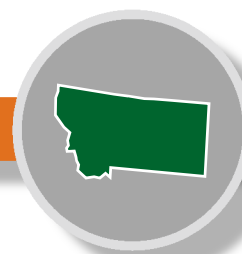


## Montana



Montana’s bioscience industry employed more than 2,500 in 2012 while operating 368 business establishments across the state. The state’s largest component subsector is bioscience-related distribution which accounts for half of industry employment. Since 2007, job gains in three of Montana’s five bioscience subsectors have offset losses in the others, the modest job gains were in drugs and pharmaceuticals, medical devices, and in research, testing, and medical labs. State inventors have been issued 158 patents in bioscience-related technology areas including drugs and pharmaceuticals, surgical and medical instruments, and biochemistry.

### Bioscience Performance Metrics

#### Summary of State Performance in Selected Bioscience-related Metrics

Metric	Montana	United States	Quintile
<b>Bioscience Industry, 2012</b>			
Bioscience Industry Employment	2,559	1,619,746	V
Bioscience Industry Location Quotient	0.50	n/a	V
Bioscience Industry Establishments	368	73,088	IV
<b>Academic Bioscience R&amp;D Expenditures, FY 2012</b>			
Bioscience R&D (\$ thousands)	\$93,048	\$38,139,876	V
Bioscience Share of Total R&D	50%	61%	IV
Bioscience R&D Per Capita	\$92	\$119	III
<b>NIH Funding, FY 2013</b>			
Funding (\$ thousands)	\$29,181	\$22,293,255	V
Funding Per Capita	\$29	\$70	IV
<b>Bioscience Venture Capital Investments, 2009–13 (\$ millions)</b>	\$17.5	\$49,401.7	IV
<b>Bioscience and Related Patents, 2009–13</b>	158	100,238	V

State ranking figures for bioscience performance metrics are calculated as quintiles, where I = top quintile, III = middle quintile, and V = bottom quintile.

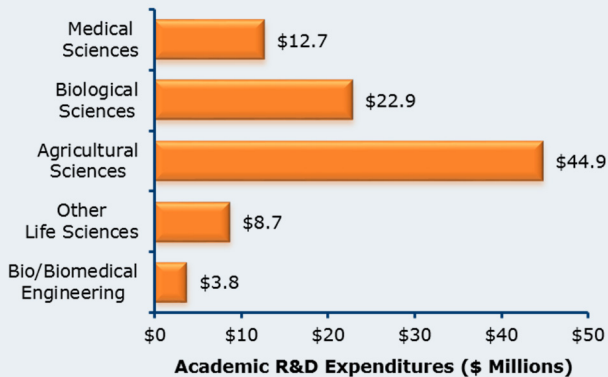
For source notes, see end of State Profile.

Industry Subsector	Montana		United States	
	2012	2007-2012 Change	2012	2007-2012 Change
<b>Agricultural Feedstock &amp; Chemicals</b>				
Establishments	14	0.0%	1,772	5.2%
Employment	116	-40.9%	76,404	-1.0%
Location Quotient	0.48		n/a	
Direct-Effect Employment Multiplier	14.2		18.1	
Total Employment Impact	1,640		1,382,637	
Average Annual Wage	\$47,006	-3.6%	\$75,828	14.2%
<b>Bioscience-Related Distribution</b>				
Establishments	224	0.4%	36,793	1.4%
Employment	1,254	-13.0%	442,016	-3.9%
Location Quotient	0.95		n/a	
Direct-Effect Employment Multiplier	2.6		2.7	
Total Employment Impact	3,212		1,199,015	
Average Annual Wage	\$60,670	15.7%	\$85,188	11.5%
<b>Drugs and Pharmaceuticals</b>				
Establishments	12	20.0%	3,057	12.0%
Employment	344	111.0%	284,331	-10.9%
Location Quotient	0.39		n/a	
Direct-Effect Employment Multiplier	4.8		9.9	
Total Employment Impact	1,666		2,673,265	
Average Annual Wage	\$36,660	-22.0%	\$106,576	13.9%
<b>Medical Devices and Equipment</b>				
Establishments	30	30.4%	7,235	12.0%
Employment	259	17.0%	349,432	1.4%
Location Quotient	0.24		n/a	
Direct-Effect Employment Multiplier	2.8		3.9	
Total Employment Impact	718		1,318,459	
Average Annual Wage	\$39,256	8.5%	\$75,695	10.7%
<b>Research, Testing, and Medical Laboratories</b>				
Establishments	88	25.1%	24,231	31.0%
Employment	587	8.4%	467,563	9.7%
Location Quotient	0.40		n/a	
Direct-Effect Employment Multiplier	2.5		2.7	
Total Employment Impact	1,494		1,284,196	
Average Annual Wage	\$60,267	15.5%	\$91,248	15.9%
<b>Total Bioscience Industry</b>				
Establishments	368	8.1%	73,088	11.4%
Employment	2,559	-0.1%	1,619,746	-0.4%
Location Quotient	0.50		n/a	
Direct-Effect Employment Multiplier	3.6		4.9	
Total Employment Impact	9,195		7,857,572	
Average Annual Wage	\$54,569	8.4%	\$88,202	12.8%
<b>Total Private Sector</b>				
Establishments	40,195	0.1%	8,699,564	-0.5%
Employment	347,797	-2.5%	111,137,206	-3.1%
Average Annual Wage	\$35,966	16.2%	\$49,130	11.1%

