

Q1. Which of the following industry categories best describes the type of business your company is engaged in?																									
		Region									Industry										Company Size				
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100	
Engineering and Construction	10%	14%	11%	13%	12%	12%	14%	6%	5%	12%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	6%	10%	13%	4%
Food and Beverage	6%	6%	7%	7%	3%	5%	5%	7%	7%	6%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	6%	6%	1%	
Financial	8%	6%	6%	6%	11%	8%	5%	4%	9%	7%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	6%	10%	12%	
Manufacturing	17%	18%	16%	19%	15%	17%	24%	15%	8%	21%	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	14%	32%	21%		
Retail	8%	11%	10%	13%	4%	12%	9%	12%	9%	7%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	9%	3%	13%		
Service	20%	39%	25%	34%	23%	16%	19%	25%	19%	19%	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	23%	17%	9%		
Wholesale and Distribution	5%	7%	5%	8%	4%	13%	5%	1%	0%	7%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	7%	3%	4%		
Nonprofit	15%	N/A	N/A	N/A	14%	7%	7%	22%	24%	14%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	14%	6%	19%		
Tourism	3%	N/A	N/A	N/A	3%	1%	5%	0%	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	3%	0%	6%		
Technology	4%	N/A	N/A	N/A	5%	4%	3%	3%	6%	4%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	5%	6%	2%		
Health Care	4%	N/A	N/A	N/A	5%	4%	3%	3%	6%	4%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	4%	4%	9%		
Other	0%	0%	20%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Q2. As you think about the current business or economic conditions in New York State as compared to one year ago, would you say they are considerably better, a little better, about the same, a little worse, or considerably worse?																									
		Region									Industry										Company Size				
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100	
Considerably better	4%	6%	2%	3%	3%	4%	3%	6%	5%	2%	2%	0%	5%	2%	0%	3%	7%	8%	7%	9%	0%	5%	1%	1%	
A little better	19%	23%	7%	14%	18%	11%	22%	15%	31%	16%	17%	23%	21%	18%	16%	21%	11%	29%	13%	5%	4%	18%	19%	21%	
About the same	24%	32%	10%	47%	23%	25%	29%	25%	20%	24%	28%	33%	16%	24%	23%	25%	26%	21%	20%	27%	17%	27%	29%	16%	
A little worse	34%	23%	30%	26%	41%	37%	31%	36%	26%	29%	34%	30%	49%	33%	35%	30%	41%	30%	53%	32%	26%	32%	29%	41%	
Considerably worse	20%	16%	50%	10%	15%	23%	14%	18%	19%	29%	19%	13%	9%	22%	26%	21%	15%	13%	7%	27%	52%	18%	21%	21%	
Q3. Looking forward from today through next year, that is, the entire 2023 year, how would you describe your expectations for the economy in New York State?																									
		Region									Industry										Company Size				
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100	
Considerably better	3%	5%	5%	2%	3%	1%	3%	3%	6%	3%	4%	3%	5%	2%	5%	3%	4%	3%	7%	5%	0%	3%	1%	4%	
A little better	16%	31%	35%	17%	18%	12%	14%	16%	24%	13%	8%	20%	21%	11%	9%	15%	11%	27%	33%	18%	13%	20%	15%	11%	
About the same	26%	24%	17%	38%	22%	23%	31%	31%	28%	27%	25%	43%	26%	24%	21%	33%	22%	29%	7%	23%	4%	23%	32%	23%	
A little worse	36%	26%	20%	34%	35%	45%	40%	33%	28%	35%	40%	27%	40%	42%	47%	31%	37%	27%	47%	36%	39%	36%	36%	45%	
Considerably worse	18%	15%	23%	9%	23%	19%	12%	16%	14%	22%	25%	7%	9%	20%	19%	19%	26%	14%	7%	18%	43%	18%	15%	17%	
Q4. Now thinking specifically about your industry, how would you describe the current business or economic conditions in New York State as compared with one year ago?																									
		Region									Industry										Company Size				
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100	
Considerably better	4%	7%	5%	2%	5%	1%	5%	7%	3%	3%	4%	7%	5%	2%	0%	6%	0%	6%	7%	9%	0%	5%	6%	1%	
A little better	17%	21%	12%	15%	15%	16%	24%	16%	19%	13%	17%	23%	28%	17%	5%	16%	26%	18%	20%	14%	4%	17%	19%	19%	
About the same	25%	34%	14%	39%	22%	23%	22%	36%	31%	26%	28%	30%	21%	26%	26%	25%	22%	32%	27%	14%	13%	28%	19%	21%	
A little worse	35%	24%	29%	33%	33%	41%	40%	24%	33%	36%	34%	20%	33%	36%	51%	36%	33%	29%	33%	45%	26%	34%	37%	36%	
Considerably worse	19%	13%	40%	11%	26%	19%	9%	16%	14%	23%	17%	20%	14%	20%	19%	17%	19%	14%	13%	18%	57%	17%	18%	23%	
Q5. And looking forward from today through next year, how would you describe your expectations for your industry here in New York?																									
		Region									Industry										Company Size				
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100	
Considerably better	4%	9%	6%	2%	3%	1%	5%	9%	7%	2%	2%	13%	7%	1%	5%	5%	0%	8%	0%	5%	0%	4%	4%	4%	
A little better	19%	28%	34%	16%	18%	15%	19%	18%	29%	16%	21%	7%	19%	13%	9%	20%	22%	23%	47%	32%	17%	21%	18%	17%	
About the same	28%	29%	20%	37%	23%	31%	33%	33%	22%	31%	26%	43%	30%	34%	16%	34%	30%	26%	13%	14%	0%	29%	26%	21%	
A little worse	34%	22%	21%	33%	34%	40%	31%	28%	30%	34%	34%	30%	35%	37%	58%	27%	33%	31%	27%	36%	17%	32%	38%	39%	
Considerably worse	15%	12%	18%	13%	21%	13%	12%	12%	12%	17%	17%	7%	9%	14%	12%	15%	15%	12%	13%	14%	65%	14%	14%	19%	

Q6. Now thinking specifically about your company, what are your expectations for revenue through the end of the year 2023? Do you believe your revenue will...?																								
	Region											Industry								Company Size				
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Grow substantially	3%	7%	3%	3%	4%	0%	5%	4%	2%	3%	4%	7%	0%	4%	2%	4%	0%	3%	0%	5%	0%	2%	5%	3%
Grow moderately	35%	40%	31%	38%	33%	40%	34%	33%	36%	36%	21%	40%	53%	31%	26%	36%	44%	36%	40%	41%	26%	32%	41%	42%
Stay about the same	35%	31%	31%	36%	37%	35%	31%	39%	36%	28%	40%	27%	35%	34%	30%	33%	30%	41%	27%	41%	35%	36%	33%	34%
Decrease moderately	23%	18%	23%	19%	22%	16%	26%	22%	19%	27%	28%	23%	12%	26%	33%	23%	22%	17%	33%	14%	17%	26%	15%	15%
Decrease substantially	5%	4%	12%	5%	4%	9%	3%	1%	6%	6%	8%	3%	0%	4%	9%	5%	4%	4%	0%	0%	22%	5%	5%	6%

  

Q7. Continuing to focus on your company, please think quickly about profitability. Between today and the end of the calendar year 2023, do you expect your profits to...?																								
	Region											Industry								Company Size				
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Grow substantially	2%	4%	3%	2%	4%	0%	2%	3%	4%	2%	2%	10%	0%	2%	0%	5%	0%	1%	0%	5%	0%	2%	5%	0%
Grow moderately	24%	30%	22%	32%	23%	27%	22%	25%	27%	19%	21%	27%	33%	24%	19%	30%	22%	17%	27%	32%	0%	21%	31%	28%
Stay about the same	38%	32%	34%	34%	40%	36%	40%	43%	36%	34%	34%	30%	44%	30%	28%	35%	44%	60%	27%	32%	35%	40%	28%	36%
Decrease moderately	29%	27%	14%	6%	28%	25%	28%	24%	25%	36%	34%	30%	21%	37%	37%	25%	30%	16%	40%	32%	26%	30%	28%	25%
Decrease substantially	8%	7%	28%	26%	5%	12%	9%	4%	8%	9%	9%	3%	2%	7%	16%	5%	4%	5%	7%	0%	39%	7%	8%	11%

  

Q8. Businesses and the executives that direct them strive to enhance profitability in many ways. Through which of the following strategies do you plan to MOST enhance your company's profitability over the next year? Please select ONE.																								
	Region											Industry								Company Size				
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Market/demand growth	33%	32%	43%	38%	35%	24%	38%	32%	37%	31%	36%	37%	43%	24%	19%	37%	19%	43%	13%	45%	26%	32%	30%	35%
Cost reduction	22%	15%	24%	23%	17%	26%	17%	20%	27%	23%	15%	27%	14%	22%	36%	16%	30%	26%	20%	9%	43%	22%	18%	24%
Price increase	30%	36%	16%	17%	31%	39%	34%	32%	18%	32%	42%	23%	31%	39%	38%	31%	41%	11%	53%	23%	9%	31%	38%	27%
New technology	8%	8%	7%	8%	12%	7%	9%	8%	6%	9%	6%	7%	10%	11%	0%	9%	7%	4%	13%	23%	13%	7%	10%	11%
Other	7%	9%	11%	13%	5%	4%	2%	8%	12%	5%	2%	7%	2%	5%	7%	8%	4%	16%	0%	0%	9%	8%	4%	2%

