

Siena College Research Institute

Sponsored by The Business Council of New York State

2017: 462 Upstate NY, 143 Buffalo CEOs; 2016: 440 Upstate NY, 119 Buffalo CEOs

2015: 531 Upstate NY, 148 Buffalo CEOs; 2014: 524 Upstate NY, 156 Buffalo CEOs

Q1. Which of the following industry categories best describes the type of business your company is engaged in?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Engineering and Construction	13%	17%	19%	12%	18%	20%	11%	16%	12%	17%
Food and Beverage	6%	3%	3%	7%	5%	4%	9%	5%	6%	3%
Financial	3%	6%	8%	4%	7%	9%	3%	5%	6%	8%
Manufacturing	21%	19%	19%	24%	18%	16%	30%	24%	24%	21%
Retail	10%	10%	10%	12%	11%	10%	9%	12%	12%	12%
Service	40%	36%	34%	33%	32%	31%	24%	25%	23%	23%
Wholesale and Distribution	8%	8%	8%	9%	10%	10%	10%	11%	16%	15%
Other	0%	0%	0%	0%	0%	0%	3%	2%	NA	NA
Refused	0%	0%	0%	0%	0%	0%	0%	0%	1%	1%

Q2. As you think about the current business or economic conditions in New York State as compared to six months ago, would you say they are considerably better, a little better, about the same, a little worse, or considerably worse?

	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate 2014
Considerably better	3%	4%	4%	3%	1%	1%	4%	2%	9%	4%
A little better	22%	23%	24%	27%	26%	26%	22%	24%	30%	32%
About the same	46%	47%	48%	47%	48%	48%	46%	44%	36%	44%
A little worse	24%	20%	18%	21%	21%	21%	20%	22%	19%	16%
Considerably worse	4%	5%	5%	3%	4%	4%	8%	8%	6%	4%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Q3. Looking forward from today through next year, that is, the entire 2018 year, how would you describe your expectations for the economy in New York State?

	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate 2014
Considerably better	3%	5%	5%	6%	5%	4%	4%	3%	9%	5%
A little better	28%	29%	30%	39%	37%	36%	26%	27%	34%	37%
About the same	34%	36%	37%	34%	37%	38%	39%	40%	36%	39%
A little worse	26%	24%	23%	18%	19%	20%	25%	24%	16%	15%
Considerably worse	9%	6%	5%	3%	3%	3%	5%	6%	4%	4%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%

Q4. Now thinking specifically about your industry, how would you describe the current business or economic conditions in New York State as compared with six months ago?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Considerably better	2%	3%	4%	3%	2%	2%	3%	3%	4%	4%
A little better	15%	18%	19%	20%	18%	16%	19%	21%	24%	24%
About the same	43%	45%	45%	42%	47%	49%	40%	39%	37%	42%
A little worse	32%	27%	24%	28%	27%	26%	29%	29%	25%	24%
Considerably worse	7%	7%	7%	8%	7%	7%	9%	8%	10%	6%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Q5. And looking forward from today through the next year, how would you describe your expectations for your industry here in New York?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Considerably better	2%	5%	6%	6%	5%	5%	4%	3%	6%	5%
A little better	19%	24%	26%	31%	30%	31%	22%	24%	27%	30%
About the same	37%	35%	35%	33%	35%	35%	37%	41%	31%	36%
A little worse	31%	27%	24%	23%	24%	25%	31%	25%	30%	24%
Considerably worse	10%	8%	7%	8%	6%	5%	6%	7%	5%	5%
Prefer not to answer	0%	1%	1%	0%	0%	0%	0%	0%	0%	0%
Q6. Now thinking specifically about your company, what are your expectations for revenue through the year 2018? Do you believe your revenue will...?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Grow substantially	3%	4%	5%	4%	3%	2%	3%	3%	6%	4%
Grow moderately	45%	44%	43%	43%	48%	50%	39%	42%	41%	45%
Stay about the same	28%	35%	39%	34%	33%	33%	38%	36%	32%	33%
Decrease moderately	20%	13%	10%	16%	14%	13%	18%	17%	19%	16%
Decrease substantially	3%	3%	3%	3%	2%	2%	3%	2%	1%	1%
Prefer not to answer	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%

