

Siena College Research Institute
 Sponsored by The Business Council of New York State
 2017: 462 Upstate NY CEOs, MOE +/- 4.6%
 2016: 440 Upstate NY CEOs, MOE +/- 4.7%
 2015: 531 Upstate NY CEOs, MOE +/- 4.3%

Q1. Which of the following industry categories best describes the type of business your company is engaged in?																							
	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Upstate 2012	Region				Cluster			Company Size			Revenue						
							Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100					Up to \$5M	\$5M+	
Engineering and Construction	17%	18%	16%	17%	17%	15%	23%	13%	10%	25%	22%	12%	21%	17%	20%	15%						20%	16%
Food and Beverage	3%	5%	5%	3%	3%	5%	1%	6%	5%	1%	4%	4%	3%	3%	6%	3%						6%	3%
Financial	6%	7%	5%	8%	6%	8%	10%	3%	6%	6%	7%	7%	3%	5%	6%	9%						7%	6%
Manufacturing	19%	18%	24%	21%	19%	19%	16%	21%	22%	21%	23%	18%	17%	21%	23%	14%						15%	21%
Retail	10%	11%	12%	12%	12%	14%	10%	10%	10%	9%	6%	11%	13%	12%	6%	6%						11%	9%
Service	36%	32%	25%	23%	27%	26%	37%	40%	32%	29%	29%	39%	38%	32%	33%	47%						36%	35%
Wholesale and Distribution	8%	10%	11%	15%	15%	14%	3%	8%	15%	9%	10%	9%	6%	10%	7%	6%						5%	10%
Other	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%						0%	0%
Refused	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%						0%	0%

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?																							
	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Upstate 2012	Region				Cluster			Company Size			Industry					Revenue	
							Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Considerably better	4%	1%	2%	4%	2%	1%	3%	3%	3%	7%	13%	0%	0%	4%	7%	1%	5%	8%	0%	2%	3%	3%	4%
A little better	23%	26%	24%	32%	24%	21%	29%	22%	19%	22%	59%	12%	0%	23%	29%	23%	28%	20%	20%	21%	31%	23%	24%
About the same	47%	48%	44%	44%	46%	44%	51%	46%	47%	43%	27%	74%	20%	50%	39%	49%	37%	49%	53%	48%	51%	46%	48%
A little worse	20%	21%	22%	16%	22%	28%	15%	24%	24%	18%	0%	13%	60%	18%	26%	19%	27%	17%	24%	21%	15%	19%	21%
Considerably worse	5%	4%	8%	4%	7%	7%	1%	4%	7%	10%	0%	0%	20%	5%	0%	7%	4%	6%	2%	7%	0%	8%	4%
Don't know/Refused	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	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?																							
	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Upstate 2012	Region				Cluster			Company Size			Industry					Revenue	
							Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Considerably better	5%	5%	3%	5%	2%	2%	3%	3%	3%	12%	16%	0%	0%	4%	10%	2%	8%	6%	0%	4%	3%	3%	5%
A little better	29%	37%	27%	37%	28%	31%	32%	28%	27%	29%	73%	16%	1%	30%	33%	29%	29%	38%	22%	25%	36%	21%	33%
About the same	36%	37%	40%	39%	40%	32%	41%	34%	39%	25%	12%	63%	12%	38%	24%	36%	32%	36%	47%	36%	36%	43%	33%
A little worse	24%	19%	24%	15%	24%	25%	22%	26%	23%	25%	0%	21%	61%	22%	31%	24%	28%	11%	29%	27%	23%	24%	24%
Considerably worse	6%	3%	6%	4%	6%	10%	1%	9%	8%	9%	0%	0%	25%	6%	1%	7%	4%	10%	2%	8%	3%	9%	5%
Don't know/Refused	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	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?																							
	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Upstate 2012	Region				Cluster			Company Size			Industry					Revenue	
							Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Considerably better	3%	2%	3%	4%	3%	2%	2%	2%	6%	6%	12%	0%	0%	3%	7%	1%	5%	4%	0%	2%	5%	3%	4%
A little better	18%	18%	21%	24%	20%	17%	23%	15%	16%	16%	53%	5%	0%	18%	26%	16%	19%	22%	9%	17%	18%	17%	18%
About the same	45%	47%	39%	42%	44%	41%	46%	43%	43%	47%	34%	71%	7%	48%	43%	41%	43%	49%	40%	42%	46%	41%	46%
A little worse	27%	27%	29%	24%	25%	31%	26%	32%	26%	18%	1%	23%	69%	25%	20%	31%	25%	21%	44%	29%	23%	31%	25%
Considerably worse	7%	7%	8%	6%	8%	8%	3%	7%	8%	13%	1%	1%	25%	5%	4%	11%	8%	3%	7%	9%	5%	8%	6%
Don't know/Refused	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%

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Q5. And looking forward from today through the next year, how would you describe your expectations for your industry here in New York?																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Considerably better	5%	5%	3%	5%	3%	2%	4%	2%	6%	12%	17%	0%	0%	4%	13%	1%	10%	6%	2%	10%	4%	5%	
A little better	24%	30%	24%	30%	25%	27%	30%	19%	24%	24%	65%	10%	0%	26%	27%	19%	28%	26%	13%	26%	21%	20%	26%
About the same	35%	35%	41%	36%	38%	33%	37%	37%	36%	28%	18%	63%	4%	37%	33%	37%	29%	41%	31%	30%	41%	36%	35%
A little worse	27%	24%	25%	24%	25%	27%	27%	31%	22%	24%	0%	27%	61%	25%	23%	30%	28%	20%	40%	32%	15%	29%	26%
Considerably worse	8%	6%	7%	5%	9%	10%	1%	10%	12%	12%	0%	0%	35%	7%	4%	12%	5%	8%	13%	9%	10%	11%	7%
Don't know/Refused	1%	0%	0%	0%	0%	0%	1%	0%	1%	1%	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	3%	0%	1%
Q6. Now thinking specifically about your company, what are your expectations for revenue through the year 2018? Do you believe your revenue will...?																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Grow substantially	4%	3%	3%	4%	3%	2%	6%	3%	4%	4%	10%	2%	1%	4%	6%	4%	1%	7%	4%	5%	0%	7%	4%
Grow moderately	44%	48%	42%	45%	39%	36%	48%	45%	41%	38%	65%	41%	24%	41%	54%	48%	43%	52%	22%	43%	54%	39%	46%
Stay about the same	35%	33%	36%	33%	36%	35%	38%	28%	38%	41%	22%	44%	34%	39%	24%	33%	41%	32%	38%	35%	31%	38%	34%
Decrease moderately	13%	14%	17%	16%	18%	23%	8%	20%	11%	13%	2%	12%	31%	13%	13%	13%	11%	8%	33%	13%	13%	12%	14%
Decrease substantially	3%	2%	2%	1%	3%	4%	1%	3%	6%	3%	0%	1%	10%	3%	3%	2%	4%	1%	2%	4%	0%	5%	2%
Don't know/Refused	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%
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...?																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Grow substantially	3%	2%	2%	3%	2%	2%	3%	5%	2%	4%	9%	1%	1%	3%	6%	2%	1%	4%	4%	4%	3%	3%	4%
Grow moderately	36%	41%	33%	38%	29%	28%	40%	32%	35%	38%	50%	38%	16%	33%	43%	45%	42%	46%	20%	31%	44%	34%	37%
Stay about the same	35%	34%	36%	35%	38%	32%	38%	34%	36%	32%	35%	39%	29%	38%	30%	29%	35%	32%	36%	36%	31%	36%	35%
Decrease moderately	20%	20%	25%	22%	26%	33%	17%	24%	20%	21%	7%	21%	37%	21%	16%	20%	16%	16%	36%	23%	21%	20%	21%
Decrease substantially	4%	3%	4%	3%	4%	6%	2%	4%	7%	4%	0%	1%	16%	4%	6%	4%	5%	2%	4%	5%	0%	6%	4%
Don't know/Refused	1%	0%	1%	0%	0%	0%	1%	1%	1%	0%	0%	0%	1%	1%	0%	0%	0%	0%	0%	1%	3%	1%	1%
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?																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Market/demand growth	42%	48%	39%	43%	40%	38%	52%	39%	38%	34%	57%	37%	34%	42%	43%	43%	42%	47%	38%	42%	33%	45%	41%
Cost reduction	25%	25%	31%	29%	34%	34%	17%	31%	30%	22%	16%	28%	30%	26%	23%	23%	20%	23%	20%	26%	38%	27%	25%
Price increase	13%	13%	12%	15%	13%	12%	10%	11%	14%	21%	13%	13%	13%	12%	21%	12%	20%	12%	20%	9%	10%	11%	14%
New technology	11%	9%	9%	7%	10%	9%	9%	11%	13%	9%	7%	14%	8%	10%	11%	11%	5%	13%	4%	13%	13%	8%	11%
Other	8%	4%	7%	6%	3%	6%	11%	7%	4%	13%	6%	7%	14%	8%	1%	12%	13%	1%	18%	10%	3%	9%	8%
Don't know/Refused	1%	1%	1%	1%	1%	1%	1%	0%	1%	1%	0%	1%	1%	1%	0%	0%	0%	3%	0%	0%	3%	0%	1%

