

Siena College Research Institute

Sponsored by The Business Council of New York State

2017: 462 Upstate NY, 106 Rochester CEOs; 2016: 440 Upstate NY, 97 Rochester CEOs

2015: 531 Upstate NY, 156 Rochester CEOs; 2014: 524 Upstate NY, 147 Rochester CEOs

Q1. Which of the following industry categories best describes the type of business your company is engaged in?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Engineering and Construction	10%	17%	19%	20%	18%	17%	16%	16%	18%	17%
Food and Beverage	5%	3%	3%	9%	5%	4%	5%	5%	3%	3%
Financial	6%	6%	6%	3%	7%	9%	3%	5%	7%	8%
Manufacturing	22%	19%	19%	18%	18%	18%	26%	24%	20%	21%
Retail	10%	10%	10%	11%	11%	11%	15%	12%	12%	12%
Service	32%	36%	37%	28%	32%	33%	21%	25%	22%	23%
Wholesale and Distribution	15%	8%	6%	11%	10%	9%	12%	11%	18%	15%
Other	0%	0%	0%	0%	0%	0%	2%	2%	NA	NA
Refused	0%	0%	0%	0%	0%	0%	1%	0%	0%	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?

	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate 2014
Considerably better	3%	4%	4%	0%	1%	2%	2%	2%	1%	4%
A little better	19%	23%	25%	22%	26%	28%	24%	24%	34%	32%
About the same	47%	47%	47%	45%	48%	49%	37%	44%	46%	44%
A little worse	24%	20%	19%	29%	21%	19%	26%	22%	15%	16%
Considerably worse	7%	5%	4%	4%	4%	3%	10%	8%	3%	4%
Prefer not to answer	1%	0%	0%	0%	0%	0%	0%	0%	1%	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?

	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate 2014
Considerably better	3%	5%	5%	5%	5%	5%	3%	3%	1%	5%
A little better	27%	29%	30%	25%	37%	40%	25%	27%	37%	37%
About the same	39%	36%	35%	41%	37%	35%	38%	40%	44%	39%
A little worse	23%	24%	24%	26%	19%	17%	25%	24%	13%	15%
Considerably worse	8%	6%	6%	3%	3%	2%	8%	6%	4%	4%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%

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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?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Considerably better	6%	3%	3%	1%	2%	2%	3%	3%	2%	4%
A little better	16%	18%	19%	14%	18%	18%	20%	21%	29%	24%
About the same	43%	45%	45%	48%	47%	47%	35%	39%	40%	42%
A little worse	26%	27%	27%	25%	27%	27%	32%	29%	24%	24%
Considerably worse	8%	7%	6%	11%	7%	6%	11%	8%	4%	6%
Prefer not to answer	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%

