							1,142 Opstate Ne	ZW TOTK	CLO 3									
Which of the following industry categori	es best	describe	s the typ	e of business	s your com	pany is engage	d in?											
					Reg	ion											Cluster	
							Hudson Valley/										1	
		Albany	_	Rochester	Syracuse	Binghamton	Westchester	Other								High		
Engineering and Construction	13%	17%	14%	13%	16%	18%	9%	11%								15%	11%	15%
Food and Beverage	6%	3%	4%	9%	4%	10%	7%	8%								8%	5%	6%
Financial	6%	10%	8%	5%	7%	2%	6%	4%								6%	8%	4%
Manufacturing	20%	14%	19%	19%	25%	16%	16%	28%								17%	23%	18%
Retail	18%	15%	14%	15%	11%	24%	24%	21%								16%	18%	20%
Service	24%	29%	24%	27%	25%	22%	25%	19%								25%	23%	26%
Wholesale and Distribution	12%	11%	17%	13%	13%	8%	14%	9%								13%	13%	11%
																	<u> </u>	
As you think about the current business	or ecor	nomic co	nditions i	n New York a	as compare	d to six month	ıs ago, would you	say the	y are considerabl	y better, a l	ittle better	, about the same,	a little	worse, or	considerably w	orse?		
					Reg	ion						Industry					Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &		ĺ	
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Considerably better	1%	2%	1%	0%	0%	4%	1%	1%	1%	3%	1%	0%	0%	1%	0%	3%	0%	0%
A little better	20%	22%	20%	20%	21%	8%	24%	18%	25%	17%	24%	14%	16%	22%	25%	60%	11%	0%
About the same	42%	44%	43%	46%	42%	38%	36%	43%	39%	38%	54%	45%	46%	42%	34%	36%	66%	16%
A little worse	28%	28%	24%	27%	32%	38%	24%	29%	25%	33%	19%	33%	25%	27%	29%	0%	22%	57%
Considerably worse	9%	4%	12%	6%	5%	12%	15%	9%	10%	9%	1%	8%	13%	8%	11%	0%	1%	27%
Looking forward from today through nex	ct year,	that is, t	he entire	2013 year, h	now would	you describe y	our expectations	for the	economy in New	York?	•	•	•		•	•		•
	Region											Industry					Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &			1
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Considerably better	2%	4%	2%	2%	1%	4%	1%	3%	2%	9%	0%	1%	1%	3%	2%	8%	1%	0%
A little better	27%	32%	26%	34%	33%	14%	26%	25%	24%	32%	29%	28%	24%	31%	28%	76%	18%	1%
About the same	33%	32%	32%	30%	32%	26%	35%	34%	30%	25%	39%	37%	34%	31%	33%	16%	60%	11%
A little worse	26%	24%	23%	28%	25%	40%	24%	27%	31%	23%	29%	25%	27%	24%	26%	1%	20%	54%
Considerably worse	11%	7%	17%	5%	9%	16%	14%	12%	14%	12%	4%	10%	14%	11%	11%	0%	1%	34%
-																		
Now thinking specifically about your ind	ustry, h	now wou	ld you de	scribe the cu	rrent busir	ess or econon	nic conditions in N	ew Yorl	as compared wi	th six mont	hs ago?	•						
			<u> </u>		Reg	ion			1			Industry					Cluster	
					l		Hudson Valley/		Engineering &	Food &		, 			Wholesale &			
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Considerably better	1%	3%	2%	0%	2%	2%	2%	1%	3%	1%	1%	0%	0%	2%	3%	5%	0%	0%
A little better	17%	19%	14%	19%	17%	12%	16%	20%	22%	19%	14%	15%	18%	16%	18%	57%	6%	0%
About the same	39%	43%	41%	40%	42%	38%	37%	36%	38%	38%	54%	40%	36%	38%	39%	36%	65%	8%
A little worse	32%	27%	30%	38%	34%	34%	31%	35%	27%	29%	27%	36%	33%	35%	29%	2%	27%	63%
Considerably worse	10%	8%	14%	4%	6%	14%	15%	9%	10%	13%	3%	8%	12%	10%	11%	0%	1%	29%
,																		
And looking forward from today through	the ne	ext year,	how wou	ld you descr	ibe your ex	pectations for	your industry her	e in Nev	w York?			l .		I				
				•	Reg	ion	•					Industry					Cluster	
							Hudson Valley/		Engineering &	Food &		, , , , , , , , , , , , , , , , , , ,			Wholesale &			T
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Considerably better	3%	3%	1%	2%	3%	4%	4%	4%	3%	7%	0%	2%	1%	4%	4%	10%	1%	0%
A little better	25%	33%	19%	31%	27%	18%	23%	23%	23%	35%	26%	21%	26%	25%	26%	71%	15%	0%
About the same	34%	29%	37%	34%	34%	38%	35%	35%	32%	30%	36%	45%	32%	28%	36%	18%	60%	14%
A little worse	27%	28%	27%	27%	27%	30%	23%	28%	25%	23%	37%	25%	25%	30%	26%	1%	24%	52%
Considerably worse	11%	8%	16%	5%	9%	10%	15%	11%	16%	4%	1%	8%	15%	13%	8%	0%	1%	34%
Considerably Worse	11/0	0/0	10/0	3/0	3/0	10/0	13/0	11/0	10/0	7/0	1/0	G/0	13/0	13/0	G/0	0/0	1/0	34/0
	1	<u> </u>	1	l .	ı	l .	l	<u> </u>	l .	l .	1	l		L	l			

