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****PRESS RELEASE****

Study: San Diego's \$4.3B cyber cluster expands amid wider tech contraction
EDC, CCOE study quantifies impact of region's cybersecurity cluster

San Diego – Yesterday, alongside the Cyber Center of Excellence (CCOE), San Diego Regional EDC released “[For San Diego, By San Diego: 2025 Cybersecurity Industry Economic Impact and Workforce Study](#).” The sixth update since 2014, the biennial report examines the economic impact of San Diego's \$4.3 billion cybersecurity cluster and explores the firms, technology, and talent working to help detect and contain cyber threats across San Diego and beyond.

In today's hyperconnected, internet-first economy, cybersecurity is no longer optional. Whether in manufacturing, finance, healthcare, energy, or government, a single breach can inflict cascading operational, reputational, and financial consequences—reaching an average cost of \$10.2 million in the U.S., [according to IBM](#).

“San Diego continues to be a leading cyber region, with more than 1,300 firms, the Naval Information Warfare Systems Command (NAVWAR), and the highest growth of cyber certificate obtainment among our peer metros. As organizations driving innovation and strategic national priorities face increasingly costly cyberattacks, our collaborative region is developing new technologies, defenses, and cyber warriors to combat these systemic threats,” **said Lisa Easterly, President & CEO, CCOE—commissioning organization of the report.**

Amid broader technology industry declines and a shifting policy landscape, cybersecurity remains a key, growing driver of San Diego's economy. The region's cybersecurity cluster supports 29,000 local jobs, most concentrated at NAVWAR, the preeminent provider of information warfare capabilities for the U.S. Navy. In all, **the economic impact of San Diego's cyber cluster is equivalent to 26 Comic-Cons.**

KEY FINDINGS:

- **San Diego's cybersecurity cluster continues to expand, adding jobs, firms, and economic impact, even as the broader technology industry contracts.** There are 14,875 jobs across 1,350 establishments within the cybersecurity cluster in San Diego, up 11 percent and 33 percent over the last two years, respectively. Together, this amounts to \$4.3 billion regional economic impact and 29,040 jobs impacted.

- **The cybersecurity talent pool continues to grow but has been slowing down since 2022.** Despite the increased need for cybersecurity professionals, the pace the talent pool grows every year is declining. This trend parallels a similar slowdown in advertised demand, as job postings for cybersecurity workers have declined and remain 60 percent lower than pre-pandemic levels.
- **San Diego continues to expand cyber skills, particularly in certificate obtainment, which outpaces all of San Diego's peer metros.** Overall degree and certificate obtainment in San Diego continues to grow, expanding 51 percent since 2019. Certificates, which are obtained both in and outside of traditional degree programs, have grown 78 percent from 2019 to 2023.
- **Business sentiment has softened.** Survey results show that perceptions of San Diego's business environment have declined relative to 2023, including access to talent, vendors, customers, and capital. Only research and development remained at the same level compared to 2023.

“San Diego's cyber cluster remains a bright spot for our region, during a period of continued economic uncertainty. However, we must not take it for granted. We can continue to support its growth by connecting cybersecurity companies to new customers, more suppliers, and diverse talent that is necessary to thrive,” **said Eduardo Velasquez, Senior Director of Research & Economic Development, San Diego Regional EDC.**

“As cyber threats grow in frequency around the world, protecting integrated infrastructure and sensitive information across critical industries, from healthcare to defense to finance, is more important than ever,” **said Rob Johnson, Vice President of Cybersecurity Sales, Thales.**

Finding opportunities to navigate economic uncertainty, adapting curriculum to prepare talent for the rapidly-evolving cluster, and helping equip small business vendors to sustain cybersecurity compliance are all strategies that will help San Diego maintain its leadership in cybersecurity and innovation across the region and globe.

In partnership with CCOE, the report was sponsored by Thales, Deloitte, ESET, Levitzacks, and NDIA's San Diego chapter, and unveiled yesterday at an [industry event](#) hosted at Qualcomm.

Read the full study [here](#), and learn more about EDC's research at sandiegobusiness.org/about-the-region.

About San Diego Regional Economic Development Corporation (EDC)

San Diego Regional EDC mobilizes business, government and civic leaders around an inclusive economic development strategy in order to connect data to decision making, maximize regional prosperity, enhance global competitiveness, and position San Diego effectively for investment and talent. sandiegobusiness.org

About Cyber Center of Excellence (CCOE)

CCOE is a San Diego-based nonprofit that mobilizes industry, academia and government to grow the regional cyber economy and create a more secure digital community for all. sdccoe.org