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# 2018: 427 Upstate NY, MOE +/-4.7%, 76 Syracuse CEOs, MOE +/-11.2%

	Upstate Fotal 2018 17% 5% 6% 20% 13% 30% 9%	Syracuse 2018 16% 4% 11% 17% 16% 25%	Other MSAs 2018 17% 5% 5% 21%	Syracuse 2017 25% 1% 6%	Upstate Total 2017 17% 3%	Other MSAs 2017 16%	Syracuse 2016 22%	Upstate Total 2016	Other MSAs 2016	Syracuse 2015	Upstate Total 2015	Syracuse 2014	Upstate Total 2014
Tengineering and Construction Food and Beverage Financial Manufacturing Retail Gervice	17% 5% 6% 20% 13% 30% 9%	2018 16% 4% 11% 17% 16%	2018 17% 5% 5% 21%	2017 25% 1% 6%	Total 2017 17% 3%	<b>2017</b> 16%	2016	Total 2016	2016	•	•	•	
Tengineering and Construction Food and Beverage Financial Manufacturing Retail Gervice	17% 5% 6% 20% 13% 30% 9%	2018 16% 4% 11% 17% 16%	2018 17% 5% 5% 21%	2017 25% 1% 6%	Total 2017 17% 3%	<b>2017</b> 16%	2016	Total 2016	2016	•	•	•	
Food and Beverage Financial Manufacturing Retail Service	5% 6% 20% 13% 30% 9%	4% 11% 17% 16%	5% 5% 21%	1% 6%	3%		22%	400/					utai 2014
Food and Beverage Financial Manufacturing Retail Service	6% 20% 13% 30% 9%	11% 17% 16%	5% 21%	6%				18%	17%	14%	16%	24%	17%
Manufacturing Retail Service	20% 13% 30% 9%	17% 16%	21%			4%	4%	5%	5%	4%	5%	0%	3%
Retail Service	13% 30% 9%	16%		2401	6%	6%	8%	7%	7%	5%	5%	7%	8%
Service	30% 9%		420/	21%	19%	19%	17%	18%	18%	22%	24%	22%	21%
	9%	25%	12%	9%	10%	10%	8%	11%	11%	14%	12%	12%	12%
Vholesale and Distribution		23/0	30%	29%	36%	37%	31%	32%	32%	29%	25%	21%	23%
		12%	9%	9%	8%	8%	10%	10%	9%	13%	11%	14%	15%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	NA	NA
Q2. As you think about the current business or economic conditions in New Yo	ork State as	compared	to six months	ago, would	d you say the	y are conside	rably bette	r, a little bet	ter, about the	e same, a lit	tle worse, o	r consideral	oly worse?
		•		_									i
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
Т	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	2014
Considerably better	4%	5%	4%	7%	4%	3%	1%	1%	1%	1%	2%	1%	4%
A little better	23%	21%	24%	22%	23%	24%	21%	26%	27%	27%	24%	32%	32%
About the same	46%	55%	44%	43%	47%	48%	56%	48%	46%	38%	44%	41%	44%
A little worse	20%	14%	22%	18%	20%	21%	18%	21%	22%	25%	22%	20%	16%
Considerably worse	6%	4%	6%	10%	5%	4%	4%	4%	3%	9%	8%	7%	4%
·													
Q3. Looking forward from today through next year, that is, the entire 2019 year	ar, how wo	uld you de	scribe your ex	pectations f	for the econo	my in New Y	ork State?						
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
Т	Total 2018	2018	2018	2017	Total 2017	2017	2016	<b>Total 2016</b>	2016	2015	Total 2015	2014	2014
Considerably better	3%	5%	3%	12%	5%	3%	4%	5%	5%	3%	3%	4%	5%
A little better	24%	17%	26%	29%	29%	29%	42%	37%	36%	25%	27%	41%	37%
About the same	43%	55%	40%	25%	36%	38%	35%	37%	37%	37%	40%	37%	39%
A little worse	23%	16%	25%	25%	24%	24%	17%	19%	20%	25%	24%	12%	15%
Considerably worse	7%	7%	7%	9%	6%	6%	3%	3%	3%	10%	6%	7%	4%
Q4. Now thinking specifically about your industry, how would you describe th	ne current b	usiness or	economic con	ditions in N	ew York Stat	e as compare	d with six n	nonths ago?					
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
т	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Considerably better	4%	3%	5%	6%	3%	3%	3%	2%	2%	4%	3%	5%	4%
A little better	21%	20%	22%	16%	18%	19%	7%	18%	20%	23%	21%	21%	24%
About the same	42%	49%	40%	47%	45%	44%	56%	47%	45%	35%	39%	46%	42%
A little worse	25%	25%	25%	18%	27%	28%	32%	27%	25%	33%	29%	21%	24%
Considerably worse	7%	4%	8%	13%	7%	6%	3%	7%	8%	5%	8%	7%	6%