NYCEO2012 Crosstabs.xlsx 1 of 8

First Niagara Bank/Siena College Research Institute 2012 1,142 Upstate New York CEO's

					Reg	ion						Industry					Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &		1	
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Grow substantially	2%	2%	3%	1%	1%	2%	2%	2%	3%	1%	1%	2%	1%	1%	3%	5%	1%	0%
Grow moderately	34%	40%	32%	35%	37%	16%	35%	33%	21%	42%	46%	39%	29%	34%	36%	67%	34%	7%
Stay about the same	35%	36%	34%	40%	31%	46%	32%	35%	37%	28%	37%	35%	34%	36%	35%	27%	45%	28%
Decrease moderately	24%	18%	26%	20%	30%	32%	24%	24%	31%	25%	16%	19%	30%	21%	24%	1%	19%	49%
Decrease substantially	5%	4%	5%	5%	2%	4%	7%	7%	8%	4%	0%	4%	6%	7%	1%	0%	1%	15%
Refused	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Again as you consider your company and your existing customer base, do you expect to realize additional revenue from your existing customers, about the same revenue from your existing customers as you currently realize or less revenue from your existing customers than you currently do?

					Reg	ion						Industry					Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &			
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Additional revenue	19%	24%	23%	20%	20%	14%	13%	18%	14%	25%	21%	25%	12%	19%	22%	41%	17%	4%
About the same revenue	50%	52%	43%	55%	40%	50%	54%	51%	48%	54%	66%	46%	53%	45%	50%	56%	59%	32%
Less revenue	31%	24%	33%	24%	40%	36%	32%	32%	38%	22%	13%	29%	35%	36%	28%	3%	23%	65%
Refused	0%	0%	0%	1%	0%	0%	1%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Continuing to focus on your company, please think quickly about profitability. Between today and the end of the calendar year 2013 do you expect your profits to grow substantially, grow moderately, stay about the same, decrease moderately or decrease substantially?

					Reg	ion						Industry					Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &			
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Grow substantially	2%	2%	3%	1%	0%	2%	1%	3%	3%	0%	0%	3%	1%	2%	1%	4%	1%	1%
Grow moderately	25%	34%	25%	25%	27%	10%	26%	19%	18%	30%	43%	26%	18%	24%	28%	50%	25%	3%
Stay about the same	35%	29%	29%	37%	35%	44%	35%	38%	31%	29%	40%	39%	34%	36%	31%	37%	40%	25%
Decrease moderately	32%	28%	36%	34%	34%	34%	28%	31%	37%	33%	17%	26%	38%	31%	34%	8%	31%	51%
Decrease substantially	7%	7%	7%	4%	4%	10%	9%	9%	12%	7%	0%	5%	9%	8%	5%	1%	2%	20%
Refused	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%

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 firm's profitability over the next year? Cluster Region Industry Hudson Valley/ **Engineering &** Food & Wholesale & Middle Low Total Albany Buffalo Rochester Syracuse Binghamton Westchester Other Construction Beverage | Financial | Manufacturing | Retail | Service | Distribution High Market/Demand growth 36% 45% 34% 43% 40% 32% 35% 38% 31% 40% 37% 58% 34% 21% 28% 30% 33% 39% 36% 29% 40% 30% 43% 32% 20% 33% Cost reduction 29% 33% 31% 47% 54% 42% 30% 34% 33% 52% 14% 26% 15% 15% 12% Price increase 13% 15% 12% 8% 14% 13% 10% 10% 14% 10% 10% 12% 10% New technology 8% 10% 11% 6% 8% 8% 5% 3% 14% 14% 3% 10% 9% 6% 11% 6% 7% Other 5% 5% 5% 7% 6% 2% 6% 4% 6% 1% 7% 4% 6% 5% 6% 4% 5% 6% 2% 1% 2% 1% 1% 0% 4% 2% 1% 4% 0% 1% 2% 3% 1% 1% 1% 3% No Response

