## Sponsored by The Business Council of New York State

2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6%

Q1. Which of the following industry categories be	st describes the typ	Je or busii	icos your	company	is ciigaget	u 1111;	1														
									M	SA			Cluster			ompan	<i>-</i>		T		
	Upstate 2018	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Upstate 2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100				
Engineering and Construction	17%	17%	18%	16%	17%	17%	15%	23%	16%	14%	16%	18%	19%	12%	16%	19%	20%				
Food and Beverage	5%	3%	5%	5%	3%	3%	5%	1%	7%	8%	4%	5%	4%	8%	5%	8%	4%				
Financial	6%	6%	7%	5%	8%	6%	8%	8%	3%	5%	11%	7%	7%	4%	5%	7%	6%				
Manufacturing	20%	19%	18%	24%	21%	19%	19%	13%	25%	24%	17%	23%	20%	16%	22%	24%	16%				
Retail	13%	10%	11%	12%	12%	12%	14%	12%	12%	13%	16%	10%	13%	17%	15%	8%	7%				
Service	30%	36%	32%	25%	23%	27%	26%	36%	30%	26%	25%	28%	28%	35%	25%	29%	44%				
Wholesale and Distribution	9%	8%	10%	11%	15%	15%	14%	7%	8%	10%	12%	9%	9%	8%	12%	5%	4%				
Other	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%				
Q2. As you think about the current business or eco	onomic conditions	in New Yo	rk State a	s compar	ed to six n	nonths ag	o, would y	ou say	they a	re consi	iderabl	y bette	er, a little	better,	about	the sa	me, a little	worse,	or consid	lerably v	worse?
									M	SA			Cluster		C	ompan	y Size		Indu	ıstry	
	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &			
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Considerably better	4%	4%	1%	2%	4%	2%	1%	6%	3%	3%	5%	16%	0%	0%	6%	1%	4%	5%	3%	4%	5%
A little better	23%	23%	26%	24%	32%	24%	21%	23%	24%	25%	21%	71%	6%	2%	24%	27%	16%	27%	29%	15%	21%
About the same	46%	47%	48%	44%	44%	46%	44%	49%	41%	43%	55%	13%	75%	22%	43%	51%	51%	49%	41%	42%	47%
A little worse	20%	20%	21%	22%	16%	22%	28%	17%	24%	23%	14%	0%	18%	51%	21%	20%	21%	15%	19%	33%	21%
Considerably worse	6%	5%	4%	8%	4%	7%	7%	5%	8%	6%	4%	0%	0%	25%	6%	1%	9%	3%	8%	7%	7%
-																					
Q3. Looking forward from today through next yea	r, that is, the entire	e 2019 yea	ar, how w	ould you d	describe y	our expec	tations for	the ec	onomy	in Nev	v York	State?						•			•
									M	SA			Cluster		C	ompan	y Size		Indu	ıstry	
	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &			
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Considerably better	3%	5%	5%	3%	5%	2%	2%	3%	3%	3%	5%	11%	0%	0%	3%	3%	4%	7%	3%	4%	3%
A little better	24%	29%	37%	27%	37%	28%	31%	30%	22%	27%	17%	69%	10%	0%	24%	33%	17%	21%	27%	18%	23%
About the same	43%	36%	37%	40%	39%	40%	32%	40%	40%	40%	55%	18%	72%	8%	43%	43%	40%	48%	42%	47%	40%
A little worse	23%	24%	19%	24%	15%	24%	25%	22%	30%	23%	16%	1%	18%	63%	22%	21%	29%	21%	19%	27%	25%
Considerably worse	7%	6%	3%	6%	4%	6%	10%	6%	6%	7%	7%	1%	0%	28%	8%	0%	10%	4%	9%	4%	8%
Q4. Now thinking specifically about your industry	how would you de	escribe th	e current	business c	or econom	ic conditi	ons in Nev	v York	State a	s comp	ared w	ith six ı	months ag	go?			•	•	•		
									M	SA			Cluster		C	ompan	y Size		Indu	ıstry	
	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate									51 to	More	Eng &			
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Considerably better	4%	3%	2%	3%	4%	3%	2%	9%	2%	3%	3%	15%	0%	0%	4%	5%	4%	8%	2%	2%	6%
A little better	21%	18%	18%	21%	24%	20%	17%	21%	20%	24%	20%	63%	7%	0%	21%	29%	15%	21%	29%	11%	17%
	42%	45%	47%	39%	42%	44%	41%	39%	44%	39%	49%	22%	69%	6%	45%	41%	33%	56%	42%	44%	38%
About the same																					
About the same A little worse	25%	27%	27%	29%	24%	25%	31%	24%	23%	27%	25%	0%	23%	61%	22%	20%	41%	12%	20%	29%	31%
******	25% 7%	27% 7%	27% 7%	29% 8%	24% 6%	25% 8%	31% 8%	24% 7%	23% 11%	27% 6%	25% 4%	0% 0%	23% 0%	61% 33%	22% 8%	20% 4%	41% 7%	12% 3%	20% 7%	29% 15%	31% 9%

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Q5. And looking forward from today through the next ye	ar,how wo	uld you de	scribe you	ır expecta	tions for y	our indu	stry here i	n New \	York?												
									М	SA			Cluster		С	ompar	ny Size		Indi	ıstry	
	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &			
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Considerably better	5%	5%	5%	3%	5%	3%	2%	6%	3%	6%	3%	17%	0%	0%	4%	9%	2%	10%	1%	2%	6%
A little better	22%	24%	30%	24%	30%	25%	27%	28%	20%	21%	17%	63%	8%	0%	22%	27%	17%	16%	30%	16%	20%
About the same	41%	35%	35%	41%	36%	38%	33%	39%	41%	40%	46%	21%	68%	5%	41%	39%	43%	52%	38%	42%	35%
A little worse	23%	27%	24%	25%	24%	25%	27%	19%	23%	24%	26%	0%	23%	53%	22%	23%	24%	18%	21%	31%	25%
Considerably worse	10%	8%	6%	7%	5%	9%	10%	8%	13%	9%	8%	0%	0%	42%	10%	3%	13%	4%	9%	9%	13%
Q6. Now thinking specifically about your company, wha	t are your e	xpectation	s for reve	nue throu	gh the yea	ar 2019? I	Do you bel	ieve yo	ur reve	enue wi	II?										
									М	SA			Cluster			ompar			Indi	ıstry	
	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &			
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch		High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Grow substantially	4%	4%	3%	3%	4%	3%	2%	4%	8%	1%	3%	8%	2%	2%	3%	3%	7%	3%	6%	0%	6%
Grow moderately	46%	44%	48%	42%	45%	39%	36%	58%	36%	42%	49%	72%	45%	14%	44%	55%	41%	45%	55%	31%	40%
Stay about the same	35%	35%	33%	36%	33%	36%	35%	25%	34%	42%	38%	20%	41%	40%	38%	25%	35%	36%	30%	42%	41%
Decrease moderately	13%	13%	14%	17%	16%	18%	23%	12%	18%	12%	9%	1%	10%	35%	13%	16%	13%	14%	7%	25%	9%
Decrease substantially	3%	3%	2%	2%	1%	3%	4%	2%	3%	3%	1%	0%	1%	9%	3%	1%	2%	3%	2%	2%	4%
Q7. Continuing to focus on your company, please think of	uickly abou	ıt profitab	lity. Betw	een today	and the	end of the	e calendar	year 20	018 do	you exp	ect yo	ur prof	its to?								
									М	SA			Cluster			ompar			Indi	ıstry	
	Upstate	•	Upstate	Upstate	Upstate	Upstate	1 -								50 or	51 to		Eng &			
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Grow substantially	2%	3%	2%	2%	3%	2%	2%	1%	3%	2%	3%	5%	2%	0%	2%	1%	4%	0%	6%	0%	2%
Grow moderately	35%	36%	41%	33%	38%	29%	28%	47%	28%	30%	36%	63%	29%	13%	32%	45%	33%	34%	40%	24%	34%
Stay about the same	37%	35%	34%	36%	35%	38%	32%	37%	35%	40%	37%	28%	49%	24%	41%	33%	33%	40%	34%	42%	41%
Decrease moderately	20%	20%	20%	25%	22%	26%	33%	10%	26%	23%	20%	3%	18%	45%	20%	16%	22%	22%	16%	29%	17%
Decrease substantially	5%	4%	3%	4%	3%	4%	6%	5%	6%	4%	5%	1%	2%	17%	5%	4%	7%	4%	5%	5%	6%
Don't know/Refused	0%	1%	0%	1%	0%	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%
Q8. Businesses and the executives that direct them striv	e to enhanc	e profitab	ility in ma	ny ways.	Through w	vhich of tl	he followii	ng strat	egies c	lo you p	olan to	MOST	enhance y	our co		_		er the n	ext year?	1	
									М	SA			Cluster			ompar	,-		Indi	ıstry	1
	Upstate		Upstate	Upstate	Upstate	Upstate	Upstate									51 to		Eng &			
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	•	High	Middle		less	100	than 100	Constr	Manuf	Retail	Service
Market/demand growth	40%	42%	48%	39%	43%	40%	38%	45%	41%	39%	32%	50%	41%	26%	42%	39%	35%	38%	44%	29%	39%
Cost reduction	21%	25%	25%	31%	29%	34%	34%	15%	22%	25%	23%	14%	19%	35%	22%	20%	21%	16%	15%	35%	21%
Price increase	21%	13%	13%	12%	15%	13%	12%	21%	22%	20%	21%	16%	24%	22%	20%	19%	29%	32%	22%	27%	20%
New technology	10%	11%	9%	9%	7%	10%	9%	13%	3%	11%	15%	14%	10%	5%	9%	15%	10%	10%	14%	0%	11%
Other	7%	8%	4%	7%	6%	3%	6%	6%	9%	5%	7%	5%	6%	11%	6%	8%	5%	4%	5%	7%	8%
Don't know/Refused	1%	1%	1%	1%	1%	1%	1%	0%	1%	0%	3%	1%	0%	1%	1%	0%	0%	0%	0%	2%	1%