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Q5. And looking forward from today through the next year, how would you	ı describe voı	ır exnectat	ions for your ir	dustry here	e in New Yor	k?							
and the state of t		- expectat											
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Considerably better	5%	3%	5%	12%	5%	4%	3%	5%	5%	4%	3%	5%	5%
A little better	22%	17%	23%	24%	24%	24%	28%	30%	31%	24%	24%	30%	30%
About the same	41%	46%	40%	28%	35%	37%	43%	35%	32%	37%	41%	37%	36%
A little worse	23%	26%	22%	24%	27%	27%	24%	24%	25%	25%	25%	20%	24%
Considerably worse	10%	8%	10%	12%	8%	8%	3%	6%	6%	10%	7%	8%	5%
Q6. Now thinking specifically about your company, what are your expectat	ions for rever	nue through	h the year 2019	? Do you b	elieve your r	evenue will	.?	I		I	I		I
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	<b>Total 2018</b>	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Grow substantially	4%	3%	4%	4%	4%	4%	1%	3%	3%	0%	3%	8%	4%
Grow moderately	46%	49%	45%	38%	44%	45%	46%	48%	48%	44%	42%	42%	45%
Stay about the same	35%	38%	34%	41%	35%	34%	42%	33%	31%	34%	36%	39%	33%
Decrease moderately	13%	9%	14%	13%	13%	13%	11%	14%	15%	20%	17%	8%	16%
Decrease substantially	3%	1%	3%	3%	3%	3%	0%	2%	3%	1%	2%	3%	1%
Q7. Continuing to focus on your company, please think quickly about profit	ability. Betw	een today a	and the end of	the calenda	r year 2019	do you expec	t your profit	ts to?	•	•	=		•
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Grow substantially	2%	3%	2%	4%	3%	3%	1%	2%	2%	1%	2%	7%	3%
Grow moderately	35%	36%	35%	38%	36%	36%	38%	41%	42%	29%	33%	38%	38%
Stay about the same	37%	37%	38%	32%	35%	36%	40%	34%	32%	30%	36%	36%	35%
Decrease moderately	20%	20%	20%	21%	20%	20%	21%	20%	20%	35%	25%	17%	22%
Decrease substantially	5%	5%	5%	4%	4%	4%	0%	3%	4%	4%	4%	3%	3%
Don't know/Refused	0%	0%	0%	0%	1%	1%	0%	0%	0%	0%	1%	0%	0%
Q8. Businesses and the executives that direct them strive to enhance profit	ability in ma	ny ways. Th	rough which o	f the follow	ing strategie	es do you plar	n to MOST e	nhance you	r company's p	orofitability	over the nex	ct year?	
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	<b>Total 2017</b>	2017	2016	Total 2016	2016	2015	<b>Total 2015</b>	2014	Total 2014
Market/demand growth	40%	32%	42%	34%	42%	43%	39%	48%	50%	41%	39%	39%	43%
Cost reduction	21%	23%	21%	22%	25%	26%	35%	25%	23%	37%	31%	24%	29%
Price increase	21%	21%	21%	21%	13%	12%	14%	13%	12%	11%	12%	16%	15%
New technology	10%	15%	9%	9%	11%	11%	10%	9%	9%	6%	9%	9%	7%
Other	7%	7%	7%	13%	8%	8%	3%	4%	4%	4%	7%	11%	6%
Other	.,.		,,,	13/0	070	070	370	7/0	-170	170	,,,	/-	
Don't know/Refused	1%	3%	0%	1%	1%	1%	0%	1%	1%	1%	1%	1%	1%

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Q9. Please indicate which of the following are major areas of concentration	for vour con	npany now	and through 2	019.									
	700.												
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Svracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Expansion of existing markets	54%	53%	54%	46%	57%	59%	43%	53%	55%	53%	54%	50%	56%
Growth in existing products	51%	58%	49%	47%	54%	56%	50%	58%	60%	56%	52%	50%	54%
Entry into new markets	29%	24%	30%	24%	28%	29%	26%	32%	33%	34%	30%	30%	33%
New product lines	25%	32%	24%	21%	24%	24%	21%	23%	24%	20%	27%	29%	25%
Acquisition of new businesses	13%	13%	13%	7%	15%	16%	8%	15%	17%	15%	15%	18%	14%
Technology innovation	31%	34%	30%	34%	34%	34%	21%	28%	30%	24%	27%	26%	26%
Construction of new locations	10%	12%	10%	6%	8%	9%	6%	10%	10%	4%	9%	12%	10%
Internal restructuring	28%	25%	28%	24%	28%	28%	24%	25%	25%	28%	28%	25%	25%
Expansion into export markets	4%	5%	3%	3%	5%	5%	1%	4%	4%	NA	NA	NA	NA
Other	6%	1%	7%	7%	5%	5%	4%	4%	4%	6%	0%	3%	3%
Don't know/Refused	3%	3%	3%	0%	0%	0%	6%	2%	1%	0%	1%	0%	1%
Q10. Do you intend to invest between today through 2019 in any fixed asse	ts for your co	mpany des	signed to meet	growing de	mand, redu	ce costs or en	hance prod	uctivity?					
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	<b>Total 2017</b>	2017	2016	<b>Total 2016</b>	2016	2015	Total 2015	2014	Total 2014
Yes	57%	55%	58%	56%	56%	56%	46%	51%	52%	53%	55%	59%	58%
No	28%	29%	28%	28%	28%	28%	40%	36%	36%	37%	34%	28%	31%
Not sure	15%	16%	14%	16%	16%	16%	14%	13%	12%	10%	11%	13%	11%
Q11. Now thinking about the people that work for your company, between	today and th	e end of 20	019, do you pla	n to?	•	•	•				•		•
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	<b>Total 2017</b>	2017	2016	<b>Total 2016</b>	2016	2015	Total 2015	2014	Total 2014
Substantially increase your workforce	1%	1%	1%	1%	2%	2%	1%	2%	2%	0%	1%	3%	2%
Moderately increase your workforce	37%	33%	38%	34%	35%	35%	32%	37%	38%	27%	32%	28%	30%
Remain about the same	53%	61%	51%	54%	53%	53%	60%	52%	51%	58%	57%	63%	59%
Decrease your workforce	8%	5%	9%	7%	9%	9%	6%	8%	8%	15%	9%	5%	9%
Don't know/Refused	0%	0%	0%	3%	1%	1%	1%	1%	1%	0%	1%	1%	1%

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### 2018: 427 Upstate NY, MOE +/-4.7%, 76 Syracuse CEOs, MOE +/-11.2%

2017: 462 Upstate NY, 68 Syracuse CEOs; 2016: 440 Upstate NY, 72 Syracuse CEOs

Q12. And thinking about other challenges that your company faces, which of the following are you concerned with?