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Q7. Continuing to focus on your company, please think quickly about profitability. Between today and the end of the calendar year 2018 do you expect your profits to...?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Grow substantially	5%	3%	3%	5%	2%	1%	1%	2%	5%	3%
Grow moderately	32%	36%	38%	38%	41%	43%	31%	33%	31%	38%
Stay about the same	34%	35%	36%	33%	34%	34%	34%	36%	36%	35%
Decrease moderately	24%	20%	18%	20%	20%	20%	26%	25%	25%	22%
Decrease substantially	4%	4%	4%	4%	3%	3%	5%	4%	3%	3%
Prefer not to answer	1%	1%	1%	0%	0%	0%	1%	1%	0%	0%
Q8. Businesses and the executives that direct them strive to enhance profitability in many ways. Through which of the following strategies do you plan to MOST enhance your company's profitability over the next year?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Market/demand growth	39%	42%	43%	50%	48%	48%	34%	39%	37%	43%
Cost reduction	31%	25%	22%	21%	25%	26%	33%	31%	33%	29%
Price increase	11%	13%	14%	16%	13%	11%	16%	12%	17%	15%
New technology	11%	11%	10%	8%	9%	10%	9%	9%	8%	7%
Other	7%	8%	9%	4%	4%	4%	7%	7%	4%	6%
Prefer not to answer	0%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Q9. Please indicate which of the following are major areas of concentration for your company now and through 2018.										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Expansion of existing markets	60%	57%	56%	49%	53%	54%	57%	54%	53%	56%
Growth in existing products	50%	54%	56%	56%	58%	59%	53%	52%	56%	54%
Entry into new markets	26%	28%	29%	35%	32%	31%	30%	30%	33%	33%
New product lines	24%	24%	24%	23%	23%	24%	30%	27%	24%	25%
Acquisition of new businesses	20%	15%	12%	16%	15%	15%	11%	15%	9%	14%
Technology innovation	36%	34%	34%	31%	28%	27%	25%	27%	21%	26%
Construction of new locations	9%	8%	8%	10%	10%	9%	10%	9%	7%	10%
Internal restructuring	29%	28%	27%	27%	25%	24%	24%	28%	24%	25%
Expansion into export markets	6%	5%	4%	4%	4%	4%	NA	NA	NA	NA
Other	8%	5%	4%	3%	4%	4%	5%	0%	4%	3%
Prefer not to answer	0%	0%	0%	1%	2%	3%	1%	1%	1%	1%

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Q10. Do you intend to invest between today through 2018 in any fixed assets for your company designed to meet growing demand, reduce costs or enhance productivity?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Yes	56%	56%	56%	52%	51%	50%	54%	55%	57%	58%
No	29%	28%	27%	36%	36%	37%	36%	34%	35%	31%
Not sure	15%	16%	17%	12%	13%	13%	10%	11%	8%	11%
Q11. Now thinking about the people that work for your company, between today and the end of 2018, do you plan to...?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Substantially increase your workforce	3%	2%	1%	3%	2%	1%	1%	1%	2%	2%
Moderately increase your workforce	36%	35%	34%	37%	37%	37%	32%	32%	29%	30%
Remain about the same	48%	53%	56%	50%	52%	53%	53%	57%	58%	59%
Decrease your workforce	12%	9%	8%	10%	8%	7%	14%	9%	11%	9%
Prefer not to answer	1%	1%	1%	0%	1%	2%	1%	1%	1%	1%
Q12. And thinking about other challenges that your company faces, which of the following are you concerned with?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Existing U.S. competition	22%	24%	25%	28%	27%	27%	19%	25%	28%	29%
Governmental regulation	68%	61%	58%	73%	68%	67%	72%	68%	69%	69%
Taxation	60%	61%	61%	58%	57%	57%	72%	65%	63%	65%
Foreign competition	15%	10%	8%	10%	9%	9%	12%	11%	11%	12%
Energy costs	14%	18%	20%	24%	24%	24%	18%	19%	25%	30%
Risk management	26%	26%	25%	24%	22%	22%	28%	26%	19%	22%
Adverse economic conditions	33%	37%	39%	43%	42%	41%	43%	48%	39%	46%
Health care costs	74%	78%	80%	78%	79%	80%	77%	78%	74%	77%
Global political instability	15%	15%	16%	11%	12%	12%	15%	15%	13%	16%
Rising supplier costs	31%	32%	33%	24%	27%	28%	28%	25%	36%	35%
Human resources	43%	43%	44%	41%	36%	35%	45%	38%	29%	30%
Cash flow	31%	27%	25%	24%	28%	29%	27%	26%	26%	29%
Ability to obtain suitable financing	11%	10%	9%	6%	8%	10%	7%	8%	10%	8%
U.S. trade agreements	11%	9%	8%	7%	8%	9%	NA	NA	NA	NA
Don't know/None of the Above	2%	2%	2%	0%	1%	1%	0%	0%	0%	0%

