Sponsored by The Business Council of New York State

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

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

									CLOS	, IVIOL	+/- 4.3%											
Q1. Which of the following industry cate	gories best de	escribes th	e type of	business y	our comp	any is		ed in? gion		I	Cluster		_	Compan	ı Sizo						Reve	
	Upstate	Upstate	Upstate	Upstate	Upstate		, ne	gion			Ciustei		50 or	51 to	More						Up to	liue
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100						\$5M	\$5N
Engineering and Construction	18%	16%	17%	17%	15%	20%	12%	20%	22%	19%	20%	11%	17%	31%	10%						23%	179
Food and Beverage	5%	5%	3%	3%	5%	1%	7%	9%	4%	2%	5%	10%	5%	5%	5%						7%	4%
Financial	7%	5%	8%	6%	8%	13%	4%	3%	8%	10%	7%	2%	6%	6%	12%						3%	8%
Manufacturing	18%	24%	21%	19%	19%	14%	24%	18%	17%	17%	20%	13%	19%	22%	12%						7%	20%
Retail	11%	12%	12%	12%	14%	11%	12%	11%	8%	8%	10%	17%	13%	8%	7%						8%	119
Service	32%	25%	23%	27%	26%	34%	33%	28%	31%	36%	29%	37%	28%	24%	49%						42%	309
Wholesale and Distribution	10%	11%	15%	15%	14%	8%	9%	11%	10%	8%	11%	10%	13%	4%	5%						10%	9%
Other	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%						0%	0%
Refused	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%						0%	0%
Neisses	070	070	170	070	070	070	070	070	070	0,0	070	070	070	0,0	070						070	070
Q2. As you think about the current busin	ess or econor	nic condit	ions in Ne	w York Sta	ate as com	pared	to six	month	s ago.	would	vou sav t	hev ar	e consi	iderably	better. a l	ittle bett	er. abou	t the sa	me. a little	e worse. (or	
considerably worse?									6-,		, , .	,		,	,		,		,			
•							Re	gion			Cluster		(Compan	v Size			Industi	ν		Reve	enue
	Upstate	Upstate	Upstate	Upstate	Upstate		1						50 or		More	Eng &			ĺ	Whole	Up to	
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Considerably better	1%	2%	4%	2%	1%	1%	3%	0%	1%	4%	0%	0%	2%	1%	0%	1%	0%	0%	3%	0%	4%	1%
A little better	26%	24%	32%	24%	21%	32%	27%	22%	21%		13%	1%	25%	29%	28%	24%	27%	26%	30%	21%	27%	26%
About the same	48%	44%	44%	46%	44%	46%	47%	45%	56%	33%	69%	18%	50%	45%	46%	51%	53%	36%	46%	52%	39%	49%
A little worse	21%	22%	16%	22%	28%	17%	21%	29%	18%	1%	17%	66%	19%	19%	27%	19%	13%	32%	20%	26%	27%	20%
Considerably worse	4%	8%	4%	7%	7%	4%	3%	4%	4%	0%	2%	15%	4%	5%	0%	4%	8%	6%	2%	0%	3%	4%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Q3. Looking forward from today through	next year, th	at is, the	entire 201	7 year, ho	w would y	ou de	scribe	your ex	pecta	tions f	or the eco	nomy	in Nev	v York S	tate?					L		
							Re	gion			Cluster		(Compan	y Size			Industi	γ		Reve	enue
	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Considerably better	5%	3%	5%	2%	2%	4%	6%	5%	4%	13%	0%	0%	7%	0%	4%	4%	6%	9%	4%	0%	8%	4%
A little better	37%	27%	37%	28%	31%	40%	39%	25%	42%	74%	24%	5%	36%	40%	36%	40%	35%	38%	36%	36%	30%	38%
About the same	37%	40%	39%	40%	32%	37%	34%	41%	35%	12%	63%	13%	37%	40%	33%	40%	42%	23%	36%	40%	44%	36%
A little worse	19%	24%	15%	24%	25%	18%	18%	26%	17%	1%	13%	68%	19%	17%	24%	17%	15%	23%	20%	24%	15%	20%
Considerably worse	3%	6%	4%	6%	10%	2%	3%	3%	3%	0%	0%	13%	2%	4%	4%	0%	1%	6%	4%	0%	3%	2%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Q4. Now thinking specifically about your	industry, hov	v would y	ou describ	e the curr	ent busin	ess or	econo	mic cor	dition	s in Ne	w York St	ate as	compa	red wit	h six mont	hs ago?	•					
							Re	gion			Cluster		(Compan	y Size			Industi	у		Reve	enue
	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Considerably better	2%	3%	4%	3%	2%	2%	3%	1%	3%	6%	0%	0%	2%	4%	2%	1%	0%	0%	5%	0%	4%	2%
A little better	18%	21%	24%	20%	17%	23%	20%	14%	7%	49%	3%	1%	17%	24%	11%	15%	19%	17%	20%	12%	21%	179
About the same	47%	39%	42%	44%	41%	46%	42%	48%	56%	43%	65%	6%	47%	45%	46%	59%	47%	38%	42%	48%	34%	49%
A little worse	27%	29%	24%	25%	31%	24%	28%	25%	32%	2%	29%	65%	27%	22%	30%	18%	28%	28%	27%	33%	35%	259
Considerably worse	7%	8%	6%	8%	8%	6%	8%	11%	3%	0%	3%	28%	6%	5%	11%	6%	5%	17%	6%	7%	6%	7%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
		 	 / -	+ -/-	- / -	- / -	1 275	 	- / -	+	+ -/-	- / -		+		- / -		+ -/-	 / -	/ -	- / -	+