NYCEO2012 Crosstabs.xlsx 2 of 8

1,142 Upstate New York CEO's

					Reg	gion						Industry					Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &			
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Lov
Expansion of existing markets	55%	59%	56%	55%	64%	50%	50%	52%	55%	57%	64%	64%	42%	53%	57%	64%	56%	469
Growth in existing products	49%	46%	52%	47%	56%	42%	48%	48%	29%	48%	66%	57%	52%	44%	56%	54%	55%	369
Entry into new markets	33%	31%	32%	40%	30%	18%	37%	33%	34%	42%	26%	46%	21%	31%	33%	38%	34%	289
Internal restructuring	32%	38%	33%	27%	33%	36%	32%	32%	35%	35%	24%	25%	36%	36%	33%	26%	31%	409
New product lines	31%	31%	32%	32%	30%	24%	29%	33%	12%	41%	23%	43%	35%	23%	44%	36%	32%	279
Technology innovation	26%	29%	29%	21%	26%	26%	26%	27%	19%	19%	43%	32%	20%	30%	23%	32%	25%	249
Acquisition of new businesses	11%	13%	11%	17%	10%	8%	9%	8%	9%	16%	17%	10%	8%	12%	12%	12%	13%	9%
Construction of new locations	8%	9%	6%	12%	7%	10%	10%	6%	14%	19%	6%	4%	7%	8%	4%	10%	8%	6%
Other	5%	6%	3%	4%	4%	6%	7%	6%	5%	10%	4%	5%	8%	4%	2%	3%	4%	9%
No response	2%	1%	2%	3%	2%	4%	3%	3%	2%	1%	1%	2%	2%	3%	1%	2%	2%	2%
Please indicate which of the following	s the MA	IN area	of concer	tration for y	our compa	ny now and th	rough 2013.											
					Reg	ion						Industry					Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &			
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Lov
Expansion of existing markets	28%	32%	24%	31%	26%	32%	23%	31%	35%	33%	30%	29%	19%	27%	31%	36%	26%	249
Growth in existing products	24%	19%	26%	19%	31%	22%	25%	24%	14%	22%	31%	24%	30%	22%	26%	26%	27%	189
Entry into new markets	12%	15%	12%	14%	10%	6%	12%	9%	18%	4%	7%	14%	7%	12%	12%	11%	12%	129
Internal restructuring	11%	15%	15%	7%	9%	10%	10%	11%	12%	10%	7%	6%	17%	12%	10%	6%	10%	189
New product lines	9%	5%	12%	8%	8%	12%	9%	8%	5%	10%	0%	11%	11%	7%	14%	8%	9%	9%
Technology innovation	6%	4%	4%	5%	8%	6%	9%	5%	3%	4%	13%	7%	5%	8%	1%	4%	6%	6%
Acquisition of new businesses	3%	3%	2%	6%	2%	2%	3%	2%	2%	1%	6%	2%	2%	3%	3%	3%	2%	3%
Construction of new locations	2%	3%	2%	4%	2%	4%	4%	1%	5%	7%	1%	1%	2%	3%	0%	3%	2%	2%
Other	3%	4%	2%	2%	2%	4%	4%	4%	3%	6%	4%	4%	4%	2%	1%	2%	2%	6%
No response	3%	1%	1%	3%	3%	2%	4%	4%	3%	1%	0%	2%	3%	4%	2%	1%	3%	3%
Do you intend to invest between today	through	2013 in	anv fixed	assets for v	our firm de	signed to mee	t growing demand	d. reduce	e costs or enhanc	e productiv	itv?	Į.	,	,				-
	1		•			ion		,				Industry					Cluster	
							Hudson Valley/		Engineering &	Food &		1			Wholesale &			
	Total	Albany	Buffalo	Rochester	Svracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Lov
Yes	50%	50%	55%	45%	56%	42%	47%	53%	40%	49%	50%	59%	46%	51%	52%	64%	52%	379
No	38%	37%	38%	43%	33%	46%	42%	35%	50%	36%	43%	29%	42%	36%	42%	27%	38%	49%
Not sure	11%	13%	7%	13%	11%	12%	11%	12%	10%	14%	7%	12%	12%	13%	6%	9%	10%	149
	11/0	1070	7,0	1370	2270	12,0	11/0	12/0	1070	21,70	7,70	12/0	1270	2070	0,0	370	1070	1.,
(If investing in fixed assets) What is the	main w	N VOLLEY	nect to f	inance those	assets?	ı	1	ı		1		<u>l</u>	1	ı			L	
(ggauseause, renacio	1					ion						Industry					Cluster	
	+				1,00		Hudson Valley/		Engineering &	Food &		austry			Wholesale &		3.63(0)	
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Lov
Internally generated funds	56%	53%	59%	67%	56%	52%	45%	60%	55%	50%	89%	57%	55%	55%	49%	51%	60%	569
Borrow from a financial institution	35%	38%	31%	28%	33%	38%	43%	33%	42%	29%	6%	36%	33%	35%	46%	38%	32%	35
	35%	38% 4%	31% 4%	28%	33%	38% 5%	43% 3%	33%	2%	9%	0%	2%	33%	5% 5%	1%	3%	32%	-
Private equity	6%	4% 5%	4% 6%	2% 4%	3% 8%	5%	3% 8%	5%	2%	12%	6%	2% 5%	3% 8%	5% 6%	4%	3% 7%	3% 4%	39 69
Not sure							X%	1 7%	1 1/0	1 1/%	n%		. ×%				/1%	