Q13. Thinking specifically about New York and the relationship between the state government and businesses like yours, overall would you say the government of the State of New York is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?

	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Excellent	1%	1%	1%	2%	1%	1%	2%	1%	2%	1%
Good	6%	7%	8%	10%	8%	6%	6%	4%	6%	4%
Fair	22%	25%	27%	30%	29%	29%	26%	29%	26%	30%
Poor	67%	64%	62%	56%	61%	64%	62%	64%	63%	63%
Don't know	3%	3%	3%	2%	1%	1%	3%	2%	3%	2%

Q14. Of the following, what would you like to see the Governor and Legislature of New York focus on?

	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Personal Income Tax Reform	61%	58%	57%	55%	55%	54%	58%	54%	NA	NA
Business Income Tax Reform	65%	63%	62%	66%	62%	60%	68%	63%	NA	NA
Estate Tax Reform	34%	29%	28%	34%	31%	30%	34%	34%	NA	NA
Sales Tax Reform	30%	24%	22%	24%	22%	22%	32%	25%	NA	NA
Infrastructure Development	49%	52%	54%	45%	43%	43%	35%	42%	37%	42%
Energy Infrastructure	24%	24%	24%	NA	NA	NA	NA	NA	NA	NA
Business Development Incentives	28%	31%	32%	39%	36%	35%	32%	36%	34%	38%
Ethics Reform	39%	43%	45%	58%	52%	50%	41%	42%	42%	40%
Spending Cuts	58%	53%	51%	50%	51%	52%	65%	58%	72%	64%
Other	18%	16%	15%	14%	13%	13%	16%	14%	16%	16%
Prefer not to answer	0%	0%	0%	1%	1%	1%	0%	0%	0%	0%

Q15. How confident are you in the ability of the government of the State of New York to improve the business climate for businesses like yours here in New York over the next year? Are you...?

	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Very confident	0%	1%	1%	2%	1%	1%	1%	1%	3%	1%
Somewhat confident	10%	15%	17%	16%	14%	13%	14%	12%	13%	12%
Not very confident	51%	48%	47%	44%	48%	51%	50%	50%	38%	47%
Not at all confident	38%	35%	33%	39%	36%	35%	33%	37%	44%	38%
Prefer not to answer	1%	2%	2%	0%	1%	0%	1%	1%	1%	1%

Q16. And thinking about the efforts of the federal government, overall would you say the federal government is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?

	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Excellent	5%	6%	6%	1%	1%	1%	0%	0%	1%	0%
Good	24%	22%	20%	3%	6%	7%	0%	2%	3%	4%
Fair	34%	35%	35%	31%	29%	28%	17%	22%	21%	21%
Poor	31%	33%	34%	61%	59%	60%	78%	73%	74%	72%
Don't know	6%	5%	5%	5%	5%	4%	5%	2%	3%	2%

Q17. How confident are you in the ability of the federal government to improve the business climate for businesses like yours here in New York over the next year? Are you:

	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Very confident	4%	3%	3%	4%	5%	5%	0%	0%	1%	1%
Somewhat confident	36%	36%	36%	34%	27%	25%	5%	7%	8%	8%
Not very confident	42%	42%	42%	35%	44%	47%	47%	50%	37%	45%
Not at all confident	17%	18%	18%	24%	22%	22%	47%	41%	51%	44%
Prefer not to answer	1%	1%	1%	2%	2%	1%	1%	1%	4%	2%

Consider each of the following national issues. Indicate whether over the last year you think the country has been on the right track, moved in the wrong direction or is neither on the right track nor moving in the wrong direction.

