

THE POTENTIAL IMPACT OF A COMPREHENSIVE NON-DISCRIMINATION ACT ON BUSINESS ACTIVITY IN TEXAS

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Summary of Key Results

Discrimination in employment, housing, and access to public places such as restaurants, hotels, and shops leads not only a loss of dignity and opportunity for those on the receiving end of such treatment, but also involves significant economic costs stemming from both a diminished ability to attract knowledge workers and reduced opportunities for tourism, conventions, and related activity. The Perryman Group (TPG) recently examined the potential economic benefits of passing a comprehensive non-discrimination act (CNDA) as well as the associated increase in tax receipts to the State and local governments.

- The Perryman Group estimates that if Texas passes a CNDA in 2021, it would lead to increases in
 - technology-oriented business activity in the state of **\$11.6 billion** in annual gross product and approximately **103,800** jobs as of 2025, with gains rising to **\$89.5 billion** in annual gross product and nearly **594,100** jobs by 2045;
 - tourism-related business activity of **\$8.2 billion** in annual gross product and **76,424** jobs by 2025, with benefits increasing to **\$14.8 billion** in annual gross product and approximately **107,900** jobs by 2045; and
 - total business activity (from both technology and tourism effects) of **\$19.8 billion** in annual gross product and over **180,200** jobs in 2025 rising to nearly **\$104.3 billion** in annual gross product and **702,000** jobs by 2045.
- Metropolitan areas and regions with greater concentrations of knowledge workers and greater opportunities for tourism and convention activity tend to be most significantly affected.
- As of 2045, these effects represent more than **3.6%** of anticipated aggregate employment, many of them in high value-added technology related sectors.
- Cumulatively over the 2021-45 period, a CNDA passed in 2021 could be expected to lead to total gains in Texas gross product of more than **\$1.3 trillion** as well as almost **9.1 million** job-years of employment.
- The Perryman Group estimates that annual **fiscal benefits** of passing a CNDA in 2021 would be **\$1.2 billion** to the State and **\$0.9 billion** to local

government entities by 2025, with gains of **\$5.7 billion** to the State and **\$4.5 billion** to local entities by 2045. Cumulatively over the 2021-45 period, the total increase in tax receipts to the State associated with passage of an CNDA in 2021 is estimated to be **\$73.6 billion**, with **\$56.4 billion** to local entities.

In summary, assuring that Texas creates an environment that is welcoming to all workers and visitors is a key to sustained and accelerated growth in several sectors that are crucial to the future economic performance and prosperity of the state.

Introduction

Discrimination in employment, housing, and access to public places such as restaurants, hotels, and shops leads not only a loss of dignity and opportunity for those on the receiving end of such treatment, but also involves significant economic costs stemming from both a diminished ability to attract knowledge workers and reduced opportunities for tourism, conventions, and related activity. In the aftermath of the COVID-19 pandemic, these issues become even more important. Competition for quality development will markedly intensify as various states and countries seek to revitalize their economies, and firms employing highly trained workers will expand their emphasis on social governance and community environments. Similarly, as the tourism and hospitality sector seeks to rebound from the massive losses from recent restrictions, the efforts to attract major events and promote local venues will escalate notably. Comprehensive Non-Discrimination Acts (CNDAs) can help reduce discrimination and send a definitive signal that an area will not tolerate such practices in the workplace, public venues, and other settings.

Discrimination in employment, housing, and access to public places leads not only a loss of dignity and opportunity for those on the receiving end of such treatment, but also involves significant economic costs stemming from both a diminished ability to attract knowledge workers and reduced opportunities for tourism, conventions, and related activity.

In particular, the LGBTQ community has been a focus of discriminatory concerns. There have been high profile instances of bias in employment, housing, and access to public places. Moreover, this group has not specifically been identified in national non-discrimination legislation. While an overall employment non-discrimination act has been proposed in Congress in all but one legislative session since 1994, it has yet to be enacted. As a result, protections have largely fallen to states to implement.

According to a study conducted by Freedom for All Americans, approximately 20 states have enacted legislation to protect LGBTQ individuals from workplace discrimination. Nonetheless, UCLA's Williams institute estimates that half of all LGBTQ workers in the United States live without specific employment protections, more than four million people. Similarly, several

states have enacted specific limitations on the use of public places, and housing access remains an issue.

Texas has not yet passed a CNDA to protect the LGBTQ community. The Perryman Group (TPG) recently examined the potential economic benefits of passing a non-discrimination in employment, housing, and public places access act, as well as the associated increase in tax receipts to the State and local governments. Economic benefits were measured for the state and all Texas Metropolitan Statistical Areas (MSAs) and regions. This report and the accompanying Appendices describe The Perryman Group's results as well as the methods and assumptions used in this assessment. While the information underlying this analysis reflects the period prior to the health crisis and resulting economic downturn, it is likely that the effects are even more pronounced in the aftermath.

Potential Economic Benefits of a Comprehensive Non-Discrimination Act

Empirical studies indicate that non-discrimination protections encourage the location of knowledge workers and young workers in an area, thus contributing to the attraction and retention of high-growth industries conducive to long-term economic growth. The Perryman Group engaged in an extensive research and modeling effort to estimate the magnitude of incremental gains in business activity which could reasonably be expected with passage of a CNDA. Specifically, research has demonstrated that non-discriminatory employment policies foster enhanced growth in technology enterprises. These positive effects would likely be magnified by policies assuring access to housing and public places.

Similarly, surveys of travelers and convention professionals demonstrate that full access is increasingly necessary for an active tourism market. Social policies which are perceived to be discriminatory can have a detrimental effect on travel and tourism by decreasing the attractiveness of an area to event planners and potential visitors. Controversial laws can reduce numbers of attendees, for instance, which can cause professionals who organize conferences and events to avoid such locations. In addition, scheduling an event in a location with a law that is considered to be harmful by some groups can be interpreted as support for the policy, and some organizations will choose to avoid locations with controversial laws in order to avoid the appearance of approval of the public policy. Passage of a CNDA can ensure that the vibrant Texas tourism sector is protected and enhanced as more normal patterns resume.

The Perryman Group measured the impact of enacting a CNDA in Texas in the 2021 legislative session on business activity in 2025, 2030, 2035, 2040, 2045, and cumulatively for the 2021-45 time period. Although empirical evidence suggests that the benefits occur within the span of a few years, a 10-year ramp up period was assumed in the interest of conservatism with regard to the technology-based segment of the analysis. A brief overview of the major models and methods used to measure economic impacts and a definition of terms is provided on the following page, with further detail in Appendix A.

Measuring Economic and Fiscal Impacts

Any economic stimulus, whether positive or negative, generates multiplier effects throughout the economy. In this instance, passage of a CNDA would increase innovation, generating multiplier effects and dynamic responses rippling through the economy and increasing economic growth.

The Perryman Group's dynamic input-output assessment system (the US Multi-Regional Impact Assessment System, which is described in further detail in the Appendices to this report) was developed by the firm about 40 years ago and has been consistently maintained and updated since that time. The model has been used in hundreds of analyses for clients ranging from major corporations to government agencies and has been peer reviewed on multiple occasions. The impact system uses a variety of data (from surveys, industry information, and other sources) to describe the various goods and services (known as resources or inputs) required to produce another good/service. This process allows for estimation of the total economic impacts of a CNDA. The models used in the current analysis reflect the specific industrial composition and characteristics of the economies of Texas, each Metropolitan Statistical Area (MSA), and each region studied.

Total economic effects are quantified for key measures of business activity:

- **Total expenditures** (or total spending) measure the dollars changing hands as a result of the economic stimulus.
- **Gross product** (or output) is production of goods and services that will come about in each area as a result of the activity. This measure is parallel to the gross domestic product numbers commonly reported by various media outlets and is a subset of total expenditures.
- **Personal income** is dollars that end up in the hands of people in the area; the vast majority of this aggregate derives from the earnings of employees, but payments such as interest and rents are also included.
- **Job gains** are expressed as job-years of employment for multi-year, cumulative effects or jobs for annual or ongoing effects. A job-year is one person working for one year, though it could be multiple people working partial years.

An increase in business activity associated with a CNDA also has the potential to generate incremental taxes to the State and local governments which were also estimated. Monetary values were quantified on a constant (2019) basis to eliminate the effects of inflation. See the Appendices for additional information regarding the methods and assumptions used in this analysis.

Texas Benefits

The Perryman Group estimates that passing a CNDA in 2021 would lead to a total increase in business activity in the state by 2025 of an estimated **\$19.8 billion** in annual gross product and **180,226** jobs. By 2045, the economic benefits of a CNDA rise to a projected **\$104.3 billion** in annual gross product and **701,990** jobs. Cumulatively over the 2021-45 period, a CNDA passed in 2021 could be expected to lead to total gains in gross product of **\$1.3 trillion** as well as more than **9.0 million** job-years of employment.

Of this amount, technology-oriented gains comprise an estimated **\$11.6 billion** in annual gross product and approximately **103,800** jobs as of 2025, with gains rising to **\$89.5 billion** in annual gross product and nearly **594,100** jobs by 2045. Cumulatively over the 2021-45 period, a CNDA passed in 2021 could be expected to lead to gains in gross product of more than **\$1.0 trillion** as well as **6.8 million** job-years of employment from enhanced innovation.

The tourism-related component of the total increase includes a projected **\$8.2 billion** in annual gross product and **76,424** jobs in 2025, **\$14.8 billion** in annual gross product and **107,902** jobs in 2045, and nearly **\$271.0 billion** in gross product and over **2.2 million** job-years of employment over the 2021-2045 period.

The following table illustrates effects for other years and measures of economic activity, with results by industry provided in Appendix B.

Economic Benefits of Passing a Comprehensive Non-Discrimination Act in the 2021 Texas Legislative Session

ANNUALLY AS OF:		Total Expenditures (Billions of 2019 Dollars)	Gross Product (Billions of 2019 Dollars)	Personal Income (Billions of 2019 Dollars)	Employment (Permanent Jobs)
2025	Technology	\$24.249	\$11.572	\$7.138	103,801
	Tourism	\$15.716	\$8.216	\$5.070	76,424
	TOTAL	\$39.966	\$19.788	\$12.209	180,226
2030	Technology	\$59.416	\$28.354	\$17.490	234,335
	Tourism	\$18.814	\$9.835	\$6.070	85,134
	TOTAL	\$78.231	\$38.189	\$23.560	319,469
2035	Technology	\$98.800	\$47.149	\$29.083	360,649
	Tourism	\$21.992	\$11.496	\$7.095	93,319
	TOTAL	\$120.792	\$58.645	\$36.178	453,968
2040	Technology	\$140.830	\$67.206	\$41.455	477,819
	Tourism	\$25.102	\$13.122	\$8.098	100,648
	TOTAL	\$165.932	\$80.328	\$49.554	578,468
2045	Technology	\$187.535	\$89.494	\$55.204	594,088
	Tourism	\$28.264	\$14.775	\$9.119	107,902
	TOTAL	\$215.800	\$104.270	\$64.322	701,990
CUMULATIVELY (2021-2045):		Total Expenditures (Billions of 2019 Dollars)	Gross Product (Billions of 2019 Dollars)	Personal Income (Billions of 2019 Dollars)	Employment (Job-Years)
2021-2045	Technology	\$2,158.985	\$1,030.298	\$635.529	6,839,394
	Tourism	\$518.370	\$270.980	\$167.238	2,236,959
	TOTAL	\$2,677.356	\$1,301.278	\$802.766	9,076,353

Note: Based on research and modeling of the increase in innovation and tourism which could be expected with passage of a CNDA in 2021 and The Perryman Group's estimates of related gains in business activity. See Appendix A for additional information regarding methods used and definitions of terms and Appendix B for industry detail. A job-year is one person working for one year, though it could be multiple people working partial years.

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Metropolitan Area and Regional Benefits

Note that areas with greater concentrations of knowledge workers and greater opportunities for tourism and convention activity tend to be most significantly affected. For example, technology benefits are highest in Dallas-Plano-Irving (with 36.5% of total employment gains as of 2045), Houston-The Woodlands-Sugar Land (24.41%), and Austin-Round Rock (18.97%), with Fort Worth-Arlington-Grapevine and San Antonio-New Braunfels each comprising

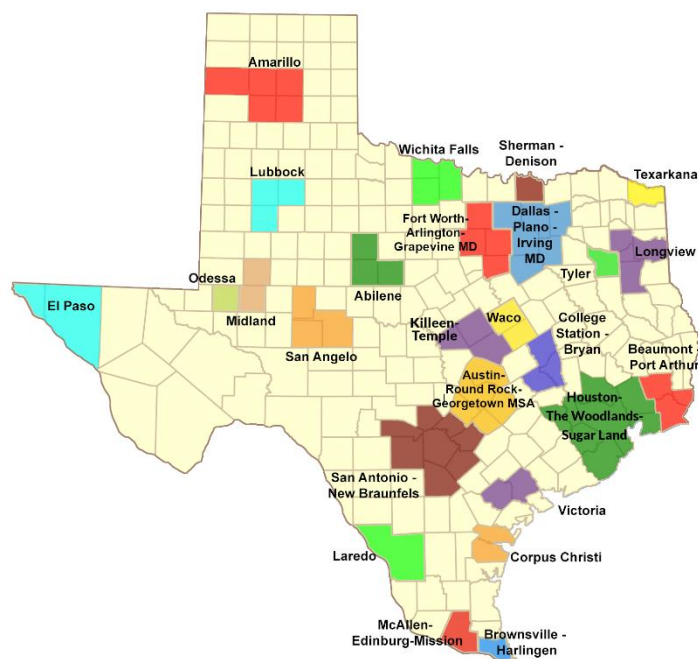
just under 5% of the total. For tourism, effects are somewhat more widely dispersed across the state, with Dallas-Plano-Irving the location of 26.9% of gains, followed by Houston-The Woodlands-Sugar Land with 23.9%, Austin-Round Rock with 9.9%, San Antonio-New Braunfels with 9.4%, and Fort Worth-Arlington-Grapevine with 9.0% of the projected 2045 employment increase.

All metropolitan areas and the rural segments of Texas would be expected to see increased employment with a CNDA. Effects on employment in 2025 and 2045 are described in the following tables, with additional detail including estimated effects for other measures of business activity and time periods provided in Appendix B.

ECONOMIC BENEFITS IF TEXAS PASSES A CNDA IN 2021

INCREASE IN EMPLOYMENT OVER BASELINE PROJECTED LEVELS

BY METROPOLITAN STATISTICAL AREA



EFFECT ON EMPLOYMENT		
	AS OF 2025	AS OF 2045
Abilene	486	1,194
Amarillo	994	2,935
Austin-Round Rock-Georgetown	27,042	123,422
Beaumont-Port Arthur	1,356	5,079
Brownsville-Harlingen	831	1,941
College Station-Bryan	1,092	2,849
Corpus Christi	1,619	4,291
Dallas-Plano-Irving	57,327	245,627
El Paso	1,962	5,096
Fort Worth-Arlington-Grapevine	12,104	38,690
Houston-The Woodlands-Sugar Land	43,618	170,820
Killeen-Temple	875	2,343
Laredo	640	1,386
Longview	880	3,330
Lubbock	1,286	3,593
McAllen-Edinburg-Mission	1,547	3,724
Midland	2,549	12,370
Odessa	686	2,345
San Angelo	393	1,160
San Antonio-New Braunfels	12,288	38,694
Sherman-Denison	622	2,583
Texarkana	254	605
Tyler	1,080	3,979
Victoria	284	837
Waco	1,013	3,546
Wichita Falls	437	1,401
Rural Areas	6,961	18,149
TOTAL	180,226	701,990

Source: The Perryman Group

ECONOMIC BENEFITS IF TEXAS PASSES A CNDA IN 2021

INCREASE IN EMPLOYMENT OVER BASELINE PROJECTED LEVELS BY REGION



EFFECT ON EMPLOYMENT		
	AS OF 2025	AS OF 2045
Panhandle	1,525	4,726
South Plains	1,511	4,182
Nortex	597	1,933
North Central Texas	69,772	287,224
Ark-Tex	652	1,975
East Texas	2,624	9,225
West Central Texas	916	2,673
Rio Grande	2,076	5,184
Permian Basin	3,767	16,415
Concho Valley	500	1,455
Heart of Texas	1,158	3,857
Capital Area	27,430	123,139
Brazos Valley	1,323	3,548
Deep East Texas	654	1,644
South East Texas	1,355	5,016
Houston-Galveston Area	43,901	169,407
Golden Crescent	579	2,118
Alamo Area	12,758	39,309
South Texas	741	1,686
Coastal Bend	1,899	5,024
Lower Rio Grande Valley	2,396	5,657
Texoma	818	3,313
Central Texas	930	2,460
Middle Rio Grande	343	823
TOTAL STATE	180,226	701,990
Source: The Perryman Group		

Fiscal Effects

Business activity generates tax revenue. The economic stimulus associated with passage of a CNDA generates a notable increase in tax receipts to the State and local government entities including cities, counties, schools, and special districts. Taxes are generated through the economic effects measured

Cumulatively over the 2021-45 period, the total increase in tax receipts to the State associated with passage of a CNDA in 2021 is estimated to be \$73.6 billion, with \$56.4 billion to local entities.

in the preceding sections. For example, retail sales associated with the economic stimulus measured in this study were quantified (results appear in Appendix B). A portion of these retail sales are taxable and lead to increased receipts to local

taxing entities. Similarly, visitor outlays can lead to gains in occupancy tax revenues. Economic benefits also affect demand for housing and commercial real estate and, hence, property tax values. When the total economic effects are considered (such as those measured in this study), the gains in taxes from these sources are significant.

The Perryman Group estimates that the total annual fiscal benefits of passing a CNDA in 2021 associated with enhanced innovation and tourism would be **\$1.2 billion** to the State and nearly **\$0.9 billion** to local government entities by 2025, rising to over **\$5.7 billion** to the State and **\$4.5 billion** to local entities by 2045. Cumulatively over the 2021-45 period, the total increase in tax receipts to the State from technology-oriented and tourism effects is estimated to be **\$73.6 billion**, with **\$56.4 billion** to local entities.

Additional detail is presented in the following table.

Fiscal Benefits of Passing a Comprehensive Non-Discrimination Act in the 2021 Texas Legislative Session

ANNUALLY AS OF:		State of Texas (Billions of 2019 Dollars)	Local Taxing Entities Across the State (Billions of 2019 Dollars)
2025	Technology	\$0.593	\$0.489
	Tourism	\$0.631	\$0.392
	TOTAL	\$1.224	\$0.881
2030	Technology	\$1.453	\$1.197
	Tourism	\$0.755	\$0.469
	TOTAL	\$2.208	\$1.666
2035	Technology	\$2.416	\$1.991
	Tourism	\$0.882	\$0.549
	TOTAL	\$3.299	\$2.539
2040	Technology	\$3.444	\$2.837
	Tourism	\$1.007	\$0.626
	TOTAL	\$4.451	\$3.464
2045	Technology	\$4.587	\$3.778
	Tourism	\$1.134	\$0.705
	TOTAL	\$5.721	\$4.484
CUMULATIVELY (2021-2045):		State of Texas (Billions of 2019 Dollars)	Local Taxing Entities Across the State (Billions of 2019 Dollars)
2021- 2045	Technology	\$52.803	\$43.499
	Tourism	\$20.798	\$12.932
	TOTAL	\$73.601	\$56.432

Note: Based on research and modeling of the increase in innovation and tourism which could be expected with passage of a CNDA in 2021 and The Perryman Group's estimates of related gains in business activity. See Appendix A for additional information regarding methods used and definitions of terms and Appendix B for industry detail. A job-year is the equivalent of one person working for one year, though it could be multiple people working partial years.