	11	C	041 8464	C	11	044	C	11	O+l 0.4C 0 -	C	11	C	11
	Upstate Total 2018	Syracuse 2018	Other MSAs 2018	Syracuse 2017	Upstate Total 2017	Other MSAs 2017	Syracuse 2016	Upstate Total 2016	Other MSAs 2016	Syracuse 2015	Upstate Total 2015	Syracuse 2014	Upstate Total 2014
Existing U.S. competition	25%	26%	25%	24%	24%	24%	18%	27%	29%	23%	25%	30%	29%
Governmental regulation	64%	64%	64%	63%	61%	61%	68%	68%	69%	71%	68%	63%	69%
Taxation	58%	62%	57%	69%	61%	60%	53%	57%	58%	66%	65%	61%	65%
Foreign competition	9%	9%	9%	7%	10%	10%	7%	9%	10%	8%	11%	9%	12%
Energy costs	24%	26%	23%	22%	18%	18%	26%	24%	23%	24%	19%	32%	30%
Risk management	22%	18%	22%	21%	26%	26%	21%	22%	23%	19%	26%	25%	22%
Adverse economic conditions	39%	43%	38%	40%	37%	37%	35%	42%	43%	53%	48%	49%	46%
Health care costs	73%	80%	72%	81%	78%	78%	82%	79%	79%	76%	78%	70%	77%
Global political instability	12%	16%	11%	15%	15%	15%	7%	12%	13%	10%	15%	9%	16%
Rising supplier costs	40%	42%	39%	35%	32%	32%	31%	27%	26%	22%	25%	33%	35%
Human resources	48%	39%	50%	35%	43%	45%	40%	36%	36%	28%	38%	30%	30%
Cash flow	28%	29%	28%	26%	27%	27%	33%	28%	26%	27%	26%	32%	29%
Ability to obtain suitable financing	7%	5%	7%	10%	10%	10%	11%	8%	8%	10%	8%	11%	8%
U.S. trade agreements	19%	20%	18%	7%	9%	9%	7%	8%	8%	NA	NA	NA	NA
None of the above	0%	0%	1%	1%	2%	2%	0%	1%	1%	0%	0%	0%	0%
Q13. Thinking specifically about New York and the relationship between th	e state gover	nment and	businesses lik	e yours, ove	erall would y	ou say the go	vernment o	f the State o	of New is doin	ig an excelle	ent, good, fa	ir or poor jo	b of
creating a business climate in which companies like yours will succeed?						•							
	Upstate	Syracuse		Syracuse	Upstate	Other MSAs		Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Excellent	1%	0%	1%	1%	1%	1%	0%	1%	1%	0%	1%	0%	1%
Good	6%	7%	6%	7%	7%	7%	8%	8%	7%	4%	4%	5%	4%
Fair	24%	22%	25%	25%	25%	25%	31%	29%	29%	33%	29%	32%	30%
Poor	67%	68%	67%	60%	64%	64%	61%	61%	62%	58%	64%	62%	63%
Don't know/Refused	1%	3%	1%	6%	3%	2%	0%	1%	1%	5%	2%	1%	2%
Q14. Of the following, what would you like to see the Governor and Legisla	ture of New \	York focus	on?			1	T		1	Т	ı	Т	,
			T										
	Upstate	Syracuse		Syracuse	Upstate	Other MSAs		Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Personal Income Tax Reform	57%	57%	57%	57%	58%	59%	47%	55%	56%	52%	54%	NA	NA
Business Income Tax Reform	57%	55%	57%	60%	63%	63%	60%	62%	62%	63%	63%	NA NA	NA NA
Estate Tax Reform	30%	28%	30%	18%	29%	31%	24%	31%	33%	37%	34%	NA NA	NA
Sales Tax Reform	29%	33%	28%	28%	24%	24%	22%	22%	22%	20%	25%	NA 200/	NA 420/
Infrastructure Development	44%	46%	44%	51%	52%	52%	35%	43%	46%	49%	42%	38%	42%
Energy Infrastructure	19%	18%	19%	32%	24%	23%	NA 250/	NA 260/	NA 270/	NA 120/	NA 2007	NA 2007	NA 2007
Business Development Incentives	27%	30%	27%	41%	31%	29%	35%	36%	37%	43%	36%	39%	38%
Ethics Reform	46%	47%	46%	38%	43%	44%	36%	52%	55%	42%	42%	42%	40%
Spending Cuts	59%	61%	58%	57%	53%	53%	44%	51%	53%	54%	58%	63%	64%
Other  Death leaves (Defended)	20%	21%	20%	19%	16%	16%	15%	13%	13%	19%	14%	12%	16%
Don't know/Refused	1%	3%	1%	0%	0%	0%	1%	1%	1%	0%	0%	0%	0%
			<u> </u>			<u> </u>			<u> </u>				