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Q9. Please indicate which of the following are major areas of concentration for your company now and through 2018.																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Expansion of existing markets	57%	53%	54%	56%	61%	58%	61%	60%	56%	46%	67%	55%	50%	57%	59%	55%	56%	69%	51%	52%	54%	61%	56%
Growth in existing products	54%	58%	52%	54%	53%	50%	55%	50%	63%	47%	64%	55%	40%	52%	64%	55%	38%	71%	53%	47%	62%	56%	54%
Entry into new markets	28%	32%	30%	33%	37%	33%	33%	26%	28%	24%	30%	25%	33%	25%	29%	37%	23%	42%	22%	30%	15%	31%	27%
New product lines	24%	23%	27%	25%	31%	31%	23%	24%	26%	21%	21%	24%	27%	20%	31%	30%	11%	32%	29%	20%	46%	14%	27%
Acquisition of new businesses	15%	15%	15%	14%	11%	13%	14%	20%	13%	7%	19%	12%	13%	11%	16%	26%	5%	11%	20%	15%	23%	13%	15%
Technology innovation	34%	28%	27%	26%	28%	27%	34%	36%	33%	34%	33%	37%	30%	29%	43%	43%	28%	38%	27%	39%	21%	32%	35%
Construction of new locations	8%	10%	9%	10%	10%	8%	12%	9%	5%	6%	7%	8%	10%	6%	7%	16%	16%	2%	4%	12%	0%	8%	9%
Internal restructuring	28%	25%	28%	25%	28%	33%	28%	29%	29%	24%	18%	30%	36%	27%	33%	31%	28%	20%	42%	31%	23%	27%	28%
Expansion into export markets	5%	4%	NA	NA	NA	NA	3%	6%	8%	3%	6%	6%	3%	5%	10%	2%	0%	14%	2%	2%	8%	5%	5%
Other	5%	4%	0%	3%	5%	4%	2%	8%	5%	7%	2%	7%	6%	5%	7%	7%	6%	1%	9%	6%	5%	4%	6%
Prefer not to answer	0%	2%	1%	1%	2%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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?																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Yes	56%	51%	55%	58%	52%	52%	58%	56%	54%	56%	62%	60%	41%	47%	67%	78%	61%	70%	47%	51%	38%	47%	59%
No	28%	36%	34%	31%	36%	38%	29%	29%	24%	28%	19%	28%	38%	34%	19%	15%	24%	16%	38%	32%	33%	35%	25%
Not sure	16%	13%	11%	11%	12%	11%	13%	15%	23%	16%	19%	12%	22%	19%	14%	7%	15%	14%	16%	17%	28%	18%	16%
Q11. Now thinking about the people that work for your company, between today and the end of 2018, do you plan to...?																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Substantially increase your workforce	2%	2%	1%	2%	1%	1%	2%	3%	0%	1%	2%	1%	3%	0%	1%	5%	1%	1%	2%	3%	0%	1%	2%
Moderately increase your workforce	35%	37%	32%	30%	27%	26%	38%	36%	29%	34%	47%	33%	22%	32%	43%	40%	48%	46%	22%	33%	10%	34%	35%
Remain about the same	53%	52%	57%	59%	59%	58%	55%	48%	58%	54%	48%	56%	56%	58%	47%	44%	46%	46%	64%	53%	77%	55%	52%
Decrease your workforce	9%	8%	9%	9%	12%	15%	4%	12%	12%	7%	1%	8%	20%	8%	9%	11%	4%	6%	11%	11%	10%	8%	9%
Don't know/Refused	1%	1%	1%	1%	1%	1%	1%	1%	1%	3%	1%	1%	0%	1%	0%	0%	1%	2%	0%	0%	3%	2%	1%

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Q12. And thinking about other challenges that your company faces, which of the following are you concerned with?																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Existing U.S. competition	24%	27%	25%	29%	25%	27%	22%	22%	29%	24%	21%	28%	21%	24%	30%	21%	19%	22%	24%	21%	46%	19%	26%
Governmental regulation	61%	68%	68%	69%	70%	69%	52%	68%	62%	63%	53%	60%	74%	58%	70%	65%	58%	22%	71%	62%	56%	56%	63%
Taxation	61%	57%	65%	65%	67%	67%	55%	60%	65%	69%	56%	66%	59%	62%	69%	55%	59%	74%	64%	55%	51%	61%	61%
Foreign competition	10%	9%	11%	12%	12%	12%	6%	15%	10%	7%	12%	9%	8%	13%	6%	5%	4%	34%	2%	1%	13%	10%	10%
Energy costs	18%	24%	19%	30%	31%	44%	21%	14%	19%	22%	20%	18%	17%	18%	16%	22%	16%	24%	22%	19%	13%	24%	16%
Risk management	26%	22%	26%	22%	21%	22%	28%	26%	25%	21%	33%	22%	25%	22%	34%	30%	33%	19%	16%	27%	26%	24%	26%
Adverse economic conditions	37%	42%	48%	46%	55%	65%	34%	33%	47%	40%	31%	35%	48%	39%	47%	29%	41%	37%	38%	35%	44%	45%	35%
Health care costs	78%	79%	78%	77%	80%	79%	80%	74%	79%	81%	76%	78%	80%	78%	83%	73%	77%	82%	82%	78%	82%	79%	78%
Global political instability	15%	12%	15%	16%	15%	22%	17%	15%	14%	15%	17%	14%	16%	15%	11%	19%	14%	24%	11%	13%	10%	13%	16%
Rising supplier costs	32%	27%	25%	35%	39%	42%	27%	31%	40%	35%	37%	29%	32%	34%	34%	24%	32%	51%	47%	19%	46%	30%	33%
Human resources	43%	36%	38%	30%	27%	24%	54%	43%	35%	35%	52%	35%	49%	35%	60%	60%	49%	42%	40%	46%	38%	42%	44%
Cash flow	27%	28%	26%	29%	35%	35%	25%	31%	25%	26%	25%	27%	29%	32%	21%	15%	23%	26%	40%	28%	33%	32%	25%
Ability to obtain suitable financing	10%	8%	8%	8%	10%	13%	7%	11%	12%	10%	10%	9%	11%	11%	7%	7%	13%	12%	9%	8%	13%	13%	9%
U.S. trade agreements	9%	8%	NA	NA	NA	NA	7%	11%	8%	7%	7%	9%	9%	11%	6%	6%	6%	17%	9%	4%	15%	8%	9%
Don't know/None of the above	2%	1%	0%	0%	0%	0%	1%	2%	2%	1%	2%	2%	1%	3%	0%	0%	3%	0%	4%	1%	3%	2%	2%

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?																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Excellent	1%	1%	1%	1%	1%	1%	0%	1%	2%	1%	3%	0%	0%	2%	0%	0%	3%	0%	0%	1%	0%	3%	1%
Good	7%	8%	4%	4%	7%	9%	9%	6%	7%	7%	12%	7%	2%	7%	11%	6%	8%	6%	4%	8%	10%	8%	7%
Fair	25%	29%	29%	30%	26%	34%	29%	22%	25%	25%	36%	25%	12%	26%	20%	27%	32%	29%	18%	26%	23%	27%	24%
Poor	64%	61%	64%	63%	65%	55%	61%	67%	64%	60%	48%	63%	86%	62%	69%	66%	57%	64%	76%	61%	59%	60%	65%
Don't know	3%	1%	2%	2%	2%	2%	1%	3%	3%	6%	1%	4%	0%	3%	0%	1%	1%	1%	2%	3%	8%	3%	2%

