#innovationsatx

JOIN THE CONVERSATION

SAN ANTONIO & THE STATE OF INNOVATION

WELCOME

Data Partner: greater: SATX



Rene Dominguez

President & CEO
VelocityTX

WELCOME

The Innovation SATX Consortium









Data & Analytics Partner

greater: SATX
REGIONAL ECONOMIC PARTNERSHIP

Sponsored By



















The Honorable Gina Ortiz Jones

Mayor of San Antonio



MAYOR'S REMARKS

Rene Dominguez

President & CEO
VelocityTX



WHY THIS MATTERS

Richard Fetchick

Director, Industry Development
greater:SATX



Isaac Martinez

Director, Insights
greater:SATX



STUDY METHODOLOGY

SAN ANTONIO & THE STATE OF INNOVATION

Data Partner: greater SATX

Defining San Antonio's Innovation Economy

We'll present the regional Innovation Economy through two data lenses:

01
INNOVATION-INTENSIVE SECTORS

Employment, establishments, earnings, and employment concentration

02
REGIONAL INNOVATION INDICATORS

Company activity, venture capital, federal R&D contracts, patents, and STEM degree completions

Data Sources:

Lightcast
BROOKINGS
USASPENDING.gov
D&B Hoovers
UNITED STATES PATENT AND TRADEMARK OFFICE uspto
crunchbase

National Framework to Regional Precision

01
Brookings Advanced Industries

Start with Brookings methodology for "Advanced Industries" which requires both, at the 4-digit NAICS level:

- R&D > 80th percentile per worker, NSF BRDIS
- STEM occupation share > 21% (O*NET, higher than national average).

02
Decompose to 6-digit NAICS

Retain 6-digit codes that concentrate R&D, patenting and STEM-intensive occupations above the parent-industry mean.

03
Apply SA Regional Filter

Cybersecurity, aerospace, bioscience, defense, advanced manufacturing, energy resilience, financial services, software and digital infrastructure.

+15 codes added to capture existing regional innovation intensive sectors for San Antonio.

9 Innovation-Intensive Sectors

44 Six-Digit NAICS Codes



Together, these nine sectors establish the industry framework used to measure San Antonio's innovation economy.

Research & Development (3)

Texas Biomedical Research Institute
SwRI Southwest Research Institute
Allosense
flyttr

Biomedical & Medical Devices (5)

Alt-Bionics
FREYYA Anytime, Anywhere.
solventum

Biotechnology & Pharmaceuticals (3)

BioBridge Global
StemBioSys
Viatris
Powerhouse Therapeutics
Mission Pharmacal

Computers & Electronics (7)

Plus One Robotics
Tower Semiconductor
General Dynamics

Software & Data Services (9)

USAA
PorchPass
SIRIUS
Openlane
@mailgun

Communications & Cyber (2)

float me
leidos
Arctic Wolf
Defense Unicorns

Defense, Aerospace & Transportation (7)

Knight Aerospace
Darkhive
Boeing
StandardAero
Booz Allen
Blackwave

Environmental & Energy (6)

TEPCO Energy Partner
Synthica
OCI

Advanced Manufacturing (2)

AISIN
TOYOTA | TX
TOYOTETSU North America

01 INNOVATION-INTENSIVE SECTORS

San Antonio's Innovation Economy

55,054

+2.5% ↗ vs 53,703 in 2024

Innovation jobs

Top Sectors for Jobs:

- </> Software & Data Services
- Defense, Aerospace & Transportation Technologies
- Research & Development (Physical, Life & Engineering Sciences)

3,626

−1.9% ↘ vs 3,698 in 2024

Innovation establishments

Top Sectors for Establishments:

- </> Software & Data Services
- Biomedical & Medical Devices
- Research & Development (Physical, Life & Engineering Sciences)

54.3%

New Measurement Baseline

Innovation Jobs Wage Premium

Innovation Avg. Earnings: $118,610

SA MSA Avg. Earnings: $76,871

188

New Measurement Baseline

Scale-up firms (50+ jobs)