Q5. And looking forward from today through the next year, how would you describe your expectations for your industry here in New York?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Considerably better	6%	5%	5%	5%	5%	5%	3%	3%	5%	5%
A little better	24%	24%	24%	22%	30%	33%	23%	24%	34%	30%
About the same	36%	35%	35%	32%	35%	35%	42%	41%	35%	36%
A little worse	22%	27%	28%	34%	24%	22%	24%	25%	21%	24%
Considerably worse	12%	8%	7%	7%	6%	5%	8%	7%	5%	5%
Prefer not to answer	1%	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...?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Grow substantially	4%	4%	4%	3%	3%	2%	3%	3%	2%	4%
Grow moderately	41%	44%	45%	41%	48%	50%	40%	42%	46%	45%
Stay about the same	38%	35%	35%	35%	33%	32%	37%	36%	33%	33%
Decrease moderately	11%	13%	14%	14%	14%	14%	18%	17%	18%	16%
Decrease substantially	6%	3%	2%	6%	2%	1%	3%	2%	1%	1%
Prefer not to answer	1%	0%	0%	0%	0%	0%	0%	0%	0%	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...?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Grow substantially	2%	3%	4%	0%	2%	2%	2%	2%	0%	3%
Grow moderately	35%	36%	37%	32%	41%	44%	29%	33%	36%	38%
Stay about the same	36%	35%	35%	39%	34%	32%	40%	36%	39%	35%
Decrease moderately	20%	20%	21%	23%	20%	19%	25%	25%	21%	22%
Decrease substantially	7%	4%	3%	6%	3%	2%	4%	4%	3%	3%
Prefer not to answer	1%	1%	1%	0%	0%	0%	0%	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?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Market/demand growth	38%	42%	43%	47%	48%	49%	36%	39%	46%	43%
Cost reduction	30%	25%	24%	23%	25%	25%	31%	31%	27%	29%
Price increase	14%	13%	13%	16%	13%	11%	11%	12%	14%	15%
New technology	13%	11%	10%	7%	9%	10%	12%	9%	4%	7%
Other	4%	8%	10%	3%	4%	4%	10%	7%	7%	6%
Prefer not to answer	1%	1%	1%	3%	1%	1%	1%	1%	2%	1%
Q9. Please indicate which of the following are major areas of concentration for your company now and through 2018.										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Expansion of existing markets	56%	57%	58%	58%	53%	51%	50%	54%	59%	56%
Growth in existing products	63%	54%	52%	57%	58%	59%	49%	52%	51%	54%
Entry into new markets	28%	28%	28%	28%	32%	33%	31%	30%	31%	33%
New product lines	26%	24%	23%	27%	23%	23%	27%	27%	25%	25%
Acquisition of new businesses	13%	15%	15%	16%	15%	15%	13%	15%	16%	14%
Technology innovation	33%	34%	35%	29%	28%	28%	28%	27%	21%	26%
Construction of new locations	5%	8%	10%	7%	10%	10%	9%	9%	10%	10%
Internal restructuring	29%	28%	27%	28%	25%	24%	30%	28%	27%	25%
Expansion into export markets	8%	5%	4%	5%	4%	3%	NA	NA	NA	NA
Other	5%	5%	6%	2%	4%	4%	6%	0%	3%	3%
Prefer not to answer	0%	0%	0%	3%	2%	2%	1%	1%	3%	1%

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?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Yes	54%	56%	57%	48%	51%	51%	54%	55%	56%	58%
No	24%	28%	29%	42%	36%	35%	33%	34%	32%	31%
Not sure	23%	16%	14%	9%	13%	14%	13%	11%	12%	11%
Q11. Now thinking about the people that work for your company, between today and the end of 2018, do you plan to...?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Substantially increase your workforce	0%	2%	3%	0%	2%	2%	0%	1%	0%	2%
Moderately increase your workforce	29%	35%	37%	37%	37%	37%	28%	32%	34%	30%
Remain about the same	58%	53%	52%	53%	52%	52%	64%	57%	53%	59%
Decrease your workforce	12%	9%	8%	8%	8%	8%	7%	9%	12%	9%
Prefer not to answer	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%
Q12. And thinking about other challenges that your company faces, which of the following are you concerned with?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Existing U.S. competition	29%	24%	22%	26%	27%	28%	25%	25%	31%	29%
Governmental regulation	62%	61%	61%	71%	68%	68%	65%	68%	74%	69%
Taxation	65%	61%	60%	60%	57%	56%	67%	65%	70%	65%
Foreign competition	10%	10%	10%	9%	9%	9%	17%	11%	12%	12%
Energy costs	19%	18%	18%	27%	24%	23%	19%	19%	36%	30%
Risk management	25%	26%	26%	20%	22%	23%	24%	26%	25%	22%
Adverse economic conditions	47%	37%	35%	49%	42%	39%	54%	48%	48%	46%
Health care costs	79%	78%	78%	84%	79%	78%	83%	78%	78%	77%
Global political instability	14%	15%	16%	14%	12%	11%	15%	15%	16%	16%
Rising supplier costs	40%	32%	30%	34%	27%	25%	27%	25%	38%	35%
Human resources	35%	43%	46%	30%	36%	39%	31%	38%	33%	30%
Cash flow	25%	27%	28%	24%	28%	29%	26%	26%	31%	29%
Ability to obtain suitable financing	12%	10%	9%	9%	8%	8%	8%	8%	8%	8%
U.S. trade agreements	8%	9%	9%	14%	8%	6%	NA	NA	NA	NA
Don't know/None of the Above	2%	2%	2%	1%	1%	1%	1%	0%	0%	0%

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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?