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Q9. Please indicate which of the following are major areas	of concer	tration fo	r your cor	npany nov	w and thr	ough 2019	).														
									M	SA			Cluster		C	ompan	y Size		Indu	ustry	
	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &			
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Expansion of existing markets	54%	57%	53%	54%	56%	61%	58%	59%	51%	52%	53%	63%	54%	40%	50%	64%	55%	59%	58%	38%	49%
Growth in existing products	51%	54%	58%	52%	54%	53%	50%	50%	49%	48%	58%	61%	48%	44%	53%	47%	48%	38%	67%	44%	44%
Entry into new markets	29%	28%	32%	30%	33%	37%	33%	33%	28%	27%	24%	29%	32%	21%	26%	36%	32%	23%	44%	15%	29%
New product lines	25%	24%	23%	27%	25%	31%	31%	29%	22%	20%	32%	28%	24%	23%	27%	25%	21%	15%	42%	33%	12%
Acquisition of new businesses	13%	15%	15%	15%	14%	11%	13%	14%	14%	11%	13%	15%	14%	8%	10%	13%	21%	4%	17%	5%	17%
Technology innovation	31%	34%	28%	27%	26%	28%	27%	32%	25%	33%	34%	33%	33%	24%	20%	45%	49%	19%	41%	18%	39%
Construction of new locations	10%	8%	10%	9%	10%	10%	8%	11%	11%	7%	12%	11%	10%	8%	8%	9%	17%	15%	10%	13%	10%
Internal restructuring	28%	28%	25%	28%	25%	28%	33%	32%	28%	26%	25%	24%	27%	33%	27%	27%	29%	30%	20%	27%	36%
Expansion into export markets	4%	5%	4%	NA	NA	NA	NA	3%	3%	3%	5%	2%	4%	5%	3%	5%	2%	0%	9%	0%	2%
Other	6%	5%	4%	0%	3%	5%	4%	3%	10%	7%	1%	5%	4%	12%	5%	7%	6%	5%	5%	7%	3%
Don't know/Refused	3%	0%	2%	1%	1%	2%	2%	2%	3%	4%	3%	2%	4%	2%	4%	3%	0%	5%	1%	4%	5%
Q10. Do you intend to invest between today through 2019	in any fixe	ed assets f	for your co	ompany d	esigned to	meet gro	wing den	and, re	educe c	osts or	enhan	e prod	luctivity?								
									M	SA			Cluster		C	ompan	y Size		Indu	ustry	
	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &			
	Upstate 2018	Upstate 2017	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Upstate 2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service
Yes		-	•		•		•	<b>Alb</b> 62%	Buff 53%	Roch 58%	<b>Syr</b> 55%	High 66%	Middle 58%	<b>Low</b> 45%				_	Manuf 76%	Retail 44%	Service 56%
Yes No	2018	2017	2016	2015	2014	2013	2012								less	100	than 100	Constr			
	<b>2018</b> 57%	<b>2017</b> 56%	<b>2016</b> 51%	<b>2015</b> 55%	<b>2014</b> 58%	<b>2013</b> 52%	<b>2012</b> 52%	62%	53%	58%	55%	66%	58%	45%	less 52%	<b>100</b> 64%	than 100 68%	Constr 60%	76%	44%	56%
No	2018 57% 28%	2017 56% 28%	2016 51% 36%	<b>2015</b> 55% 34%	2014 58% 31%	<b>2013</b> 52% 36%	2012 52% 38%	62% 28%	53% 31%	58% 25%	55% 29%	66% 19%	58% 26%	45% 44%	less 52% 33%	100 64% 21%	than 100 68% 20%	Constr 60% 21%	76% 15%	44% 45%	56% 32%
No	2018 57% 28% 15%	2017 56% 28% 16%	2016 51% 36% 13%	2015 55% 34% 11%	2014 58% 31% 11%	2013 52% 36% 12%	2012 52% 38% 11%	62% 28%	53% 31%	58% 25%	55% 29%	66% 19%	58% 26%	45% 44%	less 52% 33%	100 64% 21%	than 100 68% 20%	Constr 60% 21%	76% 15%	44% 45%	56% 32%
No Not sure	2018 57% 28% 15%	2017 56% 28% 16%	2016 51% 36% 13%	2015 55% 34% 11%	2014 58% 31% 11%	2013 52% 36% 12%	2012 52% 38% 11%	62% 28%	53% 31%	58% 25% 17%	55% 29%	66% 19%	58% 26%	45% 44%	less 52% 33% 14%	100 64% 21%	than 100 68% 20% 12%	Constr 60% 21%	76% 15% 9%	44% 45%	56% 32%
No Not sure	2018 57% 28% 15%	2017 56% 28% 16%	2016 51% 36% 13%	2015 55% 34% 11%	2014 58% 31% 11%	2013 52% 36% 12%	2012 52% 38% 11%	62% 28%	53% 31% 16%	58% 25% 17%	55% 29%	66% 19%	58% 26% 16%	45% 44%	less 52% 33% 14%	100 64% 21% 15%	than 100 68% 20% 12%	Constr 60% 21%	76% 15% 9%	44% 45% 11%	56% 32%
No Not sure	2018 57% 28% 15% mpany,be	2017 56% 28% 16%	2016 51% 36% 13% day and th	2015 55% 34% 11% ee end of 2	2014 58% 31% 11% 2019, do y	2013 52% 36% 12% ou plan to	2012 52% 38% 11%	62% 28%	53% 31% 16%	58% 25% 17%	55% 29%	66% 19%	58% 26% 16%	45% 44%	less 52% 33% 14%	100 64% 21% 15%	than 100 68% 20% 12%	Constr 60% 21% 19%	76% 15% 9%	44% 45% 11%	56% 32% 13%
No Not sure	2018 57% 28% 15% mpany,be	2017 56% 28% 16% tween too	2016 51% 36% 13% day and th	2015 55% 34% 11% ee end of 2	2014 58% 31% 11% 2019, do y	2013 52% 36% 12% ou plan to	2012 52% 38% 11% ?	62% 28% 10%	53% 31% 16% M:	58% 25% 17% SA	55% 29% 16%	66% 19% 15%	58% 26% 16% Cluster	45% 44% 11%	less 52% 33% 14%	100 64% 21% 15% ompan	than 100 68% 20% 12% y Size More	Constr 60% 21% 19% Eng &	76% 15% 9%	44% 45% 11%	56% 32% 13%
No Not sure Q11. Now thinking about the people that work for your co	2018 57% 28% 15% mpany,be Upstate 2018	2017 56% 28% 16% tween too Upstate 2017	2016 51% 36% 13% day and th Upstate 2016	2015 55% 34% 11% e end of 2 Upstate 2015	2014 58% 31% 11% 2019, do y Upstate 2014	2013 52% 36% 12% ou plan to Upstate 2013	2012 52% 38% 11% ? Upstate 2012	62% 28% 10% Alb	53% 31% 16% M:	58% 25% 17% SA Roch	55% 29% 16% Syr	66% 19% 15% High	58% 26% 16% Cluster	45% 44% 11% Low	less 52% 33% 14%	100 64% 21% 15% ompan 51 to 100	than 100 68% 20% 12% y Size More than 100	Constr 60% 21% 19% Eng & Constr	76% 15% 9% Indi	44% 45% 11% ustry	56% 32% 13%
No Not sure Q11. Now thinking about the people that work for your co	2018 57% 28% 15% mpany,be Upstate 2018 1%	2017 56% 28% 16% tween too Upstate 2017 2%	2016 51% 36% 13% day and th Upstate 2016 2%	2015 55% 34% 11% e end of 2 Upstate 2015	2014 58% 31% 11% 2019, do y Upstate 2014 2%	2013 52% 36% 12% ou plan to Upstate 2013 1%	2012 52% 38% 11% ? Upstate 2012 1%	62% 28% 10% Alb	53% 31% 16% M: Buff 2%	58% 25% 17% SA Roch 2%	55% 29% 16% Syr 1%	66% 19% 15% High 3%	58% 26% 16% Cluster Middle 1%	45% 44% 11% Low 0%	less 52% 33% 14% Co 50 or less 1%	100 64% 21% 15% 51 to 100 1%	than 100 68% 20% 12% y Size More than 100 4%	Constr 60% 21% 19% Eng & Constr 1%	76% 15% 9% Indi	44% 45% 11% sstry Retail 2%	56% 32% 13% Service 2%
No Not sure Q11. Now thinking about the people that work for your co Substantially increase your workforce Moderately increase your workforce	2018 57% 28% 15% mpany,be Upstate 2018 1% 37%	2017 56% 28% 16% tween too Upstate 2017 2% 35%	2016 51% 36% 13% day and th Upstate 2016 2% 37%	2015 55% 34% 11% e end of 2 Upstate 2015 1% 32%	2014 58% 31% 11% 2019, do y Upstate 2014 2% 30%	2013 52% 36% 12% ou plan to Upstate 2013 1% 27%	2012 52% 38% 11% ? Upstate 2012 1% 26%	62% 28% 10% Alb 0% 48%	53% 31% 16% M: Buff 2% 41%	58% 25% 17% SA Roch 2% 27%	55% 29% 16% Syr 1% 33%	66% 19% 15% High 3% 54%	58% 26% 16% Cluster Middle 1% 35%	45% 44% 11% Low 0% 21%	less 52% 33% 14% Co 50 or less 1% 33%	100 64% 21% 15% 51 to 100 1% 44%	than 100 68% 20% 12% vy Size More than 100 4% 44%	Constr 60% 21% 19% —————————————————————————————————	76% 15% 9% India Manuf 1% 44%	44% 45% 11% stry Retail 2% 20%	56% 32% 13% Service 2% 39%
No Not sure Q11. Now thinking about the people that work for your co Substantially increase your workforce Moderately increase your workforce Remain about the same	2018 57% 28% 15% mpany,be Upstate 2018 1% 37% 53%	2017 56% 28% 16% tween too Upstate 2017 2% 35% 53%	2016 51% 36% 13% day and th Upstate 2016 2% 37% 52%	2015 55% 34% 11% e end of 2 Upstate 2015 1% 32% 57%	2014 58% 31% 11% 2019, do y Upstate 2014 2% 30% 59%	2013 52% 36% 12% ou plan to Upstate 2013 1% 27% 59%	2012 52% 38% 11% Upstate 2012 1% 26% 58%	62% 28% 10% Alb 0% 48% 45%	53% 31% 16% M: Buff 2% 41% 47%	58% 25% 17% SA Roch 2% 27% 60%	55% 29% 16% Syr 1% 33% 61%	66% 19% 15% High 3% 54% 43%	58% 26% 16%  Cluster  Middle 1% 35% 58%	45% 44% 11% Low 0% 21% 54%	less 52% 33% 14% Co 50 or less 1% 33% 59%	100 64% 21% 15% 51 to 100 1% 44% 47%	than 100 68% 20% 12% y Size More than 100 4% 44% 41%	Constr 60% 21% 19% Eng & Constr 1% 48% 42%	76% 15% 9% Indu Manuf 1% 44% 49%	44% 45% 11% sstry Retail 2% 20% 62%	56% 32% 13% Service 2% 39% 52%
No Not sure  Q11. Now thinking about the people that work for your co Substantially increase your workforce Moderately increase your workforce Remain about the same Decrease your workforce	2018 57% 28% 15% mpany,be Upstate 2018 1% 37% 53% 8%	2017 56% 28% 16% tween too Upstate 2017 2% 35% 53% 9%	2016 51% 36% 13% day and th Upstate 2016 2% 37% 52% 8%	2015 55% 34% 11% e end of 2 Upstate 2015 1% 32% 57% 9%	2014 58% 31% 11% 2019, do y Upstate 2014 2% 30% 59% 9%	2013 52% 36% 12% ou plan to Upstate 2013 1% 27% 59% 12%	2012 52% 38% 11% ? Upstate 2012 1% 26% 58% 15%	62% 28% 10% Alb 0% 48% 45%	53% 31% 16% M: Buff 2% 41% 47% 9%	58% 25% 17% SA Roch 2% 27% 60% 10%	55% 29% 16% Syr 1% 33% 61% 5%	19% 15% High 3% 54% 43% 0%	58% 26% 16%  Cluster  Middle 1% 35% 58% 5%	45% 44% 11% Low 0% 21% 54% 25%	less 52% 33% 14% Co 50 or less 1% 33% 59% 8%	100 64% 21% 15% 51 to 100 1% 44% 47% 8%	than 100 68% 20% 12% y Size More than 100 4% 44% 41% 11%	Constr 60% 21% 19% Eng & Constr 1% 48% 42% 8%	76% 15% 9% Indu Manuf 1% 44% 49% 6%	44% 45% 11% Stry  Retail 2% 20% 62% 16%	56% 32% 13% Service 2% 39% 52% 7%

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2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6% 2016: 440 Upstate NY CEOs, MOE +/- 4.7%

									M	SA			Cluster		C	ompan	y Size	1	Indu	ustry	
	Upstate								50 or	51 to	More	Eng &	1								
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Existing U.S. competition	25%	24%	27%	25%	29%	25%	27%	29%	17%	27%	26%	24%	26%	23%	24%	32%	24%	16%	23%	38%	20%
Governmental regulation	64%	61%	68%	68%	69%	70%	69%	62%	68%	62%	64%	57%	63%	77%	60%	65%	74%	56%	69%	58%	63%
Taxation	58%	61%	57%	65%	65%	67%	67%	50%	60%	60%	62%	60%	52%	67%	62%	55%	46%	59%	60%	69%	50%
Foreign competition	9%	10%	9%	11%	12%	12%	12%	5%	11%	10%	9%	12%	8%	7%	11%	9%	5%	0%	33%	2%	0%
Energy costs	24%	18%	24%	19%	30%	31%	44%	27%	21%	22%	26%	24%	23%	24%	24%	21%	26%	23%	26%	24%	24%
Risk management	22%	26%	22%	26%	22%	21%	22%	23%	22%	23%	18%	21%	24%	18%	16%	33%	32%	34%	12%	15%	22%
Adverse economic conditions	39%	37%	42%	48%	46%	55%	65%	39%	39%	38%	43%	25%	41%	55%	44%	39%	26%	36%	36%	45%	39%
Health care costs	73%	78%	79%	78%	77%	80%	79%	68%	75%	71%	80%	66%	75%	79%	72%	72%	77%	74%	72%	78%	75%
Global political instability	12%	15%	12%	15%	16%	15%	22%	11%	15%	9%	16%	13%	14%	7%	13%	15%	9%	11%	22%	13%	8%
Rising supplier costs	40%	32%	27%	25%	35%	39%	42%	35%	45%	37%	42%	39%	39%	41%	43%	45%	29%	41%	55%	45%	25%
Human resources	48%	43%	36%	38%	30%	27%	24%	50%	53%	47%	39%	42%	52%	47%	41%	59%	63%	45%	48%	38%	54%
Cash flow	28%	27%	28%	26%	29%	35%	35%	24%	31%	27%	29%	25%	27%	34%	30%	25%	21%	25%	23%	38%	29%
Ability to obtain suitable financing	7%	10%	8%	8%	8%	10%	13%	5%	9%	6%	5%	7%	4%	13%	7%	4%	7%	10%	8%	11%	6%
U.S. trade agreements	19%	9%	8%	NA	NA	NA	NA	15%	21%	19%	20%	23%	18%	13%	20%	27%	7%	12%	34%	24%	8%
None of the above	0%	2%	1%	0%	0%	0%	0%	2%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%	2%	0%

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

									M	SA			Cluster		С	ompan	y Size		Indu	ıstry	
	Upstate								50 or	51 to	More	Eng &									
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Excellent	1%	1%	1%	1%	1%	1%	1%	0%	2%	2%	0%	2%	0%	1%	1%	0%	1%	1%	0%	0%	1%
Good	6%	7%	8%	4%	4%	7%	9%	8%	8%	2%	7%	11%	5%	2%	6%	8%	5%	7%	6%	2%	9%
Fair	24%	25%	29%	29%	30%	26%	34%	26%	21%	27%	22%	32%	28%	6%	24%	25%	24%	18%	22%	24%	32%
Poor	67%	64%	61%	64%	63%	65%	55%	65%	69%	68%	68%	54%	64%	91%	67%	65%	70%	74%	71%	75%	56%
Don't know/Refused	1%	3%	1%	2%	2%	2%	2%	1%	1%	2%	3%	2%	2%	0%	2%	1%	0%	0%	1%	0%	2%