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

Considerably better A little better About the same	Upstate 2016 5%	Upstate 2015	Upstate 2014	Upstate	Upstate								50 or	51 to	More	Eng &	1			Whole	Up to	
A little better About the same			2014						_					400		•					4	4
A little better About the same	5%			2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5N
About the same		3%	5%	3%	2%	5%	6%	5%	3%	15%	0%	0%	6%	1%	6%	4%	4%	6%	6%	2%	3%	5%
	30%	24%	30%	25%	27%	38%	31%	22%	28%	71%	15%	0%	29%	40%	24%	42%	36%	23%	28%	19%	38%	29%
A little worse	35%	41%	36%	38%	33%	32%	33%	32%	43%	13%	60%	5%	38%	33%	27%	38%	35%	30%	32%	48%	27%	36%
A little worse	24%	25%	24%	25%	27%	20%	23%	34%	24%	1%	24%	66%	24%	19%	31%	15%	23%	26%	25%	29%	27%	249
Considerably worse	6%	7%	5%	9%	10%	4%	8%	7%	3%	0%	0%	29%	4%	6%	12%	0%	3%	15%	9%	2%	6%	6%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Q6. Now thinking specifically about your con	l npany, wh	at are vou	ır expecta	tions for r	evenue th	l hrough	the ve	l ear 201	7? Do	vou be	lieve vou	r reven	ue wil	l?				1				
<u></u>							•	gion			Cluster			ompany	/ Size			Industi	v		Rev	enue
	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &			<u> </u>	Whole	Up to	1
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Grow substantially	3%	3%	4%	3%	2%	1%	4%	3%	1%	5%	1%	1%	3%	3%	1%	3%	3%	2%	3%	2%	1%	3%
Grow moderately	48%	42%	45%	39%	36%	58%	43%	41%	46%	73%	44%	13%	42%	59%	53%	44%	63%	36%	48%	38%	54%	47%
Stay about the same	33%	36%	33%	36%	35%	27%	34%	35%	42%	20%	43%	32%	37%	26%	31%	37%	22%	43%	32%	40%	27%	34%
Decrease moderately	14%	17%	16%	18%	23%	13%	16%	14%	11%	3%	11%	43%	16%	9%	13%	13%	10%	13%	17%	19%	14%	14%
Decrease substantially	2%	2%	1%	3%	4%	1%	3%	6%	0%	0%	0%	11%	2%	4%	1%	3%	3%	6%	1%	0%	4%	2%
Prefer not to answer	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%
Q7. Continuing to focus on your company, pl	lease thinl	c quickly a	bout prof	itability. B	etween to	oday a	nd the	end of	the ca	lendar	year 201	7 do y			•	?						
							Reg	gion			Cluster			ompany	y Size			Industi	у	1	Revo	enue
	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Grow substantially	2%	2%	3%	2%	2%	1%	5%	0%	1%	4%	1%	0%	2%	1%	1%	1%	1%	2%	3%	2%	0%	2%
Grow moderately	41%	33%	38%	29%	28%	53%	38%	32%	38%	65%	37%	11%	38%	46%	46%	47%	56%	28%	39%	24%	46%	40%
Stay about the same	34%	36%	35%	38%	32%	27%	33%	39%	40%	29%	40%	23%	38%	29%	23%	36%	31%	43%	29%	43%	31%	34%
Decrease moderately	20%	25%	22%	26%	33%	17%	20%	23%	21%	1%	21%	51%	19%	15%	28%	12%	10%	21%	25%	31%	17%	21%
Decrease substantially	3%	4%	3%	4%	6%	1%	4%	6%	0%	0%	0%	15%	2%	6%	2%	4%	1%	6%	3%	0%	6%	2%
Prefer not to answer	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%	0%	0%
Q8. Businesses and the executives that direc	t thom str	ivo to onh	ance prof	itability in	manywa	we Th	rough	which	of the	followi	na strato	rios do	vou n	an to M	IOST onbor	200 VOUR	compan	y's prof	itability o	or the ne	ovt voor	.5
Qo. Dusinesses and the executives that unec	t tilelli sti	ive to eiiii	ance proi	itability ii	i ilialiy wa	iys. 111		gion	or the	lollowi	Cluster	gies uo		ompany		ice your	Compan	Industi		ver the ne		enue
	Upstate	Upstate	Upstate	Upstate	Upstate		I NE	gion			Ciustei		50 or	51 to	More	Eng &		illuusti	У	Whole	Up to	liue
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Market/demand growth	48%	39%	43%	40%	38%	53%	50%	47%	39%	59%	44%	37%	48%	49%	48%	46%	54%	40%	46%	55%	48%	48%
Cost reduction	25%	31%	29%	34%	34%	24%	21%	23%	35%	14%	28%	34%	26%	27%	22%	21%	21%	32%	25%	26%	27%	249
Price increase	13%	12%	15%	13%	12%	6%	16%	16%	14%	11%	14%	13%	14%	10%	10%	18%	12%	9%	12%	17%	10%	149
	9%	9%	7%	10%	9%	12%	8%	7%	10%	10%	9%	9%	9%	9%	11%	12%	10%	11%	10%	2%	11%	9%
	970	1 7%																				
New technology Other	9% 4%	7%	6%	3%	6%	5%	4%	3%	3%	4%	3%	6%	3%	4%	7%	3%	0%	9%	7%	0%	4%	4%