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Q15. How confident are you in the ability of the governm	ant of the State of New York to	improvo t	ha husinass sliv	mata far hu	sinossos liko	voure boro ir	Now York	over the nev	rt voor2 Aro v	2			
Q13. How confident are you in the ability of the government	ent of the state of New York to	improve u	ie busiliess cili	liate for bu	Sillesses like	yours nere ii	I New TOIK	over the nex	t yearr Are yo	Jur			
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Very confident	1%	0%	1%	1%	1%	1%	3%	1%	1%	1%	1%	0%	1%
Somewhat confident	11%	11%	11%	21%	15%	14%	13%	14%	14%	13%	12%	14%	12%
Not very confident	42%	39%	42%	43%	48%	49%	53%	48%	48%	53%	50%	43%	47%
Not at all confident	46%	50%	45%	32%	35%	35%	32%	36%	37%	32%	37%	42%	38%
Don't know/Refused	1%	0%	1%	3%	2%	1%	0%	1%	0%	1%	1%	0%	1%
			_,_			_,-				-,-			
Q16. And thinking about the efforts of the federal govern	ment, overall would you say th	e federal g	overnment is o	doing an exc	ellent, good	, fair or poor	job of creat	ing a busine	ss climate in v	which comp	panies like yo	ours will suc	ceed?
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Excellent	18%	11%	19%	1%	6%	6%	0%	1%	1%	0%	0%	0%	0%
Good	33%	37%	32%	28%	22%	20%	6%	6%	6%	0%	2%	3%	4%
Fair	25%	24%	26%	35%	35%	35%	32%	29%	28%	19%	22%	24%	21%
Poor	22%	28%	21%	32%	33%	33%	58%	59%	61%	77%	73%	74%	72%
Don't know/Refused	2%	1%	2%	3%	5%	5%	4%	5%	4%	4%	2%	0%	2%
Q17. How confident are you in the ability of the federal g	overnment to improve the bus	iness clima	te for business	es like your	s here in Ne	w York over t	he next yea	r? Are you:					
-													
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Very confident	8%	4%	9%	4%	3%	3%	4%	5%	5%	0%	0%	0%	1%
Somewhat confident	38%	42%	37%	38%	36%	36%	25%	27%	28%	4%	7%	4%	8%
Not very confident	38%	37%	38%	34%	42%	43%	40%	44%	44%	53%	50%	53%	45%
Not at all confident	15%	17%	15%	22%	18%	17%	28%	22%	21%	41%	41%	43%	44%
Don't know/Refused	0%	0%	0%	1%	1%	1%	3%	2%	1%	3%	1%	0%	2%
Q18. Has the new New York State Paid Family Leave law	had a positive, negative or no i	mpact on y	our business?										
	Upstate	Syracuse	Other MSAs										
	Total 2018	2018	2018										
Positive impact	2%	1%	2%										
Negative impact	48%	46%	48%										
No impact	50%	53%	49%										
Don't know/Refused	0%	0%	1%										

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# 2018: 427 Upstate NY, MOE +/-4.7%, 76 Syracuse CEOs, MOE +/-11.2%

Q19. Which of the following has your business employed over	the past year to develop w	workforce s	kills of new en	nployees?								
	Upstate	Syracuse	Other MSAs									
	Total 2018	2018	2018									
Apprenticeships	23%	17%	24%									
Employer provided training	69%	66%	70%									
Worked with community college(s)	19%	16%	20%									
Worked with local high school/BOCES	17%	17%	17%									
Used NYS DOL workforce programs	9%	12%	8%									
Other	5%	4%	5%									
None of the above	21%	28%	20%									
Do you support or oppose the following proposals related to hi	iring processes and emplo	vment nra	ctices?				1	I	I.	1	I	I
Q20A. Placing restrictions on questions about criminal history	processes and emple	,ciic più										
Quarter racing restrictions on questions about critimal history												
	Upstate	Syracuse	Other MSAs				+			+		
	Total 2018	2018	2018									
Support	9%	9%	9%									
		86%	84%									
Oppose Company (D. C.	84%											
Don't know/Refused	7%	5%	7%									
Q20B. Placing restrictions on questions about salary history	<u></u>	1			1	1	1	1	1	1	1	ı
	Upstate	Syracuse	Other MSAs									
	Total 2018	2018	2018									
Support	14%	9%	15%									
Oppose	75%	79%	74%									
Don't know/Refused	12%	12%	11%									
Q20C. Placing restrictions on questions about credit history	<u> </u>						•			•		
	Upstate	Syracuse	Other MSAs									
	Total 2018	2018	2018									
Support	19%	14%	19%									
Oppose	63%	64%	62%							1		
Don't know/Refused	19%	21%	18%									
	15/3		_3/3				1			1		
Q20D. Instituting restrictions on use of non-compete agreemen	nts unrelated to trade sec	rets	1			1	1	!		!	!	!
Q200. moditating restrictions on use of non-compete agreemen	its amelated to trade sec											
	Upstate	Syracuse	Other MSAs			1	1			<del>                                     </del>	1	
	Total 2018	2018	2018									
Comment						1	1			1	1	-
Support	27%	18%	29%				1			1		
Oppose	51%	54%	50%				-			-		
Don't know/Refused	22%	28%	21%				1			1		
						1					1	

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# 2018: 427 Upstate NY, MOE +/-4.7%, 76 Syracuse CEOs, MOE +/-11.2%