Q18A. The cost of health care

	Buffalo 2017	Upstate Total 2017	Other MSAs 2017
Right track	16%	16%	16%
Wrong direction	60%	61%	61%
Neither	16%	18%	18%
Don't know	8%	6%	5%

Q18B. Our immigration system										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Right track	41%	38%	37%							
Wrong direction	45%	46%	46%							
Neither	9%	12%	13%							
Don't know	4%	4%	4%							
Q18C. The federal budget deficit										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Right track	13%	15%	16%							
Wrong direction	57%	59%	59%							
Neither	18%	18%	17%							
Don't know	11%	8%	7%							
Q18D. The taxes businesses pay										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Right track	43%	43%	43%							
Wrong direction	32%	32%	31%							
Neither	17%	18%	19%							
Don't know	7%	7%	7%							
Q18E. The health of our economy										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Right track	53%	48%	46%							
Wrong direction	24%	27%	28%							
Neither	14%	18%	20%							
Don't know	9%	7%	6%							

Q18F. Safeguarding the environment										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Right track	25%	23%	21%							
Wrong direction	38%	39%	40%							
Neither	27%	28%	29%							
Don't know	10%	10%	10%							
And consider each of the following New York State issues. Indicate whether over the last year you think the state has been on the right track, moved in the wrong direction or is neither on the right track nor moving in the wrong direction.										
Q19A. Infrastructure development										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Right track	24%	25%	26%							
Wrong direction	39%	37%	37%							
Neither	22%	24%	25%							
Don't know	15%	13%	12%							
Q19B. Ethics reform										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Right track	7%	9%	10%							
Wrong direction	61%	61%	62%							
Neither	20%	19%	18%							
Don't know	12%	10%	10%							
Q19C. State spending										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Right track	5%	9%	11%							
Wrong direction	77%	70%	67%							
Neither	13%	15%	15%							
Don't know	5%	6%	7%							

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Q19D. The regulatory environment										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Right track	3%	8%	10%							
Wrong direction	72%	66%	63%							
Neither	15%	17%	18%							
Don't know	9%	8%	8%							
Q19E. Workers Compensation reform										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Right track	10%	13%	14%							
Wrong direction	60%	56%	54%							
Neither	15%	16%	17%							
Don't know	15%	15%	15%							
Q19F. Energy costs										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Right track	10%	14%	16%							
Wrong direction	38%	36%	35%							
Neither	34%	32%	32%							
Don't know	17%	18%	18%							
Q20A. How would you rate your local area on each of the following - Suitable workforce										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Excellent	10%	9%	8%	13%	9%	7%	12%	12%	11%	12%
Good	35%	37%	38%	39%	39%	38%	38%	42%	53%	50%
Fair	37%	37%	37%	34%	40%	42%	33%	34%	23%	29%
Poor	17%	15%	14%	12%	11%	12%	16%	12%	11%	7%
Refused	1%	2%	3%	2%	2%	1%	1%	1%	2%	2%