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Conclusion

Discrimination in the workplace, housing, and public places is harmful to the dignity and opportunity of those who are victims of improper treatment. It is also harmful to the economy through multiple direct and indirect channels. These patterns will be accelerated in the wake of the disruptions associated with the COVID-19 pandemic and corresponding economic downturn. Passing a comprehensive non-discrimination act has the potential to lead to a notable increase in innovation and tourism and, therefore, economic growth.

The Perryman Group estimates that passing a CNDA in 2021 would lead to a total gain in Texas business activity from increased innovation and tourism of a projected **\$104.3 billion** in annual gross product and nearly **701,990** jobs by

As of 2045, these effects represent more than 3.6% of anticipated aggregate employment, many of them in high value-added technology related sectors.

2045, with cumulative gains over the 2021 to 2045 period of more than **\$1.3 trillion** in gross product. As of 2045, these effects represent more than **3.6%** of anticipated aggregate employment, with

many of these positions being in high value-added technology related sectors.

This economic activity would also lead to increases in tax revenues of a projected **\$5.7 billion** to the State and **\$4.5 billion** to local entities by 2045, with cumulative increases between 2021 and 2045 of **\$73.6 billion** to the State and **\$56.4 billion** to local entities.

In summary, assuring that Texas creates an environment that is welcoming to all workers and visitors is a key to sustained and accelerated growth in several sectors that are crucial to the future economic performance and prosperity of the state in an increasingly competitive environment.

Appendix A: Methods Used

US Multi-Regional Impact Assessment System

The basic modeling technique employed in this study is known as dynamic input-output analysis. This input-output segment of the methodology essentially uses extensive survey data, industry information, and a variety of corroborative source materials to create a matrix describing the various goods and services (known as resources or inputs) required to produce one unit (a dollar's worth) of output for a given sector. Once the base information is compiled, it can be mathematically simulated to generate evaluations of the magnitude of successive rounds of activity involved in the overall production process.

There are two essential steps in conducting an input-output analysis once the system is operational. The first major endeavor is to accurately define the levels of direct activity to be evaluated.

An analysis by Gao and Zhang quantified the net effects of CNDAs on technology growth as measured by patents.¹ This analysis provides an extensive assessment based on the performance of states with and without non-discrimination laws. Similarly, patent growth has been linked to economic expansion based on a model developed by Josheski and Koteski.² These findings are supported by substantial additional academic and policy research.³ By integrating these concepts into a comprehensive modeling effort, controlling for other factors, and localizing all data to the relevant geographic areas, The Perryman Group estimated the potential effects of a CNDA on total gross product, as well the direct effects on the tourism sector.

¹Gao, Huasheng and Wei Zhang, "Employment Non-Discrimination Acts and Corporate Innovation*," *Management Science*, June 2016.

² Josheski, Dushko and Cane Koteski, "The causal relationship between patent growth and growth of GDP with quarterly data in the G7 countries: cointegration, ARDL and error correction models," MPRA (Munich Personal RePEc Archive), September 2011.

³ See, for example, Hickin, Ruth, "Open, inclusive and diverse cities are better for business and economic growth," *World Economic Forum*, June 2018; Cunningham, George, "How anti-LGBT laws foster a culture of exclusion that harms states' economic prosperity," *The Conversation*, January 2017; Gates, Gary and Richard Florida, "Technology and Tolerance: The Importance of Diversity to High-Technology Growth," *Brookings*, June 2001; Atun, Rifat, Ian Harvey, and Joff Wild, "Innovation, Patents, and Economic Growth," *International Journal of Innovation Management*, June 2007; and Cainelli, Giulio, Rinaldo Evangelista, and Maria Sonova, "The Impact of Innovation on Economic Performance in Services," *The Services Industry Journal*, January 2004.

The next phase of the analysis was to estimate the nature of the output growth, as it would tend to be concentrated in technology-oriented sectors. Data from the US Patent and Trademark Office related to patents by industry was compiled and used to generate a projection of the composition of the growth that would be stimulated by the CNDA. The result of this process was an estimate of the direct portion of the stimulus associated with the additional knowledge workers.

Any economic stimulus leads to multiplier (or ripple) effects through the economy. In this case, the additional workers will generate business activity across a spectrum of industries ranging from restaurants to car dealerships to health care providers and many other types of businesses as they conduct their daily lives. The Perryman Group performed a simulation of the US Multi-Regional Impact Assessment System (USMRIAS) using the tech-weighted output calculated as inputs to quantify the total composition of gross product generated by the incremental knowledge workers. Because the model initially measures the total effect on gross product from all sources, adding multipliers to the overall growth estimate would not be appropriate. The overall totals were calibrated back to the amount of the total effect, thus giving an appropriate estimate of gross product and its overall composition. The dynamic coefficients of the USMRIAS were also utilized to expand the results to other economic aggregates, including Total Expenditures, Personal Income, and Employment. These amounts were then projected using the appropriate submodels of the US Multi-Regional Econometric Model (USMREM) under scenarios with and without the implementation of a comprehensive CNDA.

With regard to the tourism impact, TPG made use of a large survey of thousands of leisure travelers completed in 2016 by the research department of the US Travel Association in conjunction with Kantar TNS, one of the leading market research firms in the country as well as other standard travel and economic data. Among other findings, this analysis permits estimates of the minimum impacts based on four states that have recently enacted varying types of laws perceived to discriminate against the LBGTQ community (Louisiana, Mississippi, North Carolina, and Indiana).

This information was used to develop a preliminary estimate of the likely initial effects on Texas of enacting comprehensive reforms given the size of the Texas tourism market relative to these states. Given the diversity of the restrictions in the various states and the fact that the survey measured the effects of individuals who actually changed plans in response to the laws, it is likely that this estimate would be reliable. As an added measure of conservatism, however, TPG used the lower bound of the 95% confidence interval, thus creating a high probability that

the effects are understated. The results are also generally consistent with information provided by various tourism executives in the state.

For convention travelers, the analysis was confined to out-of-state participants in events in Texas and based on a survey conducted by the US Travel Association in conjunction with Meeting Professionals International. The results reflected the net proportion of events that were actually moved from the states with discriminatory policies as a result of the concerns. Again, TPG computed the lower bound of the of the 95% confidence interval around this estimate to assure conservatism in the measured impacts.

Because longer-term effects were being examined, TPG estimated leisure travel implications by examining the net effects of those in the traveler's survey who would avoid states with discriminatory policies and the convention losses based on the net group of meeting planners who indicated they would not book meetings in these locales. In both instances, there was some offset from those more likely to visit or book a convention in areas with such restrictions. Again, the lower bound of the 95% confidence interval was employed to determine the inputs. The direct effects were projected forward using the relevant sectors and regional submodels of the US Multi-Regional Econometric Model.

The statewide benefits were localized to metropolitan statistical areas (MSAs) and regions based on a modeling process which incorporated (1) the current tech-weighted composition of each area, (2) projected growth based on forecasts from The Perryman Group's US Multi-Regional Econometric Model, and (3) other localization parameters included in The Perryman Group's US Multi-Regional Impact Assessment System. Regions reflect the widely used Council of Government (COG) definitions. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the economy of each metropolitan area and region.

The second major phase of the analysis is the simulation of the input-output system to measure overall economic effects of the direct benefits of non-discrimination in employment. The present study was conducted within the context of the US Multi-Regional Impact Assessment System (USMRIAS) which was developed and is maintained by The Perryman Group. This model has been used in hundreds of diverse applications across the country and has an excellent reputation for accuracy and credibility; it has also been peer reviewed on multiple occasions. The systems used in the current simulations reflect the unique industrial structures of the economies of Texas and each of the state's metropolitan areas.

The USMRIAS is somewhat similar in format to the Input-Output Model of the United States which is maintained by the US Department of Commerce. The model developed by TPG, however, incorporates several important enhancements and refinements. Specifically, the expanded system includes (1) comprehensive 500-sector coverage for any county, multi-county, or urban region; (2) calculation of both total expenditures and value-added by industry and region; (3) direct estimation of expenditures for multiple basic input choices (expenditures, output, income, or employment); (4) extensive parameter localization; (5) price adjustments for real and nominal assessments by sectors and areas; (6) measurement of the induced impacts associated with payrolls and consumer spending; (7) embedded modules to estimate multi-sectoral direct spending effects; (8) estimation of retail spending activity by consumers; and (9) comprehensive linkage and integration capabilities with a wide variety of econometric, real estate, occupational, and fiscal impact models.

The impact assessment (input-output) process essentially estimates the amounts of all types of goods and services required to produce one unit (a dollar's worth) of a specific type of output. For purposes of illustrating the nature of the system, it is useful to think of inputs and outputs in dollar (rather than physical) terms. As an example, the construction of a new building will require specific dollar amounts of lumber, glass, concrete, hand tools, architectural services, interior design services, paint, plumbing, and numerous other elements. Each of these suppliers must, in turn, purchase additional dollar amounts of inputs. This process continues through multiple rounds of production, thus generating subsequent increments to business activity. The initial process of building the facility is known as the *direct effect*. The ensuing transactions in the output chain constitute the *indirect effect*.

Another pattern that arises in response to any direct economic activity comes from the payroll dollars received by employees at each stage of the production cycle. As workers are compensated, they use some of their income for taxes, savings, and purchases from external markets. A substantial portion, however, is spent locally on food, clothing, health care services, utilities, housing, recreation, and other items. Typical purchasing patterns in the relevant areas are obtained from the Center for Community and Economic Research *Cost of Living Index*, a privately compiled inter-regional measure which has been widely used for several decades, and the *Consumer Expenditure Survey* of the US Department of Labor. These initial outlays by area residents generate further secondary activity as local providers acquire inputs to meet this consumer demand. These consumer spending impacts are known as the *induced effect*. The USMRIAS is designed to provide realistic, yet conservative, estimates of these phenomena.

Sources for information used in this process include the Bureau of the Census, the Bureau of Labor Statistics, the Regional Economic Information System of the US Department of Commerce, and other public and private sources. The pricing data are compiled from the US Department of Labor and the US Department of Commerce. The verification and testing procedures make use of extensive public and private sources.

Impacts were measured in constant 2019 dollars to eliminate the effects of inflation. As noted above, the indirect and induced effects associated with the technology stimulus were derived from the system through reverse simulations from a measured aggregate effect from the original empirical model.

The USMRIAS generates estimates of the effect on several measures of business activity. The most comprehensive measure of economic activity used in this study is **Total Expenditures**. This measure incorporates every dollar that changes hands in any transaction. For example, suppose a farmer sells wheat to a miller for \$0.50; the miller then sells flour to a baker for \$0.75; the baker, in turn, sells bread to a customer for \$1.25. The Total Expenditures recorded in this instance would be \$2.50, that is, $\$0.50 + \$0.75 + \$1.25$. This measure is quite broad but is useful in that (1) it reflects the overall interplay of all industries in the economy, and (2) some key fiscal variables such as sales taxes are linked to aggregate spending.

A second measure of business activity frequently employed in this analysis is that of **Gross Product**. This indicator represents the regional equivalent of Gross Domestic Product, the most commonly reported statistic regarding national economic performance. In other words, the Gross Product of Texas is the amount of US output that is produced in that state; it is defined as the value of all final goods produced in a given region for a specific period of time. Stated differently, it captures the amount of value-added (gross area product) over intermediate goods and services at each stage of the production process, that is, it eliminates the double counting in the Total Expenditures concept. Using the example above, the Gross Product is \$1.25 (the value of the bread) rather than \$2.50.

Alternatively, it may be viewed as the sum of the value-added by the farmer, \$0.50; the miller, \$0.25 ($\$0.75 - \0.50); and the baker, \$0.50 ($\$1.25 - \0.75). The total value-added is, therefore, \$1.25, which is equivalent to the final value of the bread. In many industries, the primary component of value-added is the wage and salary payments to employees.

The third gauge of economic activity used in this evaluation is **Personal Income**. As the name implies, Personal Income is simply the income received by individuals, whether in the form of wages, salaries, interest, dividends, proprietors'

profits, or other sources. It may thus be viewed as the segment of overall impacts which flows directly to the citizenry.

The fourth measure, **Retail Sales**, represents the component of Total Expenditures which occurs in retail outlets (general merchandise stores, automobile dealers and service stations, building materials stores, food stores, drugstores, restaurants, and so forth). Retail Sales is a commonly used measure of consumer activity.

The final aggregates used are **Jobs and Job-Years**, which reflect the full-time equivalent jobs generated by an activity. For an economic stimulus expected to endure (such as the ongoing operations of a facility), the Jobs measure is used. It should be noted that, unlike the dollar values described above, Jobs is a “stock” rather than a “flow.” In other words, if an area produces \$1 million in output in 2018 and \$1 million in 2019, it is appropriate to say that \$2 million was achieved in the 2018-19 period. If the same area has 100 people working in 2018 and 100 in 2019, it only has 100 Jobs. When a flow of jobs is measured, such as in a construction project or a cumulative assessment over multiple years, it is appropriate to measure employment in Job-Years (a person working for a year, though it could be multiple people working for partial years). This concept is distinct from Jobs, which anticipates that the relevant positions will be maintained on a continuing basis.

In addition to the economic aggregates, the model fully integrates the specific provisions and rate structures associated with major sources of State and local revenues on a detailed industrial basis, allowing for the estimation of the fiscal benefits associated with the economic stimulus.

US Multi-Regional Econometric Model

Overview

The US Multi-Regional Econometric Model (also known as the Texas Econometric Model) was developed by Dr. M. Ray Perryman, President and CEO of The Perryman Group (TPG), beginning 40 years ago as a Texas model and has been consistently maintained, expanded, and updated to a national level since that time. It is formulated in an internally consistent manner and is designed to permit the integration of relevant global, national, state, and local factors into the projection process. It is the result of four decades of continuing research in econometrics, economic theory, statistical methods, and key policy issues and behavioral patterns, as well as intensive, ongoing study of all aspects of the global, US, state, and metropolitan area economies. It is extensively used by scores of federal and State governmental entities on an ongoing basis, as well as hundreds of major corporations. It is used in the present analysis to generate long-term forecasts by detailed industrial sectors for scenarios with and without the enactment of a CNDA in Texas and all of the MSAs and economic regions within the state. It is also used to project future patterns in direct tourism effects across all relevant regions.

This section describes the forecasting process in a comprehensive manner, focusing on both the modeling and the supplemental analysis. The overall methodology, while certainly not ensuring perfect foresight, permits an enormous body of relevant information to impact the economic outlook in a systematic manner.

Model Logic and Structure

The US Multi-Regional Econometric Model revolves around a core system which projects output (real and nominal), income (real and nominal), and employment by industry in a simultaneous manner. For purposes of illustration, it is useful to initially consider the employment functions. Essentially, employment within the system is a derived demand relationship obtained from a neo-Classical production function. The expressions are augmented to include dynamic temporal adjustments to changes in relative factor input costs, output and (implicitly) productivity, and technological progress over time. Thus, the typical equation includes output, the relative real cost of labor and capital, dynamic lag structures, and a technological adjustment parameter. The functional form is logarithmic, thus preserving the theoretical consistency with the neo-Classical formulation.

The income segment of the model is divided into wage and non-wage components. The wage equations, like their employment counterparts, are individually estimated at the 3-digit North American Industry Classification System (NAICS) level of aggregation. Hence, income by place of work is measured for approximately 90 production categories. The wage equations measure real compensation, with the form of the variable structure differing between “basic” and “non-basic.”

The basic industries, comprised primarily of the various components of Mining, Agriculture, and Manufacturing, are export-oriented, i.e., they bring external dollars into the area and form the core of the economy. The production of these sectors typically flows into national and international markets; hence, the labor markets are influenced by conditions in areas beyond the borders of the particular region. Thus, real (inflation-adjusted) wages in the basic industry are expressed as a function of the corresponding national rates, as well as measures of local labor market conditions (the reciprocal of the unemployment rate), dynamic adjustment parameters, and ongoing trends.

The “non-basic” sectors are somewhat different in nature, as the strength of their labor markets is linked to the health of the local export sectors. Consequently, wages in these industries are related to those in the basic segment of the economy. The relationship also includes the local labor market measures contained in the basic wage equations.

Note that compensation rates in the export or “basic” sectors provide a key element of the interaction of the regional economies with national and international market phenomena, while the “non-basic” or local industries are strongly impacted by area production levels. Given the wage and employment equations, multiplicative identities in each industry provide expressions for total compensation; these totals may then be aggregated to determine aggregate wage and salary income. Simple linkage equations are then estimated for the calculation of personal income by place of work.

The non-labor aspects of personal income are modeled at the regional level using straightforward empirical expressions relating to national performance, dynamic responses, and evolving temporal patterns. In some instances (such as dividends, rents, and others) national variables (for example, interest rates) directly enter the forecasting system. These factors have numerous other implicit linkages into the system resulting from their simultaneous interaction with other phenomena in national and international markets which are explicitly included in various expressions.

The output or gross area product expressions are also developed at the 3-digit NAICS level. Regional output for basic industries is linked to national performance in the relevant industries, local and national production in key related sectors, relative area and national labor costs in the industry, dynamic adjustment parameters, and ongoing changes in industrial interrelationships (driven by technological changes in production processes).

Output in the non-basic sectors is modeled as a function of basic production levels, output in related local support industries (if applicable), dynamic temporal adjustments, and ongoing patterns. The inter-industry linkages are obtained from the input-output (impact assessment) system which is part of the overall integrated modeling structure maintained by The Perryman Group. Note that the dominant component of the econometric system involves the simultaneous estimation and projection of output (real and nominal), income (real and nominal), and employment at a disaggregated industrial level. This process, of necessity, also produces projections of regional price deflators by industry. These values are affected by both national pricing patterns and local cost variations and permit changes in prices to impact other aspects of economic behavior. Income is converted from real to nominal terms using the appropriate Consumer Price Index.

Several other components of the model are critical to the forecasting process. The demographic module includes (1) a linkage equation between wage and salary (establishment) employment and household employment, (2) a labor force participation rate function, and (3) a complete population system with endogenous migration. Given household employment, labor force participation (which is a function of economic conditions and evolving patterns of worker preferences), and the working age population, the unemployment rate and level become identities.

The population system uses Census information, fertility rates, and life tables to determine the “natural” changes in population by age group. Migration, the most difficult segment of population dynamics to track, is estimated in relation to relative regional and extra-regional economic conditions over time. Because evolving economic conditions determine migration in the system, population changes are allowed to interact simultaneously with overall economic conditions. Through this process, migration is treated as endogenous to the system, thus allowing population to vary in accordance with relative business performance (particularly employment).

Real retail sales is related to income, interest rates, dynamic adjustments, and patterns in consumer behavior on a store group basis. It is expressed on an

inflation-adjusted basis. Inflation at the state level relates to national patterns, indicators of relative economic conditions, and ongoing trends. As noted earlier, prices are endogenous to the system.

A final significant segment of the forecasting system relates to real estate absorption and activity. The short-term demand for various types of property is determined by underlying economic and demographic factors, with short-term adjustments to reflect the current status of the pertinent building cycle. In some instances, this portion of the forecast requires integration with the Multi-Regional Industry-Occupation System which is maintained by The Perryman Group. This system also allows any employment simulation or forecast from the econometric model to be translated into a highly detailed occupational profile.

The overall US Multi-Regional Econometric Model contains numerous additional specifications, and individual expressions are modified to reflect alternative lag structures, empirical properties of the estimates, simulation requirements, and similar phenomena. Moreover, it is updated on an ongoing basis as new data releases become available. Nonetheless, the above synopsis offers a basic understanding of the overall structure and underlying logic of the system.

Model Simulation and Multi-Regional Structure

The initial phase of the simulation process is the execution of a standard non-linear algorithm for the state-level system and that of each of the individual sub-areas, if any, being examined. The external assumptions are derived from scenarios developed through national and international models and extensive analysis by The Perryman Group.

