

What if Montana measured the economic impact of our international visitors as a service export...as it is done at the national level?

In 2013, tourism would have been Montana's #2 export, surpassed only by our state's overseas trade of bulk grain that year!!



2013 MONTANA EXPORT SUMMARY

TOTAL - \$2.43 Billion in Combined Exports

| TOTAL EXPORTS - 2013 | TOTAL EXPORTS - 2012 | % CHANGE 2012-2013 |
|----------------------|----------------------|--------------------|
| \$2,427,655,596 | \$2,492,192,053 | -2.59% |

2013 International Traveler Expenditures

\$306.2 million*

\$131.9 million**

*Canadian

**other than Canadian

2013 Int'l Traveler Total Expenditures (Goods & Services)

\$438 million

| COMMODITY EXPORTS TO PARTNER COUNTRIES* | 2013 TOTAL (IN MILLIONS) | % CHANGE (2012-2013) |
|---|--------------------------|----------------------|
| Canada | \$ 585.72 | -8.2% |
| Republic of Korea | \$ 168.49 | -2.4% |
| China | \$ 101.04 | -4.6% |
| Switzerland | \$ 75.83 | 4.3% |
| Taiwan | \$ 73.83 | -0.3% |
| Belgium | \$ 65.41 | -21.0% |
| Mexico | \$ 55.84 | 5.8% |
| Japan | \$ 48.69 | 9.8% |
| India | \$ 31.45 | 8.8% |
| Germany | \$ 26.68 | -28.9% |

*These figures do not include bulk wheat exports

| RANK | COMMODITY | 2013 TOTAL (IN MILLIONS) | % CHANGE (2012-2013) |
|------|---|--------------------------|----------------------|
| 1 | Bulk Wheat | \$ 929.07 | 1.5% |
| 2 | Mineral Fuel – coal, light oils, etc. | \$ 332.35 | -16.4% |
| 3 | Inorganic Chemicals – copper oxides, silicon, etc. | \$ 234.87 | -2.6% |
| 4 | Industrial Machinery – semiconductor devices | \$ 169.78 | -23.4% |
| 5 | Vehicles, Parts, etc. | \$ 87.50 | -12.1% |
| 6 | Edible Vegetables – peas, lentils, etc. | \$ 80.94 | 29.8% |
| 7 | Salt, Sulfur, Earth & Stone – Portland cement, talc, etc. | \$ 71.05 | -11.6% |
| 8 | Pharmaceutical Products – diagnostics, cultures, etc. | \$ 51.96 | -19.6% |
| 9 | Optic, Medical or Surgical Instruments | \$ 48.01 | 7.7% |
| 10 | Ores, Slag & Ash – precious metal ores & concentrates, etc. | \$ 42.15 | 100.1% |
| 11 | Wood & Articles of Wood – wood charcoal, etc. | \$ 33.75 | -7.5% |
| 12 | Cereals – identity preserved wheat, barely, etc. | \$ 30.31 | 36.1% |
| 13 | Milling Products – malt, starch, etc. | \$ 28.14 | 23.4% |
| 14 | Tobacco & Manufactured Tobacco Substitutes | \$ 26.47 | n/a |
| 15 | Articles of Plastics – pipes, hoses, polymers, resins, etc. | \$ 23.50 | 80.7% |
| 16 | Food Industry Residues; Prep Animal Feed | \$ 22.31 | 30.0% |
| 17 | Preparations of Cereals – pasta, bread, pastries, etc. | \$ 20.34 | -8.5% |
| 18 | Electric Machinery | \$ 19.41 | 4.9% |
| 19 | Misc. Chemical Products – herbicides, insecticides, etc. | \$ 18.01 | -27.6% |
| 20 | Articles of Iron or Steel | \$ 16.89 | 24.1% |

WHERE MONTANA'S WHEAT GOES In 2013, Montana sent 122 million bushels of wheat to exporting facilities in the U.S. According to the Montana Wheat & Barley Committee, Japan purchased over 50% of that Montana wheat with secondary markets being Taiwan, South Korea, the Philippines, & Indonesia. (Roughly 75% of all Montana wheat is exported to Asia).