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Q14. Of the following, what would you like to see the Governor and Legislature of New York focus on?																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Personal Income Tax Reform	58%	55%	54%	NA	NA	NA	55%	61%	60%	57%	56%	63%	53%	58%	60%	59%	57%	64%	58%	55%	62%	54%	60%
Business Income Tax Reform	63%	62%	63%	NA	NA	NA	61%	65%	64%	60%	61%	65%	58%	63%	69%	55%	70%	71%	64%	58%	69%	57%	65%
Estate Tax Reform	29%	31%	34%	NA	NA	NA	31%	34%	29%	18%	31%	29%	28%	27%	33%	32%	28%	38%	42%	25%	21%	25%	31%
Sales Tax Reform	24%	22%	25%	NA	NA	NA	21%	30%	19%	28%	21%	25%	27%	25%	24%	19%	25%	22%	33%	27%	23%	24%	24%
Infrastructure Development (roads, bridges, water, sewer)	52%	43%	42%	42%	32%	37%	59%	49%	48%	51%	61%	48%	47%	52%	56%	48%	62%	42%	60%	56%	44%	58%	50%
Energy Infrastructure (power generation and transmission, natural gas transmission)	24%	NA	NA	NA	NA	NA	23%	24%	21%	32%	22%	24%	28%	25%	19%	27%	28%	24%	24%	25%	18%	25%	24%
Business Development Incentives	31%	36%	36%	38%	43%	47%	30%	28%	27%	41%	36%	29%	28%	33%	23%	27%	34%	36%	24%	33%	21%	31%	30%
Ethics Reform	43%	52%	42%	40%	39%	35%	48%	39%	45%	38%	44%	40%	50%	46%	37%	40%	47%	39%	44%	46%	33%	45%	43%
Spending Cuts	53%	51%	58%	64%	72%	74%	41%	58%	62%	57%	50%	53%	58%	55%	54%	48%	51%	60%	64%	48%	59%	55%	52%
Other	16%	13%	14%	16%	11%	17%	15%	18%	13%	19%	10%	16%	25%	13%	21%	22%	13%	16%	16%	19%	13%	13%	17%
Prefer not to answer	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	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...?																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Very confident	1%	1%	1%	1%	0%	2%	0%	0%	2%	1%	1%	1%	0%	1%	0%	1%	0%	1%	0%	1%	0%	2%	0%
Somewhat confident	15%	14%	12%	12%	15%	23%	17%	10%	15%	21%	27%	13%	3%	14%	21%	14%	16%	10%	13%	19%	10%	15%	15%
Not very confident	48%	48%	50%	47%	48%	44%	53%	51%	42%	43%	51%	50%	41%	48%	49%	53%	48%	46%	60%	42%	67%	50%	48%
Not at all confident	35%	36%	37%	38%	37%	31%	29%	38%	40%	32%	20%	33%	57%	35%	30%	32%	34%	42%	27%	36%	21%	32%	36%
Don't know/Refused	2%	1%	1%	1%	1%	0%	1%	1%	1%	3%	1%	2%	0%	2%	0%	0%	1%	1%	0%	2%	3%	1%	2%

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?																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Excellent	6%	1%	0%	0%	0%	1%	8%	5%	7%	1%	10%	5%	2%	4%	13%	6%	8%	7%	7%	4%	10%	4%	6%
Good	22%	6%	2%	4%	3%	6%	15%	24%	23%	28%	27%	17%	24%	20%	26%	21%	27%	29%	29%	13%	15%	18%	23%
Fair	35%	29%	22%	21%	18%	21%	36%	34%	35%	35%	38%	34%	33%	35%	34%	36%	37%	35%	31%	33%	41%	34%	35%
Poor	33%	59%	73%	72%	76%	71%	36%	31%	31%	32%	22%	37%	37%	34%	26%	34%	27%	26%	24%	45%	28%	39%	31%
Don't know/Refused	5%	5%	2%	2%	3%	2%	6%	6%	5%	3%	3%	7%	5%	7%	1%	2%	3%	3%	9%	5%	5%	4%	5%

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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:																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Very confident	3%	5%	0%	1%	0%	1%	3%	4%	3%	4%	3%	3%	5%	2%	6%	6%	3%	3%	9%	2%	3%	5%	3%
Somewhat confident	36%	27%	7%	8%	7%	13%	35%	36%	36%	38%	46%	33%	30%	35%	44%	35%	42%	42%	38%	32%	41%	26%	39%
Not very confident	42%	44%	50%	45%	46%	42%	48%	42%	39%	34%	39%	45%	39%	43%	37%	40%	44%	41%	42%	39%	33%	47%	40%
Not at all confident	18%	22%	41%	44%	46%	43%	13%	17%	22%	22%	12%	17%	26%	19%	13%	18%	10%	12%	11%	27%	21%	21%	17%
Don't know/Refused	1%	2%	1%	2%	1%	1%	1%	1%	1%	1%	1%	2%	0%	1%	0%	0%	1%	1%	0%	1%	3%	1%	1%
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																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Right track	16%						10%	16%	24%	18%	15%	14%	20%	16%	19%	13%	16%	19%	18%	15%	18%	18%	16%
Wrong direction	61%						62%	60%	56%	68%	65%	56%	66%	65%	54%	56%	63%	57%	53%	64%	67%	66%	59%
Neither	18%						22%	16%	17%	12%	17%	21%	10%	13%	26%	27%	14%	21%	22%	16%	10%	11%	20%
Don't know	6%						6%	8%	4%	3%	3%	8%	4%	6%	1%	4%	6%	3%	7%	5%	5%	5%	6%
Q18B. Our immigration system																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Right track	38%						32%	41%	42%	37%	43%	35%	37%	38%	46%	35%	41%	50%	38%	31%	41%	31%	41%
Wrong direction	46%						48%	45%	44%	43%	43%	47%	46%	48%	31%	50%	46%	34%	40%	52%	44%	57%	42%
Neither	12%						14%	9%	10%	15%	13%	11%	13%	10%	21%	12%	10%	12%	16%	13%	10%	8%	13%
Don't know	4%						5%	4%	3%	6%	1%	7%	4%	5%	1%	3%	4%	3%	7%	4%	5%	3%	5%
Q18C. The federal budget deficit																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Right track	15%						12%	13%	17%	24%	13%	15%	17%	14%	23%	15%	18%	16%	16%	15%	18%	14%	16%
Wrong direction	59%						57%	57%	62%	59%	56%	59%	61%	62%	53%	54%	57%	56%	58%	59%	64%	67%	55%
Neither	18%						20%	18%	15%	15%	21%	18%	14%	15%	19%	26%	16%	22%	20%	18%	10%	11%	20%
Don't know	8%						10%	11%	6%	3%	10%	8%	8%	9%	6%	5%	9%	7%	7%	8%	8%	8%	9%
Q18D. The taxes businesses pay																							
	Upstate						Region				Cluster			Company Size			Industry					Revenue	
	2017						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Right track	43%						39%	43%	44%	50%	47%	45%	36%	34%	63%	60%	51%	43%	33%	42%	38%	30%	48%
Wrong direction	32%						33%	32%	29%	31%	26%	30%	42%	38%	20%	20%	33%	32%	38%	32%	26%	40%	28%
Neither	18%						20%	17%	21%	13%	23%	18%	14%	20%	16%	17%	13%	18%	24%	21%	21%	23%	17%
Don't know	7%						8%	7%	6%	6%	4%	7%	8%	8%	1%	3%	4%	7%	4%	5%	15%	7%	7%