Once the initial simulations are completed, they are merged into a single system with additive constraints and interregional flows. Using information on minimum regional requirements, import needs, export potential, and locations, it becomes possible to balance the various forecasts into a mathematically consistent set of results.

The iterative simulation process has the additional property of imposing a global convergence criterion across the entire multi-regional system, with balance being achieved simultaneously on both a sectoral and a geographic basis. This approach is particularly critical on non-linear dynamic systems, as independent simulations of individual systems often yield unstable, non-convergent outcomes.

It should be noted that the underlying data for the modeling and simulation process are frequently updated and revised by the various public and private entities compiling them. Whenever those modifications to the database occur,

they bring corresponding changes to the structural parameter estimates of the various systems and the solutions to the simulation and forecasting system. The multi-regional version of the US Multi-Regional Econometric Model is re-estimated and simulated with each such data release, thus providing a constantly evolving and current assessment of state and local business activity.

The Final Forecast

The process described above is followed to produce an initial set of projections. Through the comprehensive multi-regional modeling and simulation process, a systematic analysis is generated which accounts for both historical patterns in economic performance and inter-relationships and best available information on the future course of pertinent external factors. While the best available techniques and data are employed in this effort, they are not capable of directly capturing “street sense,” i.e., the contemporaneous and often non-quantifiable information that can materially affect economic outcomes. In order to provide a comprehensive approach to the prediction of business conditions and to achieve the property of statistical consistence, it is necessary to compile and assimilate extensive material regarding current events and factors affecting the forecast.

This critical aspect of the forecasting methodology includes activities such as (1) daily review of hundreds of financial and business publications and electronic information sites; (2) review of major newspapers and online news sources on a daily basis; (3) direct discussions with key business and political leaders; (4) face-to-face discussions with representatives of major industry groups; and (5) frequent site visits to various regions. The insights arising from this “fact finding” are analyzed and evaluated for their effects on the likely course of the future activity.

Another vital information resource stems from the firm’s ongoing interaction with key players in the international, domestic, and state economic scenes. Such activities include visiting with corporate groups on a regular basis and being regularly involved in the policy process at all levels. The firm is also an active participant in many major corporate relocations, economic development initiatives, and regulatory proceedings.

Once organized, this information is carefully assessed and, when appropriate, independently verified. The impact on specific communities and sectors that is distinct from what is captured by the econometric system is then factored into the forecast analysis. For example, the opening or closing of a major facility, particularly in a relatively small area, can cause a sudden change in business

performance that will not be accounted for by either a modeling system based on historical relationships or expected (primarily national and international) factors.

The final step in the forecasting process is the integration of this material into the results in a logical and mathematically consistent manner. In some instances, this task is accomplished through “constant adjustment factors” which augment relevant equations. In other cases, anticipated changes in industrial structure or regulatory parameters are initially simulated within the context of the Multi-Regional Impact Assessment System to estimate their ultimate effects by sector. Those findings are then factored into the simulation as constant adjustments on a distributed temporal basis. Once this scenario is formulated, the extended system is again balanced across regions and sectors through an iterative simulation algorithm analogous to that described in the preceding section.

Appendix B: Detailed Sectoral Results

Technology-Oriented Growth

Texas

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2025 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$479,043,725	\$124,228,132	\$82,296,565	1,139
Mining	\$636,473,806	\$145,711,771	\$74,490,594	352
Utilities	\$915,195,881	\$207,104,209	\$90,374,724	335
Construction	\$402,980,658	\$221,172,520	\$182,259,935	2,269
Manufacturing	\$10,705,948,757	\$4,601,924,514	\$2,851,972,555	32,753
Wholesale Trade	\$987,917,448	\$668,419,989	\$385,416,899	3,883
Retail Trade*	\$2,775,042,245	\$2,080,171,766	\$1,208,976,420	32,965
Transportation & Warehousing	\$692,016,458	\$467,085,443	\$308,913,587	3,732
Information	\$965,776,399	\$598,763,832	\$255,631,484	2,024
Financial Activities*	\$2,823,049,778	\$730,761,137	\$285,710,135	2,615
Business Services	\$1,071,997,355	\$685,333,197	\$559,056,270	6,036
Health Services	\$631,349,502	\$441,804,391	\$373,549,779	5,474
Other Services	\$1,162,568,322	\$599,654,854	\$479,500,446	10,225
Total, All Industries	\$24,249,360,334	\$11,572,135,755	\$7,138,149,392	103,801

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2030 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$1,173,759,624	\$304,385,504	\$201,644,191	2,571
Mining	\$1,559,497,005	\$357,025,015	\$182,517,893	794
Utilities	\$2,242,425,724	\$507,449,623	\$221,437,409	757
Construction	\$987,388,833	\$541,919,997	\$446,575,838	5,122
Manufacturing	\$26,231,865,109	\$11,275,699,690	\$6,987,942,971	73,940
Wholesale Trade	\$2,420,609,124	\$1,637,771,989	\$944,353,867	8,767
Retail Trade*	\$6,799,447,251	\$5,096,865,903	\$2,962,250,902	74,420
Transportation & Warehousing	\$1,695,588,387	\$1,144,459,273	\$756,904,383	8,424
Information	\$2,366,358,815	\$1,467,099,500	\$626,351,830	4,569
Financial Activities*	\$6,917,075,978	\$1,790,521,141	\$700,050,962	5,903
Business Services	\$2,626,622,884	\$1,679,212,968	\$1,369,807,477	13,626
Health Services	\$1,546,941,365	\$1,082,515,287	\$915,276,883	12,358
Other Services	\$2,848,541,132	\$1,469,282,694	\$1,174,878,686	23,083
Total, All Industries	\$59,416,121,232	\$28,354,208,584	\$17,489,993,295	234,335

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2035 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$1,951,789,414	\$506,148,271	\$335,304,598	3,957
Mining	\$2,593,213,877	\$593,680,027	\$303,500,380	1,222
Utilities	\$3,728,823,773	\$843,814,000	\$368,217,804	1,166
Construction	\$1,641,882,233	\$901,133,155	\$742,589,859	7,883
Manufacturing	\$43,619,728,931	\$18,749,828,194	\$11,619,920,158	113,797
Wholesale Trade	\$4,025,116,530	\$2,723,373,650	\$1,570,321,422	13,493
Retail Trade*	\$11,306,479,533	\$8,475,337,463	\$4,925,787,047	114,535
Transportation & Warehousing	\$2,819,513,806	\$1,903,067,245	\$1,258,620,532	12,966
Information	\$3,934,906,254	\$2,439,570,432	\$1,041,530,861	7,032
Financial Activities*	\$11,502,078,785	\$2,977,372,996	\$1,164,081,665	9,084
Business Services	\$4,367,687,076	\$2,792,283,894	\$2,277,788,124	20,971
Health Services	\$2,572,335,697	\$1,800,063,518	\$1,521,970,679	19,019
Other Services	\$4,736,704,444	\$2,443,200,762	\$1,953,650,250	35,525
Total, All Industries	\$98,800,260,353	\$47,148,873,606	\$29,083,283,379	360,649

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2040 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$2,782,081,613	\$721,464,000	\$477,943,342	5,242
Mining	\$3,696,368,365	\$846,231,809	\$432,609,594	1,620
Utilities	\$5,315,067,282	\$1,202,772,900	\$524,857,843	1,544
Construction	\$2,340,339,761	\$1,284,475,653	\$1,058,487,959	10,444
Manufacturing	\$62,175,583,570	\$26,726,014,543	\$16,563,040,041	150,768
Wholesale Trade	\$5,737,403,127	\$3,881,898,171	\$2,238,336,945	17,876
Retail Trade*	\$16,116,261,617	\$12,080,750,285	\$7,021,219,336	151,746
Transportation & Warehousing	\$4,018,936,398	\$2,712,633,009	\$1,794,038,340	17,178
Information	\$5,608,817,354	\$3,477,364,921	\$1,484,598,614	9,317
Financial Activities*	\$16,395,068,889	\$4,243,948,966	\$1,659,282,591	12,036
Business Services	\$6,225,703,356	\$3,980,122,868	\$3,246,760,339	27,784
Health Services	\$3,666,608,597	\$2,565,811,445	\$2,169,417,771	25,198
Other Services	\$6,751,700,899	\$3,482,539,596	\$2,784,734,049	47,066
Total, All Industries	\$140,829,940,829	\$67,206,028,166	\$41,455,326,765	477,819

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2045 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$3,704,741,619	\$960,733,033	\$636,450,269	6,518
Mining	\$4,922,245,867	\$1,126,879,308	\$576,081,867	2,014
Utilities	\$7,077,776,179	\$1,601,665,027	\$698,923,672	1,920
Construction	\$3,116,498,839	\$1,710,463,988	\$1,409,528,885	12,985
Manufacturing	\$82,795,727,869	\$35,589,530,489	\$22,056,068,913	187,455
Wholesale Trade	\$7,640,177,072	\$5,169,305,475	\$2,980,667,425	22,226
Retail Trade*	\$21,461,119,213	\$16,087,255,730	\$9,349,762,915	188,671
Transportation & Warehousing	\$5,351,791,575	\$3,612,260,819	\$2,389,019,961	21,358
Information	\$7,468,946,629	\$4,630,611,298	\$1,976,956,480	11,584
Financial Activities*	\$21,832,391,177	\$5,651,428,158	\$2,209,573,308	14,964
Business Services	\$8,290,419,024	\$5,300,105,781	\$4,323,528,144	34,545
Health Services	\$4,882,616,458	\$3,416,746,799	\$2,888,891,637	31,330
Other Services	\$8,990,860,369	\$4,637,502,121	\$3,708,273,719	58,519
Total, All Industries	\$187,535,311,888	\$89,494,488,024	\$55,203,727,194	594,088

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results from 2021-2045 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Job-Years
Agriculture	\$42,650,544,914	\$11,060,363,066	\$7,327,083,390	75,033
Mining	\$56,666,966,289	\$12,973,108,916	\$6,632,096,935	23,182
Utilities	\$81,482,338,545	\$18,439,041,958	\$8,046,303,499	22,105
Construction	\$35,878,446,425	\$19,691,581,394	\$16,227,089,823	149,489
Manufacturing	\$953,179,269,565	\$409,721,655,318	\$253,918,749,156	2,158,056
Wholesale Trade	\$87,956,934,347	\$59,511,220,487	\$34,314,698,014	255,874
Retail Trade*	\$247,069,437,778	\$185,203,259,405	\$107,638,406,174	2,172,060
Transportation & Warehousing	\$61,612,077,288	\$41,585,867,019	\$27,503,403,372	245,880
Information	\$85,985,657,419	\$53,309,546,376	\$22,759,555,133	133,359
Financial Activities*	\$251,343,676,905	\$65,061,619,747	\$25,437,537,978	172,276
Business Services	\$95,442,793,398	\$61,017,048,663	\$49,774,275,854	397,699
Health Services	\$56,210,735,851	\$39,335,027,324	\$33,258,136,518	360,683
Other Services	\$103,506,568,998	\$53,388,876,434	\$42,691,207,936	673,698
Total, All Industries	\$2,158,985,447,721	\$1,030,298,216,108	\$635,528,543,782	6,839,394

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. A job-year is the equivalent of one person working for one year, though it could be multiple people working partial years. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

Regions

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results as of 2025 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$168,414,048	\$80,369,552	\$49,575,107	721
South Plains COG	\$133,797,298	\$63,849,952	\$39,385,167	573
Nortex COG	\$67,162,014	\$32,050,657	\$19,770,109	287
North Central Texas COG	\$9,851,718,683	\$4,701,378,694	\$2,899,995,660	42,171
Ark-Tex COG	\$62,374,719	\$29,766,093	\$18,360,899	267
East Texas COG	\$329,376,778	\$157,183,231	\$96,956,811	1,410
West Central Texas COG	\$90,303,799	\$43,094,243	\$26,582,227	387
Rio Grande COG	\$141,456,343	\$67,504,956	\$41,639,717	606
Permian Basin COG	\$594,810,788	\$283,852,073	\$175,091,145	2,546
Concho Valley COG	\$46,435,119	\$22,159,492	\$13,668,848	199
Heart of Texas COG	\$129,149,648	\$61,632,028	\$38,017,064	553
Capital Area COG	\$4,554,763,626	\$2,173,597,253	\$1,340,760,447	19,497
Brazos Valley COG	\$99,079,102	\$47,281,941	\$29,165,365	424
Deep East Texas COG	\$57,766,720	\$27,567,091	\$17,004,468	247
South East Texas COG	\$163,152,246	\$77,858,546	\$48,026,220	698
Houston-Galveston Area COG	\$5,938,063,134	\$2,833,727,231	\$1,747,954,633	25,418
Golden Crescent COG	\$74,151,450	\$35,386,115	\$21,827,550	317
Alamo Area COG	\$1,215,905,506	\$580,247,206	\$357,919,344	5,205
South Texas COG	\$41,430,399	\$19,771,169	\$12,195,636	177
Coastal Bend COG	\$141,607,372	\$67,577,029	\$41,684,175	606
Lower Rio Grande Valley COG	\$132,935,341	\$63,438,614	\$39,131,437	569
Texoma COG	\$121,720,176	\$58,086,580	\$35,830,091	521
Central Texas COG	\$72,215,950	\$34,462,467	\$21,257,808	309
Middle Rio Grande COG	\$21,570,075	\$10,293,543	\$6,349,463	92
State Total	\$24,249,360,334	\$11,572,135,755	\$7,138,149,392	103,801

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results as of 2030 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$398,735,409	\$190,282,145	\$117,373,526	1,573
South Plains COG	\$317,508,667	\$151,519,601	\$93,463,261	1,252
Nortex COG	\$161,857,071	\$77,240,470	\$47,644,966	638
North Central Texas COG	\$24,212,346,056	\$11,554,472,021	\$7,127,253,705	95,493
Ark-Tex COG	\$150,190,547	\$71,673,041	\$44,210,756	592
East Texas COG	\$797,518,153	\$380,586,878	\$234,760,985	3,145
West Central Texas COG	\$215,956,035	\$103,057,257	\$63,569,778	852
Rio Grande COG	\$339,448,189	\$161,989,449	\$99,921,476	1,339
Permian Basin COG	\$1,479,599,781	\$706,085,822	\$435,541,562	5,835
Concho Valley COG	\$111,877,289	\$53,389,416	\$32,932,696	441
Heart of Texas COG	\$311,789,141	\$148,790,163	\$91,779,636	1,230
Capital Area COG	\$11,180,502,808	\$5,335,493,164	\$3,291,142,456	44,095
Brazos Valley COG	\$239,071,726	\$114,088,390	\$70,374,215	943
Deep East Texas COG	\$135,964,852	\$64,884,339	\$40,023,217	536
South East Texas COG	\$399,045,507	\$190,430,127	\$117,464,807	1,574
Houston-Galveston Area COG	\$14,533,702,653	\$6,935,687,285	\$4,278,205,253	57,320
Golden Crescent COG	\$179,779,035	\$85,793,084	\$52,920,555	709
Alamo Area COG	\$2,968,813,086	\$1,416,759,353	\$873,913,004	11,709
South Texas COG	\$99,228,146	\$47,353,067	\$29,209,238	391
Coastal Bend COG	\$341,920,675	\$163,169,354	\$100,649,288	1,349
Lower Rio Grande Valley COG	\$321,711,684	\$153,525,340	\$94,700,480	1,269
Texoma COG	\$295,489,956	\$141,011,962	\$86,981,736	1,165
Central Texas COG	\$172,325,498	\$82,236,151	\$50,726,499	680
Middle Rio Grande COG	\$51,739,266	\$24,690,705	\$15,230,200	204
State Total	\$59,416,121,232	\$28,354,208,584	\$17,489,993,295	234,335

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results as of 2035 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$642,513,986	\$306,616,709	\$189,133,270	2,345
South Plains COG	\$511,803,903	\$244,240,020	\$150,656,870	1,868
Nortex COG	\$264,251,944	\$126,104,744	\$77,786,376	965
North Central Texas COG	\$40,386,853,622	\$19,273,174,483	\$11,888,453,578	147,424
Ark-Tex COG	\$246,573,594	\$117,668,387	\$72,582,498	900
East Texas COG	\$1,307,831,549	\$624,115,606	\$384,979,102	4,774
West Central Texas COG	\$349,637,452	\$166,851,909	\$102,920,833	1,276
Rio Grande COG	\$554,286,585	\$264,513,353	\$163,162,261	2,023
Permian Basin COG	\$2,475,525,876	\$1,181,355,760	\$728,706,790	9,036
Concho Valley COG	\$182,723,713	\$87,198,325	\$53,787,364	667
Heart of Texas COG	\$512,519,586	\$244,581,554	\$150,867,541	1,871
Capital Area COG	\$18,627,411,663	\$8,889,262,791	\$5,483,247,616	67,995
Brazos Valley COG	\$392,227,376	\$187,176,419	\$115,457,792	1,432
Deep East Texas COG	\$217,563,061	\$103,824,152	\$64,042,829	794
South East Texas COG	\$667,325,705	\$318,457,211	\$196,436,958	2,436
Houston-Galveston Area COG	\$24,147,474,900	\$11,523,514,593	\$7,108,157,943	88,145
Golden Crescent COG	\$296,821,110	\$141,647,208	\$87,373,580	1,083
Alamo Area COG	\$4,912,512,758	\$2,344,320,170	\$1,446,069,070	17,932
South Texas COG	\$161,121,155	\$76,889,281	\$47,428,339	588
Coastal Bend COG	\$561,296,697	\$267,858,677	\$165,225,788	2,049
Lower Rio Grande Valley COG	\$529,301,461	\$252,590,100	\$155,807,529	1,932
Texoma COG	\$488,339,648	\$233,042,547	\$143,749,827	1,783
Central Texas COG	\$280,033,144	\$133,635,754	\$82,431,800	1,022
Middle Rio Grande COG	\$84,309,863	\$40,233,852	\$24,817,826	308
State Total	\$98,800,260,353	\$47,148,873,606	\$29,083,283,379	360,649

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results as of 2040 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$890,314,033	\$424,870,376	\$262,076,792	3,021
South Plains COG	\$707,588,818	\$337,671,334	\$208,288,987	2,401
Nortex COG	\$369,187,992	\$176,181,702	\$108,675,817	1,253
North Central Texas COG	\$57,749,050,166	\$27,558,658,828	\$16,999,266,853	195,936
Ark-Tex COG	\$348,726,537	\$166,417,207	\$102,652,692	1,183
East Texas COG	\$1,834,911,673	\$875,645,653	\$540,132,748	6,226
West Central Texas COG	\$484,143,617	\$231,040,142	\$142,514,665	1,643
Rio Grande COG	\$777,680,796	\$371,120,212	\$228,921,573	2,639
Permian Basin COG	\$3,518,577,416	\$1,679,114,622	\$1,035,744,073	11,938
Concho Valley COG	\$255,499,275	\$121,927,847	\$75,209,901	867
Heart of Texas COG	\$724,731,147	\$345,851,895	\$213,335,079	2,459
Capital Area COG	\$26,603,493,953	\$12,695,561,423	\$7,831,122,618	90,263
Brazos Valley COG	\$552,550,410	\$263,684,826	\$162,651,192	1,875
Deep East Texas COG	\$298,897,223	\$142,637,958	\$87,984,714	1,014
South East Texas COG	\$964,415,727	\$460,232,747	\$283,889,696	3,272
Houston-Galveston Area COG	\$34,405,218,619	\$16,418,654,144	\$10,127,672,936	116,733
Golden Crescent COG	\$421,692,949	\$201,237,805	\$124,131,409	1,431
Alamo Area COG	\$6,957,268,008	\$3,320,106,129	\$2,047,972,306	23,605
South Texas COG	\$223,934,671	\$106,864,774	\$65,918,404	760
Coastal Bend COG	\$791,241,073	\$377,591,367	\$232,913,236	2,685
Lower Rio Grande Valley COG	\$747,512,868	\$356,723,653	\$220,041,207	2,536
Texoma COG	\$694,149,635	\$331,257,967	\$204,332,969	2,355
Central Texas COG	\$391,311,058	\$186,739,140	\$115,188,061	1,328
Middle Rio Grande COG	\$117,843,164	\$56,236,415	\$34,688,837	400
State Total	\$140,829,940,829	\$67,206,028,166	\$41,455,326,765	477,819