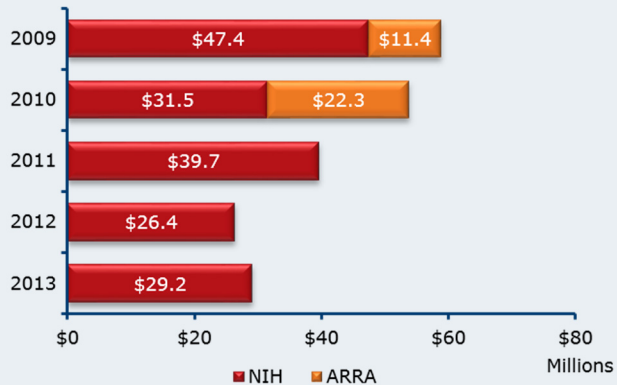
Note: U.S. employment metrics include Puerto Rico. Estimates of total impacts do not include Puerto Rico.

## Bioscience Research in Montana

### Bioscience Academic R&D Expenditures, FY 2012

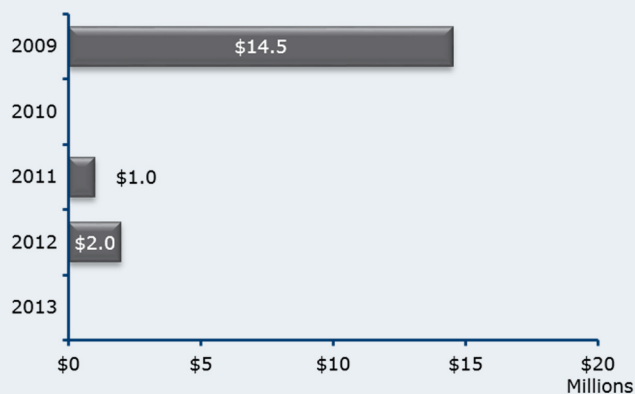


### NIH Awards, 2009–2013



## Bioscience Venture Capital in Montana

### Bioscience-Related Venture Capital Investments, 2009–2013

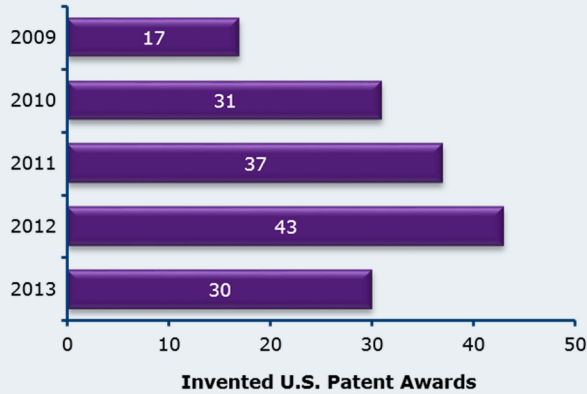


### Bioscience-Related Venture Capital Investments by Segment, 2009–2013

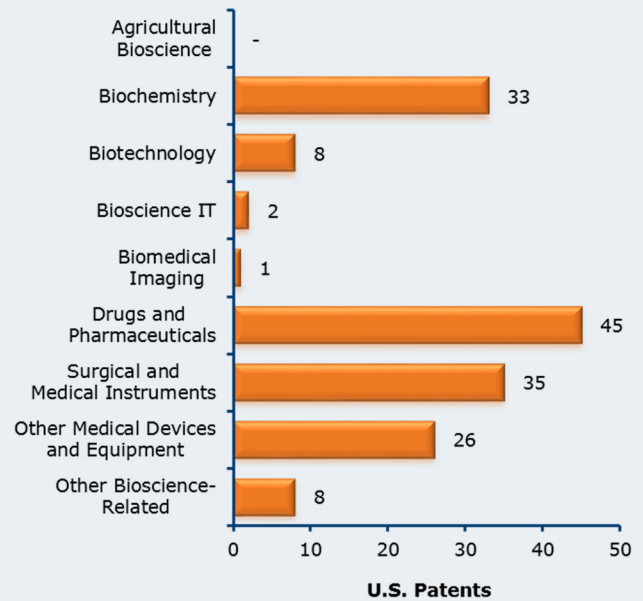


## Bioscience Patents in Montana

### Bioscience-Related Patents, 2009–2013



### Bioscience-Related Patents by Segment, 2009–2013



## Source Notes

**Employment, Establishments, and Wages:** U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW), enhanced file from the IMPLAN Group, LLC.

**Employment Multipliers:** IMPLAN Group, LLC state-level Input/Output models.

**Academic R&D Expenditures:** National Science Foundation (NSF) Higher Education Research and Development (HERD) Survey.

**NIH Funding:** National Institutes of Health, *NIH Awards by Location & Organization* (summary information within RePORT database), and NIH-managed funding for FY 2009 and FY 2010 from the American Recovery and Reinvestment Act (ARRA) website.

**Venture Capital:** Thomson Reuters Thomson ONE venture capital database.

**Patents:** U.S. Patent & Trademark Office data from Thomson Reuters Delphion Patent Analysis Database.

For a more detailed discussion of the data and methodology used, please see the Appendix to the full national report.