	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Excellent	2%	1%	1%	1%	1%	1%	0%	1%	1%	1%
Good	7%	7%	8%	7%	8%	8%	4%	4%	5%	4%
Fair	25%	25%	26%	21%	29%	32%	24%	29%	31%	30%
Poor	64%	64%	63%	70%	61%	59%	70%	64%	63%	63%
Don't know	3%	3%	3%	1%	1%	1%	3%	2%	0%	2%

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

	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Personal Income Tax Reform	60%	58%	58%	53%	55%	55%	57%	54%	NA	NA
Business Income Tax Reform	64%	63%	62%	60%	62%	62%	63%	63%	NA	NA
Estate Tax Reform	29%	29%	29%	30%	31%	32%	33%	34%	NA	NA
Sales Tax Reform	19%	24%	26%	23%	22%	22%	25%	25%	NA	NA
Infrastructure Development	48%	52%	53%	41%	43%	44%	40%	42%	44%	42%
Energy Infrastructure	21%	24%	26%	NA	NA	NA	NA	NA	NA	NA
Business Development Incentives	27%	31%	31%	39%	36%	35%	38%	36%	39%	38%
Ethics Reform	45%	43%	42%	53%	52%	52%	40%	42%	33%	40%
Spending Cuts	62%	53%	51%	61%	51%	49%	62%	58%	63%	64%
Other	13%	16%	17%	8%	13%	15%	13%	14%	18%	16%
Prefer not to answer	0%	0%	0%	0%	1%	1%	1%	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...?

	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Very confident	2%	1%	0%	1%	1%	1%	1%	1%	0%	1%
Somewhat confident	15%	15%	15%	13%	14%	14%	8%	12%	12%	12%
Not very confident	42%	48%	50%	46%	48%	50%	46%	50%	52%	47%
Not at all confident	40%	35%	33%	39%	36%	35%	46%	37%	35%	38%
Prefer not to answer	1%	2%	2%	0%	1%	0%	0%	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?

	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Excellent	7%	6%	5%	1%	1%	1%	0%	0%	0%	0%
Good	23%	22%	21%	7%	6%	6%	4%	2%	3%	4%
Fair	35%	35%	35%	22%	29%	31%	22%	22%	22%	21%
Poor	31%	33%	33%	64%	59%	59%	74%	73%	70%	72%
Don't know	5%	5%	5%	6%	5%	3%	0%	2%	4%	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:

	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Very confident	3%	3%	4%	6%	5%	5%	0%	0%	0%	1%
Somewhat confident	36%	36%	36%	18%	27%	30%	10%	7%	6%	8%
Not very confident	39%	42%	43%	55%	44%	41%	47%	50%	53%	45%
Not at all confident	22%	18%	17%	20%	22%	23%	43%	41%	39%	44%
Prefer not to answer	1%	1%	1%	2%	2%	1%	1%	1%	2%	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

	Rochester 2017	Upstate Total 2017	Other MSAs 2017
Right track	24%	16%	14%
Wrong direction	56%	61%	62%
Neither	17%	18%	18%
Don't know	4%	6%	6%

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Q18B. Our immigration system										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Right track	42%	38%	37%							
Wrong direction	44%	46%	46%							
Neither	10%	12%	12%							
Don't know	3%	4%	5%							
Q18C. The federal budget deficit										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Right track	17%	15%	15%							
Wrong direction	62%	59%	58%							
Neither	15%	18%	18%							
Don't know	6%	8%	9%							
Q18D. The taxes businesses pay										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Right track	44%	43%	43%							
Wrong direction	29%	32%	32%							
Neither	21%	18%	18%							
Don't know	6%	7%	7%							
Q18E. The health of our economy										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Right track	50%	48%	48%							
Wrong direction	24%	27%	28%							
Neither	22%	18%	17%							
Don't know	5%	7%	7%							

Q18F. Safeguarding the environment										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Right track	23%	23%	22%							
Wrong direction	40%	39%	39%							
Neither	28%	28%	28%							
Don't know	9%	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										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Right track	24%	25%	26%							
Wrong direction	42%	37%	36%							
Neither	21%	24%	26%							
Don't know	14%	13%	13%							
Q19B. Ethics reform										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Right track	9%	9%	9%							
Wrong direction	66%	61%	60%							
Neither	15%	19%	20%							
Don't know	9%	10%	11%							
Q19C. State spending										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Right track	7%	9%	10%							
Wrong direction	75%	70%	68%							
Neither	12%	15%	15%							
Don't know	6%	6%	6%							

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Q19D. The regulatory environment										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Right track	8%	8%	8%							
Wrong direction	71%	66%	65%							
Neither	15%	17%	18%							
Don't know	6%	8%	9%							