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

									M	SA			Cluster		C	ompan	y Size		Indu	ıstry	
	Upstate								50 or	51 to	More	Eng &									
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Personal Income Tax Reform	57%	58%	55%	54%	NA	NA	NA	56%	59%	56%	57%	53%	60%	55%	56%	64%	52%	63%	53%	51%	57%
Business Income Tax Reform	57%	63%	62%	63%	NA	NA	NA	54%	61%	56%	55%	56%	55%	61%	59%	60%	48%	62%	58%	55%	51%
Estate Tax Reform	30%	29%	31%	34%	NA	NA	NA	31%	32%	27%	28%	22%	32%	34%	27%	39%	24%	41%	30%	35%	23%
Sales Tax Reform	29%	24%	22%	25%	NA	NA	NA	27%	36%	20%	33%	25%	28%	34%	29%	31%	21%	25%	30%	42%	24%
Infrastructure Development (roads, bridges, water,	44%	52%	43%	42%	42%	32%	37%	47%	44%	40%	46%	43%	53%	24%	39%	53%	49%	56%	41%	40%	44%
Energy Infrastructure (power generation and	19%	24%	NA	NA	NA	NA	NA	22%	18%	16%	18%	21%	18%	16%	19%	20%	17%	22%	17%	18%	18%
Business Development Incentives	27%	31%	36%	36%	38%	43%	47%	32%	28%	22%	30%	32%	30%	17%	26%	32%	26%	29%	34%	27%	25%
Ethics Reform	46%	43%	52%	42%	40%	39%	35%	48%	53%	38%	47%	47%	43%	52%	47%	44%	46%	47%	47%	40%	47%
Spending Cuts	59%	53%	51%	58%	64%	72%	74%	47%	66%	61%	61%	59%	53%	71%	61%	57%	54%	59%	64%	64%	49%
Other	20%	16%	13%	14%	16%	11%	17%	19%	21%	21%	21%	13%	19%	32%	18%	25%	26%	22%	20%	15%	25%
Don't know/Refused	1%	0%	1%	0%	0%	0%	0%	1%	0%	1%	3%	0%	1%	1%	2%	0%	0%	3%	0%	0%	0%

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2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6%

									M:	SA			Cluster		C	ompan	y Size		Indu	ıstry	
	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate									51 to		Eng &			
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Servic
Very confident	1%	1%	1%	1%	1%	0%	2%	2%	1%	0%	0%	2%	0%	0%	1%	1%	0%	0%	0%	2%	2%
Somewhat confident	11%	15%	14%	12%	12%	15%	23%	12%	9%	12%	11%	18%	11%	2%	12%	12%	9%	14%	12%	7%	13%
Not very confident	42%	48%	48%	50%	47%	48%	44%	49%	36%	42%	39%	51%	44%	25%	40%	41%	49%	33%	37%	38%	47%
Not at all confident	46%	35%	36%	37%	38%	37%	31%	36%	52%	46%	50%	28%	44%	73%	46%	45%	43%	52%	51%	51%	38%
Don't know/Refused	1%	2%	1%	1%	1%	1%	0%	1%	2%	0%	0%	2%	0%	0%	1%	0%	0%	1%	0%	2%	0%
Q16. And thinking about the efforts of t	he federal government, over	all would	vou sav tl	l ne federal	governme	ent is doi:	ng an exce	llent.go	od. fai	r or poo	or iob o	f creati	ing a busi	ness cli	mate i	n whic	h compani	es like v	ours will	succee	1?
<u> </u>			1					- 70	M	•			Cluster			ompan	•	,		ıstry	
	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &			
	2018	2017	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Servic
Excellent	18%	6%	1%	0%	0%	0%	1%	17%	16%	25%	11%	20%	13%	25%	19%	20%	13%	19%	23%	11%	16%
Good	33%	22%	6%	2%	4%	3%	6%	29%	37%	31%	37%	35%	35%	27%	34%	33%	30%	37%	36%	40%	26%
Fair	25%	35%	29%	22%	21%	18%	21%	30%	22%	25%	24%	26%	25%	25%	23%	29%	33%	25%	24%	25%	25%
Poor	22%	33%	59%	73%	72%	76%	71%	23%	22%	18%	28%	19%	24%	20%	22%	17%	23%	19%	15%	22%	32%
Don't know/Refused	2%	5%	5%	2%	2%	3%	2%	1%	3%	2%	1%	0%	3%	2%	3%	0%	0%	0%	1%	2%	2%
	2,0	570	-,-	2/0	2/0	370	2/0	1/0	5,0			0,0	370				0,0			_,~	-/-
•																	0,0			2,0	270
Q17. How confident are you in the abilit									New Y	ork ove			r? Are yo			omnan					
•	ty of the federal government	to improv	e the bus	iness clim	ate for bu	sinesses	ike yours			ork ove					C	ompan 51 to	y Size			ıstry	
•									New Y	ork ove			r? Are yo		C	ompan 51 to 100		Eng &			Service
•	ty of the federal government Upstate	to improv	e the bus Upstate	iness clim Upstate	ate for bu Upstate	sinesses Upstate	ike yours Upstate	here in	New Y	ork ove SA	r the n	ext yea	r? Are yo Cluster	u:	C 50 or	51 to	y Size More	Eng &	Indu	ıstry	
Q17. How confident are you in the abilit	ty of the federal government Upstate 2018	to improv Upstate 2017	e the bus Upstate 2016	iness clim Upstate 2015	ate for bu Upstate 2014	sinesses Upstate 2013	ike yours Upstate 2012	here in	New Yo	ork ove SA Roch	r the n	ext yea	r? Are yo Cluster Middle	u: Low	50 or less	51 to 100	y Size More than 100	Eng & Constr	Indu Manuf	ustry Retail	Service
Q17. How confident are you in the ability	ty of the federal government Upstate 2018 8%	to improv Upstate 2017 3%	ve the bus Upstate 2016 5%	iness clim Upstate 2015 0%	Upstate	Upstate 2013	ike yours Upstate 2012	Alb	New You	ork ove SA Roch	r the n  Syr  4%	ext yea	r? Are yo Cluster Middle	u: Low 12%	50 or less 10%	51 to 100 11%	y Size More than 100	Eng & Constr	Indu Manuf 12%	stry Retail	Service 10%
Q17. How confident are you in the ability  Very confident  Somewhat confident	ty of the federal government Upstate 2018 8% 38%	to improve Upstate 2017 3% 36%	Upstate 2016 5% 27%	iness clim Upstate 2015 0% 7%	Upstate 2014 1% 8%	Upstate 2013 0% 7%	ike yours Upstate 2012 1% 13%	Alb 5% 37%	New Your Mark Mark Mark Mark Mark Mark Mark Mar	ork over SA Roch 14% 38%	Syr 4% 42%	ext yea High 8% 48%	r? Are yo Cluster Middle 8% 33%	Low 12% 39%	50 or less 10% 39%	51 to 100 11% 39%	y Size More than 100 2% 41%	Eng & Constr 5% 45%	Indu Manuf 12% 43%	Retail 5% 36%	Servic 10% 33%
Q17. How confident are you in the ability  Very confident  Somewhat confident  Not very confident	ty of the federal government Upstate 2018 8% 38% 38%	to improv Upstate 2017 3% 36% 42%	Upstate 2016 5% 27% 44%	Upstate 2015 0% 7% 50%	Upstate 2014 1% 8% 45%	Upstate 2013 0% 7% 46%	ike yours Upstate 2012 1% 13% 42%	Alb 5% 37% 42%	New Your Missing Missi	ork ove SA Roch 14% 38% 35%	Syr 4% 42% 37%	ext yea  High  8%  48%  34%	r? Are yo Cluster Middle 8% 33% 44%	Low 12% 39% 28%	Company of the second of the s	51 to 100 11% 39% 39%	y Size More than 100 2% 41% 40%	Eng & Constr 5% 45% 36%	Manuf 12% 43% 34%	Retail 5% 36% 45%	Servic 10% 33% 37%
Q17. How confident are you in the ability  Very confident  Somewhat confident  Not very confident  Not at all confident  Don't know/Refused	ty of the federal government  Upstate 2018  8% 38% 38% 15% 0%	Upstate 2017 3% 36% 42% 18% 1%	Upstate 2016 5% 27% 44% 22% 2%	Upstate 2015 0% 7% 50% 41% 1%	Upstate 2014 1% 8% 45% 44% 2%	Upstate 2013 0% 7% 46% 46% 1%	Upstate 2012 1% 13% 42% 43%	Alb 5% 37% 42% 15%	New Yo M: Buff 9% 37% 37% 16%	Roch 14% 38% 35% 13%	Syr 4% 42% 37% 17%	High 8% 48% 34% 11%	r? Are yo Cluster Middle 8% 33% 44% 15%	Low 12% 39% 28% 21%	Co 50 or less 10% 39% 35% 16%	51 to 100 11% 39% 39% 12%	y Size More than 100 2% 41% 40%	Eng & Constr 5% 45% 36% 14%	Manuf 12% 43% 34% 12%	Retail 5% 36% 45% 13%	Service 10% 33% 37% 21%
Q17. How confident are you in the ability  Very confident  Somewhat confident  Not very confident  Not at all confident	ty of the federal government  Upstate 2018  8% 38% 38% 15% 0%	Upstate 2017 3% 36% 42% 18% 1%	Upstate 2016 5% 27% 44% 22% 2%	Upstate 2015 0% 7% 50% 41% 1%	Upstate 2014 1% 8% 45% 44% 2%	Upstate 2013 0% 7% 46% 46% 1%	Upstate 2012 1% 13% 42% 43%	Alb 5% 37% 42% 15%	New Your Missing State of the New York Missing State of the New Yo	Roch 14% 38% 35% 13% 0%	Syr 4% 42% 37% 17%	High 8% 48% 34% 11%	r? Are yo Cluster Middle 8% 33% 44% 15% 0%	Low 12% 39% 28% 21%	50 or less 10% 39% 35% 16% 0%	51 to 100 11% 39% 39% 12% 0%	y Size More than 100 2% 41% 40% 16% 0%	Eng & Constr 5% 45% 36% 14%	Manuf 12% 43% 34% 12% 0%	Retail 5% 36% 45% 13% 0%	Servic 10% 33% 37% 21%
Q17. How confident are you in the ability  Very confident  Somewhat confident  Not very confident  Not at all confident  Don't know/Refused	ty of the federal government Upstate 2018 8% 38% 38% 15% 0% Family Leave law had a posit	Upstate 2017 3% 36% 42% 18% 1%	Upstate 2016 5% 27% 44% 22% 2%	Upstate 2015 0% 7% 50% 41% 1%	Upstate 2014 1% 8% 45% 44% 2%	Upstate 2013 0% 7% 46% 46% 1%	Upstate 2012 1% 13% 42% 43%	Alb 5% 37% 42% 15%	New Yo M: Buff 9% 37% 37% 16%	Roch 14% 38% 35% 13% 0%	Syr 4% 42% 37% 17%	High 8% 48% 34% 11%	r? Are yo Cluster Middle 8% 33% 44% 15%	Low 12% 39% 28% 21%	50 or less 10% 39% 35% 16% 0%	51 to 100 11% 39% 39% 12% 0%	y Size  More than 100 2% 41% 40% 16% 0%	Eng & Constr 5% 45% 36% 14% 0%	Manuf 12% 43% 34% 12% 0%	Retail 5% 36% 45% 13%	Servic 10% 33% 37% 21%
Q17. How confident are you in the ability  Very confident  Somewhat confident  Not very confident  Not at all confident  Don't know/Refused	ty of the federal government Upstate 2018 8% 38% 38% 15% 0% Family Leave law had a posit Upstate	Upstate 2017 3% 36% 42% 18% 1%	Upstate 2016 5% 27% 44% 22% 2%	Upstate 2015 0% 7% 50% 41% 1%	Upstate 2014 1% 8% 45% 44% 2%	Upstate 2013 0% 7% 46% 46% 1%	Upstate 2012 1% 13% 42% 43%	Alb 5% 37% 42% 15% 1%	New Your Missing State of the New York Missing State of the New Yo	ork ove SA Roch 14% 38% 35% 13% 0%	Syr 4% 42% 37% 17% 0%	ext yea  High  8%  48%  34%  11%  0%	r? Are yo Cluster Middle 8% 33% 44% 15% 0%	u: 12% 39% 28% 21% 0%	Company of the second of the s	51 to 100 11% 39% 39% 12% 0%	y Size  More than 100 2% 41% 40% 16% 0%	Eng & Constr 5% 45% 36% 14% 0% Eng &	Manuf 12% 43% 34% 12% 0%	Retail 5% 36% 45% 13% 0%	Servic 10% 33% 37% 21% 0%
Q17. How confident are you in the ability  Very confident  Somewhat confident  Not very confident  Not at all confident  Don't know/Refused  Q18. Has the new New York State Paid	ty of the federal government Upstate 2018 8% 38% 38% 15% 0% Family Leave law had a posit Upstate 2018	Upstate 2017 3% 36% 42% 18% 1%	Upstate 2016 5% 27% 44% 22% 2%	Upstate 2015 0% 7% 50% 41% 1%	Upstate 2014 1% 8% 45% 44% 2%	Upstate 2013 0% 7% 46% 46% 1%	Upstate 2012 1% 13% 42% 43%	Alb 5% 37% 42% 15% 1% Alb	New Your Missing State of the New York Missing State of the New Yo	Roch 14% 38% 35% 13% 0% SA	syr 4% 42% 37% 17% 0%	ext yea  High 8% 48% 34% 11% 0%	r? Are yo Cluster  Middle 8% 33% 44% 15% 0%  Cluster  Middle	Low 12% 39% 28% 21% 0%	Constant    Consta	51 to 100 11% 39% 39% 12% 0% 51 to 100	y Size  More than 100  2%  41%  40%  16%  0%  y Size  More than 100	Eng & Constr 5% 45% 36% 14% 0% Eng & Constr	Indu   Manuf   12%   43%   34%   12%   0%   Indu   Manuf	Retail 5% 36% 45% 0% stry	Service 10% 33% 37% 21% 0%
Q17. How confident are you in the ability  Very confident  Somewhat confident  Not very confident  Not at all confident  Don't know/Refused  Q18. Has the new New York State Paid I	ty of the federal government Upstate 2018 8% 38% 38% 15% 0% Family Leave law had a posit Upstate 2018 2%	Upstate 2017 3% 36% 42% 18% 1%	Upstate 2016 5% 27% 44% 22% 2%	Upstate 2015 0% 7% 50% 41% 1%	Upstate 2014 1% 8% 45% 44% 2%	Upstate 2013 0% 7% 46% 46% 1%	Upstate 2012 1% 13% 42% 43%	Alb 5% 37% 42% 15% 1% Alb 4%	New Y. M:  Buff 9% 37% 16% 0%  M:  Buff 3%	Roch 14% 38% 35% 13% 0% SA	Syr 4% 42% 37% 17% 0% Syr 1%	High 8% 48% 34% 11% 0% High 3%	r? Are yo Cluster  Middle 8% 33% 44% 15% 0%  Cluster  Middle 1%	Low 12% 39% 28% 21% 0% Low 2%	Co 50 or less 10% 39% 35% 16% 0% Co 50 or less 2%	51 to 100 11% 39% 39% 12% 0% 51 to 100 0%	y Size  More than 100  2%  41%  40%  16%  0%  y Size  More than 100  1%	Eng & Constr 5% 45% 36% 14% 0% Eng & Constr 3%	Indu Manuf 12% 43% 34% 12% 0% Indu Manuf 1%	Retail	Service 10% 33% 37% 21% 0% Service 3%
Q17. How confident are you in the ability  Very confident  Somewhat confident  Not very confident  Not at all confident  Don't know/Refused  Q18. Has the new New York State Paid in the second of the	ty of the federal government  Upstate 2018  8%  38%  38%  15%  0%  Family Leave law had a posit  Upstate 2018  2%  48%	Upstate 2017 3% 36% 42% 18% 1%	Upstate 2016 5% 27% 44% 22% 2%	Upstate 2015 0% 7% 50% 41% 1%	Upstate 2014 1% 8% 45% 44% 2%	Upstate 2013 0% 7% 46% 46% 1%	Upstate 2012 1% 13% 42% 43%	Alb 5% 37% 42% 15% 1% Alb 4% 45%	New Y.  M:  Buff 9% 37% 16% 0%  M:  Buff 3% 59%	Roch 14% 38% 35% 13% 0%  SA  Roch 0% 42%	Syr 4% 42% 37% 17% 0% Syr 1% 46%	ext yea  High 8% 48% 34% 11% 0%  High 3% 43%	r? Are yo Cluster  Middle 8% 33% 44% 15% 0%  Cluster  Middle 1% 44%	u: 12% 39% 28% 21% 0%  Low 2% 63%	Complete Service Servi	51 to 100 11% 39% 39% 12% 0% 51 to 100 0% 57%	y Size  More than 100 2% 41% 40% 16% 0%  y Size  More than 100 1% 63%	Eng & Constr 5% 45% 36% 14% 0% Eng & Constr 3% 49%	Indu Manuf 12% 43% 34% 12% 0% Indu Manuf 1% 58%	Retail 5% 36% 45% 0% Stry Retail 0% 42%	Service 10% 33% 37% 21% 0% Service 3% 44%
Q17. How confident are you in the ability  Very confident  Somewhat confident  Not very confident  Not at all confident  Don't know/Refused  Q18. Has the new New York State Paid I	ty of the federal government Upstate 2018 8% 38% 38% 15% 0% Family Leave law had a posit Upstate 2018 2%	Upstate 2017 3% 36% 42% 18% 1%	Upstate 2016 5% 27% 44% 22% 2%	Upstate 2015 0% 7% 50% 41% 1%	Upstate 2014 1% 8% 45% 44% 2%	Upstate 2013 0% 7% 46% 46% 1%	Upstate 2012 1% 13% 42% 43%	Alb 5% 37% 42% 15% 1% Alb 4%	New Y. M:  Buff 9% 37% 16% 0%  M:  Buff 3%	Roch 14% 38% 35% 13% 0% SA	Syr 4% 42% 37% 17% 0% Syr 1%	High 8% 48% 34% 11% 0% High 3%	r? Are yo Cluster  Middle 8% 33% 44% 15% 0%  Cluster  Middle 1%	Low 12% 39% 28% 21% 0% Low 2%	Co 50 or less 10% 39% 35% 16% 0% Co 50 or less 2%	51 to 100 11% 39% 39% 12% 0% 51 to 100 0%	y Size  More than 100  2%  41%  40%  16%  0%  y Size  More than 100  1%	Eng & Constr 5% 45% 36% 14% 0% Eng & Constr 3%	Indu Manuf 12% 43% 34% 12% 0% Indu Manuf 1%	Retail	Servio 10% 33% 37% 21% 0% Servio 3%