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Q18E. The health of our economy																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Right track	48%	44%	53%	50%	46%	54%	48%	42%	44%	57%	57%	51%	59%	49%	42%	51%	37%	52%			
Wrong direction	27%	30%	24%	24%	31%	18%	29%	35%	30%	20%	22%	25%	14%	31%	36%	21%	38%	23%			
Neither	18%	18%	14%	22%	21%	22%	16%	17%	19%	20%	16%	19%	20%	11%	16%	21%	17%	18%			
Don't know	7%	8%	9%	5%	3%	6%	7%	7%	8%	3%	4%	5%	7%	9%	6%	8%	8%	6%			
Q18F. Safeguarding the environment																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Right track	23%	16%	25%	23%	31%	20%	22%	27%	23%	21%	21%	23%	28%	27%	19%	26%	18%	24%			
Wrong direction	39%	42%	38%	40%	37%	36%	37%	49%	39%	33%	43%	33%	31%	36%	50%	33%	43%	38%			
Neither	28%	30%	27%	28%	25%	35%	29%	16%	26%	39%	29%	33%	31%	24%	23%	31%	26%	29%			
Don't know	10%	12%	10%	9%	7%	10%	11%	8%	11%	7%	7%	11%	10%	13%	8%	10%	13%	9%			
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																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Right track	25%	23%	24%	24%	34%	32%	23%	21%	23%	30%	30%	22%	24%	24%	30%	28%	27%	24%			
Wrong direction	37%	36%	39%	42%	31%	33%	34%	50%	39%	39%	29%	46%	42%	36%	36%	33%	42%	36%			
Neither	24%	30%	22%	21%	24%	21%	28%	22%	24%	21%	31%	25%	19%	27%	25%	18%	18%	27%			
Don't know	13%	11%	15%	14%	12%	14%	15%	8%	14%	10%	11%	8%	14%	13%	9%	21%	13%	13%			
Q19B. Ethics reform																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Right track	9%	9%	7%	9%	15%	11%	10%	6%	10%	7%	9%	9%	7%	13%	12%	3%	11%	9%			
Wrong direction	61%	63%	61%	66%	53%	58%	57%	77%	65%	53%	59%	65%	64%	60%	61%	54%	60%	62%			
Neither	19%	21%	20%	15%	18%	25%	19%	9%	16%	27%	23%	20%	20%	13%	18%	31%	17%	19%			
Don't know	10%	8%	12%	9%	15%	6%	14%	8%	9%	13%	10%	6%	9%	13%	10%	13%	13%	10%			
Q19C. State spending																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Right track	9%	12%	5%	7%	18%	12%	10%	5%	9%	13%	9%	9%	7%	9%	14%	3%	8%	10%			
Wrong direction	70%	63%	77%	75%	60%	64%	67%	84%	69%	73%	69%	70%	81%	71%	64%	72%	68%	70%			
Neither	15%	17%	13%	12%	15%	19%	14%	9%	16%	11%	16%	18%	8%	11%	17%	18%	15%	14%			
Don't know	6%	8%	5%	6%	7%	5%	9%	2%	6%	3%	6%	4%	4%	9%	5%	8%	8%	6%			

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Q19D. The regulatory environment																							
	Upstate 2017					Region				Cluster			Company Size			Industry					Revenue		
						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+	
Right track	8%					9%	3%	8%	16%	9%	10%	4%	11%	7%	2%	5%	9%	7%	11%	5%	9%	8%	
Wrong direction	66%					63%	72%	71%	53%	60%	62%	82%	65%	69%	67%	66%	70%	71%	64%	56%	67%	66%	
Neither	17%					20%	15%	15%	19%	24%	17%	10%	16%	16%	23%	24%	13%	13%	16%	26%	18%	16%	
Don't know	8%					8%	9%	6%	12%	7%	11%	4%	8%	9%	7%	5%	8%	9%	8%	13%	5%	10%	
Q19E. Workers Compensation reform																							
	Upstate 2017					Region				Cluster			Company Size			Industry					Revenue		
						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+	
Right track	13%					13%	10%	13%	16%	13%	13%	12%	12%	14%	15%	11%	7%	16%	14%	21%	11%	13%	
Wrong direction	56%					55%	60%	62%	40%	53%	53%	67%	55%	59%	56%	58%	63%	60%	56%	44%	55%	56%	
Neither	16%					15%	15%	14%	25%	22%	16%	8%	16%	19%	16%	18%	21%	11%	15%	13%	17%	16%	
Don't know	15%					17%	15%	10%	19%	12%	18%	12%	16%	9%	13%	13%	9%	13%	15%	23%	17%	14%	
Q19F. Energy costs																							
	Upstate 2017					Region				Cluster			Company Size			Industry					Revenue		
						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+	
Right track	14%					14%	10%	17%	18%	16%	12%	16%	13%	20%	16%	13%	11%	13%	16%	15%	15%	14%	
Wrong direction	36%					38%	38%	38%	25%	32%	36%	42%	39%	27%	34%	43%	31%	51%	37%	31%	39%	35%	
Neither	32%					32%	34%	27%	37%	40%	30%	27%	33%	39%	29%	30%	46%	22%	29%	31%	28%	34%	
Don't know	18%					16%	17%	18%	21%	13%	22%	14%	15%	14%	21%	14%	12%	13%	18%	23%	18%	18%	
Q20A. How would you rate your local area on each of the following: - Suitable workforce																							
	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013		Region				Cluster			Company Size			Industry					Revenue	
							Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Excellent	9%	9%	12%	12%	15%		9%	10%	8%	9%	9%	9%	10%	10%	6%	9%	13%	7%	4%	10%	3%	12%	8%
Good	37%	39%	42%	50%	50%		37%	35%	38%	40%	44%	36%	31%	38%	31%	39%	27%	37%	36%	36%	56%	33%	39%
Fair	37%	40%	34%	29%	26%		39%	37%	37%	35%	32%	41%	37%	36%	41%	38%	38%	33%	44%	41%	36%	36%	38%
Poor	15%	11%	12%	7%	8%		12%	17%	16%	13%	14%	12%	22%	14%	21%	14%	20%	22%	13%	12%	3%	17%	14%
Don't know/Refused	2%	2%	1%	2%	1%		3%	1%	2%	3%	1%	3%	0%	2%	0%	0%	3%	1%	2%	1%	3%	3%	2%
Q20B. How would you rate your local area on each of the following: - Consumer confidence																							
	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013		Region				Cluster			Company Size			Industry					Revenue	
							Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Excellent	4%	2%	2%	2%	1%		8%	3%	2%	0%	5%	4%	2%	3%	3%	7%	4%	2%	0%	6%	0%	5%	3%
Good	50%	41%	38%	32%	27%		56%	49%	47%	44%	61%	49%	37%	50%	53%	52%	46%	51%	44%	49%	59%	55%	48%
Fair	39%	45%	49%	54%	54%		30%	42%	43%	46%	27%	40%	55%	39%	41%	37%	42%	36%	53%	39%	33%	33%	42%
Poor	5%	9%	9%	11%	16%		3%	6%	7%	7%	5%	5%	7%	6%	3%	3%	6%	10%	2%	4%	5%	4%	6%
Don't know/Refused	2%	3%	2%	2%	2%		3%	1%	1%	3%	1%	3%	0%	1%	0%	0%	3%	1%	0%	1%	3%	3%	1%

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Q20C. How would you rate your local area on each of the following: - Transportation infrastructure																						
	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					Revenue	
						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Excellent	4%	3%	4%	4%	5%	6%	4%	4%	1%	4%	3%	7%	4%	4%	2%	4%	1%	9%	6%	0%	4%	4%
Good	38%	39%	40%	44%	47%	37%	41%	38%	34%	41%	39%	31%	41%	36%	35%	41%	42%	53%	30%	36%	39%	38%
Fair	45%	37%	40%	38%	35%	43%	43%	47%	47%	44%	44%	46%	43%	47%	48%	39%	42%	31%	49%	56%	44%	45%
Poor	11%	19%	15%	12%	10%	11%	10%	10%	15%	10%	10%	16%	10%	13%	14%	13%	13%	7%	13%	5%	10%	12%
Don't know/Refused	2%	3%	2%	2%	2%	3%	1%	1%	3%	1%	3%	0%	1%	0%	1%	4%	1%	0%	1%	3%	3%	2%