Q20B. How would you rate your local area on each of the following - Consumer confidence										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Excellent	3%	4%	4%	2%	2%	2%	3%	2%	3%	2%
Good	49%	50%	50%	37%	41%	42%	42%	38%	26%	32%
Fair	42%	39%	38%	53%	45%	43%	45%	49%	55%	54%
Poor	6%	5%	5%	7%	9%	10%	9%	9%	14%	11%
Refused	1%	2%	2%	2%	3%	3%	1%	2%	3%	2%
Q20C. How would you rate your local area on each of the following - Transportation infrastructure										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Excellent	4%	4%	4%	4%	3%	2%	5%	4%	3%	4%
Good	41%	38%	37%	43%	39%	38%	47%	40%	39%	44%
Fair	43%	45%	45%	31%	37%	40%	35%	40%	42%	38%
Poor	10%	11%	12%	18%	19%	19%	11%	15%	13%	12%
Refused	1%	2%	2%	3%	3%	2%	2%	2%	3%	2%
Q20D. How would you rate your local area on each of the following - Airline service										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015		
Excellent	13%	8%	5%	16%	7%	3%	16%	8%		
Good	58%	45%	39%	60%	42%	36%	66%	47%		
Fair	22%	34%	39%	21%	35%	42%	16%	31%		
Poor	4%	11%	14%	2%	13%	17%	2%	14%		
Refused	3%	3%	3%	2%	3%	3%	1%	1%		
Q20E. How would you rate your local area on each of the following - Taxi/car service										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015		
Excellent	5%	3%	3%	0%	1%	1%	5%	3%		
Good	38%	34%	33%	20%	15%	14%	39%	27%		
Fair	38%	38%	38%	37%	35%	35%	37%	38%		
Poor	15%	21%	23%	38%	43%	45%	13%	26%		
Refused	5%	4%	4%	5%	6%	5%	6%	5%		

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Q20F. How would you rate your local area on each of the following - Ride sharing services										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Excellent	8%	8%	8%							
Good	47%	48%	48%							
Fair	26%	29%	30%							
Poor	11%	10%	10%							
Refused	8%	5%	3%							
Q20G. How would you rate your local area on each of the following - Local governmental support for business										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015		
Excellent	3%	3%	4%	2%	2%	2%	3%	2%		
Good	23%	26%	27%	23%	17%	16%	18%	17%		
Fair	50%	47%	45%	50%	48%	47%	48%	48%		
Poor	23%	22%	22%	24%	30%	34%	30%	31%		
Refused	1%	2%	3%	3%	3%	2%	1%	2%		
Q20H. How would you rate your local area on each of the following - As an area where businesses can succeed										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Excellent	3%	3%	3%	3%	3%	2%	3%	3%	3%	2%
Good	23%	29%	32%	25%	25%	26%	24%	27%	21%	25%
Fair	55%	48%	45%	52%	51%	50%	47%	49%	45%	49%
Poor	16%	16%	16%	16%	18%	19%	23%	19%	28%	21%
Refused	2%	2%	3%	4%	3%	2%	3%	3%	3%	3%
Q20I. How would you rate your local area on each of the following - As a place where consumers want to live										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Excellent	10%	14%	15%	7%	10%	11%	11%	10%	14%	12%
Good	44%	44%	44%	49%	45%	44%	47%	43%	45%	45%
Fair	39%	35%	33%	37%	34%	33%	28%	33%	34%	30%
Poor	5%	6%	7%	6%	9%	10%	12%	12%	7%	10%
Refused	1%	2%	2%	2%	3%	2%	1%	2%	1%	2%

Q21. Which SINGLE industry sector do you think will have the greatest positive impact on the economic vitality of your geographic area in the next three to five years.										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Education	8%	13%	15%	5%	9%	11%	8%	10%	11%	14%
Tourism	6%	8%	9%	8%	8%	8%	10%	8%	8%	6%
Technology	10%	25%	32%	4%	27%	36%	10%	31%	10%	30%
Transportation	2%	3%	3%	3%	3%	2%	1%	3%	1%	2%
Medical	47%	27%	18%	48%	28%	21%	44%	24%	48%	26%
Green and sustainable energy	3%	3%	3%	10%	5%	3%	13%	7%	5%	4%
Manufacturing	13%	11%	10%	14%	12%	11%	13%	15%	14%	16%
Other	5%	3%	2%	1%	1%	1%	0%	1%	2%	2%
None of the above	6%	7%	8%	6%	7%	7%	0%	0%	1%	1%

Thinking specifically about the workforce here in New York State, how significant a problem would you say each of the following is when you think about our workforce:

Q22A. How technically skilled they are										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very significant	41%	32%	29%							
Somewhat significant	34%	40%	43%							
Not too significant	22%	22%	23%							
Not at all significant	2%	3%	3%							
Don't know/Refused	1%	2%	3%							

Q22B. Their work ethic										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very significant	44%	42%	41%							
Somewhat significant	28%	32%	34%							
Not too significant	17%	18%	18%							
Not at all significant	9%	5%	4%							
Don't know/Refused	2%	2%	2%							