NYCEO2012 Crosstabs.xlsx 3 of 8

Now thinking about the people that wor	k for yo	ur comp	any, do y	ou intend to	substantia	ally increase, m	noderately increas	e, rema	in about the sam	e or decrea	se your wo	rkforce between	today a	nd the er	nd of 2013?			
					Reg		•				· ·	Industry					Cluster	
							Hudson Valley/		Engineering &	Food &		, 			Wholesale &			
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Substantially increase	0%	1%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%
Moderately increase	22%	29%	26%	24%	23%	8%	18%	19%	24%	19%	27%	27%	12%	24%	21%	42%	21%	6%
Remain about the same	61%	54%	58%	58%	62%	70%	64%	64%	56%	64%	64%	61%	67%	57%	62%	54%	67%	58%
Decrease	15%	15%	13%	16%	15%	20%	16%	16%	20%	13%	9%	11%	20%	17%	13%	3%	11%	33%
Refused	1%	1%	2%	2%	0%	2%	2%	1%	1%	3%	0%	0%	0%	1%	4%	0%	1%	2%
Now thinking about other challenges that	t your	company	faces, w	hich of the f			ed with. Check all	that ap	ply.							ı	a	
			ı		Reg	ion		1				Industry		1			Cluster	т—
			- "·			a	Hudson Valley/		Engineering &	Food &	ļ <u>.</u>				Wholesale &			١.
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service		High	Middle	+
Health care costs	79%	81%	79%	79%	78%	74%	77%	81%	82%	77%	73%	80%	81%	73%	88%	74%	78%	85%
Governmental regulation	70%	64%	70%	69%	73% 64%	72%	69%	74%	74%	67%	80%	66%	76%	67%	68%	52% 54%	71% 71%	83%
Taxation	68% 65%	64% 59%	67%	73% 66%	69%	74% 66%	67% 60%	72% 69%	75%	67% 51%	54% 69%	69% 70%	83% 67%	55%	72% 65%	54%	64%	76% 74%
Adverse economic conditions Energy costs	49%	46%	67% 42%	45%	44%	56%	50%	59%	70% 55%	65%	17%	43%	62%	61% 44%	51%	51%	44%	55%
Rising supplier costs	44%	41%	40%	45%	43%	48%	42%	49%	42%	75%	9%	54%	51%	32%	46%	44%	44%	45%
Cash flow	39%	38%	39%	23%	39%	42%	47%	41%	41%	48%	21%	33%	47%	40%	36%	40%	37%	40%
Existing U.S. competition	25%	25%	27%	23%	36%	22%	25%	23%	23%	25%	27%	32%	19%	22%	34%	25%	31%	19%
Human resources	23%	27%	24%	22%	23%	26%	21%	20%	16%	25%	19%	22%	19%	32%	20%	28%	22%	19%
Global political instability	22%	24%	22%	21%	21%	16%	20%	23%	16%	28%	21%	31%	22%	13%	25%	22%	22%	21%
Risk management	21%	26%	19%	17%	27%	22%	16%	20%	24%	16%	46%	13%	16%	27%	14%	20%	21%	20%
Ability to obtain suitable financing	14%	13%	15%	9%	15%	10%	18%	16%	14%	14%	9%	12%	17%	15%	15%	16%	12%	15%
Foreign competition	13%	10%	13%	12%	15%	12%	11%	17%	4%	12%	3%	39%	9%	4%	11%	15%	13%	13%
Availability of equity financing	9%	11%	6%	6%	12%	8%	12%	8%	11%	10%	3%	6%	10%	10%	8%	8%	9%	10%
Other	4%	6%	4%	4%	4%	2%	5%	4%	6%	4%	1%	4%	3%	7%	1%	3%	4%	7%
	1,0	0,0	170	1,70	1,70	270	370	.,,	070	.,,,	2,0	.,,	3,0	,,,	2,0	3,0	1,70	1 770
Which of the challenges you selected are	you M	OST cond	cerned w	ith?	I	I.	l .	1			I	l .			1			-
					Reg	ion						Industry					Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &			
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Governmental regulation	24%	25%	23%	27%	24%	24%	22%	24%	29%	22%	50%	15%	19%	27%	24%	16%	25%	30%
Adverse economic conditions	22%	24%	21%	29%	22%	18%	20%	21%	23%	13%	19%	26%	24%	20%	24%	27%	21%	20%
Taxation	12%	10%	14%	11%	12%	20%	13%	11%	7%	10%	13%	13%	16%	12%	10%	6%	10%	19%
Health care costs	12%	10%	13%	9%	13%	12%	12%	14%	8%	16%	1%	11%	13%	14%	14%	12%	11%	12%
Cash flow	8%	8%	8%	3%	4%	10%	12%	7%	13%	7%	0%	4%	10%	9%	6%	10%	9%	5%
Existing U.S. competition	5%	4%	7%	2%	12%	4%	5%	2%	5%	9%	6%	5%	3%	4%	6%	5%	7%	2%
Rising supplier costs	4%	1%	4%	2%	1%	4%	6%	4%	0%	9%	1%	7%	3%	2%	4%	7%	3%	2%
Foreign competition	3%	3%	3%	3%	3%	0%	1%	5%	2%	0%	0%	10%	2%	0%	2%	4%	3%	2%
Energy costs	3%	4%	2%	3%	3%	2%	3%	5%	4%	4%	0%	2%	3%	3%	5%	4%	4%	2%
Ability to obtain suitable financing	2%	3%	1%	3%	1%	0%	3%	0%	1%	1%	3%	1%	2%	1%	2%	2%	1%	2%
Risk management	1%	2%	1%	1%	2%	0%	1%	0%	1%	0%	6%	0%	0%	1%	1%	1%	1%	1%
Global political instability	1%	0%	2%	2%	0%	4%	2%	2%	2%	4%	0%	1%	2%	1%	1%	2%	2%	1%
Human resources	1%	2%	2%	2%	2%	0%	1%	1%	2%	1%	1%	1%	0%	2%	1%	1%	2%	1%
Availability of equity financing	0%	1%	1%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%
Other	2%	3%	1%	2%	2%	2%	3%	1%	3%	3%	0%	1%	1%	3%	1%	1%	2%	2%