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2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6%

		L						/ISA		<u> </u>	Cluster		C	ompar	ny Size		Indu	ıstry	
	Upstate 2018					Alt	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Servi
Apprenticeships	23%					25%			17%	21%	24%	23%	18%	28%	32%	47%	20%	20%	17%
Employer provided training	69%					709			66%	69%	69%	68%	65%	68%	83%	70%	78%	73%	66%
Worked with community college(s)	19%					229			16%	18%	22%	14%	10%	27%	41%	11%	26%	15%	279
Worked with local high school/BOCES	17%					199	19%	14%	17%	15%	19%	15%	12%	23%	27%	15%	23%	25%	19%
Used NYS DOL workforce programs	9%					9%		7%	12%	8%	10%	7%	6%	9%	17%	5%	13%	4%	129
Other	5%					6%	6%	3%	4%	5%	6%	2%	3%	8%	7%	5%	2%	2%	109
None of the above	21%					189	22%	19%	28%	19%	22%	23%	27%	17%	9%	18%	13%	22%	239
				L															
Q20KEY. Do you support or oppose the following Q20A. Placing restrictions on questions about cri		o hiring p	rocesses a	and emplo	yment practices	?													
220A. Flacing restrictions on questions about cir	illillai ilistory						ľ	/ISA			Cluster		С	ompar	ny Size		Indu	ıstry	
	Upstate												50 or	51 to	More	Eng &			
	2018					All	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Serv
Support	9%					129	9%	8%	9%	13%	9%	7%	9%	9%	7%	10%	8%	13%	129
Oppose	84%					829	84%	85%	86%	79%	86%	86%	84%	83%	87%	82%	84%	84%	839
Don't know/Refused	7%					6%	7%	7%	5%	8%	6%	6%	6%	8%	6%	8%	8%	4%	6%
Q20B. Placing restrictions on questions about sal	ary history																		
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	,						N	/ISA			Cluster		С	ompar	ny Size		Indu	istry	
	Upstate												50 or		More	Eng &			
	2018					All	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Servi
Support	14%					209	5 11%	13%	9%	17%	11%	16%	12%	15%	15%	11%	9%	16%	189
Oppose	75%					699	74%	78%	79%	73%	75%	78%	76%	79%	73%	75%	78%	73%	719
Don't know/Refused	12%					119	5 15%	9%	12%	11%	14%	6%	12%	7%	12%	14%	13%	11%	10%
O200 Blacing restrictions on avestions shout are	dia biasami																		
Q20C. Placing restrictions on questions about cre	edit history						N	ЛSA			Cluster		С	ompar	ny Size		Indu	istry	
	Upstate												50 or	51 to	More	Eng &			
	2018					Alk	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Servi
Support	19%					209	5 18%	20%	14%	18%	17%	24%	16%	20%	23%	7%	22%	22%	22%
Oppose	63%					619	65%	61%	64%	62%	64%	62%	63%	65%	62%	64%	52%	71%	619
Don't know/Refused	19%					199	5 17%	19%	21%	21%	20%	14%	22%	15%	15%	29%	26%	7%	179
Q20D. Instituting restrictions on use of non-comp	ete agreements un	related to	trade sec	rets												ı			
			<del>                                     </del>					/ISA			Cluster	1	_		ny Size		Indu	ıstry	1
	Upstate					All	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Servi
	2019			1	i I	All	Dull	INUCII	Jyi	ringil	Intinuale	LUW	1622	100	man 100	CONSU	wiallul	netall	Jeivi
Sunnort	2018						270/	27%	1.2%	28%	28%	2/1%	27%	27%	27%	26%	20%	220/	200
	27%					289			18%	28%	28%	24%	27%	27%	27%	26%	29%	22%	299
Support Oppose Don't know/Refused							51%	49%	18% 54% 28%	28% 52% 21%	28% 49% 23%	24% 54% 22%	27% 51% 23%	27% 53% 20%	27% 50% 23%	26% 49% 25%	29% 56% 15%	22% 53% 25%	29 <sup>4</sup>

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2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6%

2016: 440 Upstate NY CEOs, MOE +/- 4.7%

Second   S								N	1SA			Cluster		С	ompar	ny Size		Indu	ustry	
Support		•								_			_				_			
Symbol   S																				
Capit   Now,   Refused   9%										+									_	25%
California   Cal	• • • • • • • • • • • • • • • • • • • •							_			_	-								63%
Upstate	Don't know/Refused	9%					13%	10%	6%	9%	10%	10%	6%	9%	7%	12%	12%	8%	4%	12%
Upstate   2018	Q20F. Instituting requirements for advan	ced scheduling and mandate	ed pay pr	emiums f	or schedu	le changes	1			1			l				!			
All Buff Rock   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 100 than 100 const Named Reduction for pass-through Businesses.   Syr High Middle Low less 1								IV	ISA	1		Cluster				<i>-</i>		Indu	istry	1
Support		•					Alb	Buff	Roch	Syr	High	Middle	Low				_	Manuf	Retail	Servic
Symbol   S	Support	8%					11%	8%											7%	10%
Den't know/Refused		66%					57%		73%	61%		65%			69%		62%	71%		62%
Q21A. The new 20% income tax deduction for pass-through businesses																				29%
Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through businesses   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20% income tax deduction for pass-through feeting   Q21A. The new 20	O21/EV Do you support or oppose the fo	llowing aspects of recent for	doral tay	roform?															<u> </u>	
Upstate   2018				reioriiir																
Alb   Buff   Roch   Syr   High   Middle   Low   less   100   lean 100   Const   Manuf   Real   Syr   Propose   Syr   S								N	1SA			Cluster		С	ompar	ny Size		Indu	ıstry	
Support         67%         Image: Compose of the comp		Upstate												50 or	51 to	More	Eng &			
Oppose         8%         1         5         7%         11%         9%         8%         11%         9%         4%         6%         12%         3%         7%           Don't know/Refused         25%         25%         26%         26%         26%         26%         26%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         25%         15%         10         10         10         25%         25%         25%         15%         10         10         10         25%         25%         25%         15%		2018					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Servic
Don't know/Refused 25%	Support	67%					68%	67%	63%	74%	66%	68%	66%	65%	75%	67%	64%	74%	69%	62%
Call	Oppose	8%					5%	7%	11%	9%	8%	7%	11%	9%	4%	6%	12%	3%	7%	11%
	Don't know/Refused	25%					27%	26%	26%	17%	25%	25%	23%	26%	21%	27%	23%	22%	24%	27%
	Q21B. The limits on taxation of non-repat	riated foreign earnings			<u> </u>	<u> </u>	<u> </u>				<u> </u>						<u> </u>			<u> </u>
Light   Lig	•							N	1SA			Cluster		С	ompar	ny Size		Indi	ustry	
Support         36%         4         5         4         5         35%         34%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         37%         38%         32%         41%         35%         39%         38%         32%         41%         35%         39%         38%         32%         41%         37%         33%         38%         32%         41%         35%         41%         37%         41%         41%         42%         43%         41%         42%         42%         42%         42%         42%         42%         42%         42%         42%         42%         42%         42%         42%         42%		Upstate												50 or	51 to	More	Eng &	'		
Oppose         19%         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         2         1         2         1         2         1         2         1         2         1         2         1         2         1         2         1         2         1         2         1         2         1         2         2         2         1         2         1         2         1         2         1         2         1         2         1         2         2         2         2         1         2         2         2         2         2         3         2         2         3		2018					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Servic
Don't know/Refused	Support	36%					35%	34%	37%	38%	32%	38%	37%	34%	39%	38%	32%	41%	35%	31%
Compose   Com	Oppose	19%					16%	24%	17%	16%	22%	17%	18%	20%	16%	17%	18%	17%	13%	23%
Digitate   Digitate	Don't know/Refused	45%					48%	41%	46%	46%	46%	45%	45%	46%	45%	45%	51%	42%	53%	46%
Digitate   Digitate	O21C. The \$10,000 cap on deductibility of	state and local taxes																		
Support         25%         25%         25%         25%         24%         24%         27%         24%         28%         29%         19%         35%         26%         23%         26%         25%         25%         25%         25%         25%         24%         24%         27%         24%         28%         29%         19%         35%         26%         23%         27%         26%         25%           Oppose         65%         65%         65%         62%         62%         65%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         66%         6								N	1SA			Cluster						Indu	ıstry	
Support         25%         Support         24%         27%         24%         28%         29%         19%         35%         26%         26%         29%         25%           Oppose         65%         65%         65%         68%         66%         66%         63%         70%         58%         66%         67%         62%         64%         62%         64%           Don't know/Refused         9%         6         6         6         65%         68%         66%         63%         70%         8%         11%         11%         10%         9%         11%           Q21D. Lowering the tax rates used to compute personal income tax=         8         9         8         8         11%         7%         8         11%         11%         10%         9%         11%           Q21D. Lowering the tax rates used to compute personal income tax=         8         9         8         8         8         8         8         8         11%         10         11%         10         10         10         10         10         10         10         10         10         10         10         10         10         10         10         10         10         10<		Upstate												50 or		More				
Oppose         65%         65%         65%         62%         62%         65%         68%         66%         67%         62%         64%         62%         64%           Don't know/Refused         9%         1         1         1         15%         9%         7%         7%         8%         11%         7%         8%         11%         11%         10%         9%         11%           Q21D. Lowering the tax rates used to compute personal income tax         8         8         8         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1												<b>-</b>					1			Servic
Don't know/Refused   9%	Support								_	_	_	1	_		_	1			25%	25%
Compose   Com	• •																			68%
Upstate   2018   Upstate   2018   Buff   Roch   Syr   High   Middle   Low   less   100   than 100   Constr   Manuf   Retain   Roch   Syr	Don't know/Refused	9%					15%	9%	7%	7%	8%	11%	7%	8%	11%	11%	10%	9%	11%	6%
Upstate 2018         2018         Alb         Buff         Roch         Syr         High         Middle         Low         51 to 100         More than 100         Eng & Constr         Manuf         Retain           Support         87%         87%         88%         89%         89%         86%         84%         87%         91%         86%         89%         92%         90%         87%           Oppose         6%         6%         6%         7%         7%         7%         7%         4%         7%         4%         5%         3%         5%         4%	Q21D. Lowering the tax rates used to com	pute personal income taxe	s		l	1			1	1	1	l				<u> </u>	1			
Support         87%         6%         86%         85%         89%         86%         87%         High         Middle         Low         less         100         than 100         Constr         Manuf         Retain           Support         87%         87%         885%         89%         89%         86%         87%         91%         86%         87%         89%         92%         90%         87%           Oppose         6%         6%         7%         7%         7%         7%         7%         4%         7%         4%         5%         3%         5%         4%								N	1SA			Cluster		С	ompar	ny Size		Indu	ıstry	
Support         87%         88%         85%         89%         89%         86%         84%         87%         91%         86%         89%         92%         90%         87%           Oppose         6%         7%         7%         6%         7%         7%         7%         7%         4%         7%         4%         5%         3%         5%         4%		Upstate												50 or	51 to	More	Eng &			
Oppose         6%         5%         7%         6%         7%         7%         4%         7%         4%         5%         3%         5%         4%							Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	_	Manuf	Retail	Servic
	Support	87%					85%	89%	89%	86%	84%	87%	91%	86%	87%	89%	92%	90%	87%	84%
Don't know/Refused 7% 10% 6% 9% 0% 6% 5% 5% 0% 5% 5% 5% 5% 5% 0%		6%					5%	7%	6%	7%	7%	7%	4%	7%	4%	5%	3%	5%	4%	10%
DOILTHIOW/NEIUSEU		+			t e	1 1	1	1	551	00/		501	==/	<b>60</b> /	-00/	501	==:	60/	00/	6%

