovation

Interested in Learning More?

For more information, please visit:

<https://sdccoe.org/>

You can find the full study @ sdccoe.org
or cyber.sandiegoAI.org



Thank You

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