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results as of 2045 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$1,155,969,562	\$551,644,931	\$340,276,334	3,662
South Plains COG	\$913,904,551	\$436,128,103	\$269,021,002	2,895
Nortex COG	\$481,285,109	\$229,676,022	\$141,673,222	1,525
North Central Texas COG	\$77,140,995,609	\$36,812,767,890	\$22,707,566,027	244,373
Ark-Tex COG	\$462,777,038	\$220,843,710	\$136,225,104	1,466
East Texas COG	\$2,402,016,409	\$1,146,276,008	\$707,068,217	7,609
West Central Texas COG	\$625,372,135	\$298,436,377	\$184,087,319	1,981
Rio Grande COG	\$1,020,493,605	\$486,993,899	\$300,397,029	3,233
Permian Basin COG	\$4,638,512,434	\$2,213,563,362	\$1,365,413,118	14,694
Concho Valley COG	\$333,382,301	\$159,094,722	\$98,135,895	1,056
Heart of Texas COG	\$960,408,678	\$458,320,527	\$282,710,163	3,042
Capital Area COG	\$35,491,704,517	\$16,937,140,493	\$10,447,495,749	112,433
Brazos Valley COG	\$727,984,252	\$347,404,322	\$214,292,677	2,306
Deep East Texas COG	\$384,065,306	\$183,281,365	\$113,055,169	1,217
South East Texas COG	\$1,310,953,517	\$625,605,454	\$385,898,099	4,153
Houston-Galveston Area COG	\$45,821,003,575	\$21,866,427,258	\$13,488,074,089	145,155
Golden Crescent COG	\$561,607,127	\$268,006,819	\$165,317,168	1,779
Alamo Area COG	\$9,192,190,768	\$4,386,642,699	\$2,705,854,094	29,120
South Texas COG	\$290,173,179	\$138,474,721	\$85,416,665	919
Coastal Bend COG	\$1,043,413,350	\$497,931,523	\$307,143,787	3,305
Lower Rio Grande Valley COG	\$986,929,350	\$470,976,564	\$290,516,906	3,126
Texoma COG	\$924,518,718	\$441,193,333	\$272,145,435	2,929
Central Texas COG	\$511,793,343	\$244,234,980	\$150,653,761	1,621
Middle Rio Grande COG	\$153,857,456	\$73,422,942	\$45,290,164	487
State Total	\$187,535,311,888	\$89,494,488,024	\$55,203,727,194	594,088

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of nondiscrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

The Net Cumulative Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results from 2021-2045 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Job-Years
Panhandle COG	\$14,246,558,267	\$6,798,657,945	\$4,193,680,156	45,131
South Plains COG	\$11,317,601,649	\$5,400,918,659	\$3,331,499,479	35,853
Nortex COG	\$5,798,129,156	\$2,766,948,769	\$1,706,763,046	18,368
North Central Texas COG	\$881,751,669,964	\$420,784,296,426	\$259,556,337,159	2,793,278
Ark-Tex COG	\$5,440,425,936	\$2,596,247,762	\$1,601,467,938	17,235
East Texas COG	\$28,643,240,799	\$13,668,957,301	\$8,431,551,557	90,738
West Central Texas COG	\$7,690,685,961	\$3,670,103,490	\$2,263,864,472	24,363
Rio Grande COG	\$12,221,491,778	\$5,832,267,740	\$3,597,572,592	38,716
Permian Basin COG	\$53,439,740,681	\$25,502,195,743	\$15,730,759,376	169,290
Concho Valley COG	\$4,011,291,988	\$1,914,244,945	\$1,180,781,722	12,707
Heart of Texas COG	\$11,285,865,786	\$5,385,773,859	\$3,322,157,570	35,752
Capital Area COG	\$406,838,155,804	\$194,148,889,059	\$119,758,686,185	1,288,812
Brazos Valley COG	\$8,627,686,194	\$4,117,253,177	\$2,539,684,021	27,331
Deep East Texas COG	\$4,829,338,369	\$2,304,628,182	\$1,421,585,488	15,299
South East Texas COG	\$14,685,324,068	\$7,008,043,156	\$4,322,837,206	46,521
Houston-Galveston Area COG	\$528,006,647,085	\$251,972,197,014	\$155,426,381,351	1,672,659
Golden Crescent COG	\$6,527,440,573	\$3,114,986,433	\$1,921,446,393	20,678
Alamo Area COG	\$107,332,679,457	\$51,220,663,989	\$31,594,924,156	340,016
South Texas COG	\$3,544,315,111	\$1,691,397,012	\$1,043,320,335	11,228
Coastal Bend COG	\$12,341,534,436	\$5,889,553,784	\$3,632,908,882	39,096
Lower Rio Grande Valley COG	\$11,626,640,017	\$5,548,396,114	\$3,422,469,386	36,832
Texoma COG	\$10,731,791,000	\$5,121,361,580	\$3,159,057,655	33,997
Central Texas COG	\$6,190,775,958	\$2,954,325,344	\$1,822,344,302	19,612
Middle Rio Grande COG	\$1,856,417,685	\$885,908,625	\$546,463,354	5,881
State Total	\$2,158,985,447,721	\$1,030,298,216,108	\$635,528,543,782	6,839,394

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. A job-year is the equivalent of one person working for one year, though it could be multiple individuals working partial years. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

Metropolitan Areas

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results as of 2025 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$31,489,248	\$15,027,112	\$9,269,315	135
Amarillo	\$91,866,041	\$43,839,767	\$27,042,096	393
Austin-Round Rock-Georgetown	\$4,542,089,320	\$2,167,548,896	\$1,337,029,582	19,443
Beaumont-Port Arthur	\$163,127,091	\$77,846,542	\$48,018,815	698
Brownsville-Harlingen	\$44,780,651	\$21,369,956	\$13,181,831	192
College Station-Bryan	\$76,199,684	\$36,363,561	\$22,430,477	326
Corpus Christi	\$114,359,592	\$54,574,005	\$33,663,397	490
Dallas-Plano-Irving	\$8,599,153,092	\$4,103,636,780	\$2,531,284,890	36,809
El Paso	\$137,703,084	\$65,713,848	\$40,534,891	589
Fort Worth-Arlington-Grapevine	\$1,220,817,210	\$582,591,140	\$359,365,175	5,226
Houston-The Woodlands-Sugar Land	\$5,921,470,439	\$2,825,808,963	\$1,743,070,334	25,347
Killeen-Temple	\$67,245,736	\$32,090,611	\$19,794,754	288
Laredo	\$29,594,665	\$14,122,990	\$8,711,617	127
Longview	\$122,000,473	\$58,220,342	\$35,912,601	522
Lubbock	\$105,800,340	\$50,489,410	\$31,143,858	453
McAllen-Edinburg-Mission	\$86,667,328	\$41,358,868	\$25,511,780	371
Midland	\$466,292,659	\$222,521,414	\$137,259,978	1,996
Odessa	\$73,051,083	\$34,861,004	\$21,503,641	313
San Angelo	\$35,799,079	\$17,083,824	\$10,537,976	153
San Antonio-New Braunfels	\$1,187,717,160	\$566,795,331	\$349,621,698	5,084
Sherman-Denison	\$93,730,342	\$44,729,437	\$27,590,880	401
Texarkana	\$14,706,498	\$7,018,148	\$4,329,070	63
Tyler	\$144,276,143	\$68,850,604	\$42,469,766	618
Victoria	\$25,779,319	\$12,302,254	\$7,588,515	110
Waco	\$116,392,097	\$55,543,945	\$34,261,694	498
Wichita Falls	\$46,881,674	\$22,372,594	\$13,800,298	201
Rural Areas	\$690,370,286	\$329,454,409	\$203,220,463	2,955
State Total	\$24,249,360,334	\$11,572,135,755	\$7,138,149,392	103,801

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results as of 2030 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$75,262,924	\$35,916,526	\$22,154,729	297
Amarillo	\$220,579,987	\$105,263,872	\$64,930,905	870
Austin-Round Rock-Georgetown	\$11,164,281,741	\$5,327,752,243	\$3,286,367,550	44,031
Beaumont-Port Arthur	\$398,941,883	\$190,380,677	\$117,434,304	1,573
Brownsville-Harlingen	\$107,984,618	\$51,531,778	\$31,786,832	426
College Station-Bryan	\$183,869,396	\$87,745,061	\$54,124,612	725
Corpus Christi	\$276,391,097	\$131,897,718	\$81,359,711	1,090
Dallas-Plano-Irving	\$21,222,797,590	\$10,127,817,453	\$6,247,236,943	83,702
El Paso	\$330,761,955	\$157,844,256	\$97,364,558	1,305
Fort Worth-Arlington-Grapevine	\$2,966,181,128	\$1,415,503,346	\$873,138,249	11,698
Houston-The Woodlands-Sugar Land	\$14,501,262,845	\$6,920,206,552	\$4,268,656,127	57,192
Killeen-Temple	\$160,533,619	\$76,608,900	\$47,255,389	633
Laredo	\$71,021,538	\$33,892,477	\$20,906,215	280
Longview	\$294,968,557	\$140,763,143	\$86,828,254	1,163
Lubbock	\$254,465,419	\$121,434,476	\$74,905,571	1,004
McAllen-Edinburg-Mission	\$210,448,542	\$100,429,004	\$61,948,567	830
Midland	\$1,164,468,808	\$555,700,890	\$342,778,209	4,593
Odessa	\$180,428,648	\$86,103,088	\$53,111,778	712
San Angelo	\$86,290,217	\$41,178,905	\$25,400,771	340
San Antonio-New Braunfels	\$2,902,032,170	\$1,384,890,561	\$854,255,076	11,445
Sherman-Denison	\$227,809,547	\$108,713,919	\$67,059,030	898
Texarkana	\$35,280,927	\$16,836,554	\$10,385,450	139
Tyler	\$350,895,172	\$167,452,110	\$103,291,061	1,384
Victoria	\$62,131,026	\$29,649,800	\$18,289,165	245
Waco	\$282,646,719	\$134,882,989	\$83,201,143	1,115
Wichita Falls	\$113,100,873	\$53,973,327	\$33,292,875	446
Rural Areas	\$1,571,284,286	\$749,838,957	\$462,530,220	6,197
State Total	\$59,416,121,232	\$28,354,208,584	\$17,489,993,295	234,335

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results as of 2035 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$122,043,269	\$58,240,764	\$35,925,199	445
Amarillo	\$359,709,922	\$171,658,633	\$105,885,810	1,313
Austin-Round Rock-Georgetown	\$18,624,494,818	\$8,887,870,832	\$5,482,389,000	67,985
Beaumont-Port Arthur	\$667,078,712	\$318,339,342	\$196,364,252	2,435
Brownsville-Harlingen	\$177,043,266	\$84,487,536	\$52,115,242	646
College Station-Bryan	\$301,526,293	\$143,892,587	\$88,758,619	1,101
Corpus Christi	\$454,646,067	\$216,963,497	\$133,831,635	1,660
Dallas-Plano-Irving	\$35,543,741,291	\$16,961,973,173	\$10,462,813,525	129,745
El Paso	\$540,605,828	\$257,984,703	\$159,135,132	1,973
Fort Worth-Arlington-Grapevine	\$4,892,096,310	\$2,334,577,153	\$1,440,059,194	17,858
Houston-The Woodlands-Sugar Land	\$24,105,766,884	\$11,503,610,941	\$7,095,880,586	87,993
Killeen-Temple	\$261,032,556	\$124,568,407	\$76,838,702	953
Laredo	\$115,536,351	\$55,135,572	\$34,009,793	422
Longview	\$483,670,984	\$230,814,595	\$142,375,539	1,766
Lubbock	\$415,816,765	\$198,433,608	\$122,401,669	1,518
McAllen-Edinburg-Mission	\$347,325,138	\$165,748,440	\$102,240,170	1,268
Midland	\$1,952,600,689	\$931,808,507	\$574,776,210	7,128
Odessa	\$301,644,867	\$143,949,172	\$88,793,522	1,101
San Angelo	\$141,179,215	\$67,372,707	\$41,558,141	515
San Antonio-New Braunfels	\$4,805,370,891	\$2,293,190,564	\$1,414,530,315	17,541
Sherman-Denison	\$377,107,401	\$179,960,955	\$111,007,009	1,377
Texarkana	\$57,571,407	\$27,473,885	\$16,946,975	210
Tyler	\$576,061,214	\$274,904,512	\$169,571,937	2,103
Victoria	\$101,619,502	\$48,494,255	\$29,913,168	371
Waco	\$467,722,808	\$223,203,901	\$137,680,963	1,707
Wichita Falls	\$184,790,255	\$88,184,508	\$54,395,680	675
Rural Areas	\$2,422,457,651	\$1,156,030,856	\$713,085,391	8,843
State Total	\$98,800,260,353	\$47,148,873,606	\$29,083,283,379	360,649

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results as of 2040 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$169,581,350	\$80,926,605	\$49,918,719	575
Amarillo	\$503,349,631	\$240,205,522	\$148,168,233	1,708
Austin-Round Rock-Georgetown	\$26,632,696,846	\$12,709,497,454	\$7,839,718,911	90,362
Beaumont-Port Arthur	\$963,950,388	\$460,010,681	\$283,752,717	3,271
Brownsville-Harlingen	\$249,194,913	\$118,919,317	\$73,354,121	845
College Station-Bryan	\$424,319,017	\$202,491,002	\$124,904,430	1,440
Corpus Christi	\$642,910,122	\$306,805,751	\$189,249,879	2,181
Dallas-Plano-Irving	\$51,017,967,561	\$24,346,491,554	\$15,017,875,486	173,098
El Paso	\$759,163,270	\$362,283,388	\$223,470,671	2,576
Fort Worth-Arlington-Grapevine	\$6,919,545,179	\$3,302,104,264	\$2,036,868,046	23,477
Houston-The Woodlands-Sugar Land	\$34,361,023,455	\$16,397,563,590	\$10,114,663,451	116,583
Killeen-Temple	\$365,042,994	\$174,203,650	\$107,455,677	1,239
Laredo	\$160,862,307	\$76,765,755	\$47,352,143	546
Longview	\$679,478,762	\$324,256,820	\$200,014,386	2,305
Lubbock	\$582,856,914	\$278,147,516	\$171,572,350	1,978
McAllen-Edinburg-Mission	\$491,922,678	\$234,752,420	\$144,804,544	1,669
Midland	\$2,776,918,753	\$1,325,184,679	\$817,426,136	9,422
Odessa	\$431,041,934	\$205,699,272	\$126,883,418	1,462
San Angelo	\$198,002,865	\$94,489,751	\$58,285,003	672
San Antonio-New Braunfels	\$6,810,236,695	\$3,249,940,719	\$2,004,691,516	23,106
Sherman-Denison	\$537,087,628	\$256,305,769	\$158,099,499	1,822
Texarkana	\$80,696,127	\$38,509,327	\$23,754,070	274
Tyler	\$806,361,423	\$384,807,010	\$237,364,129	2,736
Victoria	\$142,466,603	\$67,987,067	\$41,937,102	483
Waco	\$666,342,201	\$317,987,869	\$196,147,449	2,261
Wichita Falls	\$258,275,744	\$123,252,817	\$76,027,195	876
Rural Areas	\$3,198,645,468	\$1,526,438,598	\$941,567,484	10,853
State Total	\$140,829,940,829	\$67,206,028,166	\$41,455,326,765	477,819

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

The Net Annual Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results as of 2045 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$220,098,649	\$105,034,170	\$64,789,216	697
Amarillo	\$658,852,511	\$314,413,683	\$193,942,751	2,087
Austin-Round Rock-Georgetown	\$35,573,820,975	\$16,976,327,622	\$10,471,667,915	112,693
Beaumont-Port Arthur	\$1,310,180,153	\$625,236,393	\$385,670,448	4,150
Brownsville-Harlingen	\$327,991,751	\$156,522,276	\$96,549,108	1,039
College Station-Bryan	\$558,066,705	\$266,317,279	\$164,274,994	1,768
Corpus Christi	\$851,250,184	\$406,228,559	\$250,577,784	2,697
Dallas-Plano-Irving	\$68,392,605,922	\$32,637,913,308	\$20,132,351,190	216,659
El Paso	\$997,042,804	\$475,802,847	\$293,493,947	3,159
Fort Worth-Arlington-Grapevine	\$9,147,699,270	\$4,365,410,730	\$2,692,757,379	28,979
Houston-The Woodlands-Sugar Land	\$45,779,574,029	\$21,846,656,496	\$13,475,878,704	145,024
Killeen-Temple	\$477,819,863	\$228,022,358	\$140,653,177	1,514
Laredo	\$208,789,061	\$99,637,076	\$61,460,075	661
Longview	\$891,610,826	\$425,489,224	\$262,458,522	2,825
Lubbock	\$763,191,322	\$364,205,631	\$224,656,387	2,418
McAllen-Edinburg-Mission	\$651,181,531	\$310,752,984	\$191,684,687	2,063
Midland	\$3,658,230,126	\$1,745,758,860	\$1,076,852,865	11,589
Odessa	\$573,888,229	\$273,867,533	\$168,932,288	1,818
San Angelo	\$259,392,148	\$123,785,581	\$76,355,825	822
San Antonio-New Braunfels	\$9,003,996,325	\$4,296,833,664	\$2,650,456,342	28,524
Sherman-Denison	\$716,977,818	\$342,151,897	\$211,052,775	2,271
Texarkana	\$105,818,915	\$50,498,274	\$31,149,326	335
Tyler	\$1,050,110,454	\$501,127,476	\$309,115,176	3,327
Victoria	\$186,600,821	\$89,048,536	\$54,928,646	591
Waco	\$890,095,218	\$424,765,955	\$262,012,381	2,820
Wichita Falls	\$336,695,635	\$160,675,892	\$99,111,222	1,067
Rural Areas	\$3,943,730,641	\$1,882,003,720	\$1,160,894,064	12,493
State Total	\$187,535,311,888	\$89,494,488,024	\$55,203,727,194	594,088

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

The Net Cumulative Impact of Incremental Technology Oriented Growth Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity

Results from 2021-2045 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Job-Years
Abilene	\$2,689,233,250	\$1,283,339,924	\$791,614,642	8,519
Amarillo	\$7,921,398,733	\$3,780,202,869	\$2,331,778,108	25,094
Austin-Round Rock-Georgetown	\$406,595,447,628	\$194,033,065,304	\$119,687,241,529	1,288,043
Beaumont-Port Arthur	\$14,680,316,384	\$7,005,653,418	\$4,321,363,121	46,505
Brownsville-Harlingen	\$3,894,269,189	\$1,858,400,019	\$1,146,334,372	12,337
College Station-Bryan	\$6,629,208,894	\$3,163,551,706	\$1,951,403,368	21,000
Corpus Christi	\$10,002,177,040	\$4,773,179,538	\$2,944,285,250	31,686
Dallas-Plano-Irving	\$774,930,214,224	\$369,807,595,584	\$228,111,899,086	2,454,881
El Paso	\$11,915,373,198	\$5,686,183,649	\$3,507,462,167	37,746
Fort Worth-Arlington-Grapevine	\$107,217,663,729	\$51,165,776,866	\$31,561,067,616	339,652
Houston-The Woodlands-Sugar Land	\$526,975,234,317	\$251,479,992,338	\$155,122,770,108	1,669,391
Killeen-Temple	\$5,770,482,379	\$2,753,755,338	\$1,698,624,818	18,280
Laredo	\$2,539,505,627	\$1,211,887,796	\$747,540,153	8,045
Longview	\$10,610,903,200	\$5,063,672,222	\$3,123,472,586	33,614
Lubbock	\$9,149,835,370	\$4,366,430,107	\$2,693,386,171	28,986
McAllen-Edinburg-Mission	\$7,619,074,805	\$3,635,929,639	\$2,242,784,693	24,136
Midland	\$42,043,191,907	\$20,063,602,405	\$12,376,020,671	133,188
Odessa	\$6,560,052,442	\$3,130,549,275	\$1,931,046,168	20,781
San Angelo	\$3,101,927,747	\$1,480,283,541	\$913,097,226	9,827
San Antonio-New Braunfels	\$104,967,216,883	\$50,091,831,985	\$30,898,616,089	332,523
Sherman-Denison	\$8,287,179,184	\$3,954,758,444	\$2,439,450,865	26,253
Texarkana	\$1,269,210,171	\$605,684,942	\$373,610,342	4,021
Tyler	\$12,562,481,856	\$5,994,993,000	\$3,697,947,945	39,796
Victoria	\$2,232,688,394	\$1,065,470,299	\$657,224,070	7,073
Waco	\$10,285,979,467	\$4,908,614,047	\$3,027,826,593	32,585
Wichita Falls	\$4,052,036,225	\$1,933,688,668	\$1,192,775,377	12,836
Rural Areas	\$54,483,145,478	\$26,000,123,184	\$16,037,900,646	172,596
State Total	\$2,158,985,447,721	\$1,030,298,216,108	\$635,528,543,782	6,839,394

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. A job-year is the equivalent of one person working for one year, though it could be multiple individuals working partial years. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the relevant economy.