Innovation HQs in SATX region with 50+ employees

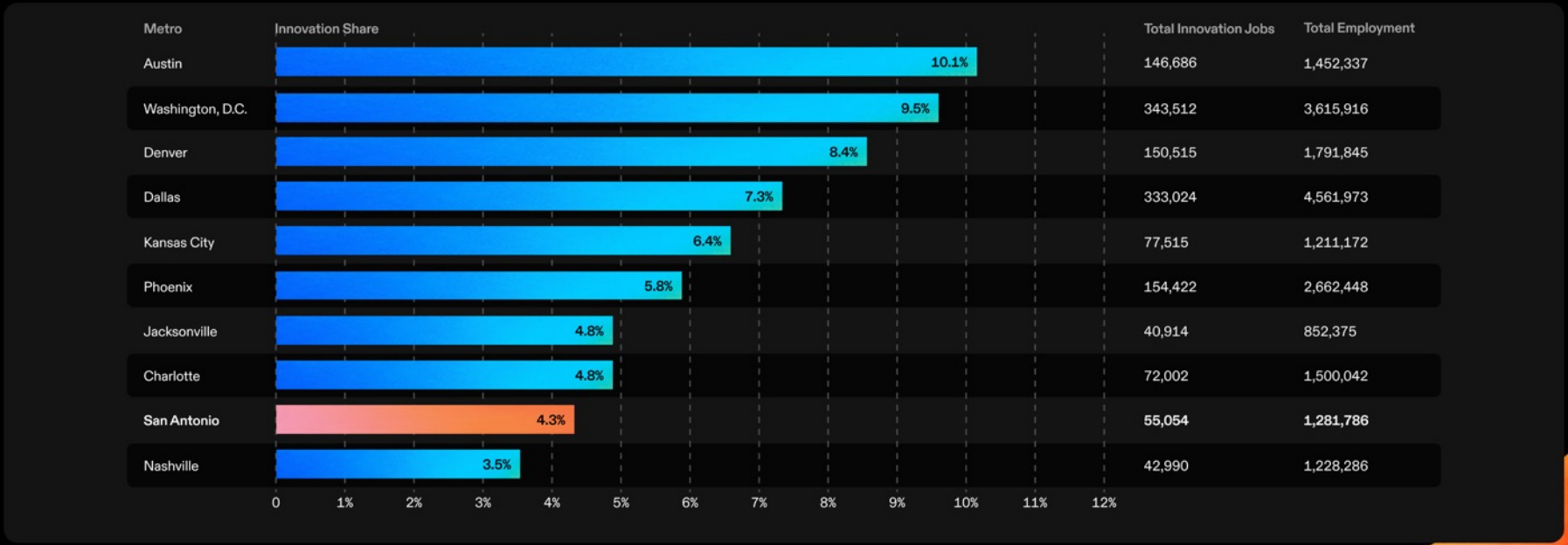
How San Antonio Compares

55,054 +2.5% ↗ vs 53,703 in 2024
Innovation jobs

Innovation Jobs as a Share of Total Employment

San Antonio ranks 8th for absolute innovation job count and 9th for innovation jobs as a ratio of total employment.