  

Q9. Please indicate which of the following are major areas of concentration for your company now and through 2023. Please check ALL that apply.																								
	Region											Industry								Company Size				
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Expansion of existing markets	50%	49%	48%	55%	53%	41%	61%	50%	61%	41%	55%	40%	52%	55%	37%	53%	52%	46%	36%	68%	41%	47%	56%	53%
Growth in existing products	51%	50%	47%	50%	53%	57%	43%	45%	51%	49%	35%	53%	69%	55%	54%	47%	48%	49%	43%	68%	41%	48%	56%	58%
Entry into new markets	24%	25%	26%	26%	30%	18%	23%	19%	22%	29%	20%	13%	26%	27%	20%	27%	22%	20%	43%	41%	23%	19%	36%	34%
New product lines	23%	25%	22%	22%	26%	19%	18%	16%	29%	27%	2%	27%	29%	32%	27%	18%	33%	20%	7%	41%	32%	20%	26%	29%
Acquisition of new businesses	10%	14%	11%	12%	14%	4%	7%	3%	13%	17%	2%	20%	19%	11%	10%	8%	15%	8%	0%	14%	9%	7%	12%	17%
Technology innovation	29%	32%	25%	29%	34%	28%	27%	27%	25%	27%	24%	23%	40%	32%	17%	21%	15%	35%	14%	59%	45%	24%	35%	40%
Construction of new locations	8%	7%	8%	8%	8%	4%	5%	20%	8%	6%	18%	10%	12%	2%	15%	8%	4%	6%	0%	5%	5%	7%	3%	11%
Internal restructuring	29%	28%	26%	27%	26%	27%	25%	30%	29%	32%	25%	30%	31%	24%	34%	27%	19%	38%	0%	32%	41%	25%	32%	37%
Other	9%	9%	8%	6%	7%	11%	7%	14%	10%	5%	12%	13%	2%	9%	10%	4%	11%	14%	14%	0%	14%	11%	6%	3%

  

Q10A. Do you intend to invest between today through 2023 in any fixed assets for your company designed to meet growing demand, reduce costs or enhance productivity?																								
	Region											Industry								Company Size				
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Yes	55%	55%	41%	51%	56%	48%	64%	52%	58%	51%	58%	47%	55%	72%	56%	47%	52%	50%	60%	57%	36%	49%	56%	72%
No	26%	23%	37%	30%	26%	21%	20%	27%	26%	34%	18%	20%	33%	20%	22%	32%	30%	30%	7%	33%	32%	29%	29%	14%
Not sure	19%	22%	22%	19%	18%	32%	16%	21%	17%	15%	24%	33%	12%	8%	22%	21%	19%	20%	33%	10%	32%	22%	15%	13%

  

Q10B. Do you intend to invest between today through 2023 in any fixed assets for your company designed to respond to climate change (e.g., fuel switching, energy efficiency, renewable generation, etc.)?																								
	Region											Industry								Company Size				
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Yes	17%	15%	N/A	N/A	13%	14%	20%	17%	27%	17%	18%	17%	14%	18%	17%	11%	15%	27%	33%	18%	14%	13%	12%	33%
No	64%	64%	N/A	N/A	68%	62%	64%	60%	52%	73%	67%	60%	74%	64%	76%	65%	74%	54%	53%	55%	55%	66%	72%	55%
Not sure	18%	21%	N/A	N/A	19%	25%	16%	22%	22%	11%	16%	23%	12%	17%	7%	24%	11%	20%	13%	27%	32%	21%	16%	12%

Q11. Now thinking about the people that work for your company, between today and the end of 2023, do you plan to...?																								
		Region									Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Substantially increase your workforce	3%	5%	2%	1%	5%	1%	4%	0%	4%	2%	6%	10%	2%	2%	0%	2%	0%	1%	7%	0%	9%	1%	3%	9%
Moderately increase your workforce	30%	39%	25%	29%	34%	32%	26%	31%	24%	32%	30%	27%	40%	33%	26%	30%	19%	33%	20%	36%	13%	26%	40%	36%
Decrease your workforce	9%	5%	10%	12%	4%	9%	9%	9%	10%	10%	10%	13%	5%	4%	19%	9%	11%	3%	7%	18%	9%	9%	8%	6%
Remain about the same	59%	51%	62%	57%	56%	57%	61%	59%	63%	56%	54%	50%	52%	61%	55%	59%	70%	63%	67%	45%	70%	63%	50%	48%
Q12. And thinking about other challenges that your company faces, which of the following are you concerned with? Please check ALL that apply.																								
		Region									Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Adverse economic conditions	65%	56%	65%	44%	74%	68%	54%	57%	70%	58%	57%	50%	71%	66%	70%	60%	69%	72%	47%	57%	83%	66%	67%	66%
Governmental regulation	63%	65%	59%	65%	62%	63%	63%	66%	54%	73%	71%	53%	79%	67%	70%	57%	54%	58%	40%	57%	83%	60%	63%	74%
Rising supplier costs	60%	70%	47%	34%	52%	75%	58%	62%	61%	57%	69%	87%	31%	73%	77%	55%	73%	39%	53%	52%	57%	62%	64%	54%
Health care costs	59%	55%	50%	66%	63%	63%	63%	67%	49%	51%	57%	40%	55%	63%	74%	56%	58%	62%	40%	67%	65%	60%	68%	56%
Taxation	57%	56%	59%	58%	50%	68%	67%	69%	43%	57%	73%	57%	48%	72%	67%	59%	77%	22%	47%	67%	35%	60%	62%	45%
Energy costs	54%	47%	27%	22%	50%	57%	54%	64%	49%	56%	53%	60%	17%	71%	74%	51%	65%	49%	47%	57%	39%	56%	53%	51%
Human resources	48%	52%	35%	45%	51%	44%	49%	41%	55%	43%	41%	33%	67%	46%	40%	47%	42%	49%	67%	38%	70%	39%	62%	67%
Your supply chain	36%	N/A	N/A	N/A	29%	44%	47%	39%	34%	33%	47%	37%	7%	57%	58%	20%	62%	13%	33%	57%	39%	38%	37%	35%
Cash flow	27%	24%	37%	29%	23%	27%	18%	39%	30%	26%	20%	43%	14%	16%	28%	29%	19%	36%	20%	52%	35%	29%	28%	19%
Existing U.S. competition	20%	19%	20%	24%	19%	20%	21%	16%	20%	24%	20%	30%	24%	16%	19%	21%	42%	12%	20%	29%	13%	19%	21%	21%
Risk management	19%	22%	19%	22%	23%	9%	16%	18%	24%	21%	18%	10%	24%	11%	9%	19%	15%	26%	33%	48%	26%	19%	14%	26%
Global political instability	18%	20%	14%	12%	20%	15%	12%	26%	18%	17%	10%	23%	21%	18%	9%	23%	35%	12%	13%	24%	4%	18%	14%	17%
Ability to obtain suitable financing	10%	7%	9%	8%	9%	4%	5%	18%	15%	12%	6%	13%	2%	6%	9%	14%	8%	19%	7%	19%	9%	11%	9%	7%
Foreign competition	8%	8%	7%	9%	6%	5%	5%	10%	4%	13%	8%	17%	2%	24%	2%	3%	12%	0%	0%	14%	0%	8%	15%	4%
Q13. Focusing on one challenge in particular, inflation, what impact is inflation having on your company's profitability?																								
		Region									Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Substantially positive impact	3%	N/A	N/A	N/A	1%	4%	0%	6%	0%	6%	4%	0%	2%	2%	0%	5%	8%	1%	0%	5%	4%	3%	4%	1%
Moderately positive impact	6%	N/A	N/A	N/A	8%	7%	9%	10%	3%	2%	2%	7%	12%	8%	7%	6%	8%	4%	7%	0%	0%	6%	8%	5%
Moderately negative impact	52%	N/A	N/A	N/A	53%	37%	68%	51%	53%	50%	51%	48%	61%	61%	51%	54%	35%	51%	60%	45%	30%	55%	44%	54%
Substantially negative impact	33%	N/A	N/A	N/A	33%	41%	18%	27%	39%	38%	33%	41%	15%	26%	40%	30%	35%	34%	20%	50%	65%	31%	38%	34%
No impact	6%	N/A	N/A	N/A	4%	11%	5%	6%	6%	5%	10%	3%	10%	3%	2%	5%	15%	9%	13%	0%	0%	6%	6%	6%
Q14. Which of the following is your company doing in response to inflation? Please select ALL that apply.																								
		Region									Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Raising prices	73%	N/A	N/A	N/A	69%	80%	70%	80%	65%	77%	82%	76%	61%	89%	79%	71%	89%	50%	80%	82%	27%	76%	79%	66%
Cutting costs	47%	N/A	N/A	N/A	49%	54%	32%	48%	51%	48%	33%	48%	27%	52%	60%	40%	41%	63%	47%	64%	59%	48%	47%	48%
Changing business practices	33%	N/A	N/A	N/A	36%	30%	28%	33%	31%	36%	25%	41%	37%	31%	29%	31%	15%	44%	27%	23%	68%	31%	35%	35%
Changing supply tactics	23%	N/A	N/A	N/A	18%	30%	21%	28%	25%	20%	22%	38%	0%	35%	33%	18%	30%	15%	20%	32%	23%	24%	22%	24%
Decreasing investments in your business	22%	N/A	N/A	N/A	19%	20%	14%	23%	27%	28%	31%	21%	5%	20%	14%	25%	19%	21%	13%	27%	50%	23%	25%	21%
Decreasing workforce	12%	N/A	N/A	N/A	9%	15%	7%	8%	19%	14%	16%	17%	5%	15%	17%	14%	4%	6%	13%	14%	9%	11%	18%	10%
Reducing employees' hours	12%	N/A	N/A	N/A	6%	7%	14%	17%	24%	12%	12%	28%	2%	9%	29%	11%	7%	6%	27%	9%	14%	13%	10%	13%
Increasing investments in your business	12%	N/A	N/A	N/A	11%	12%	11%	17%	11%	8%	6%	17%	10%	12%	14%	13%	11%	10%	20%	14%	5%	12%	13%	9%
Q15. Thinking about the recently passed Inflation Reduction Act, do you expect the act to have a positive impact on your business' profitability, a negative impact, or no impact?																								
		Region									Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Positive	14%	N/A	N/A	N/A	6%	9%	13%	24%	27%	10%	22%	17%	7%	9%	5%	13%	15%	19%	8%	23%	22%	16%	12%	11%
Negative	39%	N/A	N/A	N/A	40%	51%	38%	35%	17%	48%	43%	28%	38%	49%	54%	40%	41%	22%	31%	27%	35%	35%	42%	45%
No impact	48%	N/A	N/A	N/A	54%	40%	50%	40%	56%	43%	35%	55%	55%	42%	41%	47%	44%	59%	62%	50%	43%	48%	46%	44%