Tourism and Related Activity

Texas

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2025 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$335,367,942	\$91,567,077	\$59,548,408	672
Mining	\$212,028,009	\$49,086,686	\$27,027,501	113
Utilities	\$719,902,008	\$165,889,033	\$72,389,549	226
Construction	\$284,348,233	\$151,647,159	\$124,966,704	1,260
Manufacturing	\$2,147,128,582	\$639,748,073	\$353,667,632	4,100
Wholesale Trade	\$533,475,385	\$360,967,546	\$208,137,102	1,696
Retail Trade*	\$3,482,457,539	\$2,566,606,757	\$1,484,054,464	33,559
Transportation & Warehousing	\$1,661,676,217	\$1,206,654,515	\$798,038,224	7,804
Information	\$320,714,978	\$197,239,369	\$84,207,819	541
Financial Activities*	\$2,037,267,995	\$544,154,022	\$211,886,987	1,597
Business Services	\$536,898,472	\$335,893,778	\$274,003,253	2,392
Health Services	\$437,029,401	\$305,974,548	\$258,704,315	3,066
Other Services	\$3,007,864,045	\$1,600,241,178	\$1,113,744,131	19,397
Total, All Industries	\$15,716,158,804	\$8,215,669,741	\$5,070,376,087	76,424

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2030 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$401,481,721	\$109,618,431	\$71,287,664	749
Mining	\$253,826,794	\$58,763,539	\$32,355,649	126
Utilities	\$861,822,078	\$198,592,072	\$86,660,282	251
Construction	\$340,404,086	\$181,542,582	\$149,602,395	1,403
Manufacturing	\$2,570,409,299	\$765,866,754	\$423,388,976	4,568
Wholesale Trade	\$638,643,676	\$432,127,980	\$249,168,842	1,889
Retail Trade*	\$4,168,982,389	\$3,072,582,580	\$1,776,618,050	37,383
Transportation & Warehousing	\$1,989,255,808	\$1,444,532,019	\$955,361,914	8,694
Information	\$383,940,099	\$236,122,752	\$100,808,384	603
Financial Activities*	\$2,438,891,012	\$651,427,479	\$253,657,972	1,779
Business Services	\$642,741,584	\$402,111,218	\$328,019,717	2,665
Health Services	\$523,184,520	\$366,293,771	\$309,704,776	3,416
Other Services	\$3,600,828,464	\$1,915,709,585	\$1,333,305,464	21,608
Total, All Industries	\$18,814,411,529	\$9,835,290,762	\$6,069,940,086	85,134

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2035 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$469,290,446	\$128,132,565	\$83,327,877	821
Mining	\$296,697,169	\$68,688,476	\$37,820,394	138
Utilities	\$1,007,380,528	\$232,133,512	\$101,296,872	276
Construction	\$397,897,033	\$212,204,430	\$174,869,667	1,538
Manufacturing	\$3,004,541,591	\$895,218,717	\$494,897,753	5,007
Wholesale Trade	\$746,508,149	\$505,112,742	\$291,252,506	2,071
Retail Trade*	\$4,873,107,556	\$3,591,530,016	\$2,076,682,038	40,977
Transportation & Warehousing	\$2,325,233,500	\$1,688,507,948	\$1,116,718,884	9,530
Information	\$448,786,113	\$276,002,981	\$117,834,534	661
Financial Activities*	\$2,850,810,368	\$761,451,087	\$296,499,832	1,950
Business Services	\$751,298,177	\$470,026,264	\$383,420,992	2,921
Health Services	\$611,548,383	\$428,159,387	\$362,012,728	3,744
Other Services	\$4,208,994,608	\$2,239,265,601	\$1,558,495,654	23,685
Total, All Industries	\$21,992,093,620	\$11,496,433,725	\$7,095,129,732	93,319

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2040 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$535,647,459	\$146,250,330	\$95,110,323	886
Mining	\$338,649,733	\$78,400,930	\$43,168,145	149
Utilities	\$1,149,822,725	\$264,956,866	\$115,620,108	297
Construction	\$454,159,117	\$242,209,839	\$199,595,993	1,659
Manufacturing	\$3,429,379,569	\$1,021,801,391	\$564,875,603	5,400
Wholesale Trade	\$852,063,356	\$576,534,977	\$332,435,203	2,234
Retail Trade*	\$5,562,158,147	\$4,099,367,336	\$2,370,321,973	44,196
Transportation & Warehousing	\$2,654,018,264	\$1,927,260,610	\$1,274,621,372	10,278
Information	\$512,243,841	\$315,029,416	\$134,496,172	713
Financial Activities*	\$3,253,910,966	\$869,119,205	\$338,424,494	2,103
Business Services	\$857,530,688	\$536,487,320	\$437,636,184	3,150
Health Services	\$698,020,469	\$488,700,525	\$413,200,821	4,038
Other Services	\$4,804,140,557	\$2,555,894,625	\$1,778,864,759	25,545
Total, All Industries	\$25,101,744,891	\$13,122,013,370	\$8,098,371,150	100,648

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2045 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$603,135,646	\$164,676,945	\$107,093,621	949
Mining	\$381,317,454	\$88,278,951	\$48,607,058	160
Utilities	\$1,294,693,104	\$298,339,753	\$130,187,509	319
Construction	\$511,380,288	\$272,726,744	\$224,743,824	1,778
Manufacturing	\$3,861,459,669	\$1,150,541,893	\$636,046,350	5,789
Wholesale Trade	\$959,417,941	\$649,174,732	\$374,319,932	2,395
Retail Trade*	\$6,262,954,836	\$4,615,861,650	\$2,668,967,526	47,381
Transportation & Warehousing	\$2,988,407,751	\$2,170,083,237	\$1,435,215,590	11,019
Information	\$576,783,320	\$354,721,127	\$151,441,837	764
Financial Activities*	\$3,663,883,134	\$978,622,719	\$381,063,836	2,254
Business Services	\$965,574,122	\$604,081,324	\$492,775,570	3,377
Health Services	\$785,966,626	\$550,273,695	\$465,261,506	4,329
Other Services	\$5,409,431,832	\$2,877,921,155	\$2,002,990,449	27,386
Total, All Industries	\$28,264,405,724	\$14,775,303,925	\$9,118,714,610	107,902

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Cumulative Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results from 2021-2045 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Job-Years
Agriculture	\$11,061,526,832	\$3,020,180,384	\$1,964,100,394	19,681
Mining	\$6,993,374,178	\$1,619,038,749	\$891,454,985	3,316
Utilities	\$23,744,712,516	\$5,471,560,510	\$2,387,643,042	6,607
Construction	\$9,378,730,672	\$5,001,817,123	\$4,121,808,844	36,870
Manufacturing	\$70,819,292,569	\$21,100,974,742	\$11,665,110,200	120,019
Wholesale Trade	\$17,595,755,416	\$11,905,885,137	\$6,865,039,408	49,647
Retail Trade*	\$114,862,789,964	\$84,655,048,787	\$48,948,948,911	982,271
Transportation & Warehousing	\$54,807,492,759	\$39,799,395,269	\$26,321,899,362	228,437
Information	\$10,578,224,344	\$6,505,596,695	\$2,777,448,093	15,845
Financial Activities*	\$67,195,732,660	\$17,947,971,649	\$6,988,722,819	46,738
Business Services	\$17,708,659,964	\$11,078,870,597	\$9,037,519,557	70,018
Health Services	\$14,414,652,800	\$10,092,036,986	\$8,532,910,757	89,756
Other Services	\$99,209,151,051	\$52,781,165,092	\$36,734,908,247	567,754
Total, All Industries	\$518,370,095,727	\$270,979,541,719	\$167,237,514,618	2,236,959

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. A job-year is the equivalent of one person working for one year, though it could be multiple individuals working partial years. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

Regions

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2025 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$165,342,422	\$86,433,253	\$53,343,077	804
South Plains COG	\$193,045,766	\$100,915,260	\$62,280,780	939
Nortex COG	\$63,606,608	\$33,250,547	\$20,520,881	309
North Central Texas COG	\$5,675,906,437	\$2,967,097,326	\$1,831,171,384	27,601
Ark-Tex COG	\$79,244,954	\$41,425,540	\$25,566,153	385
East Texas COG	\$249,629,453	\$130,494,555	\$80,535,914	1,214
West Central Texas COG	\$108,972,357	\$56,965,630	\$35,156,862	530
Rio Grande COG	\$302,423,089	\$158,092,588	\$97,568,294	1,471
Permian Basin COG	\$251,083,913	\$131,254,878	\$81,005,154	1,221
Concho Valley COG	\$61,994,537	\$32,407,833	\$20,000,792	301
Heart of Texas COG	\$124,354,649	\$65,006,770	\$40,119,526	605
Capital Area COG	\$1,631,269,052	\$852,750,851	\$526,283,025	7,933
Brazos Valley COG	\$184,850,193	\$96,631,000	\$59,636,709	899
Deep East Texas COG	\$83,734,053	\$43,772,230	\$27,014,434	407
South East Texas COG	\$135,061,963	\$70,604,051	\$43,573,939	657
Houston-Galveston Area COG	\$3,800,806,651	\$1,986,883,219	\$1,226,223,239	18,483
Golden Crescent COG	\$53,754,072	\$28,100,104	\$17,342,238	261
Alamo Area COG	\$1,553,332,573	\$812,009,320	\$501,139,015	7,554
South Texas COG	\$115,941,714	\$60,608,883	\$37,405,329	564
Coastal Bend COG	\$265,777,524	\$138,936,008	\$85,745,634	1,292
Lower Rio Grande Valley COG	\$375,796,960	\$196,449,002	\$121,240,307	1,827
Texoma COG	\$61,068,486	\$31,923,737	\$19,702,027	297
Central Texas COG	\$127,654,346	\$66,731,697	\$41,184,080	621
Middle Rio Grande COG	\$51,507,034	\$26,925,458	\$16,617,294	250
State Total	\$15,716,158,804	\$8,215,669,741	\$5,070,376,087	76,424

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2030 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$194,948,416	\$101,909,876	\$62,894,617	882
South Plains COG	\$229,647,452	\$120,048,903	\$74,089,284	1,039
Nortex COG	\$74,959,743	\$39,185,434	\$24,183,650	339
North Central Texas COG	\$6,955,041,605	\$3,635,769,120	\$2,243,848,327	31,471
Ark-Tex COG	\$93,395,145	\$48,822,596	\$30,131,314	423
East Texas COG	\$294,758,702	\$154,086,007	\$95,095,595	1,334
West Central Texas COG	\$128,074,964	\$66,951,576	\$41,319,781	580
Rio Grande COG	\$356,812,168	\$186,524,644	\$115,115,399	1,615
Permian Basin COG	\$300,762,991	\$157,224,767	\$97,032,710	1,361
Concho Valley COG	\$73,105,876	\$38,216,319	\$23,585,552	331
Heart of Texas COG	\$147,259,464	\$76,980,332	\$47,509,119	666
Capital Area COG	\$1,933,219,168	\$1,010,596,191	\$623,698,727	8,748
Brazos Valley COG	\$220,290,001	\$115,157,267	\$71,070,366	997
Deep East Texas COG	\$93,136,256	\$48,687,261	\$30,047,790	421
South East Texas COG	\$158,940,067	\$83,086,402	\$51,277,537	719
Houston-Galveston Area COG	\$4,473,280,376	\$2,338,420,901	\$1,443,177,950	20,241
Golden Crescent COG	\$63,058,271	\$32,963,903	\$20,343,975	285
Alamo Area COG	\$1,840,521,700	\$962,138,308	\$593,792,499	8,328
South Texas COG	\$137,617,491	\$71,939,961	\$44,398,408	623
Coastal Bend COG	\$313,756,688	\$164,017,262	\$101,224,760	1,420
Lower Rio Grande Valley COG	\$448,056,517	\$234,222,905	\$144,552,818	2,027
Texoma COG	\$71,601,012	\$37,429,646	\$23,100,050	324
Central Texas COG	\$151,268,364	\$79,075,997	\$48,802,478	684
Middle Rio Grande COG	\$60,899,093	\$31,835,186	\$19,647,378	276
State Total	\$18,814,411,529	\$9,835,290,762	\$6,069,940,086	85,134

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector. by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2035 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$224,283,094	\$117,244,669	\$72,358,625	952
South Plains COG	\$266,565,863	\$139,348,114	\$85,999,969	1,131
Nortex COG	\$86,204,780	\$45,063,811	\$27,811,545	366
North Central Texas COG	\$8,323,959,323	\$4,351,375,014	\$2,685,491,081	35,321
Ark-Tex COG	\$107,410,011	\$56,148,910	\$34,652,816	456
East Texas COG	\$339,603,612	\$177,528,820	\$109,563,543	1,441
West Central Texas COG	\$146,876,381	\$76,780,074	\$47,385,528	623
Rio Grande COG	\$410,774,010	\$214,733,361	\$132,524,668	1,743
Permian Basin COG	\$351,529,011	\$183,762,858	\$113,410,937	1,492
Concho Valley COG	\$84,119,879	\$43,973,922	\$27,138,910	357
Heart of Texas COG	\$170,164,403	\$88,953,959	\$54,898,753	722
Capital Area COG	\$2,235,308,420	\$1,168,514,265	\$721,159,318	9,485
Brazos Valley COG	\$256,167,788	\$133,912,489	\$82,645,323	1,087
Deep East Texas COG	\$101,093,858	\$52,847,121	\$32,615,087	429
South East Texas COG	\$182,516,990	\$95,411,311	\$58,883,967	774
Houston-Galveston Area COG	\$5,136,252,741	\$2,684,991,718	\$1,657,067,315	21,795
Golden Crescent COG	\$72,177,934	\$37,731,234	\$23,286,178	306
Alamo Area COG	\$2,127,807,838	\$1,112,318,009	\$686,477,282	9,029
South Texas COG	\$159,394,739	\$83,324,084	\$51,424,224	676
Coastal Bend COG	\$361,425,713	\$188,936,389	\$116,603,829	1,534
Lower Rio Grande Valley COG	\$521,350,849	\$272,537,740	\$168,199,171	2,212
Texoma COG	\$81,911,322	\$42,819,392	\$26,426,381	348
Central Texas COG	\$174,918,176	\$91,439,008	\$56,432,424	742
Middle Rio Grande COG	\$70,276,884	\$36,737,455	\$22,672,858	298
State Total	\$21,992,093,620	\$11,496,433,725	\$7,095,129,732	93,319

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2040 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$251,784,770	\$131,621,253	\$81,231,266	1,010
South Plains COG	\$301,928,568	\$157,834,076	\$97,408,751	1,211
Nortex COG	\$96,744,663	\$50,573,566	\$31,211,941	388
North Central Texas COG	\$9,730,728,533	\$5,086,767,891	\$3,139,345,554	39,016
Ark-Tex COG	\$120,544,540	\$63,015,024	\$38,890,301	483
East Texas COG	\$381,793,308	\$199,583,611	\$123,174,860	1,531
West Central Texas COG	\$164,359,432	\$85,919,392	\$53,025,943	659
Rio Grande COG	\$461,443,253	\$241,220,862	\$148,871,672	1,850
Permian Basin COG	\$400,908,403	\$209,576,085	\$129,341,807	1,607
Concho Valley COG	\$94,451,197	\$49,374,650	\$30,472,019	379
Heart of Texas COG	\$191,881,592	\$100,306,685	\$61,905,192	769
Capital Area COG	\$2,521,794,135	\$1,318,275,542	\$813,585,867	10,111
Brazos Valley COG	\$290,686,961	\$151,957,492	\$93,781,963	1,166
Deep East Texas COG	\$107,084,653	\$55,978,828	\$34,547,848	429
South East Texas COG	\$204,530,214	\$106,918,790	\$65,985,914	820
Houston-Galveston Area COG	\$5,753,768,910	\$3,007,800,170	\$1,856,291,518	23,070
Golden Crescent COG	\$80,614,490	\$42,141,469	\$26,007,995	323
Alamo Area COG	\$2,400,245,881	\$1,254,735,823	\$774,371,745	9,624
South Texas COG	\$180,158,723	\$94,178,520	\$58,123,139	722
Coastal Bend COG	\$406,267,282	\$212,377,455	\$131,070,698	1,629
Lower Rio Grande Valley COG	\$592,051,986	\$309,496,974	\$191,008,902	2,374
Texoma COG	\$91,433,862	\$47,797,329	\$29,498,561	367
Central Texas COG	\$197,383,381	\$103,182,762	\$63,680,190	791
Middle Rio Grande COG	\$79,156,153	\$41,379,119	\$25,537,504	317
State Total	\$25,101,744,891	\$13,122,013,370	\$8,098,371,150	100,648

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector. by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2045 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$278,641,541	\$145,660,712	\$89,895,847	1,064
South Plains COG	\$337,122,715	\$176,231,923	\$108,763,151	1,287
Nortex COG	\$107,039,677	\$55,955,316	\$34,533,338	409
North Central Texas COG	\$11,224,603,293	\$5,867,695,458	\$3,621,302,179	42,851
Ark-Tex COG	\$133,371,250	\$69,720,226	\$43,028,478	509
East Texas COG	\$423,117,684	\$221,186,054	\$136,507,006	1,615
West Central Texas COG	\$181,309,041	\$94,779,852	\$58,494,256	692
Rio Grande COG	\$510,990,149	\$267,121,652	\$164,856,583	1,951
Permian Basin COG	\$450,715,039	\$235,612,655	\$145,410,516	1,721
Concho Valley COG	\$104,545,826	\$54,651,648	\$33,728,767	399
Heart of Texas COG	\$213,307,571	\$111,507,180	\$68,817,681	814
Capital Area COG	\$2,804,274,067	\$1,465,942,784	\$904,720,062	10,706
Brazos Valley COG	\$325,181,459	\$169,989,595	\$104,910,641	1,241
Deep East Texas COG	\$111,826,024	\$58,457,393	\$36,077,518	427
South East Texas COG	\$225,956,847	\$118,119,628	\$72,898,614	863
Houston-Galveston Area COG	\$6,352,776,148	\$3,320,933,023	\$2,049,544,336	24,252
Golden Crescent COG	\$88,755,323	\$46,397,115	\$28,634,406	339
Alamo Area COG	\$2,668,919,583	\$1,395,185,817	\$861,051,749	10,189
South Texas COG	\$200,746,082	\$104,940,624	\$64,765,071	766
Coastal Bend COG	\$450,193,802	\$235,340,177	\$145,242,353	1,719
Lower Rio Grande Valley COG	\$662,904,252	\$346,535,211	\$213,867,390	2,531
Texoma COG	\$100,608,348	\$52,593,319	\$32,458,450	384
Central Texas COG	\$219,586,156	\$114,789,330	\$70,843,290	838
Middle Rio Grande COG	\$87,913,848	\$45,957,231	\$28,362,928	336
State Total	\$28,264,405,724	\$14,775,303,925	\$9,118,714,610	107,902