NYCEO2012 Crosstabs.xlsx 4 of 8

1,142 Upstate New York CEO's

at all important?	oany tr	iat you a	ctively giv	ve васк to y	our commu	inity through c	naritable giving, s	oonsors	nips, volunteerin	g or otner p	rograms? I	s it very importan	it, some	wnat imp	ortant, not very	/ impor	rtant or r	iot
					Reg	ion						Industry				- 1	Cluster	
			1				Hudson Valley/		Engineering &	Food &					Wholesale &			

					Reg	ion						Industry					Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &		ĺ	
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Very important	46%	46%	39%	49%	46%	48%	42%	51%	42%	46%	56%	34%	52%	54%	39%	51%	45%	43%
Somewhat important	43%	45%	48%	39%	42%	40%	43%	41%	47%	45%	39%	48%	41%	35%	47%	40%	45%	42%
Not very important	6%	5%	7%	8%	10%	10%	6%	4%	5%	6%	3%	12%	3%	6%	4%	6%	6%	7%
Not at all important	5%	3%	6%	3%	3%	2%	9%	3%	5%	1%	3%	4%	4%	4%	9%	3%	4%	7%
Refused	0%	1%	0%	1%	0%	0%	1%	0%	0%	1%	0%	1%	0%	0%	1%	0%	0%	1%

How satisfied are you with the efforts you and your company have made over the last year to give back to your community through charitable giving, sponsorships, volunteering or other programs? Are you completely satisfied, somewhat satisfied, not very satisfied or not at all satisfied?

					Reg	ion						Industry					Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &			
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Completely satisfied	42%	45%	39%	45%	44%	40%	40%	44%	45%	45%	50%	37%	46%	42%	39%	39%	44%	43%
Somewhat satisfied	44%	46%	50%	45%	43%	42%	42%	41%	42%	42%	44%	46%	41%	46%	44%	52%	42%	41%
Not very satisfied	10%	7%	7%	8%	8%	10%	15%	11%	8%	9%	6%	11%	12%	8%	12%	8%	11%	10%
Not at all satisfied	3%	1%	4%	1%	4%	6%	4%	4%	5%	3%	0%	3%	1%	3%	5%	2%	3%	5%
Refused	1%	1%	0%	2%	0%	2%	1%	0%	0%	1%	0%	2%	0%	0%	1%	0%	1%	1%

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 husiness climate in which companies like yours will succeed?

business climate in which companies like	yours	WIII SUCC	eeu:															
					Reg	ion						Industry					Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &	[]		
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Excellent	1%	0%	1%	1%	0%	0%	1%	1%	0%	1%	0%	0%	0%	1%	0%	2%	0%	0%
Good	9%	13%	6%	9%	6%	6%	9%	9%	9%	10%	14%	7%	9%	9%	6%	21%	7%	1%
Fair	33%	41%	29%	30%	39%	26%	37%	28%	33%	36%	44%	26%	33%	33%	35%	44%	37%	18%
Poor	56%	43%	63%	58%	53%	68%	52%	60%	58%	49%	41%	63%	58%	54%	56%	30%	54%	80%
Don't know	2%	3%	1%	3%	2%	0%	2%	2%	1%	3%	0%	3%	0%	3%	2%	2%	2%	2%

Of the following, what would you like to see the Governor and Legislature of New York focus on? [Please check all that apply.]

					Reg	ion			Industry								Cluster	
							Hudson Valley/		Engineering &	Food &					Wholesale &			
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low
Spending Cuts	73%	64%	77%	78%	76%	76%	69%	72%	64%	78%	84%	80%	78%	61%	76%	58%	75%	81%
Income Tax Reform	57%	61%	55%	63%	58%	48%	54%	55%	56%	51%	51%	57%	61%	52%	63%	48%	60%	59%
Business Development Incentives	47%	50%	45%	39%	53%	34%	53%	48%	47%	58%	41%	46%	47%	47%	48%	55%	47%	41%
Infrastructure Development	36%	53%	32%	27%	36%	42%	38%	32%	52%	39%	33%	32%	31%	35%	33%	53%	33%	25%
Ethics Reform	35%	44%	31%	30%	33%	50%	35%	31%	32%	28%	46%	32%	37%	34%	37%	34%	34%	35%
Increasing State Revenues through	8%	8%	8%	5%	11%	10%	10%	8%	9%	10%	4%	7%	6%	9%	11%	10%	7%	9%
consumer oriented taxes	070	670	670	3%	1170	10%	10%	070	9%	10%	470	7 70	0%	9%	1176	10%	770	970
(Vol) Reducing regulations	5%	4%	4%	2%	7%	6%	4%	7%	5%	1%	3%	7%	3%	6%	5%	2%	5%	7%
(Vol) Workers compensation reform	2%	1%	3%	2%	2%	2%	1%	2%	5%	0%	0%	4%	0%	0%	3%	1%	3%	1%
Other	18%	17%	15%	20%	19%	28%	19%	19%	19%	18%	13%	17%	18%	23%	14%	17%	16%	23%