Q16. Now, thinking specifically about New York and the relationship between the state government and businesses like yours, overall would you say the government of the State of New York is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?																								
	Region										Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Excellent	1%	2%	1%	1%	0%	0%	2%	0%	3%	1%	2%	3%	0%	0%	0%	1%	0%	1%	0%	5%	0%	2%	0%	0%
Good	10%	10%	11%	5%	6%	8%	11%	14%	17%	7%	6%	7%	10%	6%	2%	13%	15%	24%	0%	0%	13%	11%	6%	11%
Fair	27%	31%	30%	25%	28%	23%	28%	30%	29%	27%	24%	41%	20%	26%	21%	25%	22%	38%	43%	41%	9%	27%	28%	24%
Poor	62%	57%	58%	66%	66%	69%	60%	56%	51%	65%	69%	48%	70%	69%	77%	61%	63%	37%	57%	55%	78%	60%	65%	65%
Q17. Of the following, what would you like to see the Governor and Legislature of New York focus on? Please check ALL that apply.																								
	Region										Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Business Income Tax Reform	54%	54%	53%	52%	47%	64%	56%	56%	38%	65%	63%	48%	56%	61%	71%	56%	85%	22%	47%	64%	17%	56%	56%	46%
Personal Income Tax Reform	51%	52%	48%	50%	51%	51%	58%	50%	42%	57%	49%	38%	59%	64%	52%	56%	70%	32%	40%	55%	26%	49%	57%	54%
Spending Cuts	51%	48%	47%	53%	51%	65%	53%	37%	32%	66%	51%	28%	59%	64%	55%	50%	67%	37%	60%	41%	52%	52%	51%	55%
Workforce Development	41%	43%	31%	N/A	42%	30%	37%	42%	52%	33%	33%	41%	33%	36%	33%	31%	33%	72%	40%	45%	52%	34%	45%	58%
Business Development Incentives	40%	41%	45%	36%	32%	41%	37%	48%	43%	41%	33%	52%	46%	31%	40%	51%	26%	34%	73%	41%	22%	44%	38%	27%
Infrastructure Development	38%	44%	40%	42%	40%	30%	44%	42%	39%	33%	53%	28%	46%	32%	36%	27%	48%	59%	13%	41%	17%	35%	44%	41%
Energy Infrastructure	32%	26%	23%	24%	28%	28%	32%	39%	40%	29%	35%	34%	23%	38%	31%	26%	41%	37%	27%	41%	22%	33%	30%	34%
Ethics Reform	26%	28%	26%	28%	29%	32%	23%	23%	26%	24%	22%	24%	46%	25%	33%	27%	22%	22%	13%	18%	17%	26%	25%	25%
Sales Tax Reform	25%	25%	23%	25%	17%	35%	21%	21%	17%	36%	24%	24%	13%	26%	29%	34%	37%	16%	20%	27%	9%	27%	19%	19%
Estate Tax Reform	24%	29%	23%	24%	24%	28%	30%	23%	12%	29%	39%	21%	21%	30%	26%	27%	30%	9%	7%	18%	13%	24%	29%	22%
Climate Change	16%	17%	N/A	N/A	12%	8%	19%	24%	27%	10%	10%	17%	10%	8%	17%	18%	7%	28%	33%	23%	17%	20%	9%	10%
Other	14%	16%	18%	17%	14%	12%	11%	16%	25%	12%	8%	21%	5%	8%	14%	14%	7%	26%	7%	14%	43%	15%	16%	12%
Q18. How confident are you in the ability of the government of the State of New York to improve the business climate for businesses like yours here in New York over the next year? Are you:																								
	Region										Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Very confident	1%	1%	2%	1%	0%	0%	2%	2%	3%	3%	0%	7%	0%	0%	0%	0%	0%	6%	0%	5%	0%	1%	1%	0%
Somewhat confident	16%	17%	18%	12%	12%	11%	18%	17%	30%	10%	14%	7%	21%	6%	9%	24%	15%	26%	13%	14%	13%	17%	12%	14%
Not very confident	38%	41%	36%	40%	34%	41%	44%	41%	32%	33%	37%	54%	21%	42%	35%	27%	41%	46%	53%	41%	39%	39%	34%	38%
Not at all confident	45%	40%	44%	45%	54%	49%	37%	40%	35%	54%	49%	32%	59%	53%	56%	49%	44%	22%	33%	41%	48%	42%	53%	48%
Q19. And thinking about the efforts of the federal government, overall would you say the federal government is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?																								
	Region										Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Excellent	1%	3%	4%	12%	2%	0%	2%	2%	3%	1%	0%	4%	0%	1%	0%	1%	0%	3%	0%	5%	4%	2%	1%	1%
Good	13%	13%	20%	27%	9%	8%	21%	17%	20%	8%	14%	18%	15%	6%	7%	13%	11%	24%	0%	18%	13%	14%	12%	10%
Fair	32%	34%	47%	32%	31%	31%	25%	33%	42%	30%	35%	36%	36%	28%	23%	31%	15%	49%	33%	36%	26%	34%	31%	32%
Poor	53%	51%	29%	25%	59%	61%	53%	48%	36%	61%	51%	43%	49%	65%	70%	55%	74%	25%	67%	41%	57%	50%	56%	57%
Q20. How confident are you in the ability of the federal government to improve the business climate for businesses like yours here in New York over the next year? Are you:																								
	Region										Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Very confident	1%	1%	4%	7%	2%	0%	2%	3%	1%	0%	2%	7%	0%	1%	0%	1%	0%	1%	0%	0%	0%	1%	3%	0%
Somewhat confident	17%	19%	27%	30%	10%	12%	25%	17%	24%	16%	18%	18%	23%	9%	12%	21%	15%	22%	7%	14%	26%	17%	19%	13%
Not very confident	37%	35%	37%	42%	36%	41%	40%	37%	38%	31%	29%	46%	31%	39%	26%	31%	33%	54%	53%	50%	22%	39%	28%	39%
Not at all confident	45%	45%	32%	19%	52%	47%	33%	43%	37%	53%	51%	29%	46%	51%	63%	48%	52%	22%	40%	36%	52%	42%	50%	48%