Q20E. Placing restrictions on drug testing (e.g., related to recreational use	of marijuana)										
	Upstate	Syracuse	Other MSAs								
	Total 2018	2018	2018								
Support	22%	16%	23%								
Oppose	69%	75%	68%								
Don't know/Refused	9%	9%	9%								
Q20F. Instituting requirements for advanced scheduling and mandated pay	premiums fo	r schedule	changes	•		•		•		•	
	Upstate	Syracuse	Other MSAs								
	Total 2018	2018	2018								
Support	8%	8%	9%								
Oppose	66%	61%	67%								
Don't know/Refused	26%	32%	24%								
Do you support or oppose the following aspects of recent federal tax reform	m?										
Q21A. The new 20% income tax deduction for pass-through businesses											
	Upstate	Syracuse	Other MSAs								
	Total 2018	2018	2018								
Support	67%	74%	66%								
Oppose	8%	9%	8%								
Don't know/Refused	25%	17%	26%								
Q21B. The limits on taxation of non-repatriated foreign earnings		•		•		•					
	Upstate	Syracuse	Other MSAs								
	Total 2018	2018	2018								
Support	36%	38%	36%								
Oppose	19%	16%	19%								
Don't know/Refused	45%	46%	45%								
Q21C. The \$10,000 cap on deductibility of state and local taxes		•		•		•					
	Upstate	Syracuse	Other MSAs								
	Total 2018	2018	2018								
Support	25%	28%	25%								
Oppose	65%	66%	65%								
Don't know/Refused	9%	7%	10%								
Q21D. Lowering the tax rates used to compute personal income taxes	•	•	•	•	•		•	•	•	•	
	Upstate	Syracuse	Other MSAs								
	Total 2018	2018	2018								1
Support	87%	86%	87%								
Oppose	6%	7%	6%								
Don't know/Refused	7%	8%	7%								

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# 2018: 427 Upstate NY, MOE +/-4.7%, 76 Syracuse CEOs, MOE +/-11.2%

2345	f 250/ t- 240/										
Q21E. Lowering the maximum tax rate on corporations	from 35% to 21%	1	1			1		1	1	1	
	Hestate	Cumpausa	Other MCAe								-
	Upstate Total 2018	Syracuse 2018	Other MSAs 2018								
N							 				-
Support	80%	82%	80%								-
Oppose	13%	14%	13%								-
Don't know/Refused	7%	4%	7%								-
Q21F. Being able to expense capital investments		I		ı							1
			01								-
	Upstate	Syracuse									
	Total 2018	2018	2018								
upport	88%	97%	86%				_				-
Oppose	4%	0%	5%						1		-
Oon't know/Refused	8%	3%	9%					1		1	1
221G. Reducing federal revenues by up to \$1 Trillion or	ver the next ten years and adding	to future d	leficits					1	1	1	
	Upstate	Syracuse									
	Total 2018	2018	2018								
upport	23%	21%	24%								
)ppose	58%	61%	57%								
Oon't know/Refused	19%	18%	19%								
222. Overall, has the recently passed federal tax reform	n had a positive, negative or no ir	npact on yo	our business?								
	Upstate	Syracuse	Other MSAs								
	Total 2018	2018	2018								
ositive impact	52%	54%	52%								
legative impact	5%	1%	6%								
lo impact	42%	43%	41%								
Oon't know/Refused	1%	1%	1%								
·											
Q23. Have the new federal tariffs had a positive, negati	ive or no impact on your business	?	!	<del>y</del>	<del></del>	ų.	•				
· · · · · · · · · · · · · · · · · · ·	i										
	Upstate	Syracuse	Other MSAs								
	Total 2018	2018	2018								
Positive impact	6%	7%	6%					+	<u> </u>	+	
Vegative impact	34%	37%	33%						+		+
No impact	60%	57%	60%	+	<del>-  </del> -		+	+	+	+	+
No Impact Don't know/Refused	0%	0%	1%				+	+	+	+	-
Jon t know/ kerusea	U%	U%	170	1			1				

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Consider each of the following national issues. Indicate w	nether over the last year you t	think the co	ountry has been	n on the righ	nt track, mov	ed in the wron	g direction or is neit	her on the ri	track no	or moving in t	he wrong di	rection
24A. The cost of health care												
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs						
	Total 2018	2018	2018	2017	Total 2017	2017						
Right track	19%	20%	19%	18%	16%	16%						
Wrong direction	62%	62%	62%	68%	61%	60%						
Neither	16%	17%	16%	12%	18%	19%						
Don't know/Refused	3%	1%	3%	3%	6%	6%						
Q24B. Our immigration system	•											
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs						
	Total 2018	2018	2018	2017	Total 2017	2017						
Right track	36%	37%	36%	37%	38%	38%						İ
Vrong direction	52%	51%	52%	43%	46%	46%						1
Neither	9%	11%	9%	15%	12%	11%						1
Don't know/Refused	4%	1%	4%	6%	4%	4%						1
	1.75			0,0	.,,	.,,,						
Q24C. The federal budget deficit		!	Į.	!	!	<u> </u>	ļ.					
Q2-ref file federal budget deficit												
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs						
	Total 2018	2018	2018	2017	Total 2017	2017						
Right track	15%	12%	15%	24%	15%	14%						
Wrong direction	68%	67%	68%	59%	59%	59%						
Neither	12%	12%	11%	15%	18%	18%						
Don't know/Refused	6%	9%	5%	3%	8%	9%						
Don't know/keruseu	070	370	370	3/0	6/0	370						
Q24D. The taxes businesses pay												
224D. The taxes businesses pay												1
	Upstate	Curacusa	Other MSAs	C	Unatata	Other MCAs						
	'	Syracuse		Syracuse	Upstate	Other MSAs						
211	Total 2018		2018	2017	Total 2017	2017						
Right track	64%	68%	63%	50%	43%	42%						+
Wrong direction	23%	21%	24%	31%	32%	32%						-
Neither	9%	7%	9%	13%	18%	19%						
Don't know/Refused	4%	4%	3%	6%	7%	7%						
		ļ										ļ
Q24E. The health of our economy				1	1	1	1				1	
			1									
	Upstate	Syracuse		Syracuse	Upstate	Other MSAs						
	Total 2018	1	2018	2017	Total 2017	2017						
Right track	66%	67%	66%	46%	48%	49%						
Wrong direction	16%	13%	17%	31%	27%	26%						
Neither	12%	13%	12%	21%	18%	18%						
Don't know/Refused	6%	7%	5%	3%	7%	7%						