CEO2018 Crosstabs

## Sponsored by The Business Council of New York State

2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6%

		1				M	SA		1	Cluster		C	ompan	y Size		Indu	stry	
	Upstate											50 or	51 to	More	Eng &		1	
	2018				Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Servic
Support	80%				81%	81%	77%	82%	82%	76%	87%	79%	84%	79%	82%	90%	85%	68%
Oppose	13%				11%	13%	15%	14%	10%	16%	12%	14%	12%	10%	12%	6%	9%	21%
Don't know/Refused	7%				8%	6%	8%	4%	8%	9%	1%	7%	4%	11%	5%	5%	5%	11%
Q21F. Q21G. Being able to expense capital in	vestments																	
Q2111 Q2101 Being abie to expense capital in	Vestinents	$\overline{}$				M	SΔ			Cluster			ompan	v Size		Indu	istry	
	Upstate	<del></del>				1	Ī			Ciustei		50 or		More	Eng &	1	<del></del>	
	2018				Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Servic
Support	88%				87%	86%	85%	97%	85%	89%	91%	87%	92%	85%	92%	92%	89%	83%
Oppose	4%				4%	4%	6%	0%	3%	5%	1%	5%	3%	1%	1%	0%	4%	6%
Don't know/Refused	8%				9%	9%	10%	3%	12%	6%	8%	8%	5%	13%	7%	8%	7%	11%
															.,,-			11/0
Reducing federal revenues by up to \$1 Trillio	n over the next ten year	s and adding	to future deficit	ts					1						1			
						M	SA	1		Cluster				y Size		Indu	stry	
	Upstate 2018				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Servic
Support	23%	<del></del>			22%	28%	21%	21%	23%	22%	27%	24%	23%	22%	29%	28%	33%	19%
Oppose	58%				58%	55%	59%	61%	58%	58%	57%	59%	57%	57%	53%	56%	47%	61%
Don't know/Refused	19%	-+			20%	16%	20%	18%	19%	20%	16%	17%	20%	21%	18%	16%	20%	20%
20.000, 10.000	1570				2070	2070	2070	1070	2570	2070	2070	27,70	2070	21/0	2070	2070	2070	2070
Q22. Overall, has the recently passed federal	tax reform had a positi	e, negative	or no impact on	your business?	*	•	•	•		•	•			•		•		•
						M	SA	1		Cluster				y Size		Indu	istry	
	Upstate											50 or	51 to	More	Eng &		İ	
	2018				Alb	Buff	Roch	Syr	High		Low	less	100	than 100	Constr	Manuf	Retail	Servic
	52%				48%	52%	56%	54%	60%	50%	49%	51%	63%	50%	55%	62%	47%	45%
Positive impact				l		1		1%	3%	6%	6%	3%	5%	6%	1%	3%	5%	6%
Negative impact	5%				6%	7%	4%											48%
Negative impact No impact	5% 42%				6% 44%	41%	40%	43%	37%	43%	44%	44%	32%	44%	42%	35%	45%	
Negative impact	5%				6%			43% 1%	37% 1%		44% 0%	44% 2%	32% 0%	44% 0%	42% 1%	35% 0%	2%	1%
Negative impact No impact	5% 42% 1%	ct on your bi	usiness?		6% 44%	41%	40%			43%								1%
Negative impact No impact Don't know/Refused	5% 42% 1%	ct on your bu	usiness?		6% 44%	41%	40% 0%			43%		2%	0%				2%	1%
Negative impact No impact Don't know/Refused	5% 42% 1%	ct on your be	usiness?		6% 44%	41% 1%	40% 0%			43% 1%		2%	0% ompan	0%		0%	2%	1%
Negative impact No impact Don't know/Refused	5% 42% 1% ive, negative or no impa	ct on your b	usiness?		6% 44%	41% 1%	40% 0%			43% 1% Cluster		2% Co	0% ompan	0% y Size	1%	0%	2%	1% Service
Negative impact No impact Don't know/Refused	5% 42% 1% ive, negative or no impa	ct on your b	usiness?		6% 44% 2%	41% 1% M	40% 0% SA	1%	1%	43% 1% Cluster	0%	2% Co 50 or	0% ompan 51 to	0%  y Size  More	1% Eng &	0%	2%	
Negative impact No impact Don't know/Refused  Q23. Have the new federal tariffs had a posit	5% 42% 1% ive, negative or no impa Upstate 2018	ct on your b	usiness?		6% 44% 2%	41% 1% M Buff	40% 0% SA Roch	1% Syr	1% High	43% 1% Cluster Middle	0%	2% Co 50 or less	0% ompan 51 to 100	0%  y Size  More than 100	1% Eng & Constr	0% Indu	2% Istry	Servic
Negative impact No impact Don't know/Refused  Q23. Have the new federal tariffs had a posit  Positive impact	5% 42% 1% ive, negative or no impa Upstate 2018 6%	ct on your b	usiness?		6% 44% 2% Alb 4%	41% 1% M Buff 9%	40% 0% SA Roch 4%	1% Syr 7%	1% High 7%	43% 1% Cluster Middle 5%	0% Low 6%	2% Co 50 or less 6%	0% ompan 51 to 100 5%	0%  y Size  More than 100 5%	1% Eng & Constr	Indu Manuf 10%	2% sstry Retail 4%	Service 3%

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2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6% 2016: 440 Upstate NY CEOs, MOE +/- 4.7%

Q24KEY. 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.

direction																		
Q24A. The cost of health care																		
						N	ISA			Cluster			ompan	y Size		Indu	ustry	
	Upstate	Upstate										50 or	51 to	More	Eng &			
	2018	2017			Alb	Buff		Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	
Right track	19%	16%			13%	19%	24%	20%	19%	18%	22%	20%	20%	11%	18%	22%	25%	14%
Wrong direction	62%	61%			69%	60%	56%	62%	63%	64%	56%	61%	60%	66%	60%	62%	56%	67%
Neither	16%	18%			16%	16%	16%	17%	16%	15%	20%	16%	15%	21%	22%	16%	11%	15%
Don't know/Refused	3%	6%			2%	5%	3%	1%	2%	4%	2%	3%	5%	2%	0%	0%	7%	3%
Q24B. Our immigration system																		
						N	ISA			Cluster		C	ompan	y Size		Indi	ustry	
	Upstate	Upstate										50 or	51 to	More	Eng &			
	2018	2017			Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Right track	36%	38%		1	31%	33%	42%	37%	37%	35%	36%	38%	32%	34%	49%	38%	38%	27%
Wrong direction	52%	46%		1	55%	53%	48%	51%	46%	54%	54%	51%	51%	57%	37%	50%	45%	61%
Neither	9%	12%			10%	9%	7%	11%	13%	8%	6%	8%	11%	9%	12%	10%	7%	9%
Don't know/Refused	4%	4%			4%	6%	2%	1%	3%	3%	4%	4%	7%	0%	1%	1%	9%	3%
		.,,			1 11		1					.,.					370	5,0
Q24C. The federal budget deficit	ļ	!	ļ	! !	<del>-  </del>					ļ								
Q24c. The reactal badget deficit						N	ISA			Cluster		-	ompan	v Size		Indi	ustry	
	Upstate	Upstate				1	1	I		Ciustei		50 or	51 to	More	Eng &		T	
	2018	2017			Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Right track	15%	15%		1	13%	16%	17%	12%	14%	14%	17%	16%	12%	11%	21%	16%	16%	15%
Wrong direction	68%	59%			75%	62%	66%	67%	61%	72%	66%	69%	68%	66%	64%	67%	60%	68%
3	12%				8%	_	_		16%				15%		11%		13%	
Neither		18%				14%	12%	12%		9%	13%	9%		18%		10%		12%
Don't know/Refused	6%	8%			4%	8%	5%	9%	8%	6%	4%	7%	5%	5%	4%	6%	11%	5%
																	Ь	
Q24D. The taxes businesses pay		1		1	T T													
						N	ISA		ļ	Cluster			ompan			Indu	ustry	
	Upstate	Upstate										50 or		More	Eng &			
	2018	2017			Alb	Buff		Syr	High			less	100	than 100	Constr	Manuf	Retail	
Right track	64%	43%			63%	58%	69%	68%	61%	64%	68%	64%	68%	67%	68%	71%	71%	59%
Wrong direction	23%	32%			25%	26%	21%	21%	26%	23%	21%	23%	24%	21%	22%	15%	22%	30%
Neither	9%	18%			11%	12%	6%	7%	12%	9%	6%	10%	5%	10%	8%	9%	5%	8%
Don't know/Refused	4%	7%			2%	4%	4%	4%	2%	4%	4%	4%	3%	2%	1%	5%	2%	3%
Q24E. The health of our economy																		
						N	ISA			Cluster		C	ompan	y Size		Indi	ustry	
	Upstate	Upstate										50 or	51 to	More	Eng &			
	2018	2017			Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Right track	66%	48%			65%	65%	67%	67%	69%	62%	71%	67%	61%	67%	75%	76%	65%	56%
Wrong direction	16%	27%			21%	19%	12%	13%	13%	18%	19%	14%	24%	16%	15%	7%	20%	21%
Neither	12%	18%			6%	12%	16%	13%	11%	14%	8%	13%	11%	11%	8%	14%	7%	14%
Don't know/Refused	6%	7%			7%	4%	5%	7%	8%	6%	2%	6%	4%	6%	1%	3%	7%	8%
1						4%	5%	/ 7/0	8%	6%	Z %							

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2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6%