NYCEO2012 Crosstabs.xlsx 5 of 8

First Niagara Bank/Siena College Research Institute 2012 1,142 Upstate New York CEO's

					Reg	ion						Industry				Cluster			
	T-4-1	A 11	D. ff-1-	D. d	J		Hudson Valley/	Oth	Engineering &	Food &	Financial.	•	D-4-11	Camaiaa	Wholesale &				
	Total	Albany	Buffalo		Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing		Service	Distribution	High	Middle	-	
Spending Cuts	40%	25%	47%	53%	35%	42%	34%	43%	28%	40%	51%	46%	46%	32%	43%	28%	40%	49%	
Income Tax Reform	18%	24%	16%	17%	16%	14%	20%	16%	16%	16%	20%	15%	20%	16%	22%	15%	20%	17%	
Business Development Incentives	14%	11%	13%	9%	19%	8%	21%	15%	11%	22%	13%	17%	14%	14%	13%	20%	14%	11%	
Infrastructure Development	9%	16%	7%	6%	10%	4%	9%	7%	22%	0%	3%	5%	6%	11%	9%	17%	7%	4%	
Ethics Reform	5%	8%	4%	4%	6%	10%	4%	4%	5%	4%	7%	3%	4%	9%	3%	7%	5%	4%	
Increasing State Revenues through consumer oriented taxes	1%	3%	1%	2%	1%	2%	2%	1%	1%	3%	0%	1%	2%	2%	1%	2%	1%	1%	
(Vol) Reducing regulations	2%	2%	2%	1%	3%	4%	1%	3%	3%	1%	0%	3%	2%	3%	1%	1%	2%	4%	
(Vol) Workers compensation reform	1%	1%	1%	0%	1%	0%	1%	1%	1%	0%	0%	1%	0%	0%	1%	0%	2%	0%	
Other	10%	11%	8%	8%	10%	16%	10%	9%	14%	12%	6%	8%	6%	14%	6%	10%	9%	10%	
How confident are you in the ability of	the gove	rnment	of the Sta	te of New Y	ork to impr	ove the busine	l ess climate for bus	inesses	like yours here ir	New York	over the ne	ext year? Are you						l	
					Reg	ion						Industry					Cluster		
							Hudson Valley/		Engineering &	Food &					Wholesale &				
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low	
Very confident	2%	1%	2%	2%	3%	2%	2%	2%	1%	3%	0%	2%	1%	3%	1%	5%	1%	0%	
Somewhat confident	21%	35%	13%	23%	22%	16%	24%	17%	22%	28%	23%	16%	20%	24%	21%	43%	20%	4%	
Not very confident	46%	39%	45%	45%	48%	46%	46%	48%	43%	43%	54%	51%	41%	42%	50%	43%	51%	41%	
Not at all confident	31%	24%	40%	30%	27%	36%	29%	33%	34%	25%	23%	31%	37%	31%	28%	10%	27%	55%	
Refused	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
And thinking about the efforts of the fe	deral go	vernmer	nt, overal	would you	say the fed	eral governme	nt is doing an exce	ellent, g	ood, fair or poor	job of creat	ing a busin	ess climate in whi	ch com	panies lik	e yours will suc	ceed?			
				•	Reg				•	•		Industry			•		Cluster		
							Hudson Valley/		Engineering &	Food &		•			Wholesale &				
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low	
Excellent	1%	1%	1%	0%	0%	0%	0%	1%	1%	0%	0%	0%	0%	1%	0%	2%	0%	0%	
Good	5%	9%	6%	3%	3%	6%	5%	4%	4%	9%	6%	4%	4%	6%	5%	12%	4%	1%	
Fair	20%	31%	12%	17%	25%	16%	20%	18%	15%	24%	20%	15%	16%	28%	19%	32%	23%	5%	
		59%	79%	77%	69%	76%	75%	76%	78%	66%	72%	79%	79%	64%	73%	52%	71%	94%	
Poor	73%													1%	2%	1%	1%	1%	
Poor Don't know	73% 1%	1%	2%	2%	3%	2%	1%	1%	2%	1%	1%	1%	0%	170					
					3%	2%				1%	1%	1%	0%	170					
	1%	1%	2%	2%	e business	climate for bus	1%	1%	2%				0%	170					