Q20D. How would you rate your local area on each of the following: - Airline service																							
	Upstate 2017	Upstate 2016	Upstate 2015				Region				Cluster			Company Size			Industry					Revenue	
							Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Excellent	8%	7%	8%				7%	13%	5%	3%	12%	5%	8%	9%	6%	5%	9%	6%	9%	5%	15%	10%	7%
Good	45%	42%	47%				44%	58%	41%	25%	47%	45%	42%	49%	40%	37%	35%	57%	58%	43%	33%	46%	44%
Fair	34%	35%	31%				37%	22%	41%	40%	29%	37%	34%	32%	31%	45%	37%	23%	24%	37%	38%	33%	34%
Poor	11%	13%	14%				8%	4%	13%	28%	11%	9%	14%	8%	20%	11%	14%	11%	7%	13%	10%	8%	12%
Don't know/Refused	3%	3%	1%				4%	3%	1%	4%	1%	4%	2%	2%	3%	2%	5%	3%	2%	2%	3%	3%	3%

Q20E. How would you rate your local area on each of the following: - Taxi/car service																							
	Upstate 2017	Upstate 2016	Upstate 2015				Region				Cluster			Company Size			Industry					Revenue	
							Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Excellent	3%	1%	3%				3%	5%	2%	3%	6%	2%	4%	4%	1%	5%	5%	2%	2%	4%	5%	3%	4%
Good	34%	15%	27%				26%	38%	41%	35%	34%	35%	33%	37%	31%	29%	38%	47%	49%	25%	33%	35%	33%
Fair	38%	35%	38%				39%	38%	36%	38%	35%	39%	40%	38%	41%	36%	34%	26%	38%	41%	41%	37%	38%
Poor	21%	43%	26%				27%	15%	21%	19%	21%	20%	21%	18%	23%	29%	16%	22%	9%	27%	15%	18%	21%
Don't know/Refused	4%	6%	5%				6%	5%	1%	4%	4%	4%	3%	4%	3%	1%	6%	3%	2%	2%	5%	6%	4%

Q20F. How would you rate your local area on each of the following: - Ride sharing services																							
	Upstate 2017						Region				Cluster			Company Size			Industry					Revenue	
							Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
Excellent	8%						10%	8%	9%	4%	10%	7%	8%	8%	7%	12%	8%	7%	7%	8%	21%	8%	9%
Good	48%						56%	47%	48%	32%	52%	47%	46%	49%	43%	51%	51%	46%	51%	48%	44%	47%	48%
Fair	29%						25%	26%	28%	43%	24%	31%	29%	28%	33%	28%	28%	29%	27%	32%	21%	29%	28%
Poor	10%						5%	11%	13%	16%	10%	10%	12%	10%	14%	7%	6%	14%	13%	10%	10%	9%	11%
Don't know/Refused	5%						5%	8%	1%	4%	4%	5%	4%	5%	3%	2%	8%	4%	2%	3%	5%	6%	4%

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Q20G. How would you rate your local area on each of the following: - Local governmental support for business																							
	Upstate 2017	Upstate 2016	Upstate 2015	Region				Cluster			Company Size			Industry					Revenue				
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Excellent	3%	2%	2%				6%	3%	1%	3%	4%	4%	2%	4%	4%	0%	3%	2%	4%	4%	0%	4%	3%
Good	26%	17%	17%				28%	23%	26%	26%	30%	26%	18%	25%	30%	27%	16%	32%	27%	25%	28%	26%	26%
Fair	47%	48%	48%				46%	50%	43%	44%	51%	47%	42%	46%	40%	59%	51%	37%	53%	45%	56%	41%	48%
Poor	22%	30%	31%				17%	23%	28%	22%	13%	21%	39%	23%	24%	15%	28%	28%	13%	24%	13%	26%	21%
Don't know/Refused	2%	3%	2%				3%	1%	1%	4%	1%	3%	0%	2%	1%	0%	3%	1%	2%	1%	3%	3%	2%
Q20H. How would you rate your local area on each of the following: - As an area where businesses can succeed																							
	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					Revenue		
						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+	
Excellent	3%	3%	3%	2%	3%		5%	3%	2%	3%	6%	2%	3%	4%	3%	3%	4%	1%	4%	4%	0%	4%	3%
Good	29%	25%	27%	25%	24%		39%	23%	27%	25%	39%	32%	11%	29%	34%	32%	28%	26%	33%	32%	26%	34%	28%
Fair	48%	51%	49%	49%	51%		43%	55%	43%	54%	44%	51%	50%	48%	40%	56%	44%	51%	47%	47%	62%	46%	49%
Poor	16%	18%	19%	21%	21%		11%	16%	25%	15%	9%	12%	34%	17%	21%	9%	20%	21%	13%	15%	8%	13%	17%
Don't know/Refused	2%	3%	3%	3%	1%		2%	2%	3%	3%	1%	3%	2%	2%	1%	0%	4%	1%	2%	2%	5%	3%	2%
Q20I. How would you rate your local area on each of the following: - As a place where consumers want to live																							
	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					Revenue		
						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+	
Excellent	14%	10%	10%	12%	14%		19%	10%	14%	10%	20%	12%	11%	14%	11%	15%	11%	11%	18%	14%	10%	17%	13%
Good	44%	45%	43%	45%	44%		44%	44%	45%	40%	48%	46%	33%	44%	37%	50%	37%	46%	49%	44%	49%	42%	45%
Fair	35%	34%	33%	30%	30%		28%	39%	34%	40%	26%	35%	47%	34%	43%	31%	39%	33%	29%	36%	33%	35%	34%
Poor	6%	9%	12%	10%	11%		7%	5%	6%	7%	5%	6%	8%	6%	9%	4%	10%	9%	4%	4%	5%	3%	7%
Don't know/Refused	2%	3%	2%	2%	1%		2%	1%	1%	3%	1%	3%	0%	2%	0%	0%	3%	1%	0%	2%	3%	3%	1%
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?																							
	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					Revenue		
						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+	
Education	13%	9%	10%	14%	8%		16%	8%	12%	16%	14%	11%	11%	13%	9%	12%	15%	13%	13%	12%	5%	14%	12%
Tourism	8%	8%	8%	6%	7%		4%	6%	13%	12%	8%	9%	6%	9%	7%	6%	4%	8%	9%	7%	8%	12%	7%
Technology	25%	27%	31%	30%	26%		41%	10%	20%	32%	30%	23%	25%	23%	34%	28%	32%	17%	24%	27%	18%	24%	26%
Transportation	3%	3%	3%	2%	1%		6%	2%	0%	3%	3%	3%	3%	4%	0%	2%	6%	1%	2%	2%	3%	6%	2%
Medical	27%	28%	24%	26%	29%		9%	47%	34%	13%	22%	30%	27%	27%	26%	28%	20%	26%	29%	32%	36%	26%	27%
Green and sustainable energy	3%	5%	7%	4%	3%		4%	3%	4%	1%	4%	3%	2%	3%	3%	6%	1%	0%	4%	5%	5%	3%	4%
Manufacturing	11%	12%	15%	16%	16%		10%	13%	8%	12%	13%	9%	12%	11%	11%	12%	11%	23%	4%	5%	18%	4%	13%
Other	3%	1%	1%	2%	2%		3%	5%	1%	1%	1%	3%	5%	1%	7%	3%	4%	2%	3%	3%	5%	2%	3%
None of the above	7%	7%	0%	1%	7%		7%	6%	8%	9%	4%	9%	8%	9%	3%	3%	6%	10%	11%	5%	3%	9%	6%