2013 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana

| | Overseas Visitors ¹ | Canadian Visitors | Domestic Visitors |
|----------------------------|--------------------------------|-------------------|-------------------|
| Sample size | 196 | 1,480 | 8,558 |
| Nonresident Travelers | 209,000 | 1,600,000 | 9,210,000 |
| Group Size (people/group) | 2.63 | 2.44 | 2.23 |
| Length of Stay (nights) | 7.11 | 2.37 | 4.99 |
| % of All Travelers in 2013 | 2% | 15% | 83% |

| Expenditure Category ^{2,3} | Avg. Daily Group Expend. ⁴ | % of Daily Expend. | Avg. Trip Expend | Avg. Daily Group Expend. ⁴ | % of Daily Expend. | Avg. Trip Expend | Avg. Daily Group Expend. ⁴ | % of Daily Expend. | Avg. Trip Expend |
|--------------------------------------|---------------------------------------|--------------------|-------------------|---------------------------------------|--------------------|------------------|---------------------------------------|--------------------|------------------|
| Gasoline | \$49.54 | 29% | \$352.20 | \$52.48 | 30% | \$124.26 | \$51.24 | 35% | \$255.85 |
| Retail Sales | \$38.91 | 23% | \$276.62 | \$48.63 | 28% | \$115.14 | \$24.70 | 17% | \$123.32 |
| Restaurant, Bar | \$31.80 | 18% | \$226.07 | \$29.60 | 17% | \$70.07 | \$26.72 | 18% | \$133.40 |
| Hotel, B&B, etc. | \$13.79 | 8% | \$98.07 | \$17.09 | 10% | \$40.46 | \$12.10 | 8% | \$60.41 |
| Groceries, Snacks | \$11.17 | 6% | \$79.43 | \$9.01 | 5% | \$21.32 | \$10.19 | 7% | \$50.87 |
| Outfitter, Guide | \$10.92 | 6% | \$77.63 | \$3.97 | 2% | \$9.40 | \$3.46 | 2% | \$17.27 |
| Rental Cabin, Condo | \$7.39 | 4% | \$52.53 | \$1.98 | 1% | \$4.69 | \$3.47 | 2% | \$17.30 |
| Auto Rental | \$5.50 | 3% | \$39.11 | \$1.23 | 1% | \$2.92 | \$1.30 | 1% | \$6.47 |
| Licenses, Entrance Fees | \$0.91 | 1% | \$6.44 | \$1.94 | 1% | \$4.60 | \$1.63 | 1% | \$8.13 |
| Campground, RV Park | \$0.77 | <1% | \$5.51 | \$4.71 | 3% | \$11.16 | \$7.58 | 5% | \$37.82 |
| Gambling | \$0.64 | <1% | \$4.54 | \$1.86 | 1% | \$4.41 | \$0.90 | 1% | \$4.47 |
| Misc. Services | \$0.48 | <1% | \$3.38 | \$0.37 | <1% | \$0.87 | \$0.56 | <1% | \$2.81 |
| Auto Repair | \$0.19 | <1% | \$1.33 | \$0.40 | <1% | \$0.94 | \$0.38 | <1% | \$1.88 |
| Farmers Market | \$0.00 | 0% | \$0.00 | \$0.89 | 1% | \$2.11 | \$0.49 | <1% | \$2.44 |
| Transportation Fares | \$0.00 | 0% | \$0.00 | \$0.01 | <1% | \$0.02 | \$0.06 | <1% | \$0.30 |
| Total Average Daily per Group | \$172.01 | | \$1,222.86 | \$174.17 | | \$412.36 | \$144.76 | | \$722.77 |
| Total 2013 Expenditures | \$131,900,000 | | | \$306,160,000 | | | \$3,186,430,000 | | |
| % of Total | 4% | | | 8% | | | 88% | | |

¹Numerous overseas visitors may pre-pay for many of their trip expenses, which are not reflected here; these figures represent only expenditures made in MT. ²Data is collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures. ³Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures. ⁴Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.