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Q24F. Safeguarding the environment												
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs						
	Total 2018	2018	2018	2017	Total 2017	2017						
Right track	32%	36%	31%	31%	23%	21%						
Wrong direction	38%	38%	38%	37%	39%	40%						
Neither	22%	17%	23%	25%	28%	29%						
Don't know/Refused	8%	9%	8%	7%	10%	10%						
And consider each of the following New York State issues. Indicate whe	ther over the las	t year you	think the state	has been o	n the right tr	ack, moved in	the wrong direc	tion or is neith	er on the righ	nt track nor m	oving in the	wrong
lirection												
Q25A. Infrastructure development												
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs						
	Total 2018	2018	2018	2017	Total 2017	2017						
light track	25%	28%	25%	34%	25%	24%						
Vrong direction	45%	43%	45%	31%	37%	39%						
Neither	20%	22%	19%	24%	24%	25%						
Oon't know/Refused	10%	7%	10%	12%	13%	13%						
Q25B. Ethics reform			•									
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs						
	Total 2018	2018	2018	2017	Total 2017	2017						
Right track	8%	9%	8%	15%	9%	8%						
Nrong direction	69%	67%	70%	53%	61%	63%						
Neither	15%	17%	15%	18%	19%	19%						
Don't know/Refused	8%	7%	8%	15%	10%	10%						
Q25C. State spending		· I	•	I	I		•	<u> </u>	'N	u u	· ·	
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs						
	Total 2018	2018	2018	2017	Total 2017	2017						
Right track	8%	8%	8%	18%	9%	8%					1	
Vrong direction	74%	76%	73%	60%	70%	72%						
Neither	11%	12%	11%	15%	15%	14%						
Don't know/Refused	7%	4%	7%	7%	6%	6%						
Q25D. The regulatory environment								ļ		-	•	
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs						
	Total 2018	1 -	2018	2017	Total 2017	2017						
Right track	8%	12%	7%	16%	8%	7%						
Wrong direction	73%	74%	72%	53%	66%	68%						1
<u> </u>				19%	17%	17%		+		_		1
Neither	11%	11%	11%	19%	1/%	1/%						
Neither Don't know/Refused	11% 8%	11% 4%	11% 9%	19%	8%	8%						+

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# 2018: 427 Upstate NY, MOE +/-4.7%, 76 Syracuse CEOs, MOE +/-11.2%

post w t o vi f													
Q25E. Workers Compensation reform		l						l	1			1	
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs							
	Total 2018	2018	2018	2017	Total 2017	2017							
Right track	17%	18%	17%	16%	13%	12%							
Wrong direction	52%	54%	51%	40%	56%	59%						-	
Neither	16%	17%	15%	25%	16%	15%						-	
	15%	11%	16%	19%	15%	15%						-	
Don't know/Refused	15%	11%	16%	19%	15%	14%						-	
O3FF Franciscosts													
Q25F. Energy costs		l		1		1		l		1		1	1
	Unetete	Syracuse	Other MSAs	C	11	Other MSAs						-	
	Upstate Total 2018	2018	2018	Syracuse	Upstate Total 2017	2017							
Right track	10tai 2018	12%	15%	2017	14%								1
	45%	45%	45%	18% 25%	36%	13% 38%							1
Wrong direction Neither	26%	45% 36%	45% 24%	25% 37%	36%	38%							1
Don't know/Refused	14%	36% 8%	15%	21%								1	
Don't know/kerusea	14%	8%	15%	21%	18%	17%						1	
		1 6.1		<u> </u>	<u> </u>			<u> </u>	<u> </u>	<u> </u>	·	1	
Thinking about your company and all the people that work for y		each of the	following state	ements. For	r each indica	te now descri	ptive that s	tatement is	of your com	pany and yo	ur worktord	е.	
Q26A. Our company operates as a team; collaboration is part of	r everything we do	1		1		1		1		1		1	
	I I	C	044										
	Upstate	Syracuse											
Completely describely a	Total 2018	2018	2018									1	
Completely descriptive	53%	54%	52%										
Somewhat descriptive	44%	43%	45%										
Not very descriptive	2%	3%	2%										
Not at all descriptive	0%	0%	0%										
Don't know/Refused	0%	0%	1%										
		l	l										
Q26B. Our employees are actively encouraged and supported in	their personal and prof	essional gr	owth	1	1	1		ı	1	1	1	1	
		_	T =										
	Upstate	Syracuse											
	Total 2018	2018	2018										1
Completely descriptive	54%	51%	54%										
Somewhat descriptive	39%	43%	38%										
Not very descriptive	6%	5%	6%										
Not at all descriptive	1%	0%	1%										
Don't know/Refused	0%	0%	0%										
		<u> </u>										<u> </u>	