Don't know	1%	1%	2%	2%		climate for bus	1% sinesses like yours	1%	2% New York over t	he next yea		1% Industry	0%	176			Cluster		
Don't know	1% the fede	1% ral govei	2% rnment to	2% o improve th	e business Reg	climate for bus	1% sinesses like yours Hudson Valley/	1% here in	2% New York over to Engineering &	he next yea	r? Are you	Industry			Wholesale &	High		Low	
Don't know How confident are you in the ability of	1% the fede	1% ral gove	2% rnment to	2% Dimprove th	e business Reg Syracuse	climate for bus ion Binghamton	1% sinesses like yours Hudson Valley/ Westchester	1% here in	2% New York over to Engineering & Construction	he next yea Food & Beverage	r? Are you Financial	Industry Manufacturing	Retail	Service	Distribution	High	Middle		
Don't know How confident are you in the ability of Very confident	1% the fede Total 1%	1% ral gover	rnment to	2% improve th Rochester 1%	Reg Syracuse 0%	climate for busion Binghamton 0%	1% sinesses like yours Hudson Valley/ Westchester 1%	1% here in Other 1%	2% New York over to Engineering & Construction 1%	Food & Beverage	r? Are you Financial 0%	Industry Manufacturing 1%	Retail 0%	Service 2%	Distribution 0%	3%	Middle	0%	
Don't know How confident are you in the ability of Very confident Somewhat confident	1% the fede Total 1% 13%	1% ral gover Albany 2% 19%	2% rnment to Buffalo 2% 12%	2% improve th Rochester 1% 9%	Syracuse 0% 13%	climate for busion Binghamton 0% 8%	1% sinesses like yours Hudson Valley/ Westchester 1% 16%	1% here in Other 1% 12%	2% New York over to Engineering & Construction 1% 7%	Food & Beverage 3% 18%	r? Are you Financial 0% 13%	Industry Manufacturing 1% 11%	Retail 0% 11%	Service 2% 20%	Distribution 0% 11%	3% 30%	Middle 1% 11%	0% 2%	
Don't know How confident are you in the ability of Very confident Somewhat confident Not very confident	1% the fede Total 1% 13% 41%	1% ral gover Albany 2% 19% 45%	2% nment to Buffalo 2% 12% 36%	2% improve th Rochester 1% 9% 44%	Reg Syracuse 0% 13% 47%	climate for busion Binghamton 0% 8% 58%	1% sinesses like yours Hudson Valley/ Westchester 1% 16% 37%	1% here in Other 1% 12% 38%	2% New York over to Engineering & Construction 1% 7% 47%	Food & Beverage 3% 18% 42%	r? Are you Financial 0% 13% 38%	Industry Manufacturing 1% 11% 39%	Retail 0% 11% 37%	Service 2% 20% 41%	0% 11% 45%	3% 30% 45%	Middle 1% 11% 46%	0% 2% 31%	
Don't know How confident are you in the ability of Very confident Somewhat confident	1% the fede Total 1% 13%	1% ral gover Albany 2% 19%	2% rnment to Buffalo 2% 12%	2% improve th Rochester 1% 9%	Syracuse 0% 13%	climate for busion Binghamton 0% 8%	1% sinesses like yours Hudson Valley/ Westchester 1% 16%	1% here in Other 1% 12%	2% New York over to Engineering & Construction 1% 7%	Food & Beverage 3% 18%	r? Are you Financial 0% 13%	Industry Manufacturing 1% 11%	Retail 0% 11%	Service 2% 20%	Distribution 0% 11%	3% 30%	Middle 1% 11%	Low 0% 2% 31% 67% 0%	