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Q9. Please indicate which of the following a	Te major a	i cas ui cui	i centratio	ii ioi youi	Company	y 110 W 6			LUI/.				ı									
							Reg	gion			Cluster		_	ompan	1		1	Indust	ry		Rev	enue
	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Upstate 2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5M
Expansion of existing markets	53%	54%	56%	61%	58%	58%	49%	58%	43%	54%	51%	55%	52%	56%	53%	65%	59%	38%	51%	60%	55%	52%
Growth in existing products	58%	52%	54%	53%	50%	65%	56%	57%	50%	62%	60%	45%	59%	54%	55%	38%	59%	66%	58%	71%	51%	59%
Entry into new markets	32%	30%	33%	37%	33%	35%	35%	28%	26%	34%	30%	33%	31%	29%	40%	29%	40%	30%	30%	40%	30%	33%
New product lines	23%	27%	25%	31%	31%	23%	23%	27%	21%	22%	26%	17%	23%	21%	25%	12%	29%	30%	18%	40%	27%	229
Acquisition of new businesses	15%	15%	14%	11%	13%	18%	16%	16%	8%	21%	12%	15%	9%	18%	33%	12%	14%	9%	17%	14%	10%	179
Technology innovation	28%	27%	26%	28%	27%	30%	31%	29%	21%	34%	24%	28%	23%	36%	41%	29%	31%	17%	31%	17%	20%	30%
Construction of new locations	10%	9%	10%	10%	8%	13%	10%	7%	6%	16%	7%	5%	6%	15%	14%	19%	5%	13%	8%	7%	14%	9%
Internal restructuring	25%	28%	25%	28%	33%	22%	27%	28%	24%	27%	23%	26%	25%	26%	24%	22%	22%	38%	24%	19%	20%	26%
Expansion into export markets	4%	NA	NA	NA	NA	4%	4%	5%	1%	3%	4%	2%	4%	3%	5%	0%	8%	4%	3%	7%	3%	4%
Other	4%	0%	3%	5%	4%	6%	3%	2%	4%	1%	4%	7%	3%	6%	4%	3%	4%	11%	4%	0%	1%	4%
Prefer not to answer	2%	1%	1%	2%	2%	1%	1%	3%	6%	2%	2%	1%	3%	0%	1%	1%	0%	6%	1%	2%	0%	2%
Trefer not to diswer	270	170	170	270	270	1/0	1/0	370	070	2/0	270	1/0	370	070	170	170	070	070	170	270	070	+ -/-
Q10. Do you intend to invest between toda	v through 2	017 in an	v fixed ass	ets for vo	ur compa	nv des	igned :	to mee	t grow	ing dei	mand red	duce co	osts or	enhanc	e producti	vitv?		I				
Zeo. 20 you miena io meest zeineen ious			, med do	70.00.70		,		gion			Cluster		1	ompan	•			Industi	rv		Rev	enue
	Upstate	Upstate	Upstate	Upstate	Upstate		1,05				Ciustei			51 to	More	Eng &		Indust	, 	Whole	Up to	
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Yes	51%	55%	58%	52%	52%	54%	52%	48%	46%	55%	52%	40%	43%	63%	69%	62%	71%	40%	43%	36%	49%	519
No	36%	34%	31%	36%	38%	32%	36%	42%	40%	31%	36%	48%	44%	27%	22%	32%	21%	43%	42%	48%	37%	36%
Not sure	13%	11%	11%	12%	11%	15%	12%	9%	14%	14%	12%	12%	13%	10%	10%	6%	9%	17%	15%	17%	14%	129
																						1
Q11. (If investing in fixed assessts) What is	he main w	ay you ex	pect to fin	ance thos	e assets?										l	L						
,							Res	gion			Cluster		C	ompan	y Size			Industi	ry		Rev	enue
	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &			ĺ	Whole	Up to	
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Internally generated funds	59%	60%	63%	57%	58%	59%	68%	57%	52%	52%	68%	45%	60%	59%	61%	60%	67%	63%	56%	47%	46%	62%
Borrow from a financial institution	27%	31%	31%	34%	33%	34%	18%	32%	24%	34%	19%	39%	24%	33%	32%	29%	22%	16%	30%	33%	34%	26%
Private equity	6%	4%	2%	2%	3%	1%	8%	6%	9%	8%	5%	9%	8%	2%	4%	6%	4%	11%	7%	7%	11%	5%
Not sure	7%	5%	4%	7%	6%	5%	6%	4%	15%	6%	8%	6%	7%	6%	4%	4%	7%	11%	8%	13%	9%	7%
Q12. Now thinking about the people that w	ork for you	ır compan	v, betwee	n today a	nd the en	d of 20	17, do	you pl	an to	.?					!	ļ.	!				!	
							Res	ion			Cluster		C	ompan	y Size			Industi	ry		Rev	enue
	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &			ĺ	Whole	Up to	
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Substantially increase your workforce	2%	1%	2%	1%	1%	2%	3%	0%	1%	2%	1%	1%	1%	1%	1%	3%	1%	0%	2%	0%	3%	1%
Moderately increase your workforce	37%	32%	30%	27%	26%	40%	37%	37%	32%	55%	31%	23%	33%	49%	46%	54%	36%	34%	39%	24%	41%	37%
Remain about the same	52%	57%	59%	59%	58%	50%	50%	53%	60%	40%	61%	49%	57%	41%	45%	36%	49%	53%	50%	71%	45%	539
Decrease your workforce	8%	9%	9%	12%	15%	6%	10%	8%	6%	2%	5%	27%	8%	8%	7%	5%	12%	11%	8%	5%	11%	7%
Prefer not to answer	1%	1%	1%	1%	1%	1%	0%	2%	1%	1%	2%	0%	1%	1%	1%	3%	3%	2%	1%	0%	0%	2%
	1,0	1/0	1 -/-	1,0	1/0	1 -/-	0,0		1 7/0	1,0		0,0		1 1/0		3,0	3,0	-/-	1/0	0,0	0,0	-/0

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Q13. Now thinking about other challenges	that your co	ompany fa	ices, whic	h of the fo	llowing a	re you	conce	rned w	ith?													