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																						
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue					
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+				
Very significant	32%					24%	41%	33%	31%	33%	30%	35%	32%	33%	35%	44%	39%	27%	32%	15%	33%	32%
Somewhat significant	40%					46%	34%	39%	43%	39%	43%	38%	39%	44%	41%	28%	38%	49%	38%	49%	37%	41%
Not too significant	22%					24%	22%	23%	19%	23%	20%	25%	24%	23%	19%	22%	22%	13%	26%	26%	24%	22%
Not at all significant	3%					3%	2%	3%	4%	2%	4%	2%	4%	0%	3%	3%	0%	9%	2%	8%	3%	3%
Don't know/Refused	2%					3%	1%	3%	3%	2%	3%	0%	2%	0%	1%	4%	1%	2%	1%	3%	3%	2%
Q22B. Their work ethic																						
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue					
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+				
Very significant	42%					37%	44%	42%	47%	41%	42%	42%	41%	41%	44%	46%	43%	42%	42%	41%	48%	40%
Somewhat significant	32%					37%	28%	35%	29%	32%	32%	35%	33%	40%	31%	32%	29%	38%	29%	36%	31%	33%
Not too significant	18%					22%	17%	17%	13%	17%	19%	16%	20%	14%	18%	11%	22%	11%	21%	18%	14%	19%
Not at all significant	5%					2%	9%	4%	7%	7%	4%	7%	4%	4%	7%	9%	3%	7%	6%	3%	5%	6%
Don't know/Refused	2%					2%	2%	2%	3%	3%	2%	0%	3%	0%	0%	3%	2%	2%	2%	3%	2%	2%
Q22C. Having realistic salary and benefit expectations																						
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue					
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+				
Very significant	23%					26%	19%	27%	15%	21%	22%	26%	22%	24%	20%	19%	18%	27%	27%	10%	33%	19%
Somewhat significant	48%					43%	50%	49%	54%	51%	50%	42%	51%	43%	47%	49%	52%	44%	44%	62%	45%	49%
Not too significant	25%					26%	28%	22%	24%	24%	24%	29%	23%	31%	30%	27%	28%	22%	25%	23%	20%	27%
Not at all significant	2%					2%	3%	0%	4%	2%	2%	2%	2%	1%	3%	3%	1%	4%	2%	3%	1%	3%
Don't know/Refused	2%					3%	1%	2%	3%	2%	2%	0%	2%	0%	0%	3%	1%	2%	2%	3%	2%	2%
Q22D. Use or abuse of drugs or alcohol																						
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue					
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+				
Very significant	29%					21%	39%	29%	25%	32%	27%	30%	32%	34%	15%	28%	37%	38%	24%	26%	33%	28%
Somewhat significant	37%					37%	38%	35%	34%	39%	37%	33%	34%	37%	46%	38%	40%	33%	35%	41%	34%	37%
Not too significant	27%					32%	17%	29%	31%	23%	27%	32%	24%	27%	35%	25%	19%	24%	31%	26%	22%	29%
Not at all significant	4%					6%	3%	4%	6%	4%	4%	4%	6%	1%	3%	6%	2%	2%	6%	5%	8%	3%
Don't know/Refused	3%					3%	2%	3%	4%	2%	4%	1%	4%	0%	1%	3%	2%	2%	4%	3%	3%	3%

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Q22E. Their ability to express themselves both verbally and in writing																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Very significant	29%	28%	32%	32%	22%	27%	29%	34%	29%	24%	32%	32%	29%	29%	31%	18%	39%	26%			
Somewhat significant	46%	43%	49%	41%	53%	48%	45%	44%	47%	51%	39%	41%	43%	51%	42%	67%	41%	48%			
Not too significant	20%	24%	15%	23%	19%	18%	22%	21%	19%	24%	23%	22%	23%	16%	23%	8%	15%	22%			
Not at all significant	3%	3%	3%	3%	5%	2%	1%	3%	0%	5%	4%	3%	2%	2%	5%	3%	3%				
Don't know/Refused	2%	2%	1%	2%	3%	1%	2%	0%	2%	0%	0%	3%	1%	2%	1%	3%	2%	2%			

Q23. How prepared is your company for the Paid Family Leave Act that takes effect January 2018? Are you...:																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Very prepared	28%	37%	24%	28%	16%	28%	29%	24%	25%	30%	36%	24%	24%	7%	33%	28%	28%	28%			
Not very prepared	10%	6%	11%	10%	16%	10%	11%	8%	14%	6%	2%	15%	14%	13%	5%	13%	8%	11%			
Somewhat prepared	47%	47%	46%	49%	43%	50%	43%	51%	43%	56%	54%	48%	43%	49%	47%	49%	48%	46%			
Not at all prepared	14%	9%	17%	11%	24%	11%	15%	17%	18%	7%	6%	11%	17%	31%	13%	8%	16%	14%			
Don't know/Refused	1%	1%	1%	1%	1%	1%	2%	0%	1%	1%	1%	1%	1%	0%	2%	3%	0%	2%			

Q24. Which of the following, if any, have you done to prepare for the Paid Family Leave Act's effect?																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Hired outside legal or consulting help	19%	19%	17%	25%	13%	19%	19%	19%	16%	29%	23%	14%	17%	16%	21%	31%	13%	22%			
Modified your existing company leave policy	44%	52%	42%	41%	34%	44%	43%	45%	39%	50%	61%	35%	41%	33%	50%	44%	44%	43%			
Updated or purchased a new compliance solution	10%	13%	8%	9%	4%	12%	9%	8%	8%	10%	14%	13%	10%	4%	8%	8%	10%	9%			
Modified your existing workforce	4%	1%	6%	8%	1%	4%	2%	8%	4%	4%	4%	3%	6%	9%	4%	0%	4%	4%			
Hired or set a plan to hire temporary employees	6%	2%	6%	8%	9%	7%	5%	6%	5%	6%	7%	4%	8%	4%	7%	3%	5%	6%			
Nothing	39%	34%	40%	39%	50%	33%	43%	39%	47%	30%	21%	47%	39%	58%	34%	36%	43%	38%			

Q25. How would you describe your company's employee scheduling practices?																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Primarily pre-determined fixed schedules/fixed shifts	62%	66%	63%	58%	62%	65%	61%	60%	64%	70%	52%	58%	76%	62%	56%	72%	55%	65%			
Schedules vary, but are provided to employees in advance	23%	22%	16%	32%	25%	19%	25%	23%	20%	17%	37%	25%	14%	29%	26%	18%	28%	21%			
Employees make their own schedules based on business need	10%	9%	12%	8%	13%	12%	8%	13%	12%	9%	6%	10%	8%	2%	12%	8%	14%	9%			
Employees are often called in with little or no notice to cover unexpected business variations	2%	0%	6%	1%	0%	1%	2%	4%	2%	3%	1%	4%	0%	4%	2%	0%	1%	2%			
Other	2%	1%	3%	1%	0%	2%	2%	0%	1%	1%	2%	1%	1%	0%	2%	3%	3%	1%			
Don't know/Refused	1%	2%	1%	1%	0%	1%	2%	0%	1%	0%	1%	1%	1%	2%	1%	0%	0%	1%			

Q26. What does your company do to maintain 'equal pay' by race/ethnicity and gender within the organization?																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Adhere to a formal 'equal pay' policy	39%	43%	37%	37%	37%	39%	36%	44%	33%	43%	50%	39%	41%	38%	35%	44%	36%	40%			
Conduct 'equal pay' assessments	13%	12%	15%	8%	18%	13%	14%	9%	12%	13%	16%	13%	12%	16%	12%	18%	8%	15%			
Hire outside consultants to assess 'equal pay'	2%	1%	3%	2%	3%	1%	3%	2%	1%	3%	4%	0%	3%	2%	2%	0%	3%	2%			
Nothing in particular	44%	41%	43%	52%	43%	46%	44%	44%	53%	40%	28%	47%	42%	42%	48%	38%	52%	42%			
Don't know/Refused	2%	2%	3%	1%	0%	1%	3%	0%	1%	1%	2%	1%	1%	2%	3%	0%	1%	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?																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Very familiar	18%	19%	15%	23%	13%	17%	18%	20%	17%	16%	26%	19%	20%	11%	16%	26%	18%	18%			
Somewhat familiar	31%	32%	31%	38%	21%	32%	33%	27%	30%	37%	31%	19%	40%	27%	31%	36%	23%	34%			
Not very familiar	24%	23%	27%	17%	31%	27%	22%	25%	25%	17%	29%	27%	12%	29%	31%	10%	28%	23%			
Not at all familiar	24%	21%	25%	22%	32%	22%	25%	25%	27%	27%	14%	33%	27%	29%	20%	26%	28%	23%			
Don't know/Refused	2%	4%	1%	1%	3%	1%	2%	3%	1%	3%	1%	3%	1%	4%	2%	3%	3%	2%			