Q21. Now, please think about these issues specific to New York State. First, NYS is considering new "antitrust" legislation that would allow for lawsuits against any business that "abuses" (conduct that would tend to foreclose or limit competition) a "dominant market position", (40% market share if a seller or 30% or higher if a buyer). To what extent do you believe this legislation would impact your business?																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Significant positive impact	1%	N/A	N/A	N/A	0%	1%	2%	0%	3%	0%	0%	0%	0%	0%	0%	2%	0%	1%	0%	0%	4%	1%	1%	0%
Moderate positive impact	5%	N/A	N/A	N/A	3%	5%	5%	5%	5%	5%	4%	4%	8%	3%	5%	3%	11%	4%	7%	5%	9%	6%	4%	3%
Little to no impact	60%	N/A	N/A	N/A	58%	50%	67%	70%	57%	66%	65%	71%	59%	58%	49%	63%	59%	60%	53%	77%	39%	61%	64%	56%
Moderate adverse impact	7%	N/A	N/A	N/A	10%	11%	7%	3%	5%	3%	2%	7%	10%	11%	21%	3%	0%	7%	7%	0%	9%	6%	8%	14%
Significant adverse impact	7%	N/A	N/A	N/A	9%	8%	4%	3%	5%	9%	6%	0%	5%	7%	5%	7%	7%	9%	13%	0%	13%	5%	8%	10%
Don't know	21%	N/A	N/A	N/A	20%	24%	16%	19%	25%	17%	24%	18%	18%	20%	21%	22%	22%	18%	20%	18%	26%	22%	15%	17%
Q22. Do you think this new "antitrust" legislation would have a positive, negative or no impact on the overall economic climate of New York State?																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Positive impact	10%	N/A	N/A	N/A	7%	7%	18%	14%	14%	8%	10%	7%	8%	6%	7%	13%	4%	19%	13%	9%	13%	14%	4%	7%
No impact	20%	N/A	N/A	N/A	19%	23%	14%	24%	16%	24%	25%	36%	8%	22%	12%	20%	26%	13%	0%	36%	30%	20%	19%	19%
Negative impact	31%	N/A	N/A	N/A	39%	38%	29%	17%	24%	34%	25%	25%	51%	39%	35%	29%	22%	25%	33%	23%	26%	27%	38%	38%
Don't know	38%	N/A	N/A	N/A	35%	32%	39%	44%	46%	33%	39%	32%	33%	34%	47%	38%	48%	42%	53%	32%	30%	39%	39%	35%
Q23. The mandated closures of businesses during the COVID pandemic increased unemployment insurance (UI) claims. NYS borrowed from the federal government to pay those claims. Current law requires repaying that debt, now nearly \$8 billion. One proposed way of doing this is through increased payroll taxes paid by the employer. Do you support or oppose repaying the nearly \$8 billion dollar debt to the federal government through increased payroll taxes paid by the employer?																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Support	5%	N/A	N/A	N/A	4%	7%	2%	6%	7%	2%	6%	4%	8%	2%	0%	6%	0%	9%	7%	5%	0%	5%	8%	1%
Oppose	89%	N/A	N/A	N/A	92%	90%	86%	83%	86%	93%	90%	82%	92%	92%	93%	89%	100%	81%	87%	86%	87%	88%	88%	95%
Don't know	6%	N/A	N/A	N/A	3%	3%	12%	11%	8%	5%	4%	14%	0%	6%	7%	5%	0%	10%	7%	9%	13%	7%	4%	4%
Q24. How serious an impact do you think those increased UI taxes would have on your business?																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Very serious	33%	N/A	N/A	N/A	29%	34%	25%	40%	37%	34%	31%	43%	21%	37%	40%	32%	26%	23%	40%	41%	48%	33%	32%	35%
Somewhat serious	51%	N/A	N/A	N/A	54%	47%	61%	44%	44%	51%	51%	46%	62%	53%	47%	47%	63%	61%	40%	36%	30%	47%	54%	55%
Not very serious	14%	N/A	N/A	N/A	15%	15%	11%	15%	15%	13%	14%	7%	13%	10%	14%	20%	11%	9%	13%	18%	22%	16%	13%	9%
Not at all serious	3%	N/A	N/A	N/A	2%	4%	4%	2%	4%	2%	4%	4%	5%	0%	0%	1%	0%	8%	7%	5%	0%	3%	1%	1%
Q25. The Climate Leadership and Community Protection Act (CLCPA), adopted in 2019, mandates that NYS's economy be net carbon zero by 2050, 70% of electricity must come from renewable sources by 2030 and 100% by 2040, and that 35% of the benefits of clean energy investment must go to low-income communities and communities of color. Do you think this legislation, the CLCPA, will have a positive, negative or no impact on your business' profitability?																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Positive impact	9%	N/A	N/A	N/A	4%	3%	12%	14%	20%	9%	10%	11%	5%	8%	2%	12%	4%	17%	13%	9%	4%	11%	3%	11%
No impact	17%	N/A	N/A	N/A	18%	20%	14%	17%	24%	9%	12%	19%	38%	6%	14%	22%	19%	18%	27%	18%	13%	18%	18%	14%
Negative impact	60%	N/A	N/A	N/A	60%	68%	60%	52%	45%	72%	69%	56%	46%	79%	70%	53%	63%	48%	40%	55%	61%	58%	68%	63%
Don't know	13%	N/A	N/A	N/A	17%	9%	14%	16%	11%	10%	10%	15%	10%	8%	14%	13%	15%	17%	20%	18%	22%	13%	12%	12%
Q26A. Are you currently evaluating or actively taking steps to meet CLCPA's goals through building and process electrification?																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Currently evaluating	18%	N/A	N/A	N/A	17%	14%	25%	18%	22%	15%	16%	15%	10%	15%	20%	18%	19%	27%	27%	19%	14%	17%	14%	27%
Actively taking steps	11%	N/A	N/A	N/A	8%	7%	13%	23%	16%	7%	10%	19%	21%	9%	12%	7%	4%	17%	27%	0%	5%	9%	6%	21%
Neither	71%	N/A	N/A	N/A	76%	79%	62%	59%	62%	78%	75%	67%	69%	76%	68%	75%	78%	56%	47%	81%	81%	75%	79%	52%

Q26B. Are you currently evaluating or actively taking steps to meet CLCPA's goals with alternative energy vehicles?																								
		Region									Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Currently evaluating	14%	N/A	N/A	N/A	13%	16%	18%	15%	20%	8%	16%	11%	13%	6%	24%	14%	19%	15%	33%	5%	14%	13%	8%	24%
Actively taking steps	9%	N/A	N/A	N/A	9%	5%	9%	13%	11%	6%	12%	4%	3%	5%	10%	11%	11%	12%	13%	14%	0%	6%	8%	17%
Neither	77%	N/A	N/A	N/A	78%	78%	73%	72%	69%	86%	73%	85%	85%	90%	66%	74%	70%	72%	53%	81%	86%	81%	84%	58%
Q26C. Are you currently evaluating or actively taking steps to meet CLCPA's goals in any other way?																								
		Region									Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Currently evaluating	7%	N/A	N/A	N/A	2%	3%	3%	7%	13%	10%	3%	12%	5%	11%	0%	8%	6%	10%	25%	14%	0%	6%	11%	9%
Actively taking steps	5%	N/A	N/A	N/A	4%	0%	9%	7%	7%	7%	3%	0%	11%	2%	5%	4%	12%	20%	0%	0%	0%	7%	0%	3%
Neither	87%	N/A	N/A	N/A	94%	97%	88%	87%	80%	83%	94%	88%	84%	87%	95%	89%	82%	70%	75%	86%	100%	87%	89%	88%
Q27. Do you think this legislation, the CLCPA, will have a positive, negative or no impact on the NYS economy?																								
		Region									Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Positive impact	16%	N/A	N/A	N/A	9%	9%	18%	31%	28%	10%	10%	15%	13%	10%	7%	20%	15%	25%	20%	23%	13%	18%	10%	13%
No impact	6%	N/A	N/A	N/A	9%	3%	7%	3%	7%	4%	4%	4%	3%	6%	2%	8%	11%	7%	7%	0%	4%	5%	12%	3%
Negative impact	64%	N/A	N/A	N/A	64%	76%	70%	50%	45%	72%	80%	54%	72%	76%	74%	57%	67%	43%	40%	59%	61%	63%	65%	66%
Don't know	15%	N/A	N/A	N/A	18%	12%	5%	16%	20%	14%	6%	27%	13%	8%	16%	15%	7%	24%	33%	18%	22%	14%	13%	18%
Q28. Some legislators have been discussing further increases in the state minimum wage, to \$15 or more "upstate" and \$20 or more "downstate". Do you think such increases to the minimum wage would have a positive, negative or no impact on your business' profitability?																								
		Region									Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Positive impact	5%	N/A	N/A	N/A	5%	1%	5%	8%	11%	2%	4%	0%	5%	1%	0%	9%	0%	13%	7%	5%	4%	6%	3%	3%
No impact	29%	N/A	N/A	N/A	39%	30%	27%	25%	29%	20%	37%	11%	38%	30%	16%	34%	26%	21%	27%	45%	17%	30%	36%	21%
Negative impact	61%	N/A	N/A	N/A	52%	66%	63%	59%	53%	74%	55%	81%	54%	67%	79%	50%	67%	58%	67%	41%	78%	60%	56%	71%
Don't know	5%	N/A	N/A	N/A	3%	3%	5%	8%	7%	4%	4%	7%	3%	1%	5%	7%	7%	7%	0%	9%	0%	4%	5%	5%
Q29. And what about you personally, do you support or oppose increasing the minimum wage to \$15 or more upstate and to \$20 or more downstate?																								
		Region									Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Support	31%	N/A	N/A	N/A	37%	22%	34%	32%	49%	18%	25%	22%	23%	27%	23%	39%	19%	45%	53%	27%	35%	33%	33%	26%
Oppose	59%	N/A	N/A	N/A	48%	72%	55%	56%	45%	75%	59%	67%	69%	67%	70%	50%	81%	46%	40%	45%	52%	57%	59%	65%
Don't know	10%	N/A	N/A	N/A	15%	7%	11%	13%	5%	7%	16%	11%	8%	6%	7%	11%	0%	9%	7%	27%	13%	9%	8%	9%
Q30. NYS is considering legislation to encourage employers to hire persons that face barriers to employment (veterans, formerly incarcerated, recipients of supplemental security income benefits, etc). For each of the following approaches designed to encourage employers to hire persons that face barriers to employment, indicate how likely each would make you to hire those candidates.																								
Q30A. Wage-based tax credits																								
		Region									Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Very likely	18%	N/A	N/A	N/A	16%	16%	18%	20%	25%	15%	5%	12%	3%	14%	15%	20%	18%	35%	20%	22%	29%	18%	15%	20%
Somewhat likely	42%	N/A	N/A	N/A	42%	34%	42%	46%	40%	51%	39%	56%	41%	48%	51%	35%	32%	46%	60%	33%	33%	40%	42%	50%
Not very likely	19%	N/A	N/A	N/A	21%	27%	22%	16%	13%	14%	30%	20%	31%	23%	8%	23%	36%	2%	10%	11%	14%	19%	27%	14%
Not at all likely	21%	N/A	N/A	N/A	20%	23%	18%	18%	22%	21%	27%	12%	24%	15%	26%	23%	14%	17%	10%	33%	24%	23%	16%	15%