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Q26C. Overall, we have a company where people love coming to work	each day	1			1	1	1	1	1	1	1	1
			T									
	Upstate	Syracuse	Other MSAs									
	Total 2018	2018	2018									
Completely descriptive	32%	33%	31%									
Somewhat descriptive	60%	55%	62%									
Not very descriptive	7%	9%	6%									
Not at all descriptive	1%	1%	1%									
Don't know/Refused	1%	1%	1%									
Q26D. Everyone's opinions and suggestions are solicited and taken ser	iously. We have a	process fo	r receiving and	acting on f	eedback							
	Upstate	Syracuse										
	Total 2018	2018	2018									
Completely descriptive	46%	53%	45%									
Somewhat descriptive	45%	41%	46%									
Not very descriptive	8%	5%	9%									
s	0%	1%	0%									
Not at all descriptive	0,0											
	0%	0%	0%									
Not at all descriptive  Don't know/Refused			0%									
	0%		0%									
Don't know/Refused	0%		0%									
Don't know/Refused	0%		0% Other MSAs									
Don't know/Refused	0% Itegic plan	0%										
Don't know/Refused  Q26E. The entire company knows and understands the company's stra	0% Itegic plan Upstate	0% Syracuse	Other MSAs									
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive	0%  Itegic plan  Upstate Total 2018	0% Syracuse 2018	Other MSAs 2018									
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive	0%  Itegic plan  Upstate Total 2018 26%	0% Syracuse 2018 28%	Other MSAs 2018 26%									
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive  Not very descriptive	0%  Itegic plan  Upstate Total 2018 26% 56% 15%	0%  Syracuse 2018 28% 62%	Other MSAs 2018 26% 55% 15%									
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive	0% Integic plan Upstate Total 2018 26% 56%	0% Syracuse 2018 28% 62% 11%	Other MSAs 2018 26% 55%									
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive	0%  Integic plan  Upstate Total 2018 26% 56% 15% 2%	0%  Syracuse 2018 28% 62% 11% 0%	Other MSAs 2018 26% 55% 15% 3%									
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused	0%  Itegic plan  Upstate Total 2018 26% 56% 15% 2% 0%	0%  Syracuse 2018  28%  62%  11%  0%  0%	Other MSAs 2018 26% 55% 15% 3% 1%	hose goals								
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused	0%  Itegic plan  Upstate Total 2018 26% 56% 15% 2% 0%	0%  Syracuse 2018  28%  62%  11%  0%  0%	Other MSAs 2018 26% 55% 15% 3% 1%	hose goals								
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive	0%  Integic plan  Upstate Total 2018 26% 56% 15% 2% 0%  Is a process they to	0%  Syracuse 2018  28%  62%  11%  0%  0%  use to asses	Other MSAs 2018 26% 55% 15% 3% 1%	hose goals								
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused	0%  Integic plan  Upstate Total 2018 26% 56% 15% 2% 0%  Uss a process they usses they used to the use of the u	0%  Syracuse 2018 28% 62% 11% 0% 0%  use to asses  Syracuse	Other MSAs 2018 26% 55% 15% 3% 1% ss progress on t	hose goals								
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused  Q26F. Individual departments have short and long term goals as well a	0%  Integic plan  Upstate Total 2018 26% 56% 15% 2% 0%  Is a process they upstate Total 2018	0%  Syracuse 2018 28% 62% 11% 0% 0%  use to asses Syracuse 2018	Other MSAs 2018 26% 55% 15% 3% 1% Sprogress on to the MSAs 2018	hose goals								
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused  Q26F. Individual departments have short and long term goals as well a	0%  Itegic plan  Upstate Total 2018 26% 56% 15% 2% 0%  Usstate Total 2018  Upstate Total 2018	0%  Syracuse 2018 28% 62% 11% 0% 0%  use to asses Syracuse 2018 18%	Other MSAs 2018 26% 55% 15% 3% 1%  Other MSAs 2018 27%	hose goals								
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused  Q26F. Individual departments have short and long term goals as well a	0%  Itegic plan  Upstate Total 2018 26% 56% 15% 2% 0%  Upstate Total 2018 25% 44%	0%  Syracuse 2018 28% 62% 11% 0% 0%  se to asses  Syracuse 2018 18% 46%	Other MSAs 2018 26% 55% 15% 3% 1%  Other MSAs 2018 27% 43%	hose goals								
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused  Q26F. Individual departments have short and long term goals as well a  Completely descriptive  Somewhat descriptive  Not very descriptive	0%  Itegic plan  Upstate Total 2018 26% 56% 15% 2% 0%  Usstate Total 2018 25% 44% 26%	0%  Syracuse 2018 28% 62% 11% 0% 0%  se to asses  Syracuse 2018 18% 46% 28%	Other MSAs 2018 26% 55% 15% 3% 1%  Other MSAs 2018 27% 43% 26%	hose goals								
Don't know/Refused  Q26E. The entire company knows and understands the company's stra  Completely descriptive  Somewhat descriptive  Not very descriptive  Not at all descriptive  Don't know/Refused  Q26F. Individual departments have short and long term goals as well a	0%  Itegic plan  Upstate Total 2018 26% 56% 15% 2% 0%  Upstate Total 2018 25% 44%	0%  Syracuse 2018 28% 62% 11% 0% 0%  se to asses  Syracuse 2018 18% 46%	Other MSAs 2018 26% 55% 15% 3% 1%  Other MSAs 2018 27% 43%	hose goals								