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Q22C. Having realistic salary and benefit expectations										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very significant	19%	23%	24%							
Somewhat significant	50%	48%	47%							
Not too significant	28%	25%	24%							
Not at all significant	3%	2%	2%							
Don't know/Refused	1%	2%	3%							
Q22D. Use or abuse of drugs or alcohol										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very significant	39%	29%	25%							
Somewhat significant	38%	37%	36%							
Not too significant	17%	27%	31%							
Not at all significant	3%	4%	5%							
Don't know/Refused	2%	3%	3%							
Q22E. Their ability to express themselves both verbally and in writing										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very significant	32%	29%	28%							
Somewhat significant	49%	46%	44%							
Not too significant	15%	20%	23%							
Not at all significant	3%	3%	3%							
Don't know/Refused	1%	2%	2%							
Q23. How prepared is your company for the Paid Family Leave Act that takes effect January 2018? Are you...:										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very prepared	24%	28%	29%							
Not very prepared	11%	10%	10%							
Somewhat prepared	46%	47%	47%							
Not at all prepared	17%	14%	13%							
Don't know/Refused	1%	1%	1%							

Q24. Which of the following, if any, have you done to prepare for the Paid Family Leave Act's effect?										
	Albany 2017	Upstate Total 2017	Other MSAs 2017							
Hired outside legal or consulting help	17%	19%	20%							
Modified your existing company leave policy	42%	44%	45%							
Updated or purchased a new compliance solution	8%	10%	10%							
Modified your existing workforce	6%	4%	3%							
Hired or set a plan to hire temporary employees	6%	6%	5%							
Nothing	40%	39%	39%							
Q25. How would you describe your company's employee scheduling practices?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Primarily pre-determined fixed schedules/fixed shifts	63%	62%	62%							
Schedules vary, but are provided to employees in advance	16%	23%	26%							
Employees make their own schedules based on business need	12%	10%	9%							
Employees are often called in with little or no notice to cover unexpected business variations	6%	2%	0%							
Other	3%	2%	1%							
Don't know/Refused	1%	1%	1%							
Q26. What does your company do to maintain 'equal pay' by race/ethnicity and gender within the organization?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Adhere to a formal 'equal pay' policy	37%	39%	39%							
Conduct 'equal pay' assessments	15%	13%	12%							
Hire outside consultants to assess 'equal pay'	3%	2%	2%							
Nothing in particular	43%	44%	45%							
Don't know/Refused	3%	2%	1%							

Q27. Of late, there has been a lot of discussion about what are called 'Disruptive Technologies', how familiar are you with this conversation about Disruptive Technologies?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very familiar	15%	18%	19%							
Somewhat familiar	31%	31%	31%							
Not very familiar	27%	24%	23%							
Not at all familiar	25%	24%	24%							
Don't know/Refused	1%	2%	3%							
How innovative would you say your company is in each of the following areas?										
Q28A. Use of the mobile Internet										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	24%	25%	25%							
Somewhat innovative	46%	48%	49%							
Not very innovative	17%	18%	18%							
Not at all innovative	11%	6%	4%							
Don't know/Refused	1%	2%	3%							
Q28B. Production										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	16%	16%	17%							
Somewhat innovative	50%	49%	49%							
Not very innovative	23%	23%	23%							
Not at all innovative	8%	6%	5%							
Don't know/Refused	3%	6%	7%							

Q28C. Marketing										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	16%	18%	19%							
Somewhat innovative	46%	44%	43%							
Not very innovative	29%	31%	32%							
Not at all innovative	7%	5%	4%							
Don't know/Refused	1%	2%	2%							
Q28D. Client services										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	27%	28%	29%							
Somewhat innovative	45%	45%	45%							
Not very innovative	21%	21%	21%							
Not at all innovative	5%	3%	2%							
Don't know/Refused	2%	2%	2%							
Q28E. Information processing										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	20%	21%	22%							
Somewhat innovative	52%	51%	50%							
Not very innovative	25%	24%	24%							
Not at all innovative	2%	2%	2%							
Don't know/Refused	0%	2%	3%							
Q28F. Physical space utilization										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	27%	23%	21%							
Somewhat innovative	42%	45%	46%							
Not very innovative	26%	27%	28%							
Not at all innovative	4%	3%	3%							
Don't know/Refused	1%	2%	3%							