Q30B. Targeted training programs related to company-specific skill needs																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Very likely	20%	N/A	N/A	N/A	18%	14%	24%	30%	26%	15%	11%	18%	10%	19%	14%	27%	10%	33%	20%	16%	29%	19%	19%	23%
Somewhat likely	39%	N/A	N/A	N/A	44%	39%	43%	30%	33%	43%	43%	41%	37%	39%	35%	34%	33%	50%	50%	37%	38%	35%	44%	48%
Not very likely	18%	N/A	N/A	N/A	19%	20%	16%	18%	14%	19%	24%	23%	23%	25%	19%	14%	29%	4%	20%	16%	14%	17%	24%	18%
Not at all likely	22%	N/A	N/A	N/A	20%	27%	16%	22%	26%	23%	22%	18%	30%	17%	32%	24%	29%	13%	10%	32%	19%	28%	13%	11%
Q30C. "Soft skill" training																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Very likely	14%	N/A	N/A	N/A	15%	8%	11%	20%	14%	15%	5%	10%	10%	10%	6%	18%	14%	25%	20%	11%	25%	11%	17%	16%
Somewhat likely	36%	N/A	N/A	N/A	42%	25%	47%	27%	39%	35%	39%	35%	30%	34%	35%	35%	27%	51%	50%	39%	15%	34%	35%	44%
Not very likely	26%	N/A	N/A	N/A	21%	38%	23%	27%	20%	27%	24%	30%	30%	37%	21%	21%	41%	18%	20%	17%	30%	26%	30%	24%
Not at all likely	24%	N/A	N/A	N/A	22%	28%	19%	27%	27%	24%	32%	25%	30%	19%	38%	26%	18%	5%	10%	33%	30%	29%	17%	15%
Q31. On another topic, "Disruptive Technologies", innovations that significantly alter the way that consumers, industries, or businesses operate. How familiar are you with Disruptive Technologies?																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Very familiar	13%	N/A	N/A	N/A	16%	7%	11%	17%	13%	15%	4%	4%	31%	15%	7%	11%	11%	6%	20%	45%	13%	11%	14%	17%
Somewhat familiar	30%	N/A	N/A	N/A	34%	26%	34%	24%	26%	30%	27%	19%	36%	34%	31%	24%	15%	37%	27%	36%	30%	26%	32%	38%
Not very familiar	25%	N/A	N/A	N/A	20%	33%	29%	25%	29%	25%	29%	30%	10%	27%	31%	23%	22%	35%	20%	14%	17%	27%	22%	25%
Not at all familiar	32%	N/A	N/A	N/A	30%	34%	27%	33%	32%	30%	40%	48%	23%	25%	31%	41%	52%	22%	33%	5%	39%	36%	31%	20%
Q32. Which of the following disruptive technologies do you currently use or do you see your company using in the near future?																								
Q32A. The Internet																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Currently use	94%	N/A	N/A	N/A	97%	91%	85%	97%	99%	94%	90%	96%	100%	96%	93%	90%	93%	97%	100%	100%	86%	93%	96%	98%
Future use	1%	N/A	N/A	N/A	0%	3%	2%	0%	1%	3%	0%	0%	0%	1%	2%	2%	7%	2%	0%	0%	0%	2%	0%	2%
No plans to use	4%	N/A	N/A	N/A	3%	7%	13%	3%	0%	3%	10%	4%	0%	2%	5%	8%	0%	2%	0%	0%	14%	5%	4%	0%
Q32B. Automation of knowledge (including artificial intelligence)																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Currently use	20%	N/A	N/A	N/A	34%	15%	8%	20%	11%	21%	20%	4%	32%	18%	17%	18%	11%	19%	20%	41%	19%	14%	22%	36%
Future use	29%	N/A	N/A	N/A	24%	27%	30%	30%	35%	32%	18%	28%	46%	39%	26%	26%	19%	24%	33%	41%	19%	26%	36%	35%
No plans to use	51%	N/A	N/A	N/A	42%	58%	62%	50%	54%	47%	61%	68%	22%	43%	57%	56%	70%	56%	47%	18%	62%	60%	42%	29%
Q32C. 5G and Improved Connectivity																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Currently use	55%	N/A	N/A	N/A	59%	61%	47%	61%	55%	47%	55%	46%	69%	48%	47%	61%	74%	43%	53%	73%	45%	52%	62%	60%
Future use	28%	N/A	N/A	N/A	24%	27%	27%	27%	34%	29%	24%	17%	19%	33%	40%	24%	19%	37%	40%	14%	27%	29%	22%	28%
No plans to use	17%	N/A	N/A	N/A	16%	12%	25%	12%	11%	24%	20%	38%	11%	18%	14%	15%	7%	21%	7%	14%	27%	20%	16%	12%
Q32D. The Internet of things (computing devices embedded in everyday objects)																								
		Region										Industry										Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Currently use	39%	N/A	N/A	N/A	50%	42%	25%	35%	49%	28%	45%	38%	47%	33%	35%	42%	30%	40%	33%	59%	29%	35%	46%	49%
Future use	27%	N/A	N/A	N/A	21%	25%	35%	26%	21%	36%	20%	13%	31%	37%	33%	24%	41%	21%	27%	18%	24%	27%	29%	26%
No plans to use	34%	N/A	N/A	N/A	29%	33%	39%	39%	30%	36%	35%	50%	22%	30%	33%	34%	30%	39%	40%	23%	48%	38%	25%	26%