How innovative would you say your company is in each of the following areas?																					
Q28A. Use of the mobile Internet																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Very innovative	25%	30%	24%	24%	19%	25%	26%	22%	22%	23%	34%	28%	18%	29%	32%	5%	24%	25%			
Somewhat innovative	48%	48%	46%	44%	59%	53%	46%	49%	49%	50%	49%	61%	43%	40%	45%	56%	51%	48%			
Not very innovative	18%	16%	17%	25%	15%	18%	18%	20%	20%	17%	12%	10%	20%	18%	18%	31%	19%	18%			
Not at all innovative	6%	4%	11%	6%	3%	4%	7%	8%	6%	10%	4%	1%	14%	13%	4%	5%	5%	7%			
Don't know/Refused	2%	2%	1%	2%	4%	1%	3%	1%	2%	0%	1%	0%	4%	0%	2%	3%	1%	3%			

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Q28B. Production																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Very innovative	16%	14%	16%	22%	15%	13%	18%	17%	15%	26%	13%	14%	31%	13%	15%	3%	16%	17%			
Somewhat innovative	49%	55%	50%	42%	49%	60%	47%	41%	48%	46%	56%	57%	59%	31%	45%	44%	55%	48%			
Not very innovative	23%	20%	23%	28%	21%	19%	24%	26%	27%	17%	18%	23%	9%	40%	23%	38%	17%	25%			
Not at all innovative	6%	3%	8%	5%	7%	4%	6%	8%	5%	7%	7%	5%	0%	11%	7%	10%	6%	6%			
Don't know/Refused	6%	8%	3%	4%	9%	4%	5%	8%	5%	4%	5%	1%	1%	4%	11%	5%	7%	5%			
Q28C. Marketing																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Very innovative	18%	18%	16%	24%	15%	15%	21%	17%	17%	11%	28%	9%	16%	29%	22%	13%	18%	18%			
Somewhat innovative	44%	45%	46%	40%	46%	50%	42%	40%	45%	49%	40%	38%	41%	44%	44%	56%	46%	43%			
Not very innovative	31%	32%	29%	35%	25%	32%	28%	37%	32%	33%	28%	41%	38%	20%	27%	31%	29%	32%			
Not at all innovative	5%	3%	7%	1%	10%	2%	6%	5%	5%	7%	3%	13%	3%	4%	4%	0%	4%	5%			
Don't know/Refused	2%	2%	1%	1%	4%	1%	2%	2%	1%	0%	1%	0%	2%	2%	3%	0%	3%	2%			
Q28D. Client services																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Very innovative	28%	30%	27%	33%	21%	32%	25%	30%	28%	24%	32%	14%	33%	20%	38%	15%	28%	28%			
Somewhat innovative	45%	45%	45%	42%	51%	49%	45%	42%	45%	46%	48%	51%	36%	51%	43%	62%	44%	46%			
Not very innovative	21%	21%	21%	24%	19%	16%	24%	22%	23%	23%	17%	30%	28%	22%	13%	21%	25%	20%			
Not at all innovative	3%	3%	5%	0%	4%	3%	2%	5%	3%	7%	2%	5%	2%	4%	2%	3%	2%	4%			
Don't know/Refused	2%	1%	2%	1%	4%	0%	3%	2%	1%	0%	1%	0%	1%	2%	4%	0%	2%	2%			
Q28E. Information processing																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Very innovative	21%	19%	20%	25%	22%	24%	23%	13%	20%	24%	23%	16%	27%	13%	25%	8%	21%	21%			
Somewhat innovative	51%	50%	52%	45%	56%	51%	46%	60%	51%	46%	52%	59%	41%	51%	50%	59%	54%	50%			
Not very innovative	24%	26%	25%	25%	18%	23%	26%	23%	25%	26%	24%	23%	27%	31%	21%	26%	25%	24%			
Not at all innovative	2%	1%	2%	3%	1%	1%	3%	2%	3%	1%	0%	1%	3%	0%	1%	5%	0%	3%			
Don't know/Refused	2%	3%	0%	2%	3%	1%	2%	2%	1%	3%	0%	0%	2%	4%	2%	3%	0%	2%			

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Q28F. Physical space utilization																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Very innovative	23%	21%	27%	24%	16%	24%	23%	23%	23%	23%	21%	19%	28%	38%	22%	13%	23%	23%			
Somewhat innovative	45%	48%	42%	42%	49%	44%	44%	46%	43%	53%	49%	49%	49%	38%	40%	41%	43%	45%			
Not very innovative	27%	24%	26%	31%	29%	28%	28%	25%	29%	21%	28%	28%	18%	20%	31%	41%	30%	26%			
Not at all innovative	3%	4%	4%	2%	1%	2%	3%	5%	4%	1%	2%	3%	4%	0%	4%	5%	3%	4%			
Don't know/Refused	2%	2%	1%	2%	4%	1%	2%	2%	1%	1%	0%	1%	1%	4%	3%	0%	2%	2%			

Q28G. Employee benefits																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Very innovative	22%	20%	21%	23%	25%	22%	20%	23%	22%	20%	22%	19%	27%	13%	25%	8%	25%	20%			
Somewhat innovative	50%	55%	48%	48%	46%	54%	49%	48%	50%	54%	51%	63%	50%	44%	44%	51%	49%	51%			
Not very innovative	23%	20%	24%	22%	26%	19%	26%	22%	23%	23%	23%	13%	19%	31%	26%	36%	23%	23%			
Not at all innovative	3%	1%	4%	5%	1%	2%	2%	6%	4%	0%	2%	4%	1%	9%	2%	3%	2%	4%			
Don't know/Refused	3%	3%	2%	3%	1%	2%	2%	2%	1%	3%	1%	1%	3%	2%	2%	3%	2%	3%			

Q28H. Employment arrangements																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Very innovative	16%	14%	15%	17%	22%	16%	15%	17%	16%	14%	17%	9%	21%	9%	20%	10%	18%	15%			
Somewhat innovative	50%	52%	52%	51%	43%	50%	52%	47%	50%	53%	53%	59%	49%	42%	49%	41%	47%	51%			
Not very innovative	27%	29%	28%	24%	29%	28%	27%	29%	27%	30%	29%	28%	24%	40%	25%	36%	30%	27%			
Not at all innovative	3%	2%	3%	5%	4%	2%	4%	5%	5%	1%	1%	3%	2%	4%	3%	10%	2%	4%			
Don't know/Refused	3%	3%	2%	4%	1%	3%	2%	2%	2%	1%	0%	1%	3%	4%	2%	3%	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																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Currently use	89%	93%	87%	89%	85%	91%	89%	88%	89%	87%	95%	86%	96%	91%	88%	82%	88%	89%			
Future use	2%	1%	3%	3%	1%	4%	1%	2%	2%	3%	2%	4%	1%	2%	1%	5%	3%	2%			
No plans to use	3%	3%	4%	3%	4%	1%	4%	7%	4%	4%	1%	3%	1%	4%	4%	8%	3%	4%			
Don't know/Refused	5%	3%	5%	6%	9%	4%	6%	4%	5%	6%	2%	8%	2%	2%	6%	5%	7%	5%			