NYCEO2012 Crosstabs.xlsx 6 of 8

First Niagara Bank/Siena College Research Institute 2012 1,142 Upstate New York CEO's

Support 7/95 776 978 678 678 678 678 678 678 678 678 678 6								1,142 Upstate Ne													
Total Albany Buffalo Rochester Syracuse Binghanton Mudson Valley Depose Family Syracuse Syracuse Binghanton Mudson Valley Depose Family Syracuse	For each of the following national propo	sals ind	icate wh	ether yo	u support it o		•	Health Care Refo	rm Legis	lation											
Support Total Albany Buffalo Rochester Syracus Region Forest Syracus Region		Region																			
Support 7/95 776 978 678 678 678 678 678 678 678 678 678 6		Total	Albany	Ruffalo	Pochester	Syracuse	Ringhamton		Other			Financial	Manufacturing	Potail	Sarvica		⊔iah	Middle	Low		
Oppose	Support																_		85%		
No opinion																			10%		
For each of the following national proposals indicate whether you support it or oppose it? - Passa Balanced Budget Constitutional Amendment Total Albamy Buffalo Rochester Syracuse Binghamton Westchester Other Construction Beverage Financial Manufacturing Retail Service Distribution High Middel Lower Manufacturing Manufacturing Retail Service Distribution High Middel Lower Manufacturing Manufacturing High Middel Lower Manufacturing Manufacturing Manufacturing Manufacturing Manufacturing Manufacturing Manufacturing Manufacturing																			4%		
Total Albany Surface	THE SPITION	070	1070	070	370	070	12/0	070	070	770	7,0	070	070	070	370	070	12/0		170		
Total Albany Buffalo Rochester Syracuse Binghamton Mudson Valley Mostheside Other Construction Support Syracuse Syracuse Singhamton Support Syracuse Singhamton Syracuse Singhamton Syracuse Syracuse Singhamton Syracuse Syracuse Singhamton Syracuse Syracuse Syracuse Syracuse Singhamton Syracuse Syracuse Syracuse Singhamton Syracuse Syr	For each of the following national propo	sals ind	icate wh	ether yo	u support it o	or oppose i	t? - Pass a Bala	nced Budget Cons	titution	al Amendment		U.		ı	1		ı				
Total Albahy Buffalo Rochester Syracus Bighamton Westhester Officer Construction Beverage Flancial Manufacturing Real Service Distribution High Middle Location						Reg	ion						Industry					Cluster			
Support Supp										-								I			
Compose 11% 15% 9% 9% 14% 6% 13% 11% 11% 11% 7% 12% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13% 13%						_													_		
No opinion 10% 13% 10% 5% 6% 6% 0% 13% 13% 10% 13% 14% 8% 7% 11% 13% 12% 8% 9% 9% 9% 9% 9% 9% 9	Support											1							86%		
For each of the following national proposals indicate whether you support it or oppose R2 - Increase Federal Spending on Infrastructure Region	Oppose				9%							16%			14%			9%	5%		
Total Albany Buffalo Rochester Syracus Binghamton Westchester Construction Reverage Financial Manufacturing Retail Service Distribution High Middle Lo	No opinion	10%	13%	10%	5%	6%	0%	13%	11%	10%	13%	4%	8%	7%	11%	13%	12%	8%	9%		
Total Albany Buffalo Rochester Syracus Binghamton Westchester Construction Reverage Financial Manufacturing Retail Service Distribution High Middle Lo	For each of the following national prope	sals ind	icata wh	othor vo	nart it		t? Incress F	doral Enanding o	n Infract	*******											
Total Albany Buffalo Rochester Syracuse Binghamton Westchester Other Construction Reverse Financial Manufacturing Retail Service Distribution High Middle Lo Support 48% 62% 42% 41% 50% 52% 50% 45% 67% 45% 67% 43% 51% 38% 41% 55% 45% 67% 43% 51% 38% 41% 55% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 67% 45% 45% 67% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45% 45%	For each of the following national propo	sais illu	licate wii	ether yo	u support it t			ederal Spending of	IIIIIIast	ructure			Industry					Cluster			
Support Alsa Burfalo Rochester Syracuse Binghamton Westchester Other Construction Beverage Financial Manufacturing Retail Service Distribution High Middle Local						1.08	i	Hudson Valley/		Fngineering &	Food &					Wholesale &			Г		
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NYCEO2012 Crosstabs.xlsx 7 of 8

1,142 Upstate New York CEO's

For each of the following national pro	posals ind	licate wh	ether you	u support it	or oppose i	t? - Enact a Te	mporary Reductio	n in Emp	loyer Payroll Ta	ces									
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	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low	
Support	55%	60%	54%	51%	59%	58%	61%	49%	66%	57%	43%	47%	62%	56%	50%	54%	54%	57%	
Oppose	30%	27%	30%	32%	27%	30%	24%	36%	22%	27%	43%	35%	22%	30%	36%	30%	28%	32%	
No opinion	15%	13%	16%	17%	14%	12%	15%	15%	12%	16%	13%	19%	15%	13%	14%	15%	17%	11%	
For each of the following national pro	nosals ind	licate wh	ether voi	u support it e	or oppose i	 t? - Increase th	 ne Income Taxes P	aid by T	hose Farning ove	r \$250.000	a vear								
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							Hudson Valley/		Engineering &	Food &					Wholesale &			1	
	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low	
Support	39%	46%	33%	30%	47%	34%	37%	41%	31%	49%	29%	36%	37%	47%	39%	62%	36%	25%	
Oppose	53%	46%	59%	63%	49%	52%	54%	49%	60%	36%	64%	54%	54%	46%	56%	28%	56%	68%	
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	Total	Albany				Binghamton	Westchester	Other	Construction	Beverage		Manufacturing		-	Distribution		Middle	_	
Support	89%	88%	93%	84%	90%	92%	88%	91%	89%	91%	90%	91%	91%	88%	87%	86%	89%	92%	
Oppose	4%	6%	4%	5%	5%	2%	5%	3%	5%	6%	3%	4%	2%	6%	5%	6%	4%	3%	
No opinion	6%	6%	4%	10%	5%	6%	8%	6%	6%	3%	7%	6%	7%	6%	8%	8%	6%	5%	
For each of the following national pro	posals ind	licate wh	ether voi	u support it (or oppose i	t? - Cap Annua	l Increases in Fede	eral Regi	ulatory Spending	at Zero Do	lars			1					
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	Total	Albany	Buffalo	Rochester	Syracuse	Binghamton	Westchester	Other	Construction	Beverage	Financial	Manufacturing	Retail	Service	Distribution	High	Middle	Low	
Support	68%	62%	72%	73%	67%	78%	66%	66%	65%	69%	67%	73%	79%	59%	67%	51%	69%	80%	
Oppose	12%	17%	10%	9%	12%	8%	11%	15%	13%	9%	13%	10%	5%	19%	15%	26%	9%	5%	
No opinion	20%	22%	17%	19%	21%	14%	23%	19%	22%	22%	20%	18%	16%	23%	18%	23%	22%	15%	

NYCEO2012 Crosstabs.xlsx 8 of 8