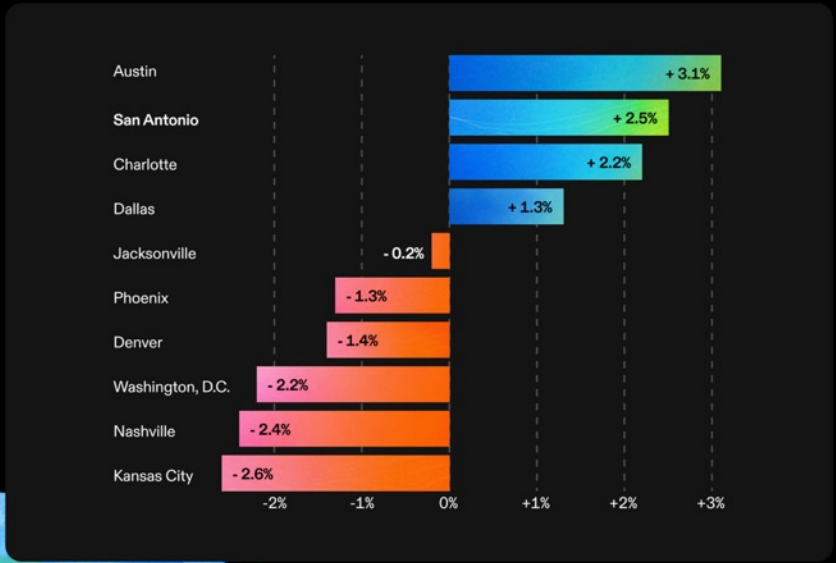
Source: Lightcast.io



How San Antonio Compares

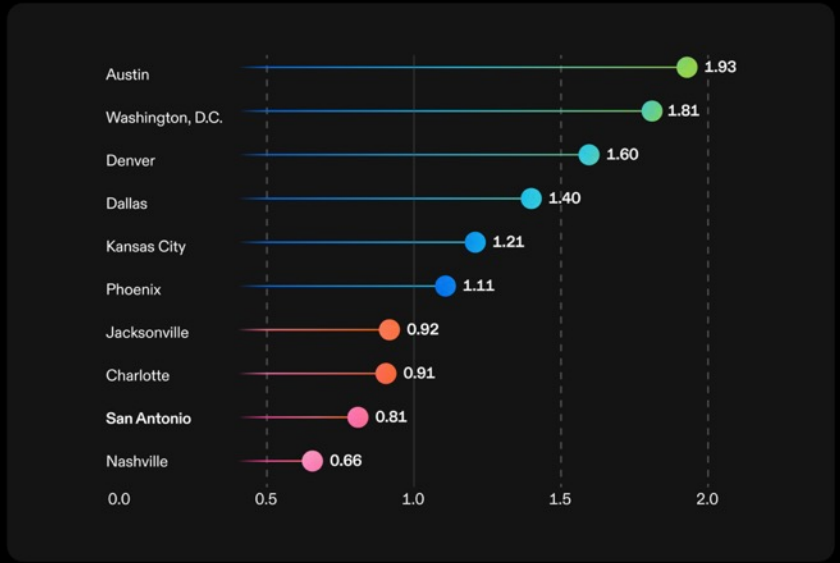
Jacksonville, DC, Phoenix, Nashville, Kansas City and Denver all declined over the same period

2024–2025 innovation-job growth by metro.



San Antonio sits below most peers and the national benchmark

2025 location quotient (LQ) by metro; 1.0 = national average.



Source: Lightcast.io, Metro comparisons are based on greater:SATX competitive metro set.