							Re	gion			Cluster		C	Compan	y Size			Indust	ry		Rev	enue
	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M-
Existing U.S. competition	27%	25%	29%	25%	27%	32%	28%	26%	18%	24%	30%	24%	24%	36%	31%	22%	35%	28%	23%	36%	18%	29%
Governmental regulation	68%	68%	69%	70%	69%	63%	73%	71%	68%	65%	64%	82%	65%	69%	78%	72%	69%	72%	64%	55%	56%	70%
Taxation	57%	65%	65%	67%	67%	57%	58%	60%	53%	55%	57%	61%	61%	51%	51%	67%	55%	83%	42%	62%	51%	59%
Foreign competition	9%	11%	12%	12%	12%	10%	10%	9%	7%	7%	12%	6%	10%	5%	8%	8%	26%	6%	3%	10%	6%	10%
Energy costs	24%	19%	30%	31%	44%	21%	24%	27%	26%	22%	25%	24%	25%	22%	24%	21%	28%	36%	17%	33%	27%	23%
Risk management	22%	26%	22%	21%	22%	24%	24%	20%	21%	25%	20%	22%	20%	22%	31%	31%	14%	13%	27%	12%	21%	22%
Adverse economic conditions	42%	48%	46%	55%	65%	38%	43%	49%	35%	34%	40%	57%	42%	36%	41%	37%	41%	57%	36%	50%	41%	42%
Health care costs	79%	78%	77%	80%	79%	76%	78%	84%	82%	81%	77%	83%	77%	85%	82%	85%	81%	70%	82%	83%	77%	79%
Global political instability	12%	15%	16%	15%	22%	13%	11%	14%	7%	16%	11%	10%	11%	12%	11%	10%	19%	4%	12%	12%	8%	13%
Rising supplier costs	27%	25%	35%	39%	42%	22%	24%	34%	31%	22%	31%	24%	28%	26%	23%	28%	35%	30%	19%	43%	34%	25%
Human resources	36%	38%	30%	27%	24%	36%	41%	30%	40%	36%	34%	44%	30%	45%	52%	33%	28%	30%	46%	36%	30%	38%
Cash flow	28%	26%	29%	35%	35%	30%	24%	24%	33%	29%	27%	27%	32%	17%	20%	27%	19%	40%	33%	26%	41%	25%
Ability to obtain suitable financing	8%	8%	8%	10%	13%	9%	6%	9%	11%	8%	8%	10%	9%	5%	7%	6%	8%	21%	8%	2%	7%	9%
U.S. trade agreements	8%	NA	NA	NA	NA	6%	7%	14%	7%	6%	7%	15%	8%	8%	8%	6%	9%	11%	3%	17%	11%	7%
Prefer not to answer	1%	0%	0%	0%	0%	1%	0%	1%	0%	1%	1%	0%	1%	0%	0%	0%	1%	2%	1%	0%	1%	1%
Q14A. Specifically, to what degree does go	vernmental	regulatio	n in each	of the follo	owing are	as con	cern y	ou? - Ei	mployi	ment &	Labor		•	•				•	•	•	•	
							Re	gion			Cluster		C	ompan	y Size			Indust	ry		Rev	enue
	Upstate												50 or	51 to	More	Eng &				Whole	Up to	
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M-
A great deal	60%					57%	62%	66%	57%	52%	62%	70%	54%	73%	69%	62%	61%	70%	60%	40%	58%	61%
Some	30%					34%	29%	23%	35%	36%	30%	19%	34%	23%	27%	32%	33%	23%	27%	40%	34%	29%
Not very much	8%					8%	8%	9%	8%	9%	8%	9%	10%	4%	4%	7%	7%	4%	11%	19%	8%	8%
Not at all	1%					1%	1%	1%	0%	3%	0%	2%	2%	0%	0%	0%	0%	2%	3%	0%	0%	2%
Q14B. Specifically, to what degree does go	vernmental	regulatio	n in each o	of the follo	owing are	as cond	cern yo	ou? - Er	nvironi	mental	ı	1					1	1		ı	1	
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,								gion			Cluster		С	ompan	v Size			Indust	rv		Rev	enue
	Upstate												50 or		More	Eng &			ĺ	Whole	Up to	
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M-
A great deal	24%					22%	25%	33%	19%	21%	23%	33%	27%	22%	21%	38%	29%	29%	14%	26%	21%	25%
Some	32%					29%	33%	32%	31%	28%	36%	28%	29%	36%	33%	42%	32%	40%	31%	24%	26%	33%
Not very much	31%					36%	28%	28%	36%	32%	30%	34%	30%	34%	35%	18%	32%	18%	33%	38%	37%	30%
Not at all	13%					14%	15%	6%	14%	18%	11%	6%	14%	8%	11%	1%	6%	13%	22%	12%	16%	12%
Total an	1370					11/0	1370	070	11/0	1070	11/0	070	11/0	0,0	11/0	170	070	1370	22/0	12/0	1070	12/0
Q14C. Specifically, to what degree does go	vernmental	regulation	n in each (of the follo	owing are	as cond	ern vo	1117 - Pi	niect/	land us	ie.	<u> </u>		l	l		<u> </u>	1	<u> </u>	<u> </u>	1	_!
Q1-en specimenty) to triat degree does go		Legulation	l III cacii (gion	oject,	10110 0	Cluster		_	compan	v Size			Indust	rv		Rev	enue
	Upstate							5.0			Ciustei		50 or		More	Eng &		I	1	Whole	Up to	
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M-
A great deal	14%					16%	14%	17%	4%	10%	14%	16%	15%	13%	10%	27%	9%	20%	8%	10%	16%	13%
A SI CUL UCUI	22%					21%	19%	24%	26%	21%	22%	25%	20%	25%	25%	35%	19%	33%	12%	18%	17%	23%
						L / 0	12/0	24/0	20/0	Z 1 /0	22/0	23/0	20/0	23/0	23/0	33/0	13/0	_	12/0	10/0		
Some						40%	120/	20%	120/	/120/	20%	150/	/110/	120/	1/10/	21%	E 10/	270/	1/10/	15%	120/	//∩0/
	41%					40% 23%	43% 25%	39% 20%	43% 27%	42% 27%	38% 26%	45% 14%	41% 23%	43% 19%	44% 21%	31% 6%	51% 21%	27%	44% 36%	45% 28%	43% 23%	40% 24%