Right track								M	SA			Cluster		C	ompan	y Size		Indu	ıstry	
Right track	Upstate	Upstate												50 or	51 to	More	Eng &			
Right track	2018	2017					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Servi
	32%	23%					26%	35%	31%	36%	29%	30%	39%	33%	28%	32%	34%	42%	35%	21%
Wrong direction	38%	39%					45%	35%	35%	38%	36%	41%	34%	35%	36%	46%	34%	27%	31%	55%
Neither	22%	28%					20%	23%	24%	17%	25%	20%	21%	21%	25%	21%	25%	27%	24%	17%
Don't know/Refused	8%	10%					9%	6%	10%	9%	10%	9%	6%	10%	11%	1%	7%	5%	11%	7%
Q25KEY. And consider each of the following New York	State issues. I	ndicate w	hether ov	er the las	t year you	think the st	ate has been o	n the r	ight tra	ck, mo	ved in t	he wrong	directi	on or i	is neith	er on the r	ight trac	k nor mo	oving in	the
wrong direction																				
Q25A. Infrastructure development					ı	1														
								М	SA	1		Cluster			ompan			Indu	istry	
	Upstate	Upstate												50 or	51 to	More	Eng &			
	2018	2017					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Servi
Right track	25%	25%					27%	27%	21%	28%	29%	27%	18%	26%	20%	28%	21%	20%	22%	33%
Wrong direction	45%	37%					46%	45%	45%	43%	34%	47%	54%	43%	47%	49%	49%	50%	49%	36%
Neither	20%	24%					17%	18%	23%	22%	29%	17%	16%	20%	25%	15%	25%	21%	18%	21%
Don't know/Refused	10%	13%					9%	10%	11%	7%	8%	9%	13%	10%	8%	9%	5%	9%	11%	10%
Q25B. Ethics reform									<u> </u>		ļ		ļ							
								М	SA			Cluster		C	ompan	y Size		Indu	ıstry	
	Upstate 2018	Upstate 2017					Alb	D66	Doob	Ç	Hiah	ما المادة		50 or	51 to 100	More than 100	Eng &	Manuf	Data:I	Camil
Dight track	8%						6%	Buff 9%	Roch 7%	Syr 9%	High 13%	Middle 7%	Low 4%	less 8%	11%	6%	Constr 7%	Manuf 7%		Servio
Right track		9%													65%		74%		11%	10%
Wrong direction	69%	61%					72%	66%	72%	67%	59% 19%	70%	81%	67%		78%		73%	62%	66% 17%
Neither Dealth was / Defeated	15%	19%					16%	16%	12%	17%		15%	11%	16%	13%	13%	14%	14%	16%	
Don't know/Refused	8%	10%					5%	9%	9%	7%	9%	9%	4%	9%	11%	2%	5%	6%	11%	7%
Q25C. State spending									1											ı
								М	SA	1		Cluster			ompan	•		Indu	istry	
	Upstate	Upstate												50 or	51 to	More	Eng &			
	2018	2017					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Servi
	8%								8%	8%	14%	7%	4%	8%	7%	9%	11%	5%	11%	10%
Right track	8%	9%					10%	7%	070											
Right track Wrong direction	74%	9% 70%					10% 65%	7% 79%	74%	76%	64%	75%	82%	73%	72%	77%	75%	85%	69%	62%
Wrong direction											64% 16%	75% 10%	82% 8%	73% 12%	72% 11%	77% 10%	75% 8%	85% 6%	69% 11%	
0	74%	70%					65%	79%	74%	76%										20%
Wrong direction Neither	74% 11%	70% 15%					65% 15%	79% 6%	74% 12%	76% 12%	16%	10%	8%	12%	11%	10%	8%	6%	11%	62% 20% 9%
Wrong direction Neither Don't know/Refused	74% 11%	70% 15%					65% 15%	79% 6%	74% 12% 6%	76% 12%	16%	10%	8%	12% 7%	11%	10% 5%	8%	6% 5%	11%	20%
Wrong direction Neither Don't know/Refused	74% 11% 7% Upstate	70% 15% 6% Upstate					65% 15% 9%	79% 6% 8% M	74% 12% 6% SA	76% 12% 4%	16%	10% 8% Cluster	8% 5%	12% 7% C	11% 11% ompan 51 to	10% 5% y Size More	8% 5% Eng &	6% 5% Indu	11% 9%	20% 9%
Wrong direction Neither Don't know/Refused  Q25D. The regulatory environment	74% 11% 7% Upstate 2018	70% 15% 6% Upstate 2017					65% 15% 9%	79% 6% 8% M	74% 12% 6% SA Roch	76% 12% 4% Syr	16% 6% High	10% 8% Cluster Middle	8% 5% Low	12% 7% Co 50 or less	11% 11% ompan 51 to 100	10% 5% y Size More than 100	8% 5% Eng & Constr	6% 5% Indu	11% 9% Istry	20% 9% Servi
Wrong direction Neither Don't know/Refused  Q25D. The regulatory environment  Right track	74% 11% 7% Upstate 2018 8%	70% 15% 6% Upstate 2017 8%					65% 15% 9% Alb	79% 6% 8% M Buff 7%	74% 12% 6% SA Roch 6%	76% 12% 4% Syr 12%	16% 6% High 13%	10% 8% Cluster Middle 7%	8% 5% Low 4%	12% 7% Co 50 or less 10%	11% 11% ompan 51 to 100 5%	10% 5% y Size More than 100 5%	8% 5% Eng & Constr 7%	6% 5% Indu Manuf 6%	11% 9% sstry Retail	20% 9% Servi 9%
Wrong direction Neither Don't know/Refused  Q25D. The regulatory environment  Right track Wrong direction	74% 11% 7% Upstate 2018 8% 73%	70% 15% 6% Upstate 2017 8% 66%					65% 15% 9% Alb 9% 69%	79% 6% 8% M Buff 7% 74%	74% 12% 6% SA Roch 6% 74%	76% 12% 4% Syr 12% 74%	16% 6% High 13% 63%	10% 8% Cluster Middle 7% 73%	8% 5% Low 4% 85%	12% 7% Co 50 or less 10% 71%	11% 11% ompan 51 to 100 5% 76%	10% 5% y Size More than 100 5% 76%	8% 5% Eng & Constr 7% 73%	6% 5% Indu Manuf 6% 73%	11% 9% stry Retail 9% 71%	20% 9% Servi 9% 68%
Wrong direction Neither Don't know/Refused  Q25D. The regulatory environment  Right track	74% 11% 7% Upstate 2018 8%	70% 15% 6% Upstate 2017 8%					65% 15% 9% Alb	79% 6% 8% M Buff 7%	74% 12% 6% SA Roch 6%	76% 12% 4% Syr 12%	16% 6% High 13%	10% 8% Cluster Middle 7%	8% 5% Low 4%	12% 7% Co 50 or less 10%	11% 11% ompan 51 to 100 5%	10% 5% y Size More than 100 5%	8% 5% Eng & Constr 7%	6% 5% Indu Manuf 6%	11% 9% sstry Retail	20% 9% Servi

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2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6%

Q25E. Workers Compensation reform								P.4	C A		1	Chustan	CommonySino			Industry				
								M	SA			Cluster	1		Company Size		-		isti y	
	Upstate	Upstate								_						More	Eng &			
	2018	2017					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Right track	17%	13%					18%	16%	17%	18%	20%	17%	16%	20%	20%	11%	21%	17%	15%	21%
Wrong direction	52%	56%					51%	51%	51%	54%	46%	51%	60%	51%	43%	59%	55%	51%	53%	48%
Neither	16%	16%					16%	15%	15%	17%	21%	15%	12%	13%	21%	17%	19%	16%	20%	13%
Don't know/Refused	15%	15%		1			15%	18%	16%	11%	13%	18%	13%	17%	16%	13%	5%	15%	13%	18%
Q25F. Energy costs																	<u> </u>			
								М	SA			Cluster		С	ompan	y Size	Industry			
	Upstate	Upstate												50 or	51 to	More	Eng &			
	2018	2017					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Right track	14%	14%					15%	15%	15%	12%	18%	13%	13%	14%	16%	13%	18%	10%	11%	15%
Wrong direction	45%	36%					45%	44%	46%	45%	41%	45%	52%	44%	39%	52%	47%	49%	36%	49%
Neither	26%	32%					26%	22%	25%	36%	26%	28%	22%	27%	31%	20%	27%	24%	40%	21%
Don't know/Refused	14%	18%					13%	20%	14%	8%	15%	14%	14%	15%	15%	15%	8%	16%	13%	15%
Q26KEY. Thinking about your company a	nd all the people that work	for your c	ompany,	consider e	each of th	e following statem	ents. Fo	r each i	ndicate	how d	escript	ive that s	tateme	nt is o	f your o	company a	nd your	workford	e.	
Q26KEY. Thinking about your company a Q26A. Our company operates as a team;				consider	each of th	e following staten	nents. Fo	r each i	ndicate	how d	escript	ive that s	tateme	nt is o	fyour	company a	nd your	workford	ce.	* 
				consider	each of th	e following staten	nents. Fo	r each i M		how d	escript	ive that s Cluster	tateme		f your o	•	nd your		istry	
		rything we		consider	each of th	e following staten	nents. Fo			how d	escript		tateme	С		•	end your			
	collaboration is part of eve	rything we		consider	each of th	e following staten	Alb			how d	escript High		Low	С	ompan	y Size				Service
	collaboration is part of eve	rything we		consider	each of th	e following statem		М	SA			Cluster		C 50 or	ompan 51 to	y Size More	Eng &	Indu	ıstry	Service 60%
Q26A. Our company operates as a team;	collaboration is part of eve Upstate 2018	rything we		consider 6	each of th	e following staten	Alb	M Buff	SA Roch	Syr	High	Cluster	Low	C 50 or less	ompan 51 to 100	y Size More than 100	Eng & Constr	Indu Manuf	istry Retail	
Q26A. Our company operates as a team;  Completely descriptive	Collaboration is part of eve Upstate 2018 53%	rything we		consider	each of th	e following staten	<b>Alb</b> 57%	M Buff 50%	Roch	<b>Syr</b> 54%	High 57%	Cluster Middle 50%	<b>Low</b> 54%	50 or less	ompan 51 to 100 59%	y Size More than 100	Eng & Constr 45%	Indu Manuf 55%	Retail	60%
Q26A. Our company operates as a team;  Completely descriptive  Somewhat descriptive	Upstate 2018 53% 44%	rything we		consider	each of th	e following staten	Alb 57% 39%	M Buff 50% 46%	SA Roch 50% 49%	<b>Syr</b> 54% 43%	High 57% 40%	Cluster  Middle 50% 48%	<b>Low</b> 54% 41%	C 50 or less 52% 45%	51 to 100 59% 41%	y Size  More than 100 52% 43%	Eng & Constr 45% 53%	Indu Manuf 55% 44%	Retail 36% 58%	60% 37%
Q26A. Our company operates as a team;  Completely descriptive  Somewhat descriptive  Not very descriptive	Upstate 2018 53% 44% 2%	rything we		consider	each of th	e following staten	Alb 57% 39% 4%	M Buff 50% 46% 3%	SA Roch 50% 49% 0%	<b>Syr</b> 54% 43% 3%	High 57% 40% 3%	Cluster  Middle 50% 48% 1%	Low 54% 41% 4%	50 or less 52% 45% 3%	51 to 100 59% 41% 0%	y Size More than 100 52% 43% 2%	Eng & Constr 45% 53% 0%	Indu Manuf 55% 44% 0%	Retail 36% 58% 4%	60% 37% 3%
Q26A. Our company operates as a team;  Completely descriptive Somewhat descriptive Not very descriptive Not at all descriptive Don't know/Refused	Upstate 2018 53% 44% 2% 0%	rything we	e do			e following staten	Alb 57% 39% 4% 0%	Buff 50% 46% 3% 0%	Roch 50% 49% 0% 1%	Syr 54% 43% 3% 0%	High 57% 40% 3% 0%	Cluster  Middle 50% 48% 1% 0%	Low 54% 41% 4% 0%	C 50 or less 52% 45% 3% 0%	51 to 100 59% 41% 0% 0%	y Size  More than 100  52%  43%  2%  1%	Eng & Constr 45% 53% 0% 1%	Manuf 55% 44% 0%	Retail 36% 58% 4% 0%	60% 37% 3% 0%
Q26A. Our company operates as a team;  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive	Upstate 2018 53% 44% 2% 0%	rything we	e do			e following staten	Alb 57% 39% 4% 0%	Buff 50% 46% 3% 0%	Roch 50% 49% 0% 1%	Syr 54% 43% 3% 0%	High 57% 40% 3% 0%	Cluster  Middle 50% 48% 1% 0%	Low 54% 41% 4% 0%	50 or less 52% 45% 3% 0% 0%	51 to 100 59% 41% 0% 0%	y Size More than 100 52% 43% 2% 1% 1%	Eng & Constr 45% 53% 0% 1%	Manuf 55% 44% 0%	Retail 36% 58% 4% 0%	60% 37% 3% 0%
Q26A. Our company operates as a team;  Completely descriptive Somewhat descriptive Not very descriptive Not at all descriptive Don't know/Refused	Upstate 2018 53% 44% 2% 0%	rything we	e do			e following statem	Alb 57% 39% 4% 0%	Buff 50% 46% 3% 0%	Roch 50% 49% 0% 1% 0%	Syr 54% 43% 3% 0%	High 57% 40% 3% 0%	Cluster  Middle 50% 48% 1% 0%	Low 54% 41% 4% 0%	50 or less 52% 45% 3% 0% 0%	51 to 100 59% 41% 0% 0%	y Size More than 100 52% 43% 2% 1% 1%	Eng & Constr 45% 53% 0% 1%	Manuf 55% 44% 0% 0% 1%	Retail 36% 58% 4% 0%	60% 37% 3% 0%
Q26A. Our company operates as a team;  Completely descriptive Somewhat descriptive Not very descriptive Not at all descriptive Don't know/Refused	Upstate 2018 53% 44% 2% 0%	rything we	e do			e following statem	Alb 57% 39% 4% 0%	8uff 50% 46% 3% 0% 2%	Roch 50% 49% 0% 1% 0%	Syr 54% 43% 3% 0%	High 57% 40% 3% 0%	Cluster  Middle 50% 48% 1% 0% 0%	Low 54% 41% 4% 0%	50 or less 52% 45% 3% 0% 0% C	51 to 100 59% 41% 0% 0%	y Size More than 100 52% 43% 2% 1% 1%	Eng & Constr 45% 53% 0% 1%	Manuf 55% 44% 0% 0% 1%	Retail 36% 58% 4% 0% 2%	60% 37% 3% 0%
Q26A. Our company operates as a team;  Completely descriptive Somewhat descriptive Not very descriptive Not at all descriptive Don't know/Refused	Upstate 2018 53% 44% 2% 0% 0% 0% raged and supported in the	rything we	e do			e following statem	Alb 57% 39% 4% 0%	8uff 50% 46% 3% 0% 2%	Roch 50% 49% 0% 1% 0%	Syr 54% 43% 3% 0%	High 57% 40% 3% 0%	Cluster  Middle 50% 48% 1% 0% 0%	Low 54% 41% 4% 0%	50 or less 52% 45% 3% 0% 0% C	51 to 100 59% 41% 0% 0% 0%	y Size  More than 100 52% 43% 2% 1% 1%	Eng & Constr 45% 53% 0% 1% 0%	Manuf 55% 44% 0% 0% 1%	Retail 36% 58% 4% 0% 2%	60% 37% 3% 0%
Q26A. Our company operates as a team;  Completely descriptive Somewhat descriptive Not very descriptive Not at all descriptive Don't know/Refused	Upstate 2018 53% 44% 2% 0% 0% 0% raged and supported in the	rything we	e do			e following statem	Alb 57% 39% 4% 0% 0%	M Buff 50% 46% 3% 0% 2%	SA  Roch 50% 49% 0% 1% 0%	Syr 54% 43% 3% 0% 0%	High 57% 40% 3% 0% 0%	Cluster  Middle 50% 48% 1% 0% 0% Cluster	Low 54% 41% 4% 0% 1%	C 50 or less 52% 45% 0% 0% C 50 or	51 to 100 59% 41% 0% 0% 0%	y Size  More than 100 52% 43% 2% 1% 1% 1%	Eng & Constr 45% 53% 0% 1% 0% Eng &	Manuf 55% 44% 0% 0% 1%	Retail 36% 58% 4% 0% 2%	60% 37% 3% 0% 0% Servic
Q26A. Our company operates as a team;  Completely descriptive Somewhat descriptive Not very descriptive Not at all descriptive Don't know/Refused  Q26B. Our employees are actively encoun	Upstate 2018 53% 44% 2% 0% 0% 0% raged and supported in the Upstate 2018	rything we	e do			e following statem	Alb 57% 39% 4% 0% 0%	M Buff 50% 46% 3% 0% 2% M Buff	SA  Roch 50% 49% 0% 1% 0% SA  Roch	Syr 54% 43% 3% 0% 0%	High 57% 40% 3% 0% 0% High	Cluster 50% 48% 1% 0% 0% Cluster	Low 54% 41% 4% 0% 1%	C 50 or less 52% 45% 0% 0% C 50 or less	ompan 51 to 100 59% 41% 0% 0% 0%	y Size  More than 100  52%  43%  2%  1%  1%  y Size  More than 100	Eng & Constr 45% 53% 0% 1% 0% Eng & Constr	Manuf 55% 44% 0% 0% 1%	Retail 36% 58% 4% 0% 2% stry Retail	60% 37% 3% 0% 0% Service
Q26A. Our company operates as a team;  Completely descriptive Somewhat descriptive Not very descriptive Not at all descriptive Don't know/Refused  Q26B. Our employees are actively encounty.	Upstate   2018   53%   44%   2%   0%   0%   0%	rything we	e do			e following statem	Alb 57% 39% 4% 0% 0% Alb 63%	M Buff 50% 46% 3% 0% 2% M Buff 53%	Roch 50% 49% 0% 1% 0% 5A Roch 49%	\$yr 54% 43% 3% 0% 0% \$yr 51%	High 57% 40% 3% 0% 0% High 59%	Cluster 50% 48% 1% 0% 0% Cluster Middle 51%	Low 54% 41% 4% 0% 1% Low 55%	C 50 or less 3% 0% 0% C 50 or less 50%	ompan 51 to 100 59% 41% 0% 0% 0% 0%	y Size More than 100 52% 43% 2% 1% 1% 1% y Size More than 100 61%	Eng & Constr 45% 53% 0% 1% 0% Eng & Constr 45%	Indu   Manuf   55%   44%   0%   0%   1%   Indu   Manuf   52%	Retail 36% 58% 4% 0% 2% Stry Retail 40%	60% 37% 3% 0% 0% Servic 63%
Q26A. Our company operates as a team;  Completely descriptive Somewhat descriptive Not very descriptive Not at all descriptive Don't know/Refused  Q26B. Our employees are actively encounted.  Completely descriptive Somewhat descriptive	Upstate 2018 53% 44% 2% 0% 0% 0% raged and supported in the Upstate 2018 54% 39%	rything we	e do			e following staten	Alb 57% 39% 4% 0% 0% Alb 63% 30%	MBuff 50% 46% 3% 0% 2% MBuff 53% 40%	Roch 50% 49% 0% 1% 0%  SA  Roch 49% 49%	Syr 54% 43% 3% 0% 0% Syr 51% 43%	High 57% 40% 3% 0% 0% High 59% 34%	Cluster 50% 48% 1% 0% 0% Cluster Middle 51% 42%	Low 54% 41% 4% 0% 1% Low 55% 39%	C 52% 45% 3% 0% 0% C 50 or less 50% 42%	ompan 51 to 100 59% 41% 0% 0% 0% 0 ompan 51 to 100 61% 33%	y Size More than 100 52% 43% 2% 1% 1% 1%  y Size More than 100 61% 35%	Eng & Constr 45% 53% 0% 1% 0% Eng & Constr 45% 45% 47%	Indu   Manuf   55%   44%   0%   0%   1%   Indu   Manuf   52%   40%	Retail 36% 58% 4% 0% 2% Stry Retail 40% 51%	60% 37% 3% 0% 0% Servic 63% 33%
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2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6%