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector. by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results from 2021-2045 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Job-Years
Panhandle COG	\$5,290,450,307	\$2,765,598,964	\$1,706,814,818	22,830
South Plains COG	\$6,282,491,935	\$3,284,191,738	\$2,026,869,114	27,111
Nortex COG	\$2,033,668,758	\$1,063,106,519	\$656,105,959	8,776
North Central Texas COG	\$196,028,931,880	\$102,474,719,437	\$63,243,214,898	845,938
Ark-Tex COG	\$2,533,858,726	\$1,324,582,344	\$817,478,167	10,935
East Texas COG	\$8,009,361,193	\$4,186,917,886	\$2,583,994,854	34,563
West Central Texas COG	\$3,465,741,490	\$1,811,726,889	\$1,118,123,900	14,956
Rio Grande COG	\$9,688,707,579	\$5,064,801,309	\$3,125,788,676	41,810
Permian Basin COG	\$8,280,184,964	\$4,328,491,835	\$2,671,368,517	35,732
Concho Valley COG	\$1,984,236,864	\$1,037,265,846	\$640,158,150	8,563
Heart of Texas COG	\$4,012,324,604	\$2,097,454,871	\$1,294,463,550	17,315
Capital Area COG	\$52,696,057,173	\$27,547,023,914	\$17,000,898,980	227,403
Brazos Valley COG	\$6,036,687,254	\$3,155,696,594	\$1,947,567,156	26,051
Deep East Texas COG	\$2,407,509,035	\$1,258,532,659	\$776,714,997	10,389
South East Texas COG	\$4,306,376,749	\$2,251,171,523	\$1,389,331,195	18,584
Houston-Galveston Area COG	\$121,161,765,718	\$63,337,680,971	\$39,089,431,918	522,858
Golden Crescent COG	\$1,703,465,926	\$890,491,986	\$549,575,313	7,351
Alamo Area COG	\$50,164,217,588	\$26,223,497,082	\$16,184,072,232	216,477
South Texas COG	\$3,757,582,959	\$1,964,287,903	\$1,212,278,332	16,215
Coastal Bend COG	\$8,524,491,547	\$4,456,203,843	\$2,750,187,157	36,786
Lower Rio Grande Valley COG	\$12,286,866,489	\$6,422,996,770	\$3,964,011,487	53,022
Texoma COG	\$1,933,269,284	\$1,010,622,389	\$623,714,895	8,343
Central Texas COG	\$4,124,232,132	\$2,155,954,871	\$1,330,567,363	17,798
Middle Rio Grande COG	\$1,657,615,574	\$866,523,575	\$534,782,988	7,153
State Total	\$518,370,095,727	\$270,979,541,719	\$167,237,514,618	2,236,959

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. A job-year is the equivalent of one person working for one year, though it could be multiple individuals working partial years. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector. by expenditure category and the current and projected activity in the Texas tourism sector.

Metropolitan Areas

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2025 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$72,283,092	\$37,786,206	\$23,320,104	351
Amarillo	\$123,496,045	\$64,557,933	\$39,842,521	601
Austin-Round Rock-Georgetown	\$1,562,714,493	\$816,913,747	\$504,165,827	7,599
Beaumont-Port Arthur	\$135,256,137	\$70,705,556	\$43,636,584	658
Brownsville-Harlingen	\$131,436,473	\$68,708,815	\$42,404,277	639
College Station-Bryan	\$157,524,399	\$82,346,358	\$50,820,811	766
Corpus Christi	\$232,186,940	\$121,376,428	\$74,908,578	1,129
Dallas-Plano-Irving	\$4,219,218,057	\$2,205,609,052	\$1,361,211,897	20,517
El Paso	\$282,195,221	\$147,518,409	\$91,042,342	1,372
Fort Worth-Arlington-Grapevine	\$1,414,508,877	\$739,438,811	\$456,351,458	6,878
Houston-The Woodlands-Sugar Land	\$3,757,237,721	\$1,964,107,428	\$1,212,166,951	18,271
Killeen-Temple	\$120,795,119	\$63,146,015	\$38,971,144	587
Laredo	\$105,553,581	\$55,178,455	\$34,053,891	513
Longview	\$73,625,000	\$38,487,692	\$23,753,033	358
Lubbock	\$171,238,535	\$89,515,464	\$55,245,291	833
McAllen-Edinburg-Mission	\$241,899,892	\$126,453,903	\$78,042,188	1,176
Midland	\$113,784,270	\$59,481,073	\$36,709,291	553
Odessa	\$76,772,458	\$40,133,036	\$24,768,472	373
San Angelo	\$49,207,575	\$25,723,409	\$15,875,438	239
San Antonio-New Braunfels	\$1,481,377,066	\$774,394,360	\$477,924,596	7,204
Sherman-Denison	\$45,375,111	\$23,719,977	\$14,639,002	221
Texarkana	\$39,277,218	\$20,532,285	\$12,671,688	191
Tyler	\$95,075,423	\$49,700,966	\$30,673,408	462
Victoria	\$35,779,622	\$18,703,906	\$11,543,288	174
Waco	\$105,807,266	\$55,311,070	\$34,135,735	515
Wichita Falls	\$48,695,955	\$25,455,958	\$15,710,379	237
Rural Areas	\$823,837,261	\$430,663,430	\$265,787,894	4,006
State Total	\$15,716,158,804	\$8,215,669,741	\$5,070,376,087	76,424

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2030 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$86,532,839	\$45,235,305	\$27,917,384	392
Amarillo	\$147,841,813	\$77,284,757	\$47,696,998	669
Austin-Round Rock-Georgetown	\$1,870,784,963	\$977,958,521	\$603,556,089	8,465
Beaumont-Port Arthur	\$161,920,266	\$84,644,311	\$52,239,014	733
Brownsville-Harlingen	\$157,347,601	\$82,253,936	\$50,763,773	712
College Station-Bryan	\$188,578,450	\$98,579,957	\$60,839,527	853
Corpus Christi	\$277,959,818	\$145,304,339	\$89,675,908	1,258
Dallas-Plano-Irving	\$5,050,986,430	\$2,640,418,495	\$1,629,558,541	22,855
El Paso	\$337,826,633	\$176,599,898	\$108,990,250	1,529
Fort Worth-Arlington-Grapevine	\$1,693,362,383	\$885,210,328	\$546,315,690	7,662
Houston-The Woodlands-Sugar Land	\$4,497,932,196	\$2,351,307,715	\$1,451,131,166	20,353
Killeen-Temple	\$144,608,431	\$75,594,497	\$46,653,838	654
Laredo	\$126,362,207	\$66,056,227	\$40,767,208	572
Longview	\$88,139,288	\$46,075,080	\$28,435,659	399
Lubbock	\$204,996,164	\$107,162,367	\$66,136,240	928
McAllen-Edinburg-Mission	\$289,587,562	\$151,382,778	\$93,427,272	1,310
Midland	\$136,215,478	\$71,207,055	\$43,946,088	616
Odessa	\$91,907,230	\$48,044,784	\$29,651,280	416
San Angelo	\$58,908,260	\$30,794,472	\$19,005,091	267
San Antonio-New Braunfels	\$1,773,412,835	\$927,056,945	\$572,141,714	8,025
Sherman-Denison	\$54,320,271	\$28,396,087	\$17,524,906	246
Texarkana	\$47,020,252	\$24,579,980	\$15,169,760	213
Tyler	\$113,818,405	\$59,498,917	\$36,720,303	515
Victoria	\$42,833,147	\$22,391,158	\$13,818,909	194
Waco	\$126,665,903	\$66,214,985	\$40,865,187	573
Wichita Falls	\$58,295,780	\$30,474,296	\$18,807,492	264
Rural Areas	\$986,246,923	\$515,563,574	\$318,184,798	4,463
State Total	\$18,814,411,529	\$9,835,290,762	\$6,069,940,086	85,134

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2035 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$101,147,905	\$52,875,374	\$32,632,523	429
Amarillo	\$172,811,729	\$90,337,856	\$55,752,838	733
Austin-Round Rock-Georgetown	\$2,186,753,383	\$1,143,131,971	\$705,494,402	9,279
Beaumont-Port Arthur	\$189,267,980	\$98,940,411	\$61,061,984	803
Brownsville-Harlingen	\$183,923,008	\$96,146,311	\$59,337,580	780
College Station-Bryan	\$220,428,628	\$115,229,735	\$71,115,090	935
Corpus Christi	\$324,906,167	\$169,845,685	\$104,821,826	1,379
Dallas-Plano-Irving	\$5,904,078,704	\$3,086,375,072	\$1,904,784,741	25,053
El Paso	\$394,884,258	\$206,426,945	\$127,398,286	1,676
Fort Worth-Arlington-Grapevine	\$1,979,364,808	\$1,034,718,964	\$638,586,318	8,399
Houston-The Woodlands-Sugar Land	\$5,257,615,728	\$2,748,434,588	\$1,696,221,665	22,310
Killeen-Temple	\$169,032,242	\$88,362,118	\$54,533,493	717
Laredo	\$147,704,300	\$77,212,871	\$47,652,633	627
Longview	\$103,025,676	\$53,856,985	\$33,238,333	437
Lubbock	\$239,619,231	\$125,261,681	\$77,306,398	1,017
McAllen-Edinburg-Mission	\$338,497,793	\$176,950,749	\$109,206,781	1,436
Midland	\$159,221,751	\$83,233,654	\$51,368,414	676
Odessa	\$107,430,010	\$56,159,364	\$34,659,267	456
San Angelo	\$68,857,639	\$35,995,540	\$22,214,978	292
San Antonio-New Braunfels	\$2,072,935,475	\$1,083,633,314	\$668,774,259	8,796
Sherman-Denison	\$63,494,757	\$33,192,077	\$20,484,795	269
Texarkana	\$54,961,793	\$28,731,444	\$17,731,875	233
Tyler	\$133,041,898	\$69,548,056	\$42,922,222	565
Victoria	\$50,067,502	\$26,172,938	\$16,152,870	212
Waco	\$148,059,289	\$77,398,443	\$47,767,160	628
Wichita Falls	\$68,141,714	\$35,621,288	\$21,984,005	289
Rural Areas	\$1,152,820,253	\$602,640,288	\$371,924,993	4,892
State Total	\$21,992,093,620	\$11,496,433,725	\$7,095,129,732	93,319

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2040 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$115,450,077	\$60,351,878	\$37,246,716	463
Amarillo	\$197,247,066	\$103,111,503	\$63,636,212	791
Austin-Round Rock-Georgetown	\$2,495,957,251	\$1,304,769,233	\$805,250,324	10,008
Beaumont-Port Arthur	\$216,030,207	\$112,930,447	\$69,696,063	866
Brownsville-Harlingen	\$209,929,465	\$109,741,265	\$67,727,830	842
College Station-Bryan	\$251,596,928	\$131,523,058	\$81,170,664	1,009
Corpus Christi	\$370,847,444	\$193,861,628	\$119,643,485	1,487
Dallas-Plano-Irving	\$6,738,907,173	\$3,522,784,189	\$2,174,118,639	27,020
El Paso	\$450,720,340	\$235,615,426	\$145,412,226	1,807
Fort Worth-Arlington-Grapevine	\$2,259,244,222	\$1,181,026,778	\$728,881,530	9,059
Houston-The Woodlands-Sugar Land	\$6,001,035,236	\$3,137,059,393	\$1,936,065,036	24,062
Killeen-Temple	\$192,933,164	\$100,856,398	\$62,244,453	774
Laredo	\$168,589,481	\$88,130,663	\$54,390,649	676
Longview	\$117,593,363	\$61,472,287	\$37,938,187	472
Lubbock	\$273,501,056	\$142,973,507	\$88,237,414	1,097
McAllen-Edinburg-Mission	\$386,360,907	\$201,971,338	\$124,648,467	1,549
Midland	\$181,735,484	\$95,002,776	\$58,631,836	729
Odessa	\$122,620,463	\$64,100,219	\$39,560,039	492
San Angelo	\$78,594,013	\$41,085,259	\$25,356,145	315
San Antonio-New Braunfels	\$2,366,045,651	\$1,236,857,549	\$763,338,004	9,487
Sherman-Denison	\$72,472,827	\$37,885,390	\$23,381,317	291
Texarkana	\$62,733,313	\$32,794,030	\$20,239,137	252
Tyler	\$151,853,837	\$79,382,054	\$48,991,364	609
Victoria	\$57,146,976	\$29,873,755	\$18,436,863	229
Waco	\$168,994,665	\$88,342,475	\$54,521,370	678
Wichita Falls	\$77,776,857	\$40,658,088	\$25,092,513	312
Rural Areas	\$1,315,827,424	\$687,852,782	\$424,514,666	5,276
State Total	\$25,101,744,891	\$13,122,013,370	\$8,098,371,150	100,648

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2045 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$129,996,055	\$67,955,833	\$41,939,567	496
Amarillo	\$222,098,947	\$116,102,899	\$71,653,971	848
Austin-Round Rock-Georgetown	\$2,810,432,053	\$1,469,161,890	\$906,706,763	10,729
Beaumont-Port Arthur	\$243,248,645	\$127,158,968	\$78,477,326	929
Brownsville-Harlingen	\$236,379,247	\$123,567,969	\$76,261,108	902
College Station-Bryan	\$283,296,547	\$148,094,130	\$91,397,653	1,082
Corpus Christi	\$417,571,873	\$218,286,965	\$134,717,806	1,594
Dallas-Plano-Irving	\$7,587,966,785	\$3,966,632,680	\$2,448,043,814	28,968
El Paso	\$507,508,247	\$265,301,477	\$163,733,245	1,937
Fort Worth-Arlington-Grapevine	\$2,543,894,682	\$1,329,828,670	\$820,715,986	9,712
Houston-The Woodlands-Sugar Land	\$6,757,127,658	\$3,532,309,003	\$2,179,996,965	25,796
Killeen-Temple	\$217,241,521	\$113,563,665	\$70,086,859	829
Laredo	\$189,830,688	\$99,234,569	\$61,243,526	725
Longview	\$132,409,381	\$69,217,406	\$42,718,158	505
Lubbock	\$307,960,456	\$160,987,264	\$99,354,769	1,176
McAllen-Edinburg-Mission	\$435,039,934	\$227,418,447	\$140,353,384	1,661
Midland	\$204,633,003	\$106,972,524	\$66,019,076	781
Odessa	\$138,069,864	\$72,176,441	\$44,544,354	527
San Angelo	\$88,496,361	\$46,261,741	\$28,550,859	338
San Antonio-New Braunfels	\$2,664,152,414	\$1,392,693,765	\$859,513,756	10,171
Sherman-Denison	\$81,603,944	\$42,658,709	\$26,327,215	312
Texarkana	\$70,637,313	\$36,925,870	\$22,789,140	270
Tyler	\$170,986,458	\$89,383,690	\$55,163,966	653
Victoria	\$64,347,133	\$33,637,659	\$20,759,791	246
Waco	\$190,286,923	\$99,473,067	\$61,390,717	726
Wichita Falls	\$87,576,249	\$45,780,750	\$28,254,011	334
Rural Areas	\$1,481,613,344	\$774,517,875	\$478,000,825	5,656
State Total	\$28,264,405,724	\$14,775,303,925	\$9,118,714,610	107,902

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

The Net Annual Impact of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results from 2021-2045 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Job-Years
Abilene	\$2,384,131,771	\$1,246,312,123	\$769,172,981	10,288
Amarillo	\$4,073,301,718	\$2,129,330,843	\$1,314,136,099	17,578
Austin-Round Rock-Georgetown	\$51,543,412,819	\$26,944,475,577	\$16,629,030,737	222,429
Beaumont-Port Arthur	\$4,461,187,845	\$2,332,099,493	\$1,439,276,636	19,252
Brownsville-Harlingen	\$4,335,202,875	\$2,266,240,468	\$1,398,631,133	18,708
College Station-Bryan	\$5,195,667,631	\$2,716,051,032	\$1,676,235,857	22,421
Corpus Christi	\$7,658,281,369	\$4,003,389,842	\$2,470,728,834	33,048
Dallas-Plano-Irving	\$139,163,551,039	\$72,748,168,915	\$44,897,201,041	600,542
El Paso	\$9,307,717,319	\$4,865,637,494	\$3,002,872,897	40,166
Fort Worth-Arlington-Grapevine	\$46,655,108,995	\$24,389,099,908	\$15,051,957,157	201,334
Houston-The Woodlands-Sugar Land	\$123,925,935,158	\$64,782,658,940	\$39,981,213,352	534,786
Killeen-Temple	\$3,984,216,370	\$2,082,761,207	\$1,285,395,220	17,193
Laredo	\$3,481,500,829	\$1,819,965,131	\$1,123,208,207	15,024
Longview	\$2,428,392,247	\$1,269,449,421	\$783,452,377	10,479
Lubbock	\$5,648,004,510	\$2,952,511,510	\$1,822,169,613	24,373
McAllen-Edinburg-Mission	\$7,978,646,163	\$4,170,861,511	\$2,574,085,514	34,431
Midland	\$3,752,975,757	\$1,961,879,474	\$1,210,791,948	16,195
Odessa	\$2,532,205,680	\$1,323,718,209	\$816,944,858	10,927
San Angelo	\$1,623,026,061	\$848,441,802	\$523,623,656	7,004
San Antonio-New Braunfels	\$48,860,639,602	\$25,542,047,731	\$15,763,509,502	210,852
Sherman-Denison	\$1,496,618,910	\$782,362,080	\$482,841,948	6,458
Texarkana	\$1,295,490,561	\$677,221,625	\$417,953,550	5,591
Tyler	\$3,135,897,051	\$1,639,299,706	\$1,011,708,880	13,533
Victoria	\$1,180,128,460	\$616,915,736	\$380,735,216	5,093
Waco	\$3,489,868,185	\$1,824,339,192	\$1,125,907,699	15,060
Wichita Falls	\$1,606,151,171	\$839,620,402	\$518,179,448	6,931
Rural Areas	\$27,172,835,631	\$14,204,682,344	\$8,766,550,257	117,261
State Total	\$518,370,095,727	\$270,979,541,719	\$167,237,514,618	2,236,959

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. A job-year is the equivalent of one person working for one year, though it could be multiple persons working partial years. This analysis is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis fully reflects the patterns of tourism outlays by expenditure category and the current and projected activity in the Texas tourism sector.