Q19E. Workers Compensation reform										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Right track	13%	13%	13%							
Wrong direction	62%	56%	54%							
Neither	14%	16%	17%							
Don't know	10%	15%	16%							

Q19F. Energy costs										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Right track	17%	14%	13%							
Wrong direction	38%	36%	36%							
Neither	27%	32%	34%							
Don't know	18%	18%	17%							

Q20A. How would you rate your local area on each of the following - Suitable workforce										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Excellent	8%	9%	10%	12%	9%	8%	15%	12%	16%	12%
Good	38%	37%	37%	27%	39%	41%	44%	42%	45%	50%
Fair	37%	37%	37%	44%	40%	39%	35%	34%	31%	29%
Poor	16%	15%	14%	14%	11%	11%	6%	12%	6%	7%
Refused	2%	2%	2%	2%	2%	1%	1%	1%	2%	2%

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Q20B. How would you rate your local area on each of the following - Consumer confidence										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Excellent	2%	4%	4%	1%	2%	2%	3%	2%	1%	2%
Good	47%	50%	51%	43%	41%	40%	35%	38%	37%	32%
Fair	43%	39%	38%	45%	45%	46%	51%	49%	52%	54%
Poor	7%	5%	5%	7%	9%	10%	10%	9%	8%	11%
Refused	1%	2%	2%	3%	3%	2%	1%	2%	2%	2%
Q20C. How would you rate your local area on each of the following - Transportation infrastructure										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Excellent	4%	4%	4%	3%	3%	2%	4%	4%	7%	4%
Good	38%	38%	38%	39%	39%	39%	44%	40%	56%	44%
Fair	47%	45%	44%	35%	37%	38%	37%	40%	29%	38%
Poor	10%	11%	12%	20%	19%	19%	12%	15%	7%	12%
Refused	1%	2%	2%	3%	3%	2%	3%	2%	1%	2%
Q20D. How would you rate your local area on each of the following - Airline service										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015		
Excellent	5%	8%	8%	2%	7%	8%	4%	8%		
Good	41%	45%	46%	36%	42%	44%	46%	47%		
Fair	41%	34%	32%	37%	35%	36%	35%	31%		
Poor	13%	11%	10%	19%	13%	11%	15%	14%		
Refused	1%	3%	4%	6%	3%	1%	1%	1%		
Q20E. How would you rate your local area on each of the following - Taxi/car service										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015		
Excellent	2%	3%	4%	1%	1%	1%	3%	3%		
Good	41%	34%	32%	12%	15%	16%	27%	27%		
Fair	36%	38%	38%	39%	35%	35%	44%	38%		
Poor	21%	21%	21%	38%	43%	44%	22%	26%		
Refused	1%	4%	5%	9%	6%	4%	4%	5%		

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Q20F. How would you rate your local area on each of the following - Ride sharing services										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Excellent	9%	8%	8%							
Good	48%	48%	48%							
Fair	28%	29%	29%							
Poor	13%	10%	10%							
Refused	1%	5%	6%							

Q20G. How would you rate your local area on each of the following - Local governmental support for business										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015		
Excellent	1%	3%	4%	3%	2%	2%	3%	2%		
Good	26%	26%	26%	16%	17%	18%	18%	17%		
Fair	43%	47%	47%	46%	48%	48%	47%	48%		
Poor	28%	22%	21%	30%	30%	31%	28%	31%		
Refused	1%	2%	2%	4%	3%	1%	4%	2%		

Q20H. How would you rate your local area on each of the following - As an area where businesses can succeed										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Excellent	2%	3%	4%	5%	3%	2%	4%	3%	3%	2%
Good	27%	29%	30%	16%	25%	29%	27%	27%	24%	25%
Fair	43%	48%	50%	56%	51%	50%	50%	49%	52%	49%
Poor	25%	16%	14%	21%	18%	18%	14%	19%	18%	21%
Refused	3%	2%	2%	2%	3%	3%	4%	3%	3%	3%