<b>Q32E. The cloud</b>																								
					<b>Region</b>						<b>Industry</b>										<b>Company Size</b>			
	<b>Total</b>	<b>2021 Total</b>	<b>2020 Total</b>	<b>2019 Total</b>	<b>Capital Region</b>	<b>Central/Mohawk</b>	<b>Finger Lakes</b>	<b>Mid-Hudson</b>	<b>Southern Tier</b>	<b>Western NY</b>	<b>Eng &amp; Constr</b>	<b>Food &amp; Bev</b>	<b>Financial</b>	<b>Manu</b>	<b>Retail</b>	<b>Service</b>	<b>Wholesale &amp; Dist</b>	<b>Non-profit</b>	<b>Tourism</b>	<b>Tech</b>	<b>Health Care</b>	<b>Less than 50</b>	<b>50 to 100</b>	<b>More than 100</b>
Currently use	81%	N/A	N/A	N/A	82%	81%	71%	79%	93%	78%	65%	69%	95%	72%	79%	83%	78%	97%	93%	95%	73%	78%	81%	94%
Future use	9%	N/A	N/A	N/A	8%	12%	11%	14%	5%	7%	12%	15%	3%	16%	12%	6%	7%	2%	7%	5%	9%	10%	12%	2%
No plans to use	10%	N/A	N/A	N/A	11%	7%	18%	7%	1%	14%	24%	15%	3%	11%	9%	11%	15%	2%	0%	0%	18%	12%	8%	4%
<b>Q32F. Advanced robotics</b>																								
					<b>Region</b>						<b>Industry</b>										<b>Company Size</b>			
	<b>Total</b>	<b>2021 Total</b>	<b>2020 Total</b>	<b>2019 Total</b>	<b>Capital Region</b>	<b>Central/Mohawk</b>	<b>Finger Lakes</b>	<b>Mid-Hudson</b>	<b>Southern Tier</b>	<b>Western NY</b>	<b>Eng &amp; Constr</b>	<b>Food &amp; Bev</b>	<b>Financial</b>	<b>Manu</b>	<b>Retail</b>	<b>Service</b>	<b>Wholesale &amp; Dist</b>	<b>Non-profit</b>	<b>Tourism</b>	<b>Tech</b>	<b>Health Care</b>	<b>Less than 50</b>	<b>50 to 100</b>	<b>More than 100</b>
Currently use	8%	N/A	N/A	N/A	10%	5%	9%	13%	6%	10%	10%	4%	3%	24%	7%	1%	4%	3%	0%	9%	14%	6%	9%	16%
Future use	16%	N/A	N/A	N/A	15%	12%	13%	18%	14%	22%	19%	16%	17%	33%	12%	12%	11%	10%	13%	9%	0%	11%	25%	23%
No plans to use	75%	N/A	N/A	N/A	75%	82%	77%	70%	81%	68%	71%	80%	81%	43%	80%	87%	85%	87%	87%	82%	86%	83%	65%	61%
<b>Q32G. Autonomous or near autonomous vehicles</b>																								
					<b>Region</b>						<b>Industry</b>										<b>Company Size</b>			
	<b>Total</b>	<b>2021 Total</b>	<b>2020 Total</b>	<b>2019 Total</b>	<b>Capital Region</b>	<b>Central/Mohawk</b>	<b>Finger Lakes</b>	<b>Mid-Hudson</b>	<b>Southern Tier</b>	<b>Western NY</b>	<b>Eng &amp; Constr</b>	<b>Food &amp; Bev</b>	<b>Financial</b>	<b>Manu</b>	<b>Retail</b>	<b>Service</b>	<b>Wholesale &amp; Dist</b>	<b>Non-profit</b>	<b>Tourism</b>	<b>Tech</b>	<b>Health Care</b>	<b>Less than 50</b>	<b>50 to 100</b>	<b>More than 100</b>
Currently use	1%	N/A	N/A	N/A	2%	0%	0%	0%	4%	1%	0%	0%	6%	5%	0%	0%	0%	0%	7%	0%	0%	1%	3%	2%
Future use	15%	N/A	N/A	N/A	10%	12%	19%	23%	11%	20%	23%	12%	8%	16%	15%	17%	11%	8%	7%	23%	18%	13%	16%	22%
No plans to use	84%	N/A	N/A	N/A	88%	88%	81%	77%	85%	79%	77%	88%	86%	79%	85%	83%	89%	92%	87%	77%	82%	86%	82%	76%
<b>Q32H. 3-D Printing</b>																								
					<b>Region</b>						<b>Industry</b>										<b>Company Size</b>			
	<b>Total</b>	<b>2021 Total</b>	<b>2020 Total</b>	<b>2019 Total</b>	<b>Capital Region</b>	<b>Central/Mohawk</b>	<b>Finger Lakes</b>	<b>Mid-Hudson</b>	<b>Southern Tier</b>	<b>Western NY</b>	<b>Eng &amp; Constr</b>	<b>Food &amp; Bev</b>	<b>Financial</b>	<b>Manu</b>	<b>Retail</b>	<b>Service</b>	<b>Wholesale &amp; Dist</b>	<b>Non-profit</b>	<b>Tourism</b>	<b>Tech</b>	<b>Health Care</b>	<b>Less than 50</b>	<b>50 to 100</b>	<b>More than 100</b>
Currently use	12%	N/A	N/A	N/A	8%	10%	15%	16%	10%	13%	11%	0%	3%	32%	13%	4%	7%	11%	0%	14%	0%	7%	20%	18%
Future use	17%	N/A	N/A	N/A	14%	10%	23%	16%	14%	26%	23%	21%	11%	28%	8%	18%	7%	11%	7%	23%	5%	18%	20%	12%
No plans to use	72%	N/A	N/A	N/A	78%	81%	62%	68%	76%	62%	66%	79%	86%	40%	80%	77%	85%	77%	93%	64%	95%	75%	61%	70%
<b>Q32I. Renewable energy</b>																								
					<b>Region</b>						<b>Industry</b>										<b>Company Size</b>			
	<b>Total</b>	<b>2021 Total</b>	<b>2020 Total</b>	<b>2019 Total</b>	<b>Capital Region</b>	<b>Central/Mohawk</b>	<b>Finger Lakes</b>	<b>Mid-Hudson</b>	<b>Southern Tier</b>	<b>Western NY</b>	<b>Eng &amp; Constr</b>	<b>Food &amp; Bev</b>	<b>Financial</b>	<b>Manu</b>	<b>Retail</b>	<b>Service</b>	<b>Wholesale &amp; Dist</b>	<b>Non-profit</b>	<b>Tourism</b>	<b>Tech</b>	<b>Health Care</b>	<b>Less than 50</b>	<b>50 to 100</b>	<b>More than 100</b>
Currently use	19%	N/A	N/A	N/A	23%	16%	17%	29%	22%	11%	15%	28%	11%	18%	25%	20%	19%	21%	13%	18%	14%	15%	9%	37%
Future use	42%	N/A	N/A	N/A	39%	37%	40%	45%	48%	44%	38%	32%	46%	48%	25%	32%	42%	50%	67%	59%	50%	41%	47%	45%
No plans to use	39%	N/A	N/A	N/A	38%	47%	43%	27%	30%	45%	48%	40%	43%	33%	50%	47%	38%	29%	20%	23%	36%	44%	43%	18%
<b>Q32J. Cyber security</b>																								
					<b>Region</b>						<b>Industry</b>										<b>Company Size</b>			
	<b>Total</b>	<b>2021 Total</b>	<b>2020 Total</b>	<b>2019 Total</b>	<b>Capital Region</b>	<b>Central/Mohawk</b>	<b>Finger Lakes</b>	<b>Mid-Hudson</b>	<b>Southern Tier</b>	<b>Western NY</b>	<b>Eng &amp; Constr</b>	<b>Food &amp; Bev</b>	<b>Financial</b>	<b>Manu</b>	<b>Retail</b>	<b>Service</b>	<b>Wholesale &amp; Dist</b>	<b>Non-profit</b>	<b>Tourism</b>	<b>Tech</b>	<b>Health Care</b>	<b>Less than 50</b>	<b>50 to 100</b>	<b>More than 100</b>
Currently use	70%	N/A	N/A	N/A	79%	70%	63%	67%	73%	60%	63%	44%	92%	70%	68%	60%	59%	78%	73%	95%	86%	63%	77%	88%
Future use	16%	N/A	N/A	N/A	13%	16%	13%	17%	17%	22%	16%	28%	3%	18%	10%	23%	22%	14%	20%	0%	5%	20%	12%	7%
No plans to use	14%	N/A	N/A	N/A	8%	14%	24%	16%	10%	18%	20%	28%	5%	11%	23%	17%	19%	8%	7%	5%	9%	18%	12%	4%
<b>Q32K. Digital analytics</b>																								
					<b>Region</b>						<b>Industry</b>										<b>Company Size</b>			
	<b>Total</b>	<b>2021 Total</b>	<b>2020 Total</b>	<b>2019 Total</b>	<b>Capital Region</b>	<b>Central/Mohawk</b>	<b>Finger Lakes</b>	<b>Mid-Hudson</b>	<b>Southern Tier</b>	<b>Western NY</b>	<b>Eng &amp; Constr</b>	<b>Food &amp; Bev</b>	<b>Financial</b>	<b>Manu</b>	<b>Retail</b>	<b>Service</b>	<b>Wholesale &amp; Dist</b>	<b>Non-profit</b>	<b>Tourism</b>	<b>Tech</b>	<b>Health Care</b>	<b>Less than 50</b>	<b>50 to 100</b>	<b>More than 100</b>
Currently use	42%	N/A	N/A	N/A	52%	35%	30%	41%	52%	35%	25%	28%	69%	30%	39%	43%	26%	60%	53%	68%	45%	35%	41%	66%
Future use	33%	N/A	N/A	N/A	29%	33%	35%	36%	31%	38%	40%	32%	25%	39%	27%	30%	37%	34%	33%	23%	32%	35%	36%	24%
No plans to use	25%	N/A	N/A	N/A	19%	32%	35%	23%	17%	27%	35%	40%	6%	31%	34%	27%	37%	6%	13%	9%	23%	29%	23%	10%