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Q29B. Automation of knowledge (including artificial intelligence)																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Currently use	14%	12%	17%	14%	13%	16%	12%	17%	13%	16%	17%	15%	13%	13%	15%	10%	14%	14%			
Future use	27%	26%	29%	28%	21%	30%	26%	24%	23%	30%	35%	24%	36%	16%	24%	31%	20%	29%			
No plans to use	54%	55%	50%	56%	59%	53%	56%	54%	60%	53%	44%	56%	43%	67%	56%	59%	59%	52%			
Don't know/Refused	5%	7%	4%	2%	7%	1%	6%	6%	4%	1%	4%	5%	8%	4%	5%	0%	7%	4%			
Q29C. The Internet of things (computing devices embedded in everyday objects)																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Currently use	25%	28%	23%	25%	24%	22%	24%	32%	23%	24%	31%	28%	27%	16%	26%	15%	20%	27%			
Future use	32%	30%	30%	36%	32%	38%	30%	25%	30%	39%	36%	32%	40%	36%	25%	33%	29%	33%			
No plans to use	39%	37%	44%	37%	37%	37%	41%	40%	45%	36%	29%	38%	29%	42%	44%	49%	45%	37%			
Don't know/Refused	4%	6%	3%	2%	7%	3%	5%	3%	3%	1%	4%	3%	4%	7%	5%	3%	6%	4%			
Q29D. The cloud																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Currently use	66%	74%	61%	71%	56%	69%	68%	59%	63%	74%	76%	66%	58%	56%	76%	69%	65%	67%			
Future use	16%	10%	18%	18%	22%	20%	15%	15%	18%	13%	14%	20%	23%	16%	10%	10%	14%	17%			
No plans to use	15%	13%	17%	10%	18%	10%	14%	21%	17%	11%	9%	14%	13%	24%	10%	21%	17%	14%			
Don't know/Refused	3%	3%	3%	1%	4%	1%	3%	5%	1%	1%	2%	0%	6%	4%	3%	0%	4%	2%			
Q29E. Advanced robotics																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Currently use	6%	7%	3%	6%	7%	3%	7%	6%	5%	4%	9%	4%	14%	4%	4%	5%	7%	5%			
Future use	16%	13%	19%	21%	9%	16%	16%	17%	14%	24%	19%	9%	43%	16%	7%	10%	10%	18%			
No plans to use	74%	75%	73%	71%	76%	79%	71%	74%	78%	69%	69%	85%	38%	71%	83%	85%	77%	73%			
Don't know/Refused	5%	5%	4%	3%	7%	2%	6%	4%	3%	3%	3%	3%	4%	9%	6%	0%	6%	4%			
Q29F. Autonomous or near autonomous vehicles																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Currently use	2%	1%	1%	3%	1%	0%	3%	2%	1%	1%	3%	0%	3%	2%	0%	2%	2%	2%			
Future use	11%	13%	13%	8%	7%	14%	11%	8%	10%	6%	18%	14%	6%	11%	11%	13%	9%	12%			
No plans to use	83%	81%	81%	88%	84%	85%	80%	87%	86%	91%	76%	85%	86%	82%	82%	87%	84%	83%			
Don't know/Refused	4%	4%	4%	1%	7%	1%	6%	3%	3%	1%	3%	1%	6%	4%	5%	0%	5%	4%			

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Q29G. 3-D Printing																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Currently use	8%	8%	7%	8%	13%	10%	7%	8%	8%	14%	9%	11%	21%	2%	5%	3%	8%	9%			
Future use	19%	16%	20%	21%	19%	21%	18%	17%	16%	16%	27%	22%	29%	16%	14%	21%	18%	18%			
No plans to use	69%	72%	69%	71%	62%	69%	68%	73%	73%	70%	62%	66%	46%	78%	76%	77%	69%	69%			
Don't know/Refused	4%	4%	5%	1%	6%	0%	6%	3%	3%	0%	3%	1%	4%	4%	5%	0%	5%	4%			
Q29H. Renewable energy																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Currently use	15%	19%	13%	14%	9%	19%	12%	14%	10%	14%	28%	19%	11%	18%	15%	15%	13%	15%			
Future use	36%	36%	36%	37%	35%	39%	33%	39%	36%	40%	36%	42%	39%	38%	29%	44%	36%	36%			
No plans to use	45%	41%	45%	48%	47%	41%	49%	43%	51%	44%	32%	37%	44%	40%	50%	41%	45%	45%			
Don't know/Refused	4%	4%	5%	1%	9%	1%	6%	4%	3%	1%	4%	3%	6%	4%	6%	0%	6%	4%			
Q29I. Cyber security																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Currently use	61%	63%	57%	64%	56%	59%	59%	65%	55%	67%	77%	48%	67%	42%	68%	54%	55%	62%			
Future use	22%	22%	25%	18%	21%	23%	22%	22%	24%	23%	17%	32%	20%	31%	17%	21%	29%	19%			
No plans to use	15%	10%	15%	16%	19%	17%	15%	11%	19%	10%	5%	19%	9%	22%	12%	26%	11%	16%			
Don't know/Refused	3%	4%	2%	2%	4%	1%	4%	2%	2%	0%	1%	1%	4%	4%	4%	0%	5%	2%			
Q29J. Digital analytics																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Currently use	32%	34%	32%	33%	26%	27%	34%	35%	30%	23%	46%	18%	34%	29%	38%	26%	32%	32%			
Future use	31%	29%	31%	31%	32%	39%	28%	26%	28%	43%	34%	30%	26%	22%	32%	38%	34%	30%			
No plans to use	33%	32%	32%	35%	35%	34%	32%	35%	39%	33%	17%	47%	37%	42%	25%	36%	30%	34%			
Don't know/Refused	4%	6%	4%	1%	6%	1%	6%	4%	3%	1%	3%	5%	3%	7%	5%	0%	4%	4%			
Q30. Do you tend to see these disruptive technologies more as an opportunity for your business or as a threat to your business?																					
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Opportunity	73%	73%	66%	78%	81%	78%	72%	70%	75%	67%	83%	70%	78%	62%	76%	69%	72%	73%			
Threat	19%	21%	24%	17%	10%	14%	23%	21%	20%	27%	14%	18%	16%	31%	16%	28%	19%	20%			
Don't know/Refused	7%	6%	10%	5%	9%	8%	6%	9%	5%	6%	3%	13%	7%	7%	8%	3%	8%	7%			

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 2015: 531 Upstate NY CEOs, MOE +/- 4.3%

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?																						
	Upstate 2017	Region				Cluster			Company Size			Industry					Revenue					
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+				
Tax incentives	45%	44%	43%	46%	49%	47%	47%	39%	44%	46%	51%	49%	44%	38%	45%	38%	43%	45%				
Funding Industry/University Partnerships	31%	28%	32%	31%	35%	34%	33%	22%	29%	34%	37%	29%	24%	22%	36%	33%	34%	30%				
Offering operational support and training for entrepreneurs	36%	39%	35%	34%	37%	43%	35%	30%	38%	41%	33%	30%	33%	24%	41%	38%	41%	34%				
Providing financial support including loans and grants	39%	41%	34%	32%	53%	43%	34%	42%	36%	37%	53%	39%	38%	22%	44%	26%	45%	37%				
None of the above	24%	21%	24%	28%	25%	22%	22%	30%	23%	29%	16%	27%	23%	36%	20%	28%	20%	26%				

Q32. Do you think your company will be in business in New York ten years from today or not?																						
	Upstate 2017	Upstate 2016	Region				Cluster			Company Size			Industry					Revenue				
			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Yes	65%	64%	78%	56%	61%	65%	79%	66%	46%	60%	74%	84%	66%	56%	51%	70%	69%	63%	66%			
No	12%	10%	8%	13%	16%	13%	10%	9%	22%	15%	11%	3%	10%	14%	13%	11%	15%	12%	12%			
Don't know/Refused	23%	25%	14%	31%	23%	22%	11%	24%	32%	25%	14%	13%	24%	30%	36%	19%	15%	25%	22%			

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?																						
	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					Revenue	
						Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+
New York	41%	39%	29%	28%	29%	52%	38%	30%	40%	58%	38%	25%	43%	33%	47%	46%	20%	33%	48%	44%	44%	40%
Someplace else	56%	56%	67%	69%	65%	45%	57%	68%	56%	39%	59%	70%	57%	64%	50%	51%	77%	60%	48%	54%	55%	56%
Don't know/Refused	4%	5%	3%	4%	6%	3%	5%	2%	4%	3%	3%	6%	0%	3%	3%	4%	3%	7%	4%	3%	2%	4%

Q34. Do you offer a pension or 401K to your employees?																						
	Upstate 2017	Upstate 2016	Region				Cluster			Company Size			Industry					Revenue				
			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M+			
Yes	83%	82%	86%	79%	82%	85%	85%	85%	76%	81%	93%	96%	84%	87%	71%	83%	85%	80%	84%			
No	14%	15%	11%	16%	16%	10%	13%	13%	17%	19%	7%	3%	13%	10%	24%	13%	13%	17%	13%			
Don't know	3%	3%	3%	5%	2%	4%	2%	2%	7%	0%	0%	1%	4%	3%	4%	4%	3%	3%	4%			