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

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

							Re	gion			Cluster		C	ompany	/ Size			Industr	У		Reve	enue
	Upstate							ĺ					50 or	51 to	More	Eng &				Whole	Up to	
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5N
A great deal	18%					16%	21%	20%	15%	17%	18%	20%	17%	13%	25%	11%	11%	12%	24%	22%	10%	199
Some	28%					31%	26%	30%	22%	27%	28%	33%	32%	30%	19%	31%	25%	49%	23%	12%	31%	289
Not very much	39%					42%	39%	41%	37%	39%	40%	39%	36%	48%	48%	49%	51%	26%	34%	46%	41%	399
Not at all	14%					11%	14%	9%	26%	17%	15%	9%	15%	9%	9%	9%	13%	14%	19%	20%	18%	149
Q14E. Specifically, to what de	gree does governmental	regulation	n in each c	of the follo	wing are	as cond	ern yo	u? - Co	nsume	er affai	rs											
							Re	gion			Cluster		С	ompany	/ Size			Industr	У		Reve	enue
	Upstate												50 or	51 to	More	Eng &				Whole	Up to	
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5N
A great deal	15%					17%	15%	13%	14%	13%	15%	18%	14%	15%	21%	11%	9%	17%	13%	15%	13%	169
Some	28%					24%	28%	34%	26%	27%	27%	32%	26%	23%	38%	23%	18%	40%	33%	29%	25%	299
Not very much	39%					42%	38%	42%	34%	39%	40%	35%	40%	48%	33%	49%	54%	26%	31%	41%	40%	389
Not at all	18%					17%	19%	11%	26%	20%	18%	15%	20%	15%	8%	17%	18%	17%	24%	15%	22%	18
O14F. Specifically, to what de	gree does governmental	regulation	in each c	of the follo	wing are	es conc	ern vo	uı? - Sa	fetv &	Health	1						l		<u>l</u>			<u> </u>
Q14F. Specifically, to what de	gree does governmental	regulation	in each c	of the follo	owing area	as conc		u? - Sa gion	fety &	Health	Cluster		С	ompany	/ Size			Industr	У		Reve	enue
Q14F. Specifically, to what de	gree does governmental Upstate	regulation	n in each c	of the follo	owing area	as conc			fety &	Health				ompany 51 to	/ Size More	Eng &		Industr	у	Whole	Reve	enue
Q14F. Specifically, to what de		regulation	n in each c	of the follo	owing area	as conc			-	Health		Low				Eng & Constr	Manuf	Industr Retail	y Service	Whole		
Q14F. Specifically, to what dep	Upstate	regulation	in each c	of the follo	owing area		Re	gion Roch			Cluster	Low 46%	50 or	51 to	More	_					Up to	\$5N
	Upstate 2016	regulation	in each c	of the follo	owing area	Alb	Re _i	gion Roch	Syr	High	Cluster Middle		50 or less	51 to 100	More than 100	Constr	Manuf	Retail	Service	& Dist	Up to \$5M	\$5N
A great deal	Upstate 2016 34%	regulation	n in each c	of the follo	owing area	Alb 28%	Reg Buff 34%	Roch 43%	Syr 34%	High 24%	Cluster Middle 36%	46%	50 or less 33%	51 to 100 38%	More than 100 34%	Constr 51%	Manuf 36%	Retail 25%	Service 30%	& Dist 33%	Up to \$5M 30%	\$5N 359 439
A great deal Some	Upstate 2016 34% 41%	regulation	n in each o	of the follo	owing area	Alb 28% 48%	Rep Buff 34% 39%	Roch 43% 41%	Syr 34% 37%	High 24% 45%	Middle 36% 42%	46% 33%	50 or less 33% 42%	51 to 100 38% 47%	More than 100 34% 40%	51% 36%	Manuf 36% 45%	Retail 25% 48%	Service 30% 41%	& Dist 33% 38%	Up to \$5M 30% 36%	\$5M 35% 43% 18% 5%
A great deal Some Not very much Not at all	Upstate 2016 34% 41% 18% 7%					Alb 28% 48% 19% 6%	Rep Buff 34% 39% 22% 6%	Roch 43% 41% 13% 4%	Syr 34% 37% 19% 10%	High 24% 45% 18% 12%	Middle 36% 42% 18% 4%	46% 33% 19% 3%	50 or less 33% 42% 19% 6%	51 to 100 38% 47% 12% 4%	More than 100 34% 40% 21% 5%	Constr 51% 36% 9% 4%	Manuf 36% 45% 13% 5%	Retail 25% 48% 16% 11%	Service 30% 41% 21% 8%	& Dist 33% 38% 24% 5%	Up to \$5M 30% 36% 21% 13%	\$5M 35% 43% 18% 5%
A great deal Some Not very much Not at all Q15. Thinking specifically abo	Upstate 2016 34% 41% 18% 7% ut New York and the rela	tionship k	petween t	he state g		Alb 28% 48% 19% 6%	Rep Buff 34% 39% 22% 6%	Roch 43% 41% 13% 4%	Syr 34% 37% 19% 10%	High 24% 45% 18% 12%	Middle 36% 42% 18% 4%	46% 33% 19% 3%	50 or less 33% 42% 19% 6%	51 to 100 38% 47% 12% 4%	More than 100 34% 40% 21% 5%	Constr 51% 36% 9% 4%	Manuf 36% 45% 13% 5%	Retail 25% 48% 16% 11%	Service 30% 41% 21% 8%	& Dist 33% 38% 24% 5%	Up to \$5M 30% 36% 21% 13%	\$5M 359 439 189 5%
A great deal Some Not very much Not at all	Upstate 2016 34% 41% 18% 7% ut New York and the rela	tionship k	petween t	he state g		Alb 28% 48% 19% 6%	Rep Buff 34% 39% 22% 6% busine	Roch 43% 41% 13% 4%	Syr 34% 37% 19% 10%	High 24% 45% 18% 12%	Middle 36% 42% 18% 4% all would	46% 33% 19% 3%	50 or less 33% 42% 19% 6%	51 to 100 38% 47% 12% 4%	More than 100 34% 40% 21% 5% ment of the	Constr 51% 36% 9% 4%	Manuf 36% 45% 13% 5%	Retail 25% 48% 16% 11%	Service 30% 41% 21% 8%	& Dist 33% 38% 24% 5%	Up to \$5M 30% 36% 21% 13%	\$5N 359 439 189 5% or