Q33. Do you tend to see these disruptive technologies more as an opportunity for your business or as a threat to your business?																								
		Region				Industry																Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Opportunity	80%	N/A	N/A	N/A	86%	75%	76%	78%	88%	72%	70%	69%	84%	79%	73%	74%	77%	97%	93%	100%	68%	76%	85%	89%
Threat	20%	N/A	N/A	N/A	14%	25%	24%	22%	12%	28%	30%	31%	16%	21%	27%	26%	23%	3%	7%	0%	32%	24%	15%	11%
		N/A	N/A	N/A																				
Q34. Did the COVID-19 pandemic result in an increase in use of disruptive technologies for your company, a decrease in use of disruptive technologies, or did it have no impact on your company's use of disruptive technologies?																								
		Region				Industry																Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Increase	52%	N/A	N/A	N/A	60%	47%	48%	46%	63%	48%	43%	35%	79%	44%	40%	44%	46%	71%	67%	82%	52%	47%	58%	64%
Decrease	2%	N/A	N/A	N/A	0%	1%	2%	2%	1%	6%	2%	0%	0%	1%	2%	3%	0%	2%	7%	0%	10%	1%	1%	4%
No impact	46%	N/A	N/A	N/A	40%	51%	50%	52%	36%	45%	55%	65%	21%	55%	57%	53%	54%	28%	27%	18%	38%	52%	41%	32%
Q35. Turning to your impressions of the local workforce. Is there an ample supply of local workers that are appropriately trained for your employment needs?																								
		Region				Industry																Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Yes	14%	13%	28%	21%	9%	20%	13%	10%	16%	19%	14%	23%	13%	7%	14%	18%	31%	9%	20%	14%	9%	17%	9%	5%
No	82%	79%	61%	71%	85%	78%	85%	86%	83%	76%	84%	77%	84%	91%	86%	75%	65%	85%	80%	77%	91%	78%	90%	94%
Don't know	4%	8%	11%	8%	6%	1%	2%	5%	1%	5%	2%	0%	3%	2%	0%	7%	4%	6%	0%	9%	0%	5%	1%	1%
Q36. Please indicate with which, if any, of the following you are currently having difficulty. Please select ALL that apply.																								
		Region				Industry																Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Recruiting to fill open positions	75%	78%	N/A	N/A	77%	74%	82%	76%	75%	67%	86%	62%	74%	80%	86%	70%	59%	72%	67%	64%	96%	68%	86%	91%
Retaining existing employees	38%	36%	N/A	N/A	40%	36%	36%	27%	35%	42%	39%	15%	45%	45%	30%	32%	30%	45%	27%	41%	48%	27%	50%	61%
Neither	22%	18%	N/A	N/A	21%	23%	18%	21%	23%	25%	10%	35%	18%	17%	14%	29%	37%	22%	33%	27%	4%	29%	10%	6%
Q37A. Please indicate if you have <u>increased wages</u> to recruit/retain.																								
		Region				Industry																Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Recruit	72%	88%	N/A	N/A	74%	71%	75%	73%	75%	63%	73%	58%	79%	82%	73%	65%	62%	78%	67%	67%	74%	62%	92%	91%
Retain	85%	86%	N/A	N/A	84%	87%	90%	85%	78%	84%	79%	75%	87%	89%	98%	79%	81%	86%	87%	76%	96%	82%	90%	93%
Not applicable	7%	58%	N/A	N/A	9%	4%	4%	8%	10%	9%	13%	13%	5%	2%	0%	11%	4%	9%	0%	19%	4%	10%	3%	2%
Q37B. Please indicate if you have <u>offered bonuses</u> to recruit/retain.																								
		Region				Industry																Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Recruit	37%	39%	N/A	N/A	37%	37%	43%	29%	37%	36%	34%	25%	51%	42%	46%	35%	18%	33%	8%	32%	55%	26%	50%	57%
Retain	65%	58%	N/A	N/A	75%	58%	83%	47%	59%	63%	70%	55%	80%	72%	84%	60%	59%	47%	58%	68%	64%	63%	72%	66%
Not applicable	26%	N/A	N/A	N/A	19%	31%	17%	36%	36%	27%	20%	40%	14%	17%	3%	31%	36%	48%	42%	26%	23%	32%	19%	19%
Q37C. Please indicate if you have <u>designed flexible work hours</u> to recruit/retain.																								
		Region				Industry																Company Size		
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Recruit	53%	51%	N/A	N/A	52%	47%	48%	55%	59%	53%	45%	58%	62%	47%	53%	48%	32%	69%	36%	44%	77%	43%	65%	71%
Retain	75%	66%	N/A	N/A	75%	71%	89%	69%	76%	74%	66%	79%	71%	71%	82%	71%	68%	83%	71%	89%	91%	73%	76%	83%
Not applicable	19%	N/A	N/A	N/A	21%	25%	9%	24%	16%	17%	29%	11%	26%	26%	12%	20%	27%	13%	29%	11%	0%	21%	20%	12%

Siena College Research Institute  
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UHY Advisors, Inc. and Hudson Valley Economic Development Corporation  
November 28, 2022 - February 14, 2023  
530 Upstate New York CEOs

Q37D. Please indicate if you have <i>designed flexible work location</i> to recruit/retain.																								
	Region										Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Recruit	35%	24%	N/A	N/A	42%	24%	19%	33%	41%	36%	16%	0%	67%	28%	15%	37%	14%	53%	8%	47%	50%	25%	47%	54%
Retain	54%	37%	N/A	N/A	65%	43%	57%	39%	56%	51%	55%	14%	76%	36%	33%	58%	52%	70%	33%	74%	63%	48%	55%	70%
Not applicable	44%	N/A	N/A	N/A	34%	55%	43%	57%	41%	47%	45%	86%	24%	61%	67%	36%	48%	28%	67%	26%	38%	50%	43%	28%

  

Q37E. Please indicate if you have <i>offered referral bonuses to existing employees</i> to recruit/retain.																								
	Region										Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Recruit	40%	36%	N/A	N/A	45%	35%	38%	40%	32%	45%	37%	31%	52%	53%	55%	34%	26%	28%	17%	44%	43%	20%	56%	76%
Retain	24%	23%	N/A	N/A	26%	31%	31%	11%	21%	23%	30%	25%	26%	22%	27%	23%	11%	25%	8%	25%	33%	16%	31%	38%
Not applicable	53%	N/A	N/A	N/A	49%	50%	49%	58%	67%	44%	47%	56%	42%	40%	36%	57%	68%	67%	83%	56%	57%	71%	35%	22%

  

Q38. Many businesses outsource some of their business operations. Which, if any, of the following services does your company outsource? Please check ALL that apply.																								
	Region										Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Tax services	72%	N/A	N/A	N/A	68%	64%	76%	67%	75%	78%	80%	87%	67%	78%	79%	71%	68%	60%	85%	59%	50%	74%	69%	64%
Payroll processing	68%	N/A	N/A	N/A	66%	70%	84%	74%	63%	63%	50%	61%	73%	78%	71%	72%	64%	67%	69%	73%	50%	71%	72%	57%
IT Services	58%	N/A	N/A	N/A	55%	63%	71%	60%	55%	47%	48%	48%	67%	64%	64%	53%	73%	57%	38%	41%	75%	57%	67%	55%
Accounting	41%	N/A	N/A	N/A	39%	43%	45%	43%	48%	36%	48%	57%	33%	31%	52%	52%	36%	28%	46%	41%	40%	51%	28%	16%
Marketing	19%	N/A	N/A	N/A	20%	18%	12%	22%	26%	16%	11%	4%	27%	11%	31%	23%	23%	21%	23%	14%	30%	19%	18%	23%
Shipping and logistics	14%	N/A	N/A	N/A	17%	15%	14%	14%	15%	11%	9%	22%	9%	22%	21%	9%	36%	5%	8%	14%	10%	15%	18%	10%
Human Resources	13%	N/A	N/A	N/A	17%	13%	8%	16%	11%	11%	9%	9%	12%	13%	10%	8%	9%	22%	0%	27%	20%	16%	7%	4%
Training and development	11%	N/A	N/A	N/A	10%	9%	10%	5%	9%	16%	14%	0%	12%	4%	19%	14%	14%	12%	8%	9%	10%	9%	15%	12%
Manufacturing	8%	N/A	N/A	N/A	8%	9%	8%	10%	5%	9%	9%	9%	0%	13%	17%	5%	9%	0%	8%	18%	0%	8%	10%	8%
Administrative services	3%	N/A	N/A	N/A	3%	3%	2%	0%	5%	0%	0%	0%	9%	2%	5%	5%	0%	2%	0%	0%	0%	2%	0%	6%
Research	3%	N/A	N/A	N/A	2%	1%	2%	3%	8%	3%	0%	4%	3%	1%	7%	3%	5%	7%	8%	0%	0%	4%	0%	5%
Other	3%	N/A	N/A	N/A	4%	1%	2%	2%	5%	2%	5%	0%	6%	0%	2%	3%	0%	3%	0%	5%	10%	2%	1%	6%
Sales	2%	N/A	N/A	N/A	1%	0%	2%	2%	2%	1%	7%	0%	3%	1%	2%	1%	0%	0%	0%	5%	0%	2%	3%	1%
Customer service	1%	N/A	N/A	N/A	0%	0%	2%	0%	2%	0%	0%	0%	3%	0%	2%	0%	0%	0%	0%	5%	0%	1%	0%	1%

  

Q39. Which of the following industry sectors do you think will have a positive impact on the economic vitality of your geographic area in the next three to five years?																								
	Region										Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Education	21%	13%	15%	23%	22%	18%	31%	14%	23%	18%	33%	12%	16%	21%	24%	16%	20%	25%	7%	18%	30%	21%	22%	22%
Technology	19%	23%	18%	17%	23%	22%	15%	25%	7%	19%	14%	12%	32%	19%	26%	12%	32%	14%	7%	50%	13%	15%	30%	25%
Tourism	17%	17%	22%	20%	13%	10%	17%	19%	33%	12%	4%	60%	22%	7%	19%	19%	16%	12%	71%	5%	9%	20%	8%	14%
Manufacturing	15%	13%	10%	8%	12%	18%	11%	20%	12%	19%	16%	4%	5%	28%	10%	14%	12%	17%	7%	9%	9%	18%	12%	8%
Medical	9%	15%	15%	14%	8%	7%	9%	2%	7%	18%	10%	4%	5%	6%	2%	9%	12%	12%	7%	9%	22%	8%	8%	10%
Transportation	5%	5%	3%	4%	6%	7%	7%	3%	1%	4%	4%	0%	0%	7%	7%	9%	4%	5%	0%	0%	4%	4%	7%	
Green and sustainable energy	5%	7%	9%	4%	6%	8%	4%	5%	7%	1%	8%	8%	5%	6%	0%	9%	0%	3%	0%	5%	4%	6%	5%	4%
Cannabis	5%	N/A	N/A	N/A	6%	4%	2%	7%	8%	4%	4%	0%	11%	0%	7%	9%	0%	9%	0%	5%	4%	5%	5%	5%
Other	4%	7%	8%	4%	4%	6%	4%	5%	1%	5%	6%	0%	3%	7%	5%	4%	4%	3%	0%	9%	4%	5%	4%	

  