Total (Technology and Tourism Related)

Texas

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2025 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$814,411,668	\$215,795,209	\$141,844,972	1,811
Mining	\$848,501,814	\$194,798,457	\$101,518,095	465
Utilities	\$1,635,097,888	\$372,993,242	\$162,764,272	561
Construction	\$687,328,890	\$372,819,679	\$307,226,640	3,528
Manufacturing	\$12,853,077,339	\$5,241,672,587	\$3,205,640,187	36,853
Wholesale Trade	\$1,521,392,834	\$1,029,387,535	\$593,554,001	5,580
Retail Trade*	\$6,257,499,784	\$4,646,778,523	\$2,693,030,883	66,524
Transportation & Warehousing	\$2,353,692,676	\$1,673,739,958	\$1,106,951,811	11,536
Information	\$1,286,491,376	\$796,003,201	\$339,839,303	2,565
Financial Activities*	\$4,860,317,773	\$1,274,915,160	\$497,597,122	4,211
Business Services	\$1,608,895,826	\$1,021,226,975	\$833,059,523	8,428
Health Services	\$1,068,378,904	\$747,778,940	\$632,254,094	8,541
Other Services	\$4,170,432,366	\$2,199,896,031	\$1,593,244,576	29,622
Total, All Industries	\$39,965,519,138	\$19,787,805,496	\$12,208,525,479	180,226

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2030 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$1,575,241,345	\$414,003,935	\$272,931,855	3,320
Mining	\$1,813,323,799	\$415,788,554	\$214,873,542	920
Utilities	\$3,104,247,802	\$706,041,695	\$308,097,691	1,009
Construction	\$1,327,792,919	\$723,462,579	\$596,178,233	6,525
Manufacturing	\$28,802,274,408	\$12,041,566,444	\$7,411,331,946	78,508
Wholesale Trade	\$3,059,252,801	\$2,069,899,970	\$1,193,522,710	10,656
Retail Trade*	\$10,968,429,640	\$8,169,448,483	\$4,738,868,952	111,803
Transportation & Warehousing	\$3,684,844,195	\$2,588,991,293	\$1,712,266,297	17,118
Information	\$2,750,298,914	\$1,703,222,252	\$727,160,214	5,172
Financial Activities*	\$9,355,966,990	\$2,441,948,620	\$953,708,934	7,681
Business Services	\$3,269,364,468	\$2,081,324,186	\$1,697,827,194	16,291
Health Services	\$2,070,125,885	\$1,448,809,058	\$1,224,981,659	15,774
Other Services	\$6,449,369,596	\$3,384,992,279	\$2,508,184,151	44,690
Total, All Industries	\$78,230,532,762	\$38,189,499,346	\$23,559,933,380	319,469

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2035 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$2,421,079,860	\$634,280,835	\$418,632,475	4,778
Mining	\$2,889,911,045	\$662,368,503	\$341,320,774	1,361
Utilities	\$4,736,204,301	\$1,075,947,512	\$469,514,676	1,441
Construction	\$2,039,779,266	\$1,113,337,585	\$917,459,526	9,421
Manufacturing	\$46,624,270,522	\$19,645,046,911	\$12,114,817,911	118,804
Wholesale Trade	\$4,771,624,678	\$3,228,486,392	\$1,861,573,928	15,564
Retail Trade*	\$16,179,587,090	\$12,066,867,479	\$7,002,469,086	155,512
Transportation & Warehousing	\$5,144,747,306	\$3,591,575,193	\$2,375,339,417	22,495
Information	\$4,383,692,366	\$2,715,573,413	\$1,159,365,395	7,693
Financial Activities*	\$14,352,889,154	\$3,738,824,082	\$1,460,581,498	11,034
Business Services	\$5,118,985,252	\$3,262,310,158	\$2,661,209,116	23,892
Health Services	\$3,183,884,080	\$2,228,222,905	\$1,883,983,406	22,764
Other Services	\$8,945,699,052	\$4,682,466,364	\$3,512,145,903	59,210
Total, All Industries	\$120,792,353,973	\$58,645,307,332	\$36,178,413,111	453,968

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2040 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$3,317,729,072	\$867,714,329	\$573,053,665	6,128
Mining	\$4,035,018,098	\$924,632,739	\$475,777,740	1,769
Utilities	\$6,464,890,007	\$1,467,729,766	\$640,477,951	1,842
Construction	\$2,794,498,878	\$1,526,685,492	\$1,258,083,952	12,103
Manufacturing	\$65,604,963,139	\$27,747,815,934	\$17,127,915,644	156,168
Wholesale Trade	\$6,589,466,484	\$4,458,433,148	\$2,570,772,148	20,110
Retail Trade*	\$21,678,419,764	\$16,180,117,621	\$9,391,541,310	195,942
Transportation & Warehousing	\$6,672,954,662	\$4,639,893,619	\$3,068,659,713	27,456
Information	\$6,121,061,195	\$3,792,394,338	\$1,619,094,786	10,030
Financial Activities*	\$19,648,979,855	\$5,113,068,172	\$1,997,707,085	14,139
Business Services	\$7,083,234,044	\$4,516,610,188	\$3,684,396,522	30,935
Health Services	\$4,364,629,066	\$3,054,511,969	\$2,582,618,592	29,237
Other Services	\$11,555,841,456	\$6,038,434,221	\$4,563,598,808	72,612
Total, All Industries	\$165,931,685,719	\$80,328,041,537	\$49,553,697,915	578,468

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2045 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Jobs
Agriculture	\$4,307,877,264	\$1,125,409,978	\$743,543,890	7,467
Mining	\$5,303,563,321	\$1,215,158,258	\$624,688,925	2,174
Utilities	\$8,372,469,283	\$1,900,004,779	\$829,111,181	2,239
Construction	\$3,627,879,127	\$1,983,190,732	\$1,634,272,709	14,763
Manufacturing	\$86,657,187,538	\$36,740,072,382	\$22,692,115,263	193,244
Wholesale Trade	\$8,599,595,013	\$5,818,480,207	\$3,354,987,357	24,621
Retail Trade*	\$27,724,074,049	\$20,703,117,380	\$12,018,730,441	236,052
Transportation & Warehousing	\$8,340,199,326	\$5,782,344,056	\$3,824,235,551	32,377
Information	\$8,045,729,949	\$4,985,332,425	\$2,128,398,317	12,348
Financial Activities*	\$25,496,274,311	\$6,630,050,877	\$2,590,637,145	17,219
Business Services	\$9,255,993,146	\$5,904,187,104	\$4,816,303,714	37,923
Health Services	\$5,668,583,084	\$3,967,020,494	\$3,354,153,144	35,659
Other Services	\$14,400,292,202	\$7,515,423,276	\$5,711,264,168	85,905
Total, All Industries	\$215,799,717,612	\$104,269,791,949	\$64,322,441,804	701,990

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2021-2045 by Industry

Industry	Total Expenditures	Gross Product	Personal Income	Job-Years
Agriculture	\$53,712,071,746	\$14,080,543,450	\$9,291,183,784	94,715
Mining	\$63,660,340,467	\$14,592,147,665	\$7,523,551,920	26,498
Utilities	\$105,227,051,061	\$23,910,602,468	\$10,433,946,541	28,712.1
Construction	\$45,257,177,097	\$24,693,398,517	\$20,348,898,667	186,359
Manufacturing	\$1,023,998,562,134	\$430,822,630,060	\$265,583,859,356	2,278,075
Wholesale Trade	\$105,552,689,763	\$71,417,105,625	\$41,179,737,422	305,522
Retail Trade*	\$361,932,227,742	\$269,858,308,192	\$156,587,355,084	3,154,331
Transportation & Warehousing	\$116,419,570,047	\$81,385,262,288	\$53,825,302,734	474,316.5
Information	\$96,563,881,763	\$59,815,143,071	\$25,537,003,226	149,203
Financial Activities*	\$318,539,409,565	\$83,009,591,396	\$32,426,260,797	219,014
Business Services	\$113,151,453,363	\$72,095,919,260	\$58,811,795,411	467,717
Health Services	\$70,625,388,651	\$49,427,064,310	\$41,791,047,275	450,439
Other Services	\$202,715,720,049	\$106,170,041,526	\$79,426,116,183	1,241,452
Total, All Industries	\$2,677,355,543,448	\$1,301,277,757,827	\$802,766,058,400	9,076,353

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars. A job-year is equivalent to one person working for one year, though it could be multiple persons working partial years. Components may not sum due to rounding. Retail Trade includes Restaurants, Financial Activities includes Real Estate. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

Regions

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2025 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$333,756,470	\$166,802,805	\$102,918,184	1,525
South Plains COG	\$326,843,064	\$164,765,213	\$101,665,947	1,511
Nortex COG	\$130,768,622	\$65,301,205	\$40,290,990	597
North Central Texas COG	\$15,527,625,120	\$7,668,476,020	\$4,731,167,044	69,772
Ark-Tex COG	\$141,619,672	\$71,191,633	\$43,927,052	652
East Texas COG	\$579,006,232	\$287,677,785	\$177,492,725	2,624
West Central Texas COG	\$199,276,155	\$100,059,873	\$61,739,090	916
Rio Grande COG	\$443,879,431	\$225,597,544	\$139,208,011	2,076
Permian Basin COG	\$845,894,702	\$415,106,951	\$256,096,299	3,767
Concho Valley COG	\$108,429,657	\$54,567,325	\$33,669,640	500
Heart of Texas COG	\$253,504,297	\$126,638,798	\$78,136,590	1,158
Capital Area COG	\$6,186,032,678	\$3,026,348,104	\$1,867,043,472	27,430
Brazos Valley COG	\$283,929,295	\$143,912,941	\$88,802,074	1,323
Deep East Texas COG	\$141,500,773	\$71,339,321	\$44,018,902	654
South East Texas COG	\$298,214,208	\$148,462,597	\$91,600,159	1,355
Houston-Galveston Area COG	\$9,738,869,785	\$4,820,610,450	\$2,974,177,872	43,901
Golden Crescent COG	\$127,905,522	\$63,486,219	\$39,169,788	579
Alamo Area COG	\$2,769,238,079	\$1,392,256,526	\$859,058,359	12,758
South Texas COG	\$157,372,113	\$80,380,052	\$49,600,965	741
Coastal Bend COG	\$407,384,896	\$206,513,037	\$127,429,809	1,899
Lower Rio Grande Valley COG	\$508,732,300	\$259,887,616	\$160,371,744	2,396
Texoma COG	\$182,788,662	\$90,010,316	\$55,532,119	818
Central Texas COG	\$199,870,296	\$101,194,164	\$62,441,888	930
Middle Rio Grande COG	\$73,077,109	\$37,219,001	\$22,966,757	343
State Total	\$39,965,519,138	\$19,787,805,496	\$12,208,525,479	180,226

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2030 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$593,683,825	\$292,192,021	\$180,268,143	2,455
South Plains COG	\$547,156,119	\$271,568,504	\$167,552,545	2,291
Nortex COG	\$236,816,814	\$116,425,904	\$71,828,617	978
North Central Texas COG	\$31,167,387,661	\$15,190,241,141	\$9,371,102,032	126,964
Ark-Tex COG	\$243,585,693	\$120,495,637	\$74,342,070	1,015
East Texas COG	\$1,092,276,855	\$534,672,884	\$329,856,580	4,479
West Central Texas COG	\$344,030,999	\$170,008,833	\$104,889,558	1,431
Rio Grande COG	\$696,260,357	\$348,514,094	\$215,036,875	2,953
Permian Basin COG	\$1,780,362,772	\$863,310,589	\$532,574,272	7,196
Concho Valley COG	\$184,983,165	\$91,605,734	\$56,518,248	772
Heart of Texas COG	\$459,048,605	\$225,770,495	\$139,288,755	1,896
Capital Area COG	\$13,113,721,976	\$6,346,089,355	\$3,914,841,183	52,843
Brazos Valley COG	\$459,361,727	\$229,245,656	\$141,444,581	1,940
Deep East Texas COG	\$229,101,108	\$113,571,600	\$70,071,008	958
South East Texas COG	\$557,985,574	\$273,516,530	\$168,742,344	2,293
Houston-Galveston Area COG	\$19,006,983,029	\$9,274,108,185	\$5,721,383,203	77,562
Golden Crescent COG	\$242,837,306	\$118,756,986	\$73,264,531	994
Alamo Area COG	\$4,809,334,786	\$2,378,897,661	\$1,467,705,503	20,037
South Texas COG	\$236,845,637	\$119,293,028	\$73,607,646	1,014
Coastal Bend COG	\$655,677,363	\$327,186,616	\$201,874,049	2,768
Lower Rio Grande Valley COG	\$769,768,201	\$387,748,244	\$239,253,298	3,296
Texoma COG	\$367,090,968	\$178,441,609	\$110,081,786	1,489
Central Texas COG	\$323,593,862	\$161,312,147	\$99,528,977	1,364
Middle Rio Grande COG	\$112,638,360	\$56,525,891	\$34,877,578	480
State Total	\$78,230,532,762	\$38,189,499,346	\$23,559,933,380	319,469

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2035 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$866,797,080	\$423,861,378	\$261,491,895	3,297
South Plains COG	\$778,369,766	\$383,588,134	\$236,656,839	2,999
Nortex COG	\$350,456,725	\$171,168,554	\$105,597,921	1,330
North Central Texas COG	\$48,710,812,944	\$23,624,549,497	\$14,573,944,659	182,745
Ark-Tex COG	\$353,983,606	\$173,817,296	\$107,235,314	1,356
East Texas COG	\$1,647,435,161	\$801,644,426	\$494,542,645	6,215
West Central Texas COG	\$496,513,834	\$243,631,983	\$150,306,362	1,900
Rio Grande COG	\$965,060,596	\$479,246,715	\$295,686,928	3,766
Permian Basin COG	\$2,827,054,887	\$1,365,118,618	\$842,117,726	10,528
Concho Valley COG	\$266,843,592	\$131,172,248	\$80,926,274	1,024
Heart of Texas COG	\$682,683,989	\$333,535,512	\$205,766,294	2,593
Capital Area COG	\$20,862,720,083	\$10,057,777,056	\$6,204,406,933	77,480
Brazos Valley COG	\$648,395,164	\$321,088,909	\$198,103,116	2,519
Deep East Texas COG	\$318,656,919	\$156,671,273	\$96,657,915	1,223
South East Texas COG	\$849,842,695	\$413,868,521	\$255,320,925	3,210
Houston-Galveston Area COG	\$29,283,727,641	\$14,208,506,311	\$8,765,225,258	109,940
Golden Crescent COG	\$368,999,044	\$179,378,442	\$110,659,758	1,390
Alamo Area COG	\$7,040,320,596	\$3,456,638,179	\$2,132,546,353	26,961
South Texas COG	\$320,515,894	\$160,213,365	\$98,852,563	1,264
Coastal Bend COG	\$922,722,410	\$456,795,066	\$281,829,617	3,583
Lower Rio Grande Valley COG	\$1,050,652,310	\$525,127,840	\$324,006,699	4,144
Texoma COG	\$570,250,969	\$275,861,939	\$170,176,209	2,130
Central Texas COG	\$454,951,320	\$225,074,762	\$138,864,224	1,764
Middle Rio Grande COG	\$154,586,748	\$76,971,307	\$47,490,684	606
State Total	\$120,792,353,973	\$58,645,307,332	\$36,178,413,111	453,968

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2040 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$1,142,098,803	\$556,491,629	\$343,308,058	4,030
South Plains COG	\$1,009,517,386	\$495,505,410	\$305,697,737	3,611
Nortex COG	\$465,932,655	\$226,755,268	\$139,887,758	1,641
North Central Texas COG	\$67,479,778,699	\$32,645,426,719	\$20,138,612,407	234,952
Ark-Tex COG	\$469,271,077	\$229,432,232	\$141,542,993	1,667
East Texas COG	\$2,216,704,981	\$1,075,229,265	\$663,307,608	7,756
West Central Texas COG	\$648,503,049	\$316,959,534	\$195,540,608	2,302
Rio Grande COG	\$1,239,124,050	\$612,341,074	\$377,793,245	4,489
Permian Basin COG	\$3,919,485,819	\$1,888,690,708	\$1,165,085,880	13,546
Concho Valley COG	\$349,950,472	\$171,302,497	\$105,681,920	1,246
Heart of Texas COG	\$916,612,739	\$446,158,580	\$275,240,271	3,228
Capital Area COG	\$29,125,288,088	\$14,013,836,965	\$8,644,708,485	100,374
Brazos Valley COG	\$843,237,371	\$415,642,318	\$256,433,155	3,040
Deep East Texas COG	\$405,981,876	\$198,616,786	\$122,532,562	1,443
South East Texas COG	\$1,168,945,941	\$567,151,537	\$349,875,610	4,092
Houston-Galveston Area COG	\$40,158,987,529	\$19,426,454,314	\$11,983,964,454	139,803
Golden Crescent COG	\$502,307,439	\$243,379,275	\$150,139,404	1,754
Alamo Area COG	\$9,357,513,889	\$4,574,841,953	\$2,822,344,051	33,229
South Texas COG	\$404,093,394	\$201,043,294	\$124,041,543	1,482
Coastal Bend COG	\$1,197,508,355	\$589,968,822	\$363,983,934	4,314
Lower Rio Grande Valley COG	\$1,339,564,854	\$666,220,626	\$411,050,109	4,910
Texoma COG	\$785,583,497	\$379,055,296	\$233,831,530	2,722
Central Texas COG	\$588,694,439	\$289,921,902	\$178,868,251	2,119
Middle Rio Grande COG	\$196,999,317	\$97,615,535	\$60,226,341	717
State Total	\$165,931,685,719	\$80,328,041,537	\$49,553,697,915	578,468

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2045 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$1,434,611,103	\$697,305,642	\$430,172,180	4,726
South Plains COG	\$1,251,027,266	\$612,360,026	\$377,784,153	4,182
Nortex COG	\$588,324,786	\$285,631,338	\$176,206,560	1,933
North Central Texas COG	\$88,365,598,901	\$42,680,463,348	\$26,328,868,206	287,224
Ark-Tex COG	\$596,148,288	\$290,563,936	\$179,253,582	1,975
East Texas COG	\$2,825,134,093	\$1,367,462,063	\$843,575,223	9,225
West Central Texas COG	\$806,681,176	\$393,216,229	\$242,581,575	2,673
Rio Grande COG	\$1,531,483,754	\$754,115,551	\$465,253,612	5,184
Permian Basin COG	\$5,089,227,473	\$2,449,176,017	\$1,510,823,634	16,415
Concho Valley COG	\$437,928,127	\$213,746,370	\$131,864,662	1,455
Heart of Texas COG	\$1,173,716,249	\$569,827,707	\$351,527,845	3,857
Capital Area COG	\$38,295,978,583	\$18,403,083,277	\$11,352,215,811	123,139
Brazos Valley COG	\$1,053,165,712	\$517,393,918	\$319,203,318	3,548
Deep East Texas COG	\$495,891,329	\$241,738,758	\$149,132,687	1,644
South East Texas COG	\$1,536,910,364	\$743,725,081	\$458,796,713	5,016
Houston-Galveston Area COG	\$52,173,779,723	\$25,187,360,281	\$15,537,618,426	169,407
Golden Crescent COG	\$650,362,450	\$314,403,933	\$193,951,574	2,118
Alamo Area COG	\$11,861,110,351	\$5,781,828,515	\$3,566,905,844	39,309
South Texas COG	\$490,919,261	\$243,415,345	\$150,181,736	1,686
Coastal Bend COG	\$1,493,607,151	\$733,271,700	\$452,386,140	5,024
Lower Rio Grande Valley COG	\$1,649,833,602	\$817,511,775	\$504,384,296	5,657
Texoma COG	\$1,025,127,066	\$493,786,652	\$304,603,886	3,313
Central Texas COG	\$731,379,499	\$359,024,310	\$221,497,051	2,460
Middle Rio Grande COG	\$241,771,304	\$119,380,173	\$73,653,092	823
State Total	\$215,799,717,612	\$104,269,791,949	\$64,322,441,804	701,990