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# 2018: 427 Upstate NY, MOE +/-4.7%, 76 Syracuse CEOs, MOE +/-11.2%

OSCO Walkers and the form of the state of th												
Q26G. We have a vision for our company that informs all our decisions	1			1	1	1	1	I		1	l	1
		_	0.1 2454									
	Upstate	Syracuse										
	Total 2018	2018	2018									
Completely descriptive	35%	32%	35%									
Somewhat descriptive	48%	55%	46%									
Not very descriptive	14%	12%	15%									
Not at all descriptive	2%	1%	2%									
Don't know/Refused	2%	0%	2%									
Q26H. Too often different departments seem to be headed in completely d	ifferent direc	tions										
	Upstate	Syracuse										
	Total 2018	2018	2018									
Completely descriptive	4%	3%	4%									
Somewhat descriptive	14%	17%	13%									
Not very descriptive	52%	46%	53%									
Not at all descriptive	29%	34%	28%									
Don't know/Refused	2%	0%	3%									
Q26I. We do a great job of listening to and responding to the needs of our	ustomers	•		•	•	•	•		•	•	•	
	Upstate	Syracuse	Other MSAs									
	Total 2018	2018	2018									
Completely descriptive	63%	67%	62%									
Somewhat descriptive	35%	29%	36%									
Not very descriptive	2%	4%	1%									
Not at all descriptive	0%	0%	0%									
Don't know/Refused	0%	0%	1%									
Q26J. Because we look to minimize risk, we are slow to innovate	1					1		I			I	I
	Upstate	Syracuse	Other MSAs									
	Total 2018	2018	2018									
Completely descriptive	6%	5%	7%									
Somewhat descriptive	33%	39%	32%									
Not very descriptive	43%	42%	43%									
Not at all descriptive	15%	13%	15%									
Don't know/Refused	2%	0%	3%									
DOTE KNOW/ NCIUSEU	2/0	070	3/0		<del>                                     </del>					<u> </u>		
	l		l l	l	l	_1	l	l	l	1	l	l

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# 2018: 427 Upstate NY, MOE +/-4.7%, 76 Syracuse CEOs, MOE +/-11.2%

00000 100 100 100 100 100 100 100 100 1													
Q26K. We are on top of how economic, social and technological change afform	ects us					I	1	1	1			l	1
		_											
	Upstate	Syracuse	Other MSAs										
	Total 2018	2018	2018										
Completely descriptive	20%	20%	20%										
Somewhat descriptive	57%	58%	57%										
Not very descriptive	20%	20%	20%										
Not at all descriptive	2%	3%	1%										
Don't know/Refused	1%	0%	1%										
Q26L. We constantly review our processes in an effort to always be getting	better												
	Upstate	Syracuse	Other MSAs										
	Total 2018	2018	2018										
Completely descriptive	43%	34%	45%										
Somewhat descriptive	49%	57%	48%										
Not very descriptive	6%	9%	6%										
Not at all descriptive	0%	0%	1%										
Don't know/Refused	1%	0%	1%										
Q27. Do you think your company will be in business in New York ten years	rom today o	r not?	!			Į.			!			<u> </u>	
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs				
	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016				
Yes	66%	64%	66%	65%	65%	65%	67%	64%	65%				
No	13%	12%	14%	13%	12%	12%	10%	10%	11%				
Don't know/Refused	21%	24%	20%	22%	23%	23%	24%	25%	25%				
DOTE KNOW/ Network	21/0	2-170	2070	22/0	2370	2370	2470	2370	2570				
Q28. If you had it all to do all over again, considering all factors, would you	locate vour k	nusiness in	New York or so	menlace el	lsa?		l		l l				
Q25. If you had it all to do all over again, considering all factors, would you	locate your k	Jusiness III	INCW TOTA OF 30	incpiace ci	1								
	Upstate	Syracuse	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Other MSAs	Syracuse	Upstate	Syracuse	Upstate
	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
New York	33%	25%	35%	40%	41%	41%	40%	39%	39%	28%	29%	26%	28%
Someplace else	64%	72%	63%	56%	56%	56%	60%	56%	56%	68%	67%	72%	69%
Don't know/Refused	2%	3%	2%	4%	4%	4%	0%	5%	4%	4%	3%	1%	4%
DOIL CRIDW/ NCIUSEU	2/0	3/0	2/0	4/0	4/0	4/0	0/0	3/0	4/0	4/0	3/0	1/0	4/0
Q32. Do you offer a pension or 401K to your employees?			l			<u> </u>	<u> </u>	ļ				<u> </u>	
Q32. DO YOU OTHER A PERSION OF 401K to your employees?													
	Unctoto	Curacus	Other MSAs	Cump aug -	Unetet-	Other MSAs	Syracuse	Upstate	Other MSAs				-
	Upstate	Syracuse		Syracuse			1 -						
V	Total 2018	2018	2018	2017	Total 2017	2017	2016	Total 2016	2016				1
Yes	85%	83%	86%	85%	83%	82%	79%	82%	85%				ļ
No	13%	17%	13%	10%	14%	14%	21%	15%	14%				
Don't know/Refused	1%	0%	1%	4%	3%	3%	0%	3%	2%			l	