Q40. Do you have plans to develop or invest in a cannabis business in 2023?																								
	Region										Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/Mohawk	Finger Lakes	Mid-Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Develop	1%	N/A	N/A	N/A	2%	0%	4%	0%	0%	0%	2%	0%	5%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%	3%
Invest	2%	N/A	N/A	N/A	0%	1%	4%	2%	3%	3%	4%	0%	0%	6%	2%	1%	0%	0%	0%	0%	0%	3%	0%	0%
Both	2%	N/A	N/A	N/A	4%	0%	2%	2%	4%	0%	2%	4%	3%	1%	2%	2%	4%	2%	0%	0%	0%	1%	5%	2%
Neither	96%	N/A	N/A	N/A	95%	99%	91%	97%	93%	97%	92%	96%	92%	93%	95%	97%	96%	97%	100%	100%	100%	96%	95%	95%

Q41. Thinking of one final topic, Environmental, Social and Governance (ESG), would you say ESG policies and/or practices are:																								
		2021	2020	2019	Region					Industry										Company Size				
	Total	Total	Total	Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
A part of your company's mission; ESG is a priority for your company	16%	N/A	N/A	N/A	18%	10%	20%	18%	27%	10%	8%	20%	18%	10%	7%	18%	4%	35%	33%	9%	9%	14%	8%	28%
Important but not a priority for your company	35%	N/A	N/A	N/A	42%	23%	30%	33%	35%	34%	35%	40%	47%	31%	26%	37%	35%	28%	40%	45%	35%	32%	45%	34%
Isn't something your company really thinks about	49%	N/A	N/A	N/A	40%	67%	50%	48%	38%	56%	57%	40%	34%	59%	67%	45%	62%	37%	27%	45%	57%	54%	47%	37%
[Of those with ESG as priority/part of the mission] Q42. Which, if any, of the following are reasons your company engages in ESG policies and/or practices? Please check ALL that apply.																								
		2021	2020	2019	Region					Industry										Company Size				
	Total	Total	Total	Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
It's the right thing to do	94%	N/A	N/A	N/A	80%	83%	100%	100%	100%	100%	100%	100%	57%	100%	100%	88%	100%	100%	100%	100%	100%	98%	100%	89%
Enhancing your reputation	68%	N/A	N/A	N/A	60%	67%	82%	64%	55%	100%	50%	60%	71%	63%	67%	76%	100%	65%	80%	50%	50%	70%	60%	68%
Attracting more diverse talent	60%	N/A	N/A	N/A	65%	83%	55%	45%	60%	56%	75%	40%	71%	50%	33%	41%	100%	74%	60%	50%	100%	56%	60%	68%
Attracting employees overall	53%	N/A	N/A	N/A	50%	83%	45%	45%	60%	44%	100%	40%	57%	50%	67%	47%	100%	52%	60%	0%	50%	49%	60%	61%
Increasing employee retention overall	48%	N/A	N/A	N/A	40%	67%	55%	55%	45%	44%	50%	20%	43%	50%	33%	47%	100%	57%	40%	50%	50%	47%	40%	50%
Increasing retention among diverse talent	44%	N/A	N/A	N/A	40%	67%	55%	36%	45%	33%	50%	40%	43%	25%	33%	35%	100%	57%	40%	50%	50%	44%	60%	43%
Positive impacts on financial performance	40%	N/A	N/A	N/A	30%	50%	36%	36%	55%	33%	75%	40%	29%	25%	33%	35%	0%	39%	80%	50%	50%	47%	40%	29%
Increased satisfaction among investors and/or other stakeholders	31%	N/A	N/A	N/A	25%	33%	27%	36%	40%	22%	50%	20%	43%	25%	0%	24%	0%	39%	40%	0%	50%	30%	40%	32%
[Of those with ESG as priority/part of the mission] Q43. Which of the following are challenges for your company related to ESG? Please check ALL that apply.																								
		2021	2020	2019	Region					Industry										Company Size				
	Total	Total	Total	Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Understanding ESG regulations and compliance	51%	N/A	N/A	N/A	53%	20%	40%	38%	60%	75%	33%	40%	67%	43%	50%	56%	100%	43%	40%	100%	50%	53%	75%	21%
Tracking and reporting on ESG issues (annual ESG or CorporatTracking and reporting on ESG issues (annual ESG or Corporate Social Responsibility Report (CSR))	43%	N/A	N/A	N/A	47%	40%	40%	38%	47%	38%	67%	20%	100%	57%	100%	19%	0%	57%	20%	0%	0%	29%	25%	33%
Achieving greater transparency about our ESG performance	29%	N/A	N/A	N/A	29%	20%	40%	13%	33%	25%	67%	40%	17%	14%	0%	19%	0%	29%	80%	0%	50%	29%	50%	67%
Identifying ESG areas, known as materiality assessment	22%	N/A	N/A	N/A	12%	60%	20%	13%	40%	0%	0%	20%	0%	57%	0%	13%	100%	36%	20%	0%	0%	15%	25%	0%
The financial costs of ESG are too high	16%	N/A	N/A	N/A	18%	0%	10%	0%	13%	50%	0%	0%	17%	29%	50%	13%	0%	21%	20%	0%	0%	6%	25%	29%
Getting involved in ESG issues is too risky	2%	N/A	N/A	N/A	0%	0%	0%	13%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%	3%	0%	46%
Q44. Finally, just a few questions about you and your company. Do you think your company will be in business in New York ten years from today or not?																								
		2021	2020	2019	Region					Industry										Company Size				
	Total	Total	Total	Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Yes	67%	59%	61%	56%	74%	62%	58%	69%	76%	57%	58%	60%	97%	51%	58%	68%	56%	94%	73%	45%	61%	60%	73%	86%
No	13%	14%	14%	17%	9%	16%	13%	11%	11%	20%	13%	16%	0%	15%	19%	16%	26%	3%	13%	23%	17%	17%	9%	4%
Don't know	20%	27%	25%	27%	18%	22%	29%	19%	13%	22%	29%	24%	3%	34%	23%	16%	19%	3%	13%	32%	22%	23%	18%	10%
Q45. If you had it all to do all over again, considering all factors, would you locate your business in New York or someplace else?																								
		2021	2020	2019	Region					Industry										Company Size				
	Total	Total	Total	Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non-profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
New York	38%	35%	36%	32%	44%	35%	36%	35%	36%	34%	38%	42%	46%	16%	28%	41%	41%	73%	40%	14%	22%	39%	36%	37%
Someplace else	53%	55%	52%	64%	47%	58%	56%	53%	45%	61%	63%	46%	43%	82%	60%	49%	56%	15%	40%	68%	39%	51%	59%	49%
Don't know	10%	11%	12%	4%	9%	7%	7%	11%	19%	5%	0%	13%	11%	2%	12%	10%	4%	12%	20%	18%	39%	10%	5%	13%

Q46. Please select your gender:																								
					Region						Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Male	77%	78%	70%	74%	78%	76%	83%	76%	68%	81%	87%	76%	84%	87%	83%	74%	78%	58%	47%	82%	74%	72%	83%	85%
Female	23%	22%	30%	21%	22%	24%	17%	24%	32%	19%	13%	24%	16%	13%	17%	26%	22%	42%	53%	18%	26%	28%	17%	15%
Q47. How would you describe your race/ethnicity?																								
					Region						Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
White	95%	94%	94%	90%	95%	100%	96%	93%	93%	97%	98%	92%	94%	94%	98%	96%	96%	95%	87%	95%	100%	95%	96%	97%
African-American	0%	1%	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Hispanic	2%	1%	1%	1%	2%	0%	2%	3%	1%	1%	0%	0%	3%	1%	0%	3%	0%	2%	7%	5%	0%	2%	1%	0%
Asian	1%	1%	1%	1%	1%	0%	0%	2%	1%	0%	0%	4%	3%	0%	0%	0%	4%	2%	0%	0%	0%	0%	3%	1%
Other	2%	3%	3%	1%	3%	0%	2%	2%	4%	2%	2%	4%	0%	5%	2%	1%	0%	2%	7%	0%	0%	3%	0%	2%
Q48. Approximately how many employees do you have in all New York State locations?																								
					Region						Industry										Company Size			
	Total	2021 Total	2020 Total	2019 Total	Capital Region	Central/ Mohawk	Finger Lakes	Mid- Hudson	Southern Tier	Western NY	Eng & Constr	Food & Bev	Financial	Manu	Retail	Service	Wholesale & Dist	Non- profit	Tourism	Tech	Health Care	Less than 50	50 to 100	More than 100
Less than 50	58%	60%	68%	62%	51%	63%	66%	69%	59%	52%	60%	63%	40%	48%	65%	65%	78%	55%	60%	68%	48%	100%	0%	0%
50 to 100	15%	18%	13%	16%	16%	17%	7%	12%	10%	19%	19%	17%	19%	28%	5%	12%	7%	6%	0%	23%	13%	0%	100%	0%
More than 100	19%	23%	19%	18%	28%	17%	19%	10%	16%	17%	8%	3%	28%	23%	30%	8%	15%	25%	40%	9%	39%	0%	0%	100%
Don't know/Refused	8%	N/A	N/A	N/A	6%	3%	9%	9%	14%	12%	13%	17%	14%	1%	0%	14%	0%	14%	0%	0%	0%	0%	0%	0%