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results from 2021-2045 by Council of Governments Region

Council of Governments (COG) Region	Total Expenditures	Gross Product	Personal Income	Jobs
Panhandle COG	\$19,537,008,573	\$9,564,256,909	\$5,900,494,974	67,962
South Plains COG	\$17,600,093,584	\$8,685,110,397	\$5,358,368,594	62,964
Nortex COG	\$7,831,797,913	\$3,830,055,287	\$2,362,869,005	27,144
North Central Texas COG	\$1,077,780,601,844	\$523,259,015,864	\$322,799,552,057	3,639,216
Ark-Tex COG	\$7,974,284,662	\$3,920,830,106	\$2,418,946,105	28,169
East Texas COG	\$36,652,601,992	\$17,855,875,187	\$11,015,546,411	125,302
West Central Texas COG	\$11,156,427,451	\$5,481,830,379	\$3,381,988,372	39,319
Rio Grande COG	\$21,910,199,357	\$10,897,069,049	\$6,723,361,268	80,527
Permian Basin COG	\$61,719,925,645	\$29,830,687,577	\$18,402,127,893	205,022
Concho Valley COG	\$5,995,528,852	\$2,951,510,791	\$1,820,939,872	21,270
Heart of Texas COG	\$15,298,190,390	\$7,483,228,730	\$4,616,621,120	53,067
Capital Area COG	\$459,534,212,977	\$221,695,912,973	\$136,759,585,166	1,516,215
Brazos Valley COG	\$14,664,373,448	\$7,272,949,772	\$4,487,251,177	53,382
Deep East Texas COG	\$7,236,847,404	\$3,563,160,841	\$2,198,300,485	25,688
South East Texas COG	\$18,991,700,817	\$9,259,214,679	\$5,712,168,401	65,105
Houston-Galveston Area COG	\$649,168,412,803	\$315,309,877,986	\$194,515,813,269	2,195,517
Golden Crescent COG	\$8,230,906,499	\$4,005,478,419	\$2,471,021,707	28,029
Alamo Area COG	\$157,496,897,044	\$77,444,161,071	\$47,778,996,388	556,494
South Texas COG	\$7,301,898,070	\$3,655,684,915	\$2,255,598,667	27,443
Coastal Bend COG	\$20,866,025,984	\$10,345,757,628	\$6,383,096,038	75,883
Lower Rio Grande Valley COG	\$23,913,506,506	\$11,971,392,884	\$7,386,480,873	89,854
Texoma COG	\$12,665,060,284	\$6,131,983,969	\$3,782,772,551	42,340
Central Texas COG	\$10,315,008,090	\$5,110,280,215	\$3,152,911,665	37,409
Middle Rio Grande COG	\$3,514,033,259	\$1,752,432,200	\$1,081,246,342	13,034
State Total	\$2,677,355,543,448	\$1,301,277,757,827	\$802,766,058,400	9,076,353

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. A job-year is equivalent to one person working for one year, though it could be multiple persons working partial years. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

Metropolitan Areas

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2025 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$103,772,341	\$52,813,318	\$32,589,419	486
Amarillo	\$215,362,086	\$108,397,699	\$66,884,617	994
Austin-Round Rock-Georgetown	\$6,104,803,812	\$2,984,462,643	\$1,841,195,409	27,042
Beaumont-Port Arthur	\$298,383,228	\$148,552,098	\$91,655,399	1,356
Brownsville-Harlingen	\$176,217,123	\$90,078,771	\$55,586,108	831
College Station-Bryan	\$233,724,082	\$118,709,918	\$73,251,289	1,092
Corpus Christi	\$346,546,531	\$175,950,433	\$108,571,975	1,619
Dallas-Plano-Irving	\$12,818,371,149	\$6,309,245,832	\$3,892,496,788	57,327
El Paso	\$419,898,304	\$213,232,256	\$131,577,233	1,962
Fort Worth-Arlington-Grapevine	\$2,635,326,087	\$1,322,029,951	\$815,716,633	12,104
Houston-The Woodlands-Sugar Land	\$9,678,708,159	\$4,789,916,392	\$2,955,237,284	43,618
Killeen-Temple	\$188,040,855	\$95,236,626	\$58,765,897	875
Laredo	\$135,148,246	\$69,301,445	\$42,765,508	640
Longview	\$195,625,473	\$96,708,034	\$59,665,634	880
Lubbock	\$277,038,875	\$140,004,874	\$86,389,149	1,286
McAllen-Edinburg-Mission	\$328,567,220	\$167,812,771	\$103,553,968	1,547
Midland	\$580,076,929	\$282,002,487	\$173,969,268	2,549
Odessa	\$149,823,541	\$74,994,040	\$46,272,113	686
San Angelo	\$85,006,654	\$42,807,233	\$26,413,414	393
San Antonio-New Braunfels	\$2,669,094,226	\$1,341,189,691	\$827,546,294	12,288
Sherman-Denison	\$139,105,453	\$68,449,414	\$42,229,882	622
Texarkana	\$53,983,716	\$27,550,433	\$17,000,758	254
Tyler	\$239,351,566	\$118,551,570	\$73,143,174	1,080
Victoria	\$61,558,941	\$31,006,160	\$19,131,802	284
Waco	\$222,199,363	\$110,855,015	\$68,397,429	1,013
Wichita Falls	\$95,577,629	\$47,828,552	\$29,510,676	437
Rural Areas	\$1,514,207,547	\$760,117,839	\$469,008,357	6,961
State Total	\$39,965,519,138	\$19,787,805,496	\$12,208,525,479	180,226

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2030 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$161,795,764	\$81,151,830	\$50,072,113	688
Amarillo	\$368,421,800	\$182,548,628	\$112,627,902	1,539
Austin-Round Rock-Georgetown	\$13,035,066,704	\$6,305,710,764	\$3,889,923,639	52,497
Beaumont-Port Arthur	\$560,862,149	\$275,024,988	\$169,673,319	2,306
Brownsville-Harlingen	\$265,332,219	\$133,785,714	\$82,550,604	1,138
College Station-Bryan	\$372,447,845	\$186,325,019	\$114,964,138	1,578
Corpus Christi	\$554,350,915	\$277,202,057	\$171,035,619	2,348
Dallas-Plano-Irving	\$26,273,784,020	\$12,768,235,948	\$7,876,795,484	106,557
El Paso	\$668,588,588	\$334,444,155	\$206,354,808	2,833
Fort Worth-Arlington-Grapevine	\$4,659,543,511	\$2,300,713,674	\$1,419,453,938	19,361
Houston-The Woodlands-Sugar Land	\$18,999,195,041	\$9,271,514,267	\$5,719,787,293	77,545
Killeen-Temple	\$305,142,050	\$152,203,397	\$93,909,227	1,287
Laredo	\$197,383,745	\$99,948,704	\$61,673,423	852
Longview	\$383,107,845	\$186,838,224	\$115,263,914	1,562
Lubbock	\$459,461,583	\$228,596,844	\$141,041,811	1,931
McAllen-Edinburg-Mission	\$500,036,104	\$251,811,781	\$155,375,840	2,140
Midland	\$1,300,684,286	\$626,907,945	\$386,724,298	5,209
Odessa	\$272,335,878	\$134,147,872	\$82,763,058	1,127
San Angelo	\$145,198,477	\$71,973,377	\$44,405,863	607
San Antonio-New Braunfels	\$4,675,445,005	\$2,311,947,506	\$1,426,396,790	19,470
Sherman-Denison	\$282,129,818	\$137,110,006	\$84,583,936	1,144
Texarkana	\$82,301,179	\$41,416,534	\$25,555,211	352
Tyler	\$464,713,577	\$226,951,027	\$140,011,364	1,899
Victoria	\$104,964,173	\$52,040,957	\$32,108,074	439
Waco	\$409,312,622	\$201,097,974	\$124,066,330	1,688
Wichita Falls	\$171,396,653	\$84,447,623	\$52,100,367	710
Rural Areas	\$2,557,531,209	\$1,265,402,531	\$780,715,018	10,660
State Total	\$78,230,532,762	\$38,189,499,346	\$23,559,933,380	319,469

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2035 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$223,191,174	\$111,116,139	\$68,557,722	875
Amarillo	\$532,521,651	\$261,996,489	\$161,638,648	2,046
Austin-Round Rock-Georgetown	\$20,811,248,201	\$10,031,002,803	\$6,187,883,402	77,264
Beaumont-Port Arthur	\$856,346,691	\$417,279,753	\$257,426,236	3,238
Brownsville-Harlingen	\$360,966,274	\$180,633,847	\$111,452,822	1,427
College Station-Bryan	\$521,954,921	\$259,122,322	\$159,873,708	2,036
Corpus Christi	\$779,552,234	\$386,809,182	\$238,653,461	3,038
Dallas-Plano-Irving	\$41,447,819,995	\$20,048,348,245	\$12,367,598,266	154,798
El Paso	\$935,490,086	\$464,411,648	\$286,533,418	3,649
Fort Worth-Arlington-Grapevine	\$6,871,461,117	\$3,369,296,118	\$2,078,645,512	26,257
Houston-The Woodlands-Sugar Land	\$29,363,382,611	\$14,252,045,529	\$8,792,102,252	110,303
Killeen-Temple	\$430,064,798	\$212,930,524	\$131,372,196	1,670
Laredo	\$263,240,651	\$132,348,443	\$81,662,427	1,048
Longview	\$586,696,660	\$284,671,580	\$175,613,872	2,203
Lubbock	\$655,435,997	\$323,695,289	\$199,708,067	2,535
McAllen-Edinburg-Mission	\$685,822,931	\$342,699,189	\$211,446,951	2,704
Midland	\$2,111,822,439	\$1,015,042,161	\$626,144,624	7,803
Odessa	\$409,074,876	\$200,108,536	\$123,452,790	1,557
San Angelo	\$210,036,855	\$103,368,247	\$63,773,119	808
San Antonio-New Braunfels	\$6,878,306,366	\$3,376,823,879	\$2,083,304,574	26,337
Sherman-Denison	\$440,602,157	\$213,153,032	\$131,491,804	1,646
Texarkana	\$112,533,199	\$56,205,329	\$34,678,850	443
Tyler	\$709,103,112	\$344,452,568	\$212,494,159	2,667
Victoria	\$151,687,004	\$74,667,194	\$46,066,037	583
Waco	\$615,782,098	\$300,602,344	\$185,448,123	2,336
Wichita Falls	\$252,931,969	\$123,805,796	\$76,379,685	964
Rural Areas	\$3,575,277,904	\$1,758,671,145	\$1,085,010,384	13,734
State Total	\$120,792,353,973	\$58,645,307,332	\$36,178,413,111	453,968

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2040 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$285,031,427	\$141,278,483	\$87,165,436	1,038
Amarillo	\$700,596,697	\$343,317,025	\$211,804,444	2,499
Austin-Round Rock-Georgetown	\$29,128,654,098	\$14,014,266,687	\$8,644,969,235	100,369
Beaumont-Port Arthur	\$1,179,980,595	\$572,941,127	\$353,448,780	4,137
Brownsville-Harlingen	\$459,124,378	\$228,660,582	\$141,081,952	1,687
College Station-Bryan	\$675,915,944	\$334,014,060	\$206,075,094	2,448
Corpus Christi	\$1,013,757,567	\$500,667,379	\$308,893,364	3,668
Dallas-Plano-Irving	\$57,756,874,734	\$27,869,275,743	\$17,191,994,125	200,118
El Paso	\$1,209,883,610	\$597,898,815	\$368,882,897	4,383
Fort Worth-Arlington-Grapevine	\$9,178,789,401	\$4,483,131,043	\$2,765,749,577	32,536
Houston-The Woodlands-Sugar Land	\$40,362,058,691	\$19,534,622,984	\$12,050,728,487	140,645
Killeen-Temple	\$557,976,159	\$275,060,048	\$169,700,130	2,012
Laredo	\$329,451,789	\$164,896,418	\$101,742,792	1,222
Longview	\$797,072,124	\$385,729,108	\$237,952,573	2,777
Lubbock	\$856,357,970	\$421,121,023	\$259,809,764	3,074
McAllen-Edinburg-Mission	\$878,283,586	\$436,723,757	\$269,453,011	3,218
Midland	\$2,958,654,237	\$1,420,187,455	\$876,057,972	10,150
Odessa	\$553,662,396	\$269,799,492	\$166,443,457	1,954
San Angelo	\$276,596,878	\$135,575,010	\$83,641,148	987
San Antonio-New Braunfels	\$9,176,282,346	\$4,486,798,268	\$2,768,029,520	32,593
Sherman-Denison	\$609,560,455	\$294,191,159	\$181,480,816	2,113
Texarkana	\$143,429,440	\$71,303,357	\$43,993,207	525
Tyler	\$958,215,259	\$464,189,064	\$286,355,493	3,345
Victoria	\$199,613,580	\$97,860,822	\$60,373,965	713
Waco	\$835,336,866	\$406,330,343	\$250,668,819	2,938
Wichita Falls	\$336,052,601	\$163,910,905	\$101,119,708	1,188
Rural Areas	\$4,514,472,892	\$2,214,291,380	\$1,366,082,150	16,129
State Total	\$165,931,685,719	\$80,328,041,537	\$49,553,697,915	578,468

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results as of 2045 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Jobs
Abilene	\$350,094,704	\$172,990,003	\$106,728,782	1,194
Amarillo	\$880,951,457	\$430,516,582	\$265,596,722	2,935
Austin-Round Rock-Georgetown	\$38,384,253,028	\$18,445,489,512	\$11,378,374,678	123,422
Beaumont-Port Arthur	\$1,553,428,798	\$752,395,361	\$464,147,774	5,079
Brownsville-Harlingen	\$564,370,998	\$280,090,245	\$172,810,216	1,941
College Station-Bryan	\$841,363,252	\$414,411,409	\$255,672,647	2,849
Corpus Christi	\$1,268,822,057	\$624,515,523	\$385,295,591	4,291
Dallas-Plano-Irving	\$75,980,572,707	\$36,604,545,988	\$22,580,395,003	245,627
El Paso	\$1,504,551,051	\$741,104,324	\$457,227,192	5,096
Fort Worth-Arlington-Grapevine	\$11,691,593,952	\$5,695,239,400	\$3,513,473,365	38,690
Houston-The Woodlands-Sugar Land	\$52,536,701,687	\$25,378,965,499	\$15,655,875,669	170,820
Killeen-Temple	\$695,061,384	\$341,586,023	\$210,740,036	2,343
Laredo	\$398,619,749	\$198,871,645	\$122,703,601	1,386
Longview	\$1,024,020,208	\$494,706,631	\$305,176,681	3,330
Lubbock	\$1,071,151,778	\$525,192,895	\$324,011,156	3,593
McAllen-Edinburg-Mission	\$1,086,221,465	\$538,171,431	\$332,038,072	3,724
Midland	\$3,862,863,130	\$1,852,731,384	\$1,142,871,941	12,370
Odessa	\$711,958,093	\$346,043,974	\$213,476,641	2,345
San Angelo	\$347,888,509	\$170,047,322	\$104,906,683	1,160
San Antonio-New Braunfels	\$11,668,148,738	\$5,689,527,428	\$3,509,970,099	38,694
Sherman-Denison	\$798,581,762	\$384,810,607	\$237,379,989	2,583
Texarkana	\$176,456,228	\$87,424,144	\$53,938,466	605
Tyler	\$1,221,096,912	\$590,511,166	\$364,279,142	3,979
Victoria	\$250,947,954	\$122,686,195	\$75,688,437	837
Waco	\$1,080,382,141	\$524,239,022	\$323,403,098	3,546
Wichita Falls	\$424,271,884	\$206,456,642	\$127,365,233	1,401
Rural Areas	\$5,425,343,984	\$2,656,521,595	\$1,638,894,889	18,149
State Total	\$215,799,717,612	\$104,269,791,949	\$64,322,441,804	701,990

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.

The Net Annual Impact of Incremental Technology Oriented Growth and of Incremental Tourism and Related Activity Associated with the Implementation in 2021 of a Comprehensive Non-Discrimination Act (CNDA) on Business Activity in Texas

Results from 2021-2045 by Metropolitan Area

Metropolitan Area	Total Expenditures	Gross Product	Personal Income	Job-Years
Abilene	\$5,073,365,021	\$2,529,652,047	\$1,560,787,623	18,808
Amarillo	\$11,994,700,452	\$5,909,533,712	\$3,645,914,207	42,672
Austin-Round Rock-Georgetown	\$458,138,860,446	\$220,977,540,881	\$136,316,272,266	1,510,472
Beaumont-Port Arthur	\$19,141,504,228	\$9,337,752,912	\$5,760,639,757	65,757
Brownsville-Harlingen	\$8,229,472,064	\$4,124,640,488	\$2,544,965,504	31,045
College Station-Bryan	\$11,824,876,525	\$5,879,602,739	\$3,627,639,225	43,422
Corpus Christi	\$17,660,458,409	\$8,776,569,380	\$5,415,014,085	64,734
Dallas-Plano-Irving	\$914,093,765,263	\$442,555,764,499	\$273,009,100,126	3,055,424
El Paso	\$21,223,090,517	\$10,551,821,143	\$6,510,335,064	77,913
Fort Worth-Arlington-Grapevine	\$153,872,772,724	\$75,554,876,775	\$46,613,024,773	540,986
Houston-The Woodlands-Sugar Land	\$650,901,169,475	\$316,262,651,278	\$195,103,983,461	2,204,178
Killeen-Temple	\$9,754,698,749	\$4,836,516,545	\$2,984,020,039	35,474
Laredo	\$6,021,006,455	\$3,031,852,927	\$1,870,748,360	23,069
Longview	\$13,039,295,447	\$6,333,121,643	\$3,906,924,963	44,093
Lubbock	\$14,797,839,880	\$7,318,941,617	\$4,515,555,784	53,359
McAllen-Edinburg-Mission	\$15,597,720,967	\$7,806,791,150	\$4,816,870,207	58,567
Midland	\$45,796,167,664	\$22,025,481,879	\$13,586,812,619	149,383
Odessa	\$9,092,258,121	\$4,454,267,484	\$2,747,991,026	31,709
San Angelo	\$4,724,953,808	\$2,328,725,344	\$1,436,720,882	16,830
San Antonio-New Braunfels	\$153,827,856,485	\$75,633,879,716	\$46,662,125,591	543,375
Sherman-Denison	\$9,783,798,094	\$4,737,120,524	\$2,922,292,813	32,711
Texarkana	\$2,564,700,732	\$1,282,906,567	\$791,563,892	9,611
Tyler	\$15,698,378,907	\$7,634,292,706	\$4,709,656,825	53,329
Victoria	\$3,412,816,854	\$1,682,386,035	\$1,037,959,287	12,166
Waco	\$13,775,847,653	\$6,732,953,239	\$4,153,734,292	47,645
Wichita Falls	\$5,658,187,396	\$2,773,309,070	\$1,710,954,825	19,767
Rural Areas	\$81,655,981,109	\$40,204,805,528	\$24,804,450,903	289,857
State Total	\$2,677,355,543,448	\$1,301,277,757,827	\$802,766,058,400	9,076,353

Source: US Multi-Regional Impact Assessment System, The Perryman Group

Notes: Monetary values given in 2019 US dollars per year. A job-year is equivalent to one person working for one year, though it could be multiple people working partial years. Components may not sum due to rounding. This analysis is based on extensive modeling and academic research related to (1) the net impact of non-discrimination policies on patent generation and (2) the resulting effects on economic growth. The tourism portion is based on extensive survey information from travelers and tourism professionals related to the net effects of non-discrimination policies on tourism and convention activity. The analysis is fully adjusted to reflect the patterns of technology investment in more than 500 industrial sectors and the current and projected patterns in the composition of the Texas economy.