A great deal Some Not very much Not at all Q15. Thinking specifically abo	Upstate 2016 34% 41% 18% 7% ut New York and the relast climate in which compa	tionship k	petween t	he state g succeed?	overnmei	Alb 28% 48% 19% 6%	Rep Buff 34% 39% 22% 6% busine	Roch 43% 41% 13% 4%	Syr 34% 37% 19% 10%	High 24% 45% 18% 12%	Middle 36% 42% 18% 4%	46% 33% 19% 3% you sa	50 or less 33% 42% 19% 6% cy the a	51 to 100 38% 47% 12% 4%	More than 100 34% 40% 21% 5% ment of the	Constr 51% 36% 9% 4%	Manuf 36% 45% 13% 5%	Retail 25% 48% 16% 11%	Service 30% 41% 21% 8%	& Dist 33% 38% 24% 5%	Up to \$5M 30% 36% 21% 13% ood, fair	\$5M 359 439 189 5%
A great deal Some Not very much Not at all Q15. Thinking specifically abo	Upstate 2016 34% 41% 18% 7% ut New York and the rela	tionship k	petween t	he state g		Alb 28% 48% 19% 6%	Rep Buff 34% 39% 22% 6% busine	Roch 43% 41% 13% 4%	Syr 34% 37% 19% 10%	High 24% 45% 18% 12%	Middle 36% 42% 18% 4% all would	46% 33% 19% 3% you sa	50 or less 33% 42% 19% 6% C	51 to 100 38% 47% 12% 4%	More than 100 34% 40% 21% 5% ment of the	Constr 51% 36% 9% 4%	Manuf 36% 45% 13% 5%	Retail 25% 48% 16% 11%	Service 30% 41% 21% 8%	& Dist 33% 38% 24% 5%	Up to \$5M 30% 36% 21% 13%	\$5N 359 439 189 59 or
A great deal Some Not very much Not at all Q15. Thinking specifically abo	Upstate 2016 34% 41% 18% 7% ut New York and the relast climate in which compa	tionship k nnies like y Upstate	petween t yours will Upstate	he state g succeed? Upstate	overnmen	Alb 28% 48% 19% 6%	Rep Buff 34% 39% 22% 6% busine	Roch 43% 41% 13% 4% esses like	Syr 34% 37% 19% 10%	High 24% 45% 18% 12%	Niddle 36% 42% 18% 4% all would Cluster	46% 33% 19% 3% you sa	50 or less 33% 42% 19% 6% cy the a	51 to 100 38% 47% 12% 4% governm	More than 100 34% 40% 21% 5% ment of the	Constr 51% 36% 9% 4% Estate of	Manuf 36% 45% 13% 5%	Retail 25% 48% 16% 11% Industr	Service 30% 41% 21% 8% ing an exc	& Dist 33% 38% 24% 5% cellent, go	Up to \$5M 30% 36% 21% 13% pod, fair Reve	\$5N 359 439 189 59
A great deal Some Not very much Not at all Q15. Thinking specifically abo poor job of creating a busines	Upstate 2016 34% 41% 18% 7% ut New York and the relast climate in which compa	tionship k nnies like y Upstate 2015	petween t yours will Upstate 2014	he state g succeed? Upstate 2013	overnmen Upstate 2012	Alb 28% 48% 19% 6% Alb	Rep Buff 34% 39% 22% 6% busine Rep Buff	Roch 43% 41% 13% 4% sses lik	Syr 34% 37% 19% 10% se your	High 24% 45% 18% 12% Fs, over	Middle 36% 42% 18% 4% all would Cluster	46% 33% 19% 3% you sa	50 or less 33% 42% 19% 6% C C 50 or less	51 to 100 38% 47% 12% 4% governm 51 to 100	More than 100 34% 40% 21% 5% ment of the y Size More than 100	Constr 51% 36% 9% 4% Estate of Constr	Manuf 36% 45% 13% 5%	Retail 25% 48% 16% 11% rk is doi	Service 30% 41% 21% 8% ing an exc	8 Dist 33% 38% 24% 5% cellent, go	Up to \$5M 30% 36% 21% 13% ood, fair Reversible Up to \$5M	\$5N 35' 43' 18' 59' or enue \$5N
A great deal Some Not very much Not at all Q15. Thinking specifically abo poor job of creating a busines Excellent Good	Upstate 2016 34% 41% 18% 7% ut New York and the relass climate in which compa	tionship k nnies like y Upstate 2015 1%	Detween to yours will Upstate 2014 1%	he state g succeed? Upstate 2013	Upstate 2012	Alb 28% 48% 19% 6% Alb 1%	Rep Buff 34% 39% 22% 6% busine Rep Buff 2%	Roch 43% 41% 13% 4% sses lik gion Roch 1%	Syr 34% 37% 19% 10% Syr 0%	High 24% 45% 18% 12% s, over High 2%	Middle 36% 42% 18% 4%	46% 33% 19% 3% you sa Low 0%	50 or less 33% 42% 19% 6% CC 50 or less 1%	51 to 100 38% 47% 12% 4% 30vernm 51 to 100 0%	More than 100 34% 40% 21% 5% ment of the y Size More than 100 1%	Constr 51% 36% 9% 4% e State of Eng & Constr 0%	Manuf 36% 45% 13% 5% F New Yo Manuf 0%	Retail 25% 48% 16% 11% rk is doi Industr	Service 30% 41% 21% 8% ing an exc	& Dist 33% 38% 24% 5% rellent, go Whole & Dist 0%	Up to \$5M 30% 36% 21% 13% od, fair Reve Up to \$5M 3%	\$5N 359 439 189 59 or enue \$5N 19
A great deal Some Not very much Not at all Q15. Thinking specifically abo poor job of creating a busines	Upstate	Upstate 2015 1% 4%	Detween to yours will Upstate 2014 1% 4%	he state g succeed? Upstate 2013 1% 7%	Upstate 2012 1% 9%	Alb 28% 48% 19% 6% at and 1% 5%	Rep Buff 34% 39% 22% 6% busine Rep Buff 2% 10%	Roch 43% 41% 13% 4% ssess like gion Roch 1% 7%	Syr 34% 37% 19% 10% See your Syr 0% 8%	High 24% 45% 12% 12% 12% 12% 12% 13%	Middle 36% 42% 18% 4% all would Cluster Middle 0% 5%	46% 33% 19% 3% you sa Low 0% 4%	50 or less 33% 42% 19% 6% 50 or less 1% 8%	51 to 100 38% 47% 12% 4% governm 51 to 100 0% 8%	More than 100 34% 40% 21% 5% ment of the y Size More than 100 1% 8%	Constr 51% 36% 9% 4% Estate of Constr 0% 1%	Manuf 36% 45% 13% 5% F New Yo Manuf 0% 8%	Retail 0% 6%	Service 30% 41% 21% 8% ing an exc	& Dist 33% 38% 24% 5% rellent, go Whole & Dist 0% 2%	Up to \$5M 30% 36% 21% 13% od, fair Reve Up to \$5M 3% 6%	\$5N 35° 43° 18° 5° or