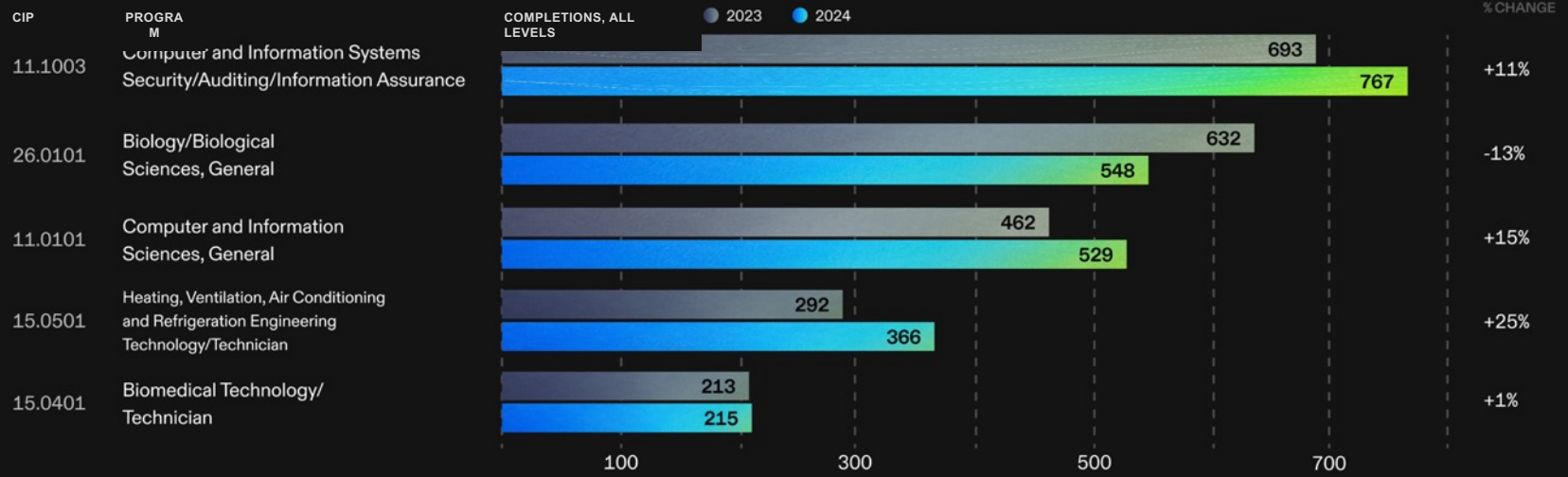
02

REGIONAL INNOVATION INDICATORS

STEM Talent Pipeline

Top STEM CIPs by Total Completions.

4,772 +1.3% ↗ vs 4,713 in 2023
STEM Degree Completions (2024)



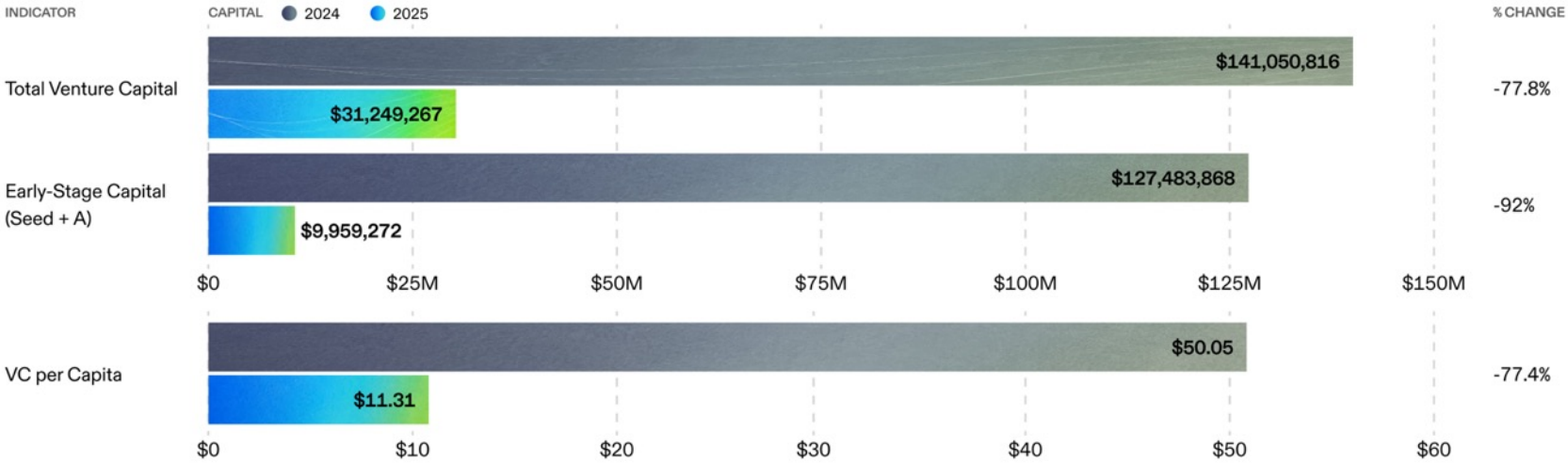
Source: STEM Completions – Lightcast.io, DHS STEM Designated Degree Program List, 7.30.26