								M	SA		l		Company Size			Industry				
	Upstate													50 or	51 to	More	Eng &			
	2018						Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Completely descriptive	32%						33%	29%	32%	33%	29%	29%	39%	29%	35%	38%	29%	26%	31%	37%
Somewhat descriptive	60%						62%	60%	63%	55%	63%	63%	52%	63%	57%	57%	60%	66%	62%	59%
Not very descriptive	7%						5%	8%	5%	9%	6%	6%	8%	6%	8%	4%	7%	7%	7%	5%
Not at all descriptive	1%						0%	2%	0%	1%	2%	0%	0%	1%	0%	0%	3%	0%	0%	0%
Don't know/Refused	1%						0%	1%	1%	1%	0%	1%	1%	1%	0%	1%	1%	1%	0%	0%
Q26D. Everyone's opinions and suggestions a	re solicited and taken s	eriously.	We have a	process 1	or receivi	ng and acting o	teedback				ı			_			1			
								М	SA		Cluster					ny Size	Industry		ustry	ı
	Upstate							- "						50 or		More	Eng &			
	2018						Alb	Buff	Roch	Syr	High		Low	less	100	than 100	Constr	Manuf		Service
Completely descriptive	46%						51%	43%	41%	53%	44%	45%	51%	44%	47%	51%	30%	53%	36%	54%
Somewhat descriptive	45% 8%						42%	46%	50%	41%	45%	45%	43%	44%	48% 5%	44%	58%	35%	55%	40%
Not very descriptive							7%	9%	10%	5%	10%	8%	6%	11%		4%	12%	10%	9%	5%
Not at all descriptive	0%						0%	1%	0% 0%	1% 0%	1% 0%	0% 0%	0% 0%	1% 0%	0% 0%	0% 1%	0% 0%	0% 1%	0% 0%	1% 0%
- 1.1 /- ( )											(1%			(1%	(1%		1 (1%			1 (1%
Don't know/Refused	0%						0%	1%	070	070	070	076	070	070	070	1/0	070	1/0	070	070
•		rategic pl	an				0%	170	0/6	070	070	076	070	070	070	170	070	170	070	070
Don't know/Refused  Q26E. The entire company knows and unders		rategic pl	an				0%		SA	070	070	Cluster	070				070		ustry	070
•		rategic pl	an				0%			070	070		070		ompar	ny Size	Eng &			070
•	tands the company's st	rategic pl	an				Alb			Syr	High		Low	C	ompar	ny Size			ustry	
•	tands the company's st Upstate	rategic pl	an					м	SA			Cluster		Co 50 or	ompar 51 to	ny Size More	Eng &	Indi	ustry	
Q26E. The entire company knows and unders	tands the company's st Upstate 2018	rategic pl	an				Alb	M Buff	SA Roch	Syr	High	Cluster	Low	Co 50 or less	ompar 51 to 100	y Size More than 100	Eng & Constr	Indi	ustry Retail	Service
Q26E. The entire company knows and unders  Completely descriptive	tands the company's st Upstate 2018 26%	rategic pl	an				Alb 31%	M Buff 24%	SA Roch 24%	<b>Syr</b> 28%	High 27%	Cluster Middle 24%	<b>Low</b> 32%	50 or less 27%	ompar 51 to 100 25%	More than 100	Eng & Constr	Inde Manuf 21%	ustry  Retail 22%	Service 35%
Q26E. The entire company knows and unders  Completely descriptive  Somewhat descriptive	tands the company's st  Upstate 2018 26% 56%	rategic pl	an				Alb 31% 51%	M Buff 24% 58%	SA Roch 24% 56%	Syr 28% 62%	High 27% 53%	Cluster Middle 24% 60%	Low 32% 52%	50 or less 27% 56%	ompar 51 to 100 25% 57%	More than 100 27% 55%	Eng & Constr 19% 59%	Indi Manuf 21% 64%	ustry  Retail 22% 62%	<b>Service</b> 35% 50%
Q26E. The entire company knows and unders  Completely descriptive  Somewhat descriptive  Not very descriptive	tands the company's st  Upstate 2018 26% 56% 15%	rategic pl	an				Alb 31% 51% 15%	M Buff 24% 58% 15%	Roch 24% 56% 17%	Syr 28% 62% 11%	High 27% 53% 15%	Cluster  Middle 24% 60% 13%	Low 32% 52% 17%	50 or less 27% 56% 15%	51 to 100 25% 57% 12%	y Size More than 100 27% 55% 16%	Eng & Constr 19% 59% 19%	Indo Manuf 21% 64% 9%	ustry  Retail 22% 62% 15%	Service 35% 50% 13%
Q26E. The entire company knows and unders  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive	tands the company's st  Upstate 2018 26% 56% 15% 2%	rategic pl	an				Alb 31% 51% 15% 4%	M Buff 24% 58% 15% 3%	SA Roch 24% 56% 17% 2%	Syr 28% 62% 11% 0%	High 27% 53% 15% 4%	Cluster  Middle 24% 60% 13% 2%	Low 32% 52% 17% 0%	Co 50 or less 27% 56% 15% 2%	51 to 100 25% 57% 12% 4%	Ny Size More than 100 27% 55% 16% 1%	Eng & Constr 19% 59% 19% 3%	Inde Manuf 21% 64% 9% 3%	ustry  Retail 22% 62% 15% 2%	Service 35% 50% 13% 2%
Q26E. The entire company knows and unders  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive	tands the company's st  Upstate 2018 26% 56% 15% 2% 0%			use to assu	ess progre	ess on those goa	Alb 31% 51% 15% 4% 0%	M Buff 24% 58% 15% 3%	SA Roch 24% 56% 17% 2%	Syr 28% 62% 11% 0%	High 27% 53% 15% 4%	Cluster  Middle 24% 60% 13% 2%	Low 32% 52% 17% 0%	Co 50 or less 27% 56% 15% 2%	51 to 100 25% 57% 12% 4%	Ny Size More than 100 27% 55% 16% 1%	Eng & Constr 19% 59% 19% 3%	Inde Manuf 21% 64% 9% 3%	ustry  Retail 22% 62% 15% 2%	Service 35% 50% 13% 2%
Q26E. The entire company knows and unders  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused	tands the company's st  Upstate 2018 26% 56% 15% 2% 0%			use to asso	ess progre	ess on those goa	Alb 31% 51% 15% 4% 0%	M Buff 24% 58% 15% 3%	Roch 24% 56% 17% 2% 1%	Syr 28% 62% 11% 0%	High 27% 53% 15% 4%	Cluster  Middle 24% 60% 13% 2%	Low 32% 52% 17% 0%	50 or less 27% 56% 15% 2% 0%	51 to 100 25% 57% 12% 4% 1%	Ny Size More than 100 27% 55% 16% 1%	Eng & Constr 19% 59% 19% 3%	Inda Manuf 21% 64% 9% 3% 2%	ustry  Retail 22% 62% 15% 2%	Service 35% 50% 13% 2%
Q26E. The entire company knows and unders  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused	tands the company's st  Upstate 2018 26% 56% 15% 2% 0%			use to asso	ess progre	ess on those goa	Alb 31% 51% 15% 4% 0%	Buff 24% 58% 15% 3% 1%	Roch 24% 56% 17% 2% 1%	Syr 28% 62% 11% 0%	High 27% 53% 15% 4%	Cluster  Middle 24% 60% 13% 2% 0%	Low 32% 52% 17% 0%	50 or less 27% 56% 15% 2% 0%	51 to 100 25% 57% 12% 4% 1%	y Size More than 100 27% 55% 16% 1%	Eng & Constr 19% 59% 19% 3%	Inda Manuf 21% 64% 9% 3% 2%	ustry  Retail 22% 62% 15% 2% 0%	Service 35% 50% 13% 2%
Q26E. The entire company knows and unders  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused	tands the company's st  Upstate 2018 26% 56% 15% 2% 0%  long term goals as well			use to asso	ess progre	ess on those goa	Alb 31% 51% 15% 4% 0%	Buff 24% 58% 15% 3% 1%	Roch 24% 56% 17% 2% 1%	Syr 28% 62% 11% 0%	High 27% 53% 15% 4%	Cluster  Middle 24% 60% 13% 2% 0%	Low 32% 52% 17% 0%	50 or less 27% 56% 15% 2% 0%	51 to 100 25% 57% 12% 4% 1%	y Size More than 100 27% 55% 16% 1% 1%	Eng & Constr 19% 59% 19% 3% 0%	Inda Manuf 21% 64% 9% 3% 2%	Retail	Service 35% 50% 13% 2%
Q26E. The entire company knows and unders  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused	tands the company's st  Upstate 2018 26% 56% 15% 2% 0%  long term goals as well  Upstate			use to asso	ess progre	ess on those goa	Alb 31% 51% 4% 0%	M Buff 24% 58% 15% 3% 1%	SA  Roch 24% 56% 17% 2% 1%	Syr 28% 62% 11% 0%	High 27% 53% 15% 4% 1%	Cluster  Middle 24% 60% 13% 2% 0%  Cluster	Low 32% 52% 17% 0%	Co 50 or less 27% 56% 15% 2% 0%	51 to 100 25% 57% 12% 4% 1%	y Size More than 100 27% 55% 16% 1% 1%  ny Size More	Eng & Constr 19% 59% 19% 3% 0%	Index   Manuf   21%   64%   9%   3%   2%   Index	Retail	Service 35% 50% 13% 2% 0%
Q26E. The entire company knows and unders  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused  Q26F. Individual departments have short and	tands the company's st  Upstate 2018 26% 56% 15% 2% 0%  long term goals as well  Upstate 2018			use to asso	ess progre	ess on those goa	Alb 31% 51% 4% 0% S	M Buff 24% 58% 15% 3% 1%	Roch 24% 56% 17% 2% 1%	Syr 28% 62% 11% 0% 0%	High 27% 53% 15% 4% 1%	Cluster  Middle 24% 60% 13% 2% 0%  Cluster  Middle	Low 32% 52% 17% 0% 0%	Co 50 or less 27% 56% 15% 2% 0%	51 to 100 25% 57% 12% 4% 1%	y Size	Eng & Constr 19% 59% 19% 3% 0% Eng & Constr	Indi Manuf 21% 64% 9% 3% 2% Indi Manuf	ustry  Retail 22% 62% 15% 2% 0%  ustry  Retail	Service   35%   50%   13%   2%   0%
Q26E. The entire company knows and unders  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused  Q26F. Individual departments have short and	tands the company's st  Upstate 2018 26% 56% 15% 2% 0%  long term goals as well Upstate 2018 25%			use to asso	ess progre	ess on those goa	Alb 31% 551% 4% 0% S Alb 25%	M Buff 24% 58% 15% 3% 1% M Buff 25%	Roch 24% 56% 17% 2% 1% SA Roch 29%	Syr 28% 62% 11% 0% 0% Syr 18%	High 27% 53% 15% 4% 1% High 27%	Cluster  Middle 24% 60% 13% 2% 0%  Cluster  Middle 23%	Low 32% 52% 17% 0% 0%	Constant    Consta	51 to 100 25% 57% 12% 4% 1% ompar 51 to 100 24%	y Size	Eng & Constr 19% 59% 19% 3% 0% Eng & Constr 15%	Indi Manuf 21% 64% 9% 3% 2% Indi Manuf 28%	ustry  Retail 22% 62% 15% 2% 0%  ustry  Retail 11%	Service 35% 50% 13% 0% Service 37%
Q26E. The entire company knows and unders  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused  Q26F. Individual departments have short and  Completely descriptive  Somewhat descriptive	tands the company's st  Upstate 2018 26% 56% 15% 2% 0%  long term goals as well Upstate 2018 25% 44%			use to asso	ess progre	ess on those goa	Alb 31% 551% 4% 0% S Alb 255% 50%	M Buff 24% 58% 15% 3% 1% M Buff 25% 44%	SA  Roch 24% 56% 17% 2% 1%  SA  Roch 29% 37%	Syr 28% 62% 11% 0% 0% Syr 18% 46%	High 27% 53% 15% 4% 1% High 27% 46%	Cluster  Middle 24% 60% 13% 2% 0%  Cluster  Middle 23% 42%	Low 32% 52% 17% 0% 0% Low 28% 44%	Constant    Consta	51 to 100 25% 57% 12% 4% 1% 51 to 100 24% 56%	y Size	Eng & Constr 19% 59% 19% 3% 0% Eng & Constr 15% 49%	Indi Manuf 21% 64% 9% 3% 2% Indi Manuf 28% 36%	ustry  Retail 22% 62% 15% 2% 0%  ustry  Retail 11% 55%	Service 35% 50% 13% 2% 0% Service 37% 39%