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

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

		<u> </u>					Reg	gion		<u> </u>	Cluster		c	ompan	y Size			Industr	у		Rev	enue
	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	Upstate 2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Dist	Up to \$5M	\$5N
Personal Income Tax Reform	55%	54%	NA	NA	NA	58%	55%	53%	47%	52%	60%	46%	57%	50%	57%	53%	53%	60%	51%	71%	49%	569
Business Income Tax Reform	62%	63%	NA	NA	NA	60%	66%	60%	60%	61%	64%	59%	66%	60%	53%	68%	67%	68%	51%	64%	54%	639
Estate Tax Reform	31%	34%	NA	NA	NA	33%	34%	30%	24%	30%	29%	35%	31%	38%	24%	28%	37%	53%	21%	36%	17%	339
Sales Tax Reform	22%	25%	NA	NA	NA	21%	24%	23%	22%	19%	22%	28%	26%	12%	20%	22%	15%	40%	16%	31%	18%	239
Infrastructure Development	43%	42%	42%	32%	37%	49%	45%	41%	35%	48%	43%	35%	42%	49%	42%	49%	41%	32%	46%	38%	45%	439
Business Development Incentives	36%	36%	38%	43%	47%	33%	39%	39%	35%	41%	34%	32%	38%	32%	35%	33%	45%	40%	35%	40%	39%	35%
Ethics Reform	52%	42%	40%	39%	35%	54%	58%	53%	36%	51%	51%	54%	52%	46%	55%	47%	51%	47%	56%	55%	45%	53%
Spending Cuts	51%	58%	64%	72%	74%	51%	50%	61%	44%	45%	53%	56%	52%	49%	49%	51%	55%	47%	47%	57%	39%	54%
Other	13%	14%	16%	11%	17%	15%	14%	8%	15%	11%	12%	22%	12%	13%	18%	15%	6%	15%	15%	10%	17%	13%
Prefer not to answer	1%	0%	0%	0%	0%	1%	1%	0%	1%	2%	1%	0%	1%	0%	1%	1%	1%	0%	2%	0%	0%	1%
Q17. How confident are you in the ability of	the gover	nment of	he State	of New Yo	rk to impi	rove th	e busi	ness cli	mate	for bus	inesses li	ke you	rs here	in New	York over	the next	t year? A	re you	.?			
							Reg	gion			Cluster		C	ompan	y Size			Industr	у		Revo	enue
	Upstate	Upstate	Upstate	Upstate	Upstate								50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Very confident	1%	1%	1%	0%	2%	0%	2%	1%	3%	2%	1%	0%	1%	0%	2%	0%	1%	4%	1%	0%	1%	1%
Somewhat confident	14%	12%	12%	15%	23%	13%	16%	13%	13%	24%	12%	2%	15%	17%	11%	14%	12%	11%	18%	7%	17%	13%
Not very confident	48%	50%	47%	48%	44%	53%	44%	46%	53%	50%	53%	34%	47%	47%	51%	44%	53%	47%	50%	50%	45%	49%
Not at all confident	36%	37%	38%	37%	31%	34%	39%	39%	32%	22%	34%	63%	37%	36%	36%	42%	35%	36%	30%	43%	35%	36%
Prefer not to answer	1%	1%	1%	1%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	2%	1%	0%	1%	1%
Q18. And thinking about the efforts of the fe	ederal gov	ernment,	overall wo	ould you s	ay the fed	eral go	vernn	nent is	doing	an exce	ellent, go	od, fair	or poo	or job o	f creating a	busines	s climate	in whice	h compa	nies like y	ours wi	.II
succeed?																						
							Reg	ion			CI		_		v Ci-o			the distance of				
	Upstate	Upstate						,			Cluster		C	ompan	y Size			Industr	у		Reve	enue
		Opstate	Upstate	Upstate	Upstate						Cluster		50 or		More	Eng &		industr	y	Whole	Reve Up to	enue
	2016	2015	Upstate 2014	Upstate 2013	Upstate 2012	Alb		Roch	Syr	High	Middle	Low			•	Eng & Constr	Manuf		Service	Whole & Dist		
Excellent	2016 1%		•			Alb			Syr 0%	High		Low 1%	50 or	51 to	More	_					Up to	
Excellent Good		2015	2014	2013	2012		Buff	Roch	_		Middle		50 or less	51 to 100	More than 100	Constr	Manuf	Retail	Service	& Dist	Up to \$5M	\$5M
	1%	2015 0%	2014 0%	2013	2012 1%	1%	Buff	Roch	0%	0%	Middle	1%	50 or less 1%	51 to 100 0%	More than 100	Constr 0%	Manuf 1%	Retail 0%	Service	& Dist 0%	Up to \$5M	\$5M- 0% 5%
Good	1% 6%	2015 0% 2%	2014 0% 4%	2013 0% 3%	2012 1% 6%	1% 8%	Buff 1% 3%	Roch 1% 7%	0% 6%	0% 8%	Middle 1% 4%	1% 6%	50 or less 1% 6%	51 to 100 0% 8%	More than 100 0% 5%	0% 3%	Manuf 1% 4%	Retail 0% 6%	Service 1% 8%	& Dist 0% 0%	Up to \$5M 3% 8%	\$5M- 0% 5% 29%
Good Fair	1% 6% 29%	2015 0% 2% 22%	2014 0% 4% 21%	2013 0% 3% 18%	2012 1% 6% 21%	1% 8% 31%	Buff 1% 3% 31%	Roch 1% 7% 22%	0% 6% 32%	0% 8% 38%	Middle 1% 4% 30%	1% 6% 13%	50 or less 1% 6% 33%	51 to 100 0% 8% 27%	More than 100 0% 5% 24%	0% 3% 27%	Manuf 1% 4% 33%	Retail 0% 6% 26%	Service 1% 8% 35%	& Dist 0% 0% 17%	Up to \$5M 3% 8% 30%	\$5M- 0% 5% 29%
Good Fair Poor	1% 6% 29% 59%	2015 0% 2% 22% 73%	2014 0% 4% 21% 72%	2013 0% 3% 18% 76%	2012 1% 6% 21% 71%	1% 8% 31% 58%	Buff 1% 3% 31% 61%	Roch 1% 7% 22% 64%	0% 6% 32% 58%	0% 8% 38% 47%	Middle 1% 4% 30% 60%	1% 6% 13% 78%	50 or less 1% 6% 33% 57%	51 to 100 0% 8% 27% 62%	More than 100 0% 5% 24% 67%	Constr 0% 3% 27% 67%	Manuf 1% 4% 33% 56%	Retail 0% 6% 26% 60%	Service 1% 8% 35% 51%	& Dist 0% 0% 17% 79%	Up to \$5M 3% 8% 30% 54%	\$5M- 0% 5% 29% 60%
Good Fair Poor	1% 6% 29% 59% 5%	2015 0% 2% 22% 73% 2%	2014 0% 4% 21% 72% 2%	2013 0% 3% 18% 76% 3%	2012 1% 6% 21% 71% 2%	1% 8% 31% 58% 1%	Buff 1% 3% 31% 61% 5%	Roch 1% 7% 22% 64% 6%	0% 6% 32% 58% 4%	0% 8% 38% 47% 7%	Middle 1% 4% 30% 60% 5%	1% 6% 13% 78% 1%	50 or less 1% 6% 33% 57% 4%	51 to 100 0% 8% 27% 62% 4%	More than 100 0% 5% 24% 67% 4%	Constr 0% 3% 27% 67% 4%	Manuf 1% 4% 33% 56%	Retail 0% 6% 26% 60%	Service 1% 8% 35% 51%	& Dist 0% 0% 17% 79%	Up to \$5M 3% 8% 30% 54%	\$5M- 0% 5% 29% 60%
Good Fair Poor Don't know	1% 6% 29% 59% 5%	2015 0% 2% 22% 73% 2%	2014 0% 4% 21% 72% 2%	2013 0% 3% 18% 76% 3%	2012 1% 6% 21% 71% 2%	1% 8% 31% 58% 1%	Buff 1% 3% 31% 61% 5%	Roch 1% 7% 22% 64% 6%	0% 6% 32% 58% 4%	0% 8% 38% 47% 7%	Middle 1% 4% 30% 60% 5%	1% 6% 13% 78% 1%	50 or less 1% 6% 33% 57% 4%	51 to 100 0% 8% 27% 62% 4%	More than 100 0% 5% 24% 67% 4% xt year? A	Constr 0% 3% 27% 67% 4%	Manuf 1% 4% 33% 56%	Retail 0% 6% 26% 60%	Service 1% 8% 35% 51% 5%	& Dist 0% 0% 17% 79%	Up to \$5M 3% 8% 30% 54% 6%	\$5M- 0% 5% 29% 60%