Q20I. How would you rate your local area on each of the following - As a place where consumers want to live										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Excellent	14%	14%	14%	11%	10%	10%	12%	10%	16%	12%
Good	45%	44%	43%	38%	45%	47%	38%	43%	46%	45%
Fair	34%	35%	35%	36%	34%	34%	36%	33%	22%	30%
Poor	6%	6%	6%	11%	9%	8%	13%	12%	13%	10%
Refused	1%	2%	2%	3%	3%	2%	1%	2%	3%	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.										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Education	12%	13%	13%	8%	9%	10%	10%	10%	15%	14%
Tourism	13%	8%	6%	10%	8%	8%	9%	8%	8%	6%
Technology	20%	25%	27%	26%	27%	28%	31%	31%	21%	30%
Transportation	0%	3%	4%	0%	3%	3%	1%	3%	1%	2%
Medical	34%	27%	25%	31%	28%	27%	25%	24%	25%	26%
Green and sustainable energy	4%	3%	3%	2%	5%	5%	6%	7%	5%	4%
Manufacturing	8%	11%	12%	14%	12%	11%	17%	15%	19%	16%
Other	1%	3%	3%	0%	1%	1%	2%	1%	4%	2%
None of the above	8%	7%	7%	8%	7%	6%	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										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very significant	33%	32%	32%							
Somewhat significant	39%	40%	41%							
Not too significant	23%	22%	22%							
Not at all significant	3%	3%	3%							
Don't know/Refused	3%	2%	2%							

Q22B. Their work ethic										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very significant	42%	42%	42%							
Somewhat significant	35%	32%	32%							
Not too significant	17%	18%	18%							
Not at all significant	4%	5%	6%							
Don't know/Refused	2%	2%	2%							

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Q22C. Having realistic salary and benefit expectations										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very significant	27%	23%	21%							
Somewhat significant	49%	48%	48%							
Not too significant	22%	25%	26%							
Not at all significant	0%	2%	3%							
Don't know/Refused	2%	2%	2%							
Q22D. Use or abuse of drugs or alcohol										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very significant	29%	29%	29%							
Somewhat significant	35%	37%	37%							
Not too significant	29%	27%	26%							
Not at all significant	4%	4%	4%							
Don't know/Refused	3%	3%	3%							
Q22E. Their ability to express themselves both verbally and in writing										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very significant	32%	29%	29%							
Somewhat significant	41%	46%	47%							
Not too significant	23%	20%	19%							
Not at all significant	3%	3%	3%							
Don't know/Refused	2%	2%	2%							
Q23. How prepared is your company for the Paid Family Leave Act that takes effect January 2018? Are you...:										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very prepared	28%	28%	28%							
Not very prepared	10%	10%	10%							
Somewhat prepared	49%	47%	46%							
Not at all prepared	11%	14%	15%							
Don't know/Refused	1%	1%	1%							

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Q24. Which of the following, if any, have you done to prepare for the Paid Family Leave Act's effect?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Hired outside legal or consulting help	25%	19%	17%							
Modified your existing company leave policy	41%	44%	45%							
Updated or purchased a new compliance solution	9%	10%	10%							
Modified your existing workforce	8%	4%	3%							
Hired or set a plan to hire temporary employees	8%	6%	5%							
Nothing	39%	39%	40%							
Q25. How would you describe your company's employee scheduling practices?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Primarily pre-determined fixed schedules/fixed shifts	58%	62%	64%							
Schedules vary, but are provided to employees in advance	32%	23%	20%							
Employees make their own schedules based on business need	8%	10%	11%							
Employees are often called in with little or no notice to cover unexpected business variations	1%	2%	2%							
Other	1%	2%	2%							
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?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Adhere to a formal 'equal pay' policy	37%	39%	39%							
Conduct 'equal pay' assessments	8%	13%	14%							
Hire outside consultants to assess 'equal pay'	2%	2%	2%							
Nothing in particular	52%	44%	42%							
Don't know/Refused	1%	2%	2%							

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?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very familiar	23%	18%	17%							
Somewhat familiar	38%	31%	29%							
Not very familiar	17%	24%	26%							
Not at all familiar	22%	24%	25%							
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										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	24%	25%	25%							
Somewhat innovative	44%	48%	49%							
Not very innovative	25%	18%	16%							
Not at all innovative	6%	6%	7%							
Don't know/Refused	2%	2%	2%							
Q28B. Production										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	22%	16%	15%							
Somewhat innovative	42%	49%	52%							
Not very innovative	28%	23%	21%							
Not at all innovative	5%	6%	6%							
Don't know/Refused	4%	6%	6%							