Q28G. Employee benefits										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	21%	22%	22%							
Somewhat innovative	48%	50%	51%							
Not very innovative	24%	23%	22%							
Not at all innovative	4%	3%	3%							
Don't know/Refused	2%	3%	3%							
Q28H. Employment arrangements										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	15%	16%	17%							
Somewhat innovative	52%	50%	50%							
Not very innovative	28%	27%	27%							
Not at all innovative	3%	3%	3%							
Don't know/Refused	2%	3%	3%							
Which of the following disruptive technologies do you currently use or do you see your company using in the near future?										
Q29A. The Internet										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	87%	89%	90%							
Future use	3%	2%	2%							
No plans to use	4%	3%	3%							
Don't know/Refused	5%	5%	5%							
Q29B. Automation of knowledge (including artificial intelligence)										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	17%	14%	13%							
Future use	29%	27%	25%							
No plans to use	50%	54%	56%							
Don't know/Refused	4%	5%	5%							

Q29C. The Internet of things (computing devices embedded in everyday objects)										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	23%	25%	26%							
Future use	30%	32%	32%							
No plans to use	44%	39%	37%							
Don't know/Refused	3%	4%	5%							
Q29D. The cloud										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	61%	66%	69%							
Future use	18%	16%	15%							
No plans to use	17%	15%	13%							
Don't know/Refused	3%	3%	3%							
Q29E. Advanced robotics										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	3%	6%	7%							
Future use	19%	16%	15%							
No plans to use	73%	74%	74%							
Don't know/Refused	4%	5%	5%							
Q29F. Autonomous or near autonomous vehicles										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	1%	2%	2%							
Future use	13%	11%	10%							
No plans to use	81%	83%	84%							
Don't know/Refused	4%	4%	4%							

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Q29G. 3-D Printing										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	7%	8%	9%							
Future use	20%	19%	18%							
No plans to use	69%	69%	69%							
Don't know/Refused	5%	4%	3%							
Q29H. Renewable energy										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	13%	15%	15%							
Future use	36%	36%	36%							
No plans to use	45%	45%	45%							
Don't know/Refused	5%	4%	4%							
Q29I. Cyber security										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	57%	61%	62%							
Future use	25%	22%	20%							
No plans to use	15%	15%	14%							
Don't know/Refused	2%	3%	3%							
Q29J. Digital analytics										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	32%	32%	32%							
Future use	31%	31%	30%							
No plans to use	32%	33%	34%							
Don't know/Refused	4%	4%	4%							

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Q30. Do you tend to see these disruptive technologies more as an opportunity for your business or as a threat to your business?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Opportunity	66%	73%	76%							
Threat	24%	19%	17%							
Don't know/Refused	10%	7%	6%							
Q31. Which of the following state funded ideas do you support in order to recruit and retain businesses that use disruptive technologies in Upstate New York?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017							
Tax incentives	43%	45%	46%							
Funding Industry/University Partnerships	32%	31%	30%							
Offering operational support and training for entrepreneurs	35%	36%	37%							
Providing financial support including loans and grants	34%	39%	41%							
None of the above	24%	24%	24%							
Q32. Do you think your company will be in business in New York ten years from today or not?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016				
Yes	56%	65%	70%	63%	64%	66%				
No	13%	12%	12%	8%	10%	11%				
Don't know	31%	23%	18%	29%	25%	23%				
Q33. If you had it all to do all over again, considering all factors, would you locate your business in New York or someplace else?										
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
New York	38%	41%	42%	41%	39%	39%	31%	29%	29%	28%
Someplace else	57%	56%	55%	55%	56%	58%	67%	67%	65%	69%
Prefer not to answer	5%	4%	3%	4%	5%	3%	2%	3%	6%	4%

Q34. Do you offer a pension or 401K to your employees?									
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016			
Yes	79%	83%	85%	84%	82%	84%			
No	16%	14%	13%	14%	15%	15%			
Don't know	5%	3%	3%	2%	3%	1%			