Good Fair Poor Don't know	1% 6% 29% 59% 5%	2015 0% 2% 22% 73% 2%	2014 0% 4% 21% 72% 2%	2013 0% 3% 18% 76% 3%	2012 1% 6% 21% 71% 2%	1% 8% 31% 58% 1%	Buff 1% 3% 31% 61% 5%	Roch 1% 7% 22% 64% 6% usiness	0% 6% 32% 58% 4%	0% 8% 38% 47% 7%	Middle 1% 4% 30% 60% 5%	1% 6% 13% 78% 1%	50 or less 1% 6% 33% 57% 4%	51 to 100 0% 8% 27% 62% 4% er the ne	More than 100 0% 5% 24% 67% 4% xt year? A	Constr 0% 3% 27% 67% 4%	Manuf 1% 4% 33% 56%	Retail 0% 6% 26% 60% 9%	Service 1% 8% 35% 51% 5%	& Dist 0% 0% 17% 79%	Up to \$5M 3% 8% 30% 54% 6%	\$5M 0% 5% 29% 60% 5%
Good Fair Poor Don't know	1% 6% 29% 59% 5% the federa	2015 0% 2% 22% 73% 2% 2%	2014 0% 4% 21% 72% 2%	2013 0% 3% 18% 76% 3%	2012 1% 6% 21% 71% 2% business	1% 8% 31% 58% 1%	Buff 1% 3% 31% 61% 5% e for b	Roch 1% 7% 22% 64% 6% usiness	0% 6% 32% 58% 4%	0% 8% 38% 47% 7%	Middle 1% 4% 30% 60% 5%	1% 6% 13% 78% 1%	50 or less 1% 6% 33% 57% 4%	51 to 100 0% 8% 27% 62% 4% er the ne	More than 100 0% 5% 24% 67% 4% ext year? Au	Constr 0% 3% 27% 67% 4%	Manuf 1% 4% 33% 56%	Retail 0% 6% 26% 60% 9% Industr	Service 1% 8% 35% 51% 5%	& Dist 0% 0% 17% 79% 5%	Up to \$5M 3% 8% 30% 54% 6%	\$5M 0% 5% 29% 60% 5%
Good Fair Poor Don't know	1% 6% 29% 59% 5% the federa	2015 0% 2% 22% 73% 2% 28 al governn Upstate	2014 0% 4% 21% 72% 2% ment to im	2013 0% 3% 18% 76% 3% prove the	2012 1% 6% 21% 71% 2% business	1% 8% 31% 58% 1%	Buff 1% 3% 31% 61% 5% e for b	Roch 1% 7% 22% 64% 6% usiness	0% 6% 32% 58% 4%	0% 8% 38% 47% 7% e yours	Middle	1% 6% 13% 78% 1%	50 or less 1% 6% 33% 57% 4% rk over	51 to 100 0% 8% 27% 62% 4% r the ne compan 51 to	More than 100 0% 5% 24% 67% 4% xt year? Ar y Size More	Constr 0% 3% 27% 67% 4% Te you: Eng &	Manuf 1% 4% 33% 56% 5%	Retail 0% 6% 26% 60% 9% Industr	Service 1% 8% 35% 51% 5%	& Dist 0% 0% 17% 79% 5% Whole	Up to \$5M 3% 8% 30% 54% 6%	\$5M 0% 5% 29% 60% 5% enue \$5M
Good Fair Poor Don't know Q19. How confident are you in the ability of	1% 6% 29% 59% 5% the federa Upstate 2016	2015 0% 2% 22% 73% 2% Displayed the second of the se	2014 0% 4% 21% 72% 2% ment to im Upstate 2014	2013 0% 3% 18% 76% 3% prove the Upstate 2013	2012 1% 6% 21% 71% 2% business Upstate 2012	1% 8% 31% 58% 1% climate	Buff 1% 3% 31% 61% 5% e for b Reg	Roch 1% 7% 22% 64% 6% usiness gion Roch	0% 6% 32% 58% 4% sees like	0% 8% 38% 47% 7% e yours	Middle	1% 6% 13% 78% 1%	50 or less 1% 6% 33% 57% 4% rk over	51 to 100 0% 8% 27% 62% 4% er the ne compan 51 to 100	More than 100 0% 5% 24% 67% 4% xt year? Ar y Size More than 100	Constr	Manuf 1% 4% 33% 56% 5%	Retail 0% 6% 26% 60% 9% Industr	Service 1% 8% 35% 51% 5% y Service	& Dist 0% 0% 17% 79% 5% Whole & Dist	Up to \$5M 3% 8% 30% 54% 6% Reve	\$5M 0% 5% 29% 60% 5% enue \$5M 5%
Good Fair Poor Don't know Q19. How confident are you in the ability of Very confident	1% 6% 29% 59% 5% the federa Upstate 2016 5%	2015 0% 2% 22% 73% 2% al governn Upstate 2015 0%	2014 0% 4% 21% 72% 2% ment to im Upstate 2014 1%	2013 0% 3% 18% 76% 3% prove the Upstate 2013 0%	2012 1% 6% 21% 71% 2% business Upstate 2012 1%	1% 8% 31% 58% 1% climate	Buff 1% 3% 31% 61% 5% e for b Reg Buff 4%	Roch 1% 7% 22% 64% 6% usiness gion Roch 6%	0% 6% 32% 58% 4% Sees like	0% 8% 38% 47% 7% e yours High 8%	Middle	1% 6% 13% 78% 1% Low 0%	50 or less 1% 6% 33% 57% 4% rk over 50 or less 7%	51 to 100 0% 8% 27% 62% 4% r the ne compan 51 to 100 3%	More than 100 0% 5% 24% 67% 4% ext year? Ar y Size More than 100 1%	Constr 0% 3% 27% 67% 4% re you: Eng & Constr 4%	Manuf 1% 4% 33% 56% 5% Manuf 4%	Retail 0% 6% 26% 60% 9% Industr	Service 1% 8% 35% 51% 5% y Service 4%	& Dist 0% 0% 17% 79% 5% Whole & Dist 2%	Up to \$5M 3% 8% 30% 54% 6% Reve Up to \$5M 6%	\$5M 0% 5% 29% 60% 5%
Good Fair Poor Don't know Q19. How confident are you in the ability of Very confident Somewhat confident	1% 6% 29% 59% 5% the federa Upstate 2016 5% 27%	2015 0% 2% 22% 73% 2% Displayer nn Upstate 2015 0% 7%	2014 0% 4% 21% 72% 2% ment to im Upstate 2014 1% 8%	2013 0% 3% 18% 76% 3% prove the Upstate 2013 0% 7%	2012 1% 6% 21% 71% 2% business Upstate 2012 1% 13%	1% 8% 31% 58% 1% climate Alb 6% 30%	Buff 1% 3% 31% 61% 5% e for b Reg Buff 4% 34%	Roch 1% 7% 22% 64% 6% usiness gion Roch 6% 18%	0% 6% 32% 58% 4% sees like Syr 4% 25%	0% 8% 38% 47% 7% e yours High 8% 32%	Middle 1% 4% 30% 60% 5% here in N Cluster Middle 5% 29%	1% 6% 13% 78% 1% Low 0% 11%	50 or less 1% 6% 33% 57% 4% rk over 50 or less 7% 26%	51 to 100 0% 8% 27% 62% 4% The ne compan 51 to 100 3% 32%	More than 100 0% 5% 24% 67% 4% ext year? An y Size More than 100 1% 27%	Constr 0% 3% 27% 67% 4% Te you: Eng & Constr 4% 28%	Manuf 1% 4% 33% 56% 5% Manuf 4% 33%	Retail 0% 6% 26% 600% 9% Industr Retail 6% 26%	Service 1% 8% 35% 51% 5% Y Service 4% 24%	& Dist 0% 0% 17% 79% 5% Whole & Dist 2% 21%	Up to \$5M 3% 8% 30% 54% 6% Reve Up to \$5M 6% 25%	\$5M 0% 5% 299 609 5% enue \$5M 279

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

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

							Reg	gion			Cluster		C	ompan	y Size			Industr	у		Rev	enue
	Upstate	Upstate	Upstate	Upstate			_						50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015	2014	2013		Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Improving	22%	21%	24%	15%		23%	33%	14%	13%	41%	15%	5%	20%	27%	25%	23%	17%	13%	28%	14%	24%	21%
Staying the same	57%	56%	56%	55%		61%	48%	61%	57%	50%	66%	44%	58%	55%	58%	51%	64%	60%	53%	57%	52%	57%
Worsening	20%	23%	20%	28%		16%	17%	23%	28%	6%	17%	50%	20%	18%	14%	24%	15%	23%	16%	29%	24%	19%
Prefer not to answer	2%	0%	1%	3%		0%	3%	2%	3%	3%	2%	1%	2%	0%	2%	1%	4%	4%	3%	0%	0%	3%
Q21. And continuing to consider the local m	arket, are	conditions	l s locally in	proving,	staying the	e same	or wo	orsenin	g for b	usines	ses in you	ur indu:	stry?									1
							Reg	gion			Cluster		C	ompan	y Size			Industr	у		Rev	enue
	Upstate	Upstate	Upstate	Upstate									50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015	2014