Q28C. Marketing										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	24%	18%	17%							
Somewhat innovative	40%	44%	46%							
Not very innovative	35%	31%	30%							
Not at all innovative	1%	5%	6%							
Don't know/Refused	1%	2%	2%							
Q28D. Client services										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	33%	28%	27%							
Somewhat innovative	42%	45%	46%							
Not very innovative	24%	21%	21%							
Not at all innovative	0%	3%	4%							
Don't know/Refused	1%	2%	2%							
Q28E. Information processing										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	25%	21%	20%							
Somewhat innovative	45%	51%	52%							
Not very innovative	25%	24%	24%							
Not at all innovative	3%	2%	2%							
Don't know/Refused	2%	2%	2%							
Q28F. Physical space utilization										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	24%	23%	23%							
Somewhat innovative	42%	45%	46%							
Not very innovative	31%	27%	26%							
Not at all innovative	2%	3%	4%							
Don't know/Refused	2%	2%	2%							

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Q28G. Employee benefits										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	23%	22%	21%							
Somewhat innovative	48%	50%	51%							
Not very innovative	22%	23%	23%							
Not at all innovative	5%	3%	3%							
Don't know/Refused	3%	3%	3%							
Q28H. Employment arrangements										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Very innovative	17%	16%	16%							
Somewhat innovative	51%	50%	50%							
Not very innovative	24%	27%	29%							
Not at all innovative	5%	3%	3%							
Don't know/Refused	4%	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										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	89%	89%	89%							
Future use	3%	2%	2%							
No plans to use	3%	3%	4%							
Don't know/Refused	6%	5%	5%							
Q29B. Automation of knowledge (including artificial intelligence)										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	14%	14%	14%							
Future use	28%	27%	26%							
No plans to use	56%	54%	54%							
Don't know/Refused	2%	5%	6%							

Q29C. The Internet of things (computing devices embedded in everyday objects)										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	25%	25%	25%							
Future use	36%	32%	30%							
No plans to use	37%	39%	40%							
Don't know/Refused	2%	4%	5%							
Q29D. The cloud										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	71%	66%	65%							
Future use	18%	16%	16%							
No plans to use	10%	15%	16%							
Don't know/Refused	1%	3%	3%							
Q29E. Advanced robotics										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	6%	6%	6%							
Future use	21%	16%	15%							
No plans to use	71%	74%	75%							
Don't know/Refused	3%	5%	5%							
Q29F. Autonomous or near autonomous vehicles										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	3%	2%	1%							
Future use	8%	11%	12%							
No plans to use	88%	83%	82%							
Don't know/Refused	1%	4%	5%							

Q29G. 3-D Printing										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	8%	8%	9%							
Future use	21%	19%	18%							
No plans to use	71%	69%	69%							
Don't know/Refused	1%	4%	5%							
Q29H. Renewable energy										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	14%	15%	15%							
Future use	37%	36%	36%							
No plans to use	48%	45%	44%							
Don't know/Refused	1%	4%	5%							
Q29I. Cyber security										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	64%	61%	60%							
Future use	18%	22%	23%							
No plans to use	16%	15%	14%							
Don't know/Refused	2%	3%	3%							
Q29J. Digital analytics										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Currently use	33%	32%	32%							
Future use	31%	31%	31%							
No plans to use	35%	33%	33%							
Don't know/Refused	1%	4%	5%							

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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?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Opportunity	78%	73%	72%							
Threat	17%	19%	20%							
Don't know/Refused	5%	7%	8%							
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?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017							
Tax incentives	46%	45%	44%							
Funding Industry/University Partnerships	31%	31%	31%							
Offering operational support and training for entrepreneurs	34%	36%	37%							
Providing financial support including loans and grants	32%	39%	41%							
None of the above	28%	24%	23%							
Q32. Do you think your company will be in business in New York ten years from today or not?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016				
Yes	61%	65%	67%	63%	64%	66%				
No	16%	12%	11%	18%	10%	8%				
Don't know	23%	23%	22%	20%	25%	26%				
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?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
New York	30%	41%	44%	34%	39%	41%	26%	29%	27%	28%
Someplace else	68%	56%	52%	61%	56%	56%	72%	67%	70%	69%
Prefer not to answer	2%	4%	4%	5%	5%	3%	3%	3%	3%	4%

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Q34. Do you offer a pension or 401K to your employees?										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016				
Yes	82%	83%	83%	83%	82%	84%				
No	16%	14%	13%	17%	15%	14%				
Don't know	2%	3%	4%	0%	3%	2%				