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2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6% 2016: 440 Upstate NY CEOs, MOE +/- 4.7%

Q26G. We have a vision for our company that	at inioning an oar accision												1								
								MSA			Cluster			Company Size			Industry				
	Upstate														50 or	51 to	More	Eng &			
	2018						Al	lb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Completely descriptive	35%						43	%	32%	32%	32%	34%	35%	34%	29%	39%	48%	26%	38%	20%	45%
Somewhat descriptive	48%						35	%	53%	48%	55%	51%	44%	51%	49%	49%	39%	49%	47%	56%	44%
Not very descriptive	14%						21	.%	11%	12%	12%	12%	17%	12%	17%	9%	12%	21%	9%	20%	11%
Not at all descriptive	2%						09	%	2%	4%	1%	1%	3%	1%	3%	0%	0%	3%	3%	0%	0%
Don't know/Refused	2%						19	%	2%	4%	0%	2%	1%	3%	2%	3%	1%	1%	2%	4%	0%
Q26H. Too often different departments seer	n to be headed in comple	etely diffe	rent direc	tions																	
•		-							MS	SA			Cluster		С	ompan	y Size	Industry			
	Upstate														50 or	51 to	More	Eng &			
	2018						Al	lb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Completely descriptive	4%						3%	%	3%	5%	3%	2%	2%	8%	3%	3%	7%	1%	2%	5%	6%
Somewhat descriptive	14%						14	%	9%	18%	17%	14%	15%	12%	13%	15%	13%	14%	10%	20%	12%
Not very descriptive	52%						52	%	61%	46%	46%	57%	49%	51%	50%	49%	61%	55%	57%	45%	55%
Not at all descriptive	29%						31	%	24%	28%	34%	24%	32%	27%	32%	31%	17%	27%	28%	27%	28%
Don't know/Refused	2%						19	%	3%	4%	0%	3%	2%	2%	2%	3%	1%	3%	2%	2%	0%
Q26I. We do a great job of listening to and re	esponding to the needs o	of our cust	tomers																		<u> </u>
Zan tro do d grout jou or note milg to dita .			1011110110						MS	SA			Cluster		C	ompan	v Size		Indu	ustry	
	Upstate															51 to		Eng &			1
	2018						Al	lb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Completely descriptive	63%						65	%	64%	59%	67%	66%	60%	66%	65%	64%	56%	62%	65%	69%	62%
Somewhat descriptive	35%						34	%	34%	40%	29%	33%	37%	32%	33%	35%	39%	36%	31%	31%	36%
Not very descriptive	2%						19	%	2%	2%	4%	2%	2%	1%	1%	1%	4%	3%	2%	0%	2%
Not at all descriptive	0%						09	%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/Refused	0%						19	%	1%	0%	0%	0%	0%	1%	0%	0%	1%	0%	1%	0%	1%
Q26J. Because we look to minimize risk, we	are slow to innovate		•	•			•						8								-
								MSA				Cluster			Company Size			Industry			
	Upstate														50 or	51 to	More	Eng &			
	2018		<u> </u>				Al	lb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service
Completely descriptive	6%						79	%	8%	5%	5%	4%	8%	6%	6%	5%	9%	7%	2%	15%	5%
Somewhat descriptive	33%						30	1%	31%	34%	39%	33%	32%	37%	33%	33%	34%	38%	28%	31%	33%
Not very descriptive	43%						45	%	44%	41%	42%	43%	45%	39%	44%	44%	40%	36%	43%	44%	49%
Not at all descriptive	15%						15	%	14%	18%	13%	18%	14%	14%	16%	16%	12%	15%	24%	11%	11%

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2018: 427 Upstate NY CEOs, MOE +/- 4.7% 2017: 462 Upstate NY CEOs, MOE +/- 4.6% 2016: 440 Upstate NY CEOs, MOE +/- 4.7%

Q26K. We are on top of how economic, social and technological change affects us MSA Cluster **Company Size** Industry Upstate 50 or 51 to More Eng & 2018 Alb Buff Roch Syr High Middle Low less 100 than 100 Constr Manuf Retail Service Completely descriptive 20% 21% 14% 20% 22% 18% 23% 18% 17% 24% 12% 19% 22% 25% 57% 56% 53% 60% 58% 55% 58% 57% 55% 60% 58% Somewhat descriptive 67% 53% 55% 60% Not very descriptive 20% 15% 22% 23% 20% 22% 20% 18% 25% 16% 12% 26% 26% 24% 13% Not at all descriptive 2% 0% 2% 2% 3% 1% 3% 0% 2% 0% 1% 3% 1% 0% 1% Don't know/Refused 1% 1% 2% 1% 0% 1% 0% 2% 1% 0% 2% 1% 1% 0% 2% Q26L. We constantly review our processes in an effort to always be getting better MSA Cluster **Company Size** Industry Upstate 50 or 51 to More Eng & 2018 Alb Buff Roch Syr High Middle Low less 100 than 100 Constr Manuf Retail Service Completely descriptive 43% 48% 44% 43% 34% 40% 44% 45% 40% 43% 46% 37% 49% 36% 45% Somewhat descriptive 49% 45% 49% 49% 57% 53% 48% 47% 53% 48% 43% 52% 45% 55% 47% Not very descriptive 6% 5% 5% 7% 9% 7% 7% 5% 6% 7% 8% 11% 3% 9% 6% Not at all descriptive 0% 1% 0% 1% 0% 0% 1% 0% 0% 1% 1% 0% 1% 0% 0% Don't know/Refused 1% 1% 0% 2% 0% 2% 0% 0% 0% 0% 2% 0% 1% 0% 2% Q27. Do you think your company will be in business in New York ten years from today or not? MSA Cluster **Company Size** Industry Upstate Upstate Upstate 50 or 51 to More Eng & 2018 2017 2016 Alb Buff Syr High Middle Low 100 than 100 Constr Retail Service Roch less Manuf 66% 65% 64% 75% 60% 65% 64% 80% 70% 41% 62% 76% 78% 74% 60% 44% 75% Yes 9% 17% 14% 12% 7% 31% 16% 13% No 13% 12% 10% 9% 6% 12% 14% 15% 12% Don't know/Refused 21% 23% 25% 16% 22% 21% 24% 13% 21% 28% 23% 11% 16% 14% 26% 42% 13% Q28. If you had it all to do all over again, considering all factors, would you locate your business in New York or someplace else? MSA Cluster Company Size Industry 50 or 51 to Upstate Upstate Upstate Upstate Upstate Upstate More Eng & 2018 2017 2016 2015 2014 2013 Alb Syr High Middle 100 than 100 Constr Service Buff Roch Low less Manuf Retail **New York** 33% 42% 32% 32% 25% 40% 35% 21% 33% 31% 39% 33% 41% 39% 29% 28% 29% 20% 27% 46% 56% 58% Someplace else 64% 56% 56% 67% 69% 65% 65% 66% 72% 61% 79% 67% 68% 61% 63% 80% 67% 53% Don't know/Refused 2% 4% 5% 3% 4% 6% 2% 3% 2% 3% 2% 4% 0% 1% 1% 0% 4% 0% 5% 2% Q32. Do you offer a pension or 401K to your employees? MSA Cluster Industry **Company Size** Upstate Upstate Upstate 50 or 51 to More Eng & 2018 2017 2016 Alb Buff Roch Syr High Middle Low less 100 than 100 Constr Manuf Retail Service Yes 85% 83% 82% 88% 86% 84% 83% 84% 88% 82% 82% 88% 95% 86% 92% 77% 88% No 13% 14% 15% 11% 11% 16% 17% 14% 11% 18% 17% 11% 5% 11% 8% 21% 11%

Don't know/Refused

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