Capital & Investment

$31.25M –78% ↘ vs $141.05M in 2024
Venture Capital

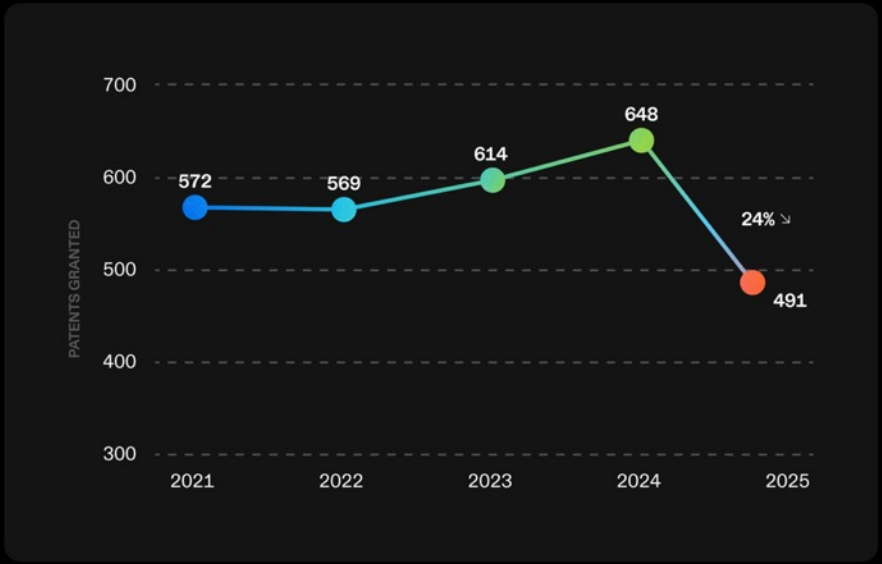
VC investment is often viewed as a signal of a region's ability to generate scalable, high-growth companies. The San Antonio region has traditionally lagged in this area, while continuing to grow access to capital.

Source: Crunchbase, Per Capita Census ACS 1-yr 2024



Patents Activity

Patents granted annually, 2021-2025.



Source: USPTO

Growing patent activity reflects the region's strong research ecosystem, increasing commercialization potential, and the development of competitive industries that can drive long-term economic growth.

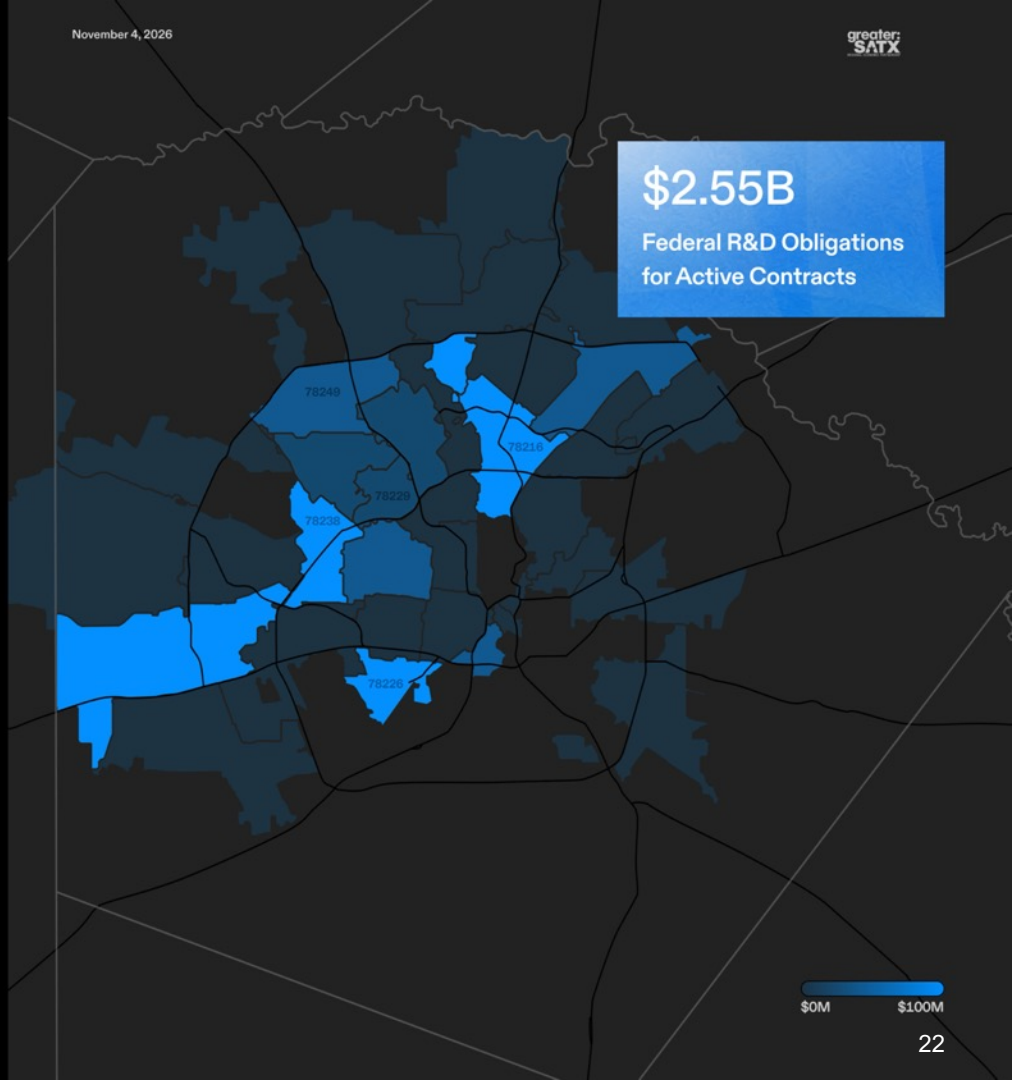
- Following several years of steady growth, there was a 24% decrease in year over year patents granted 2024 – 2025
- 2025 represents approximately 17 patents granted per 100,000 residents.
- Top corporate drivers for patents granted:

USAA SwRI QTC

Federal R&D Investments - Active Contracts

ZIP CODE	REGIONAL HUB	CURRENT AWARD VALUE
78238	Southwest Research Institute	$1.59B
78226	Port San Antonio	$223.85M
78216	San Antonio International Airport	$88.00M
78249	UT San Antonio	$34.85M
78229	Medical Center	$15.97M

USAspending.gov, based on Primary Place of Performance and Active contracts as of 9/14/2026



Innovation At-A-Glance

55,054
+2.5% ↗ vs 53,703 in 2024
Innovation Jobs

$2.55B
Active contracts as of September 14th, 2026
Active Federal R&D Contracts

$31M
−78% ↘ vs $141.05M in 2024
Venture Capital

54.3%
New Measurement Baseline
Innovation Jobs Wage Premium

0.81
9th of 10 comparison metros
Employment Concentration (LQ)

3,626
−1.9% ↘ vs 3,698 in 2024
Innovation Establishments

1,759
+3.4% ↗ vs 1,701 in 2024
New Innovation Companies

188
New Measurement Baseline
Scale-up Firms (50+ jobs)

23
−53% ↘ vs 49 in 2024
New Startups Identified

491
−24% ↘ vs 648 in 2024
Patents Granted

From Findings to Action



MODERATOR

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Will Garrett

VP, Talent & Technology Development & Integration
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Chief Executive Officer
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President & CEO
Port San Antonio

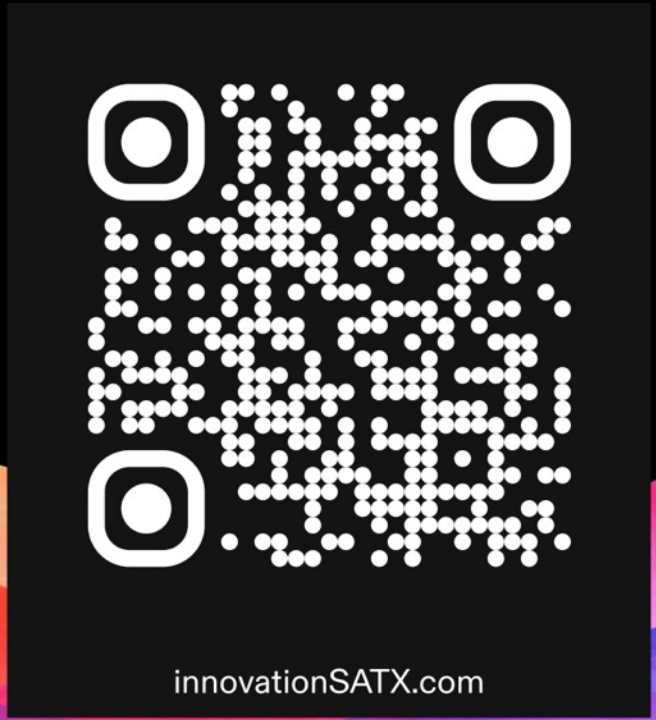
WHAT COMES NEXT



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WRAP UP

Download the report



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Download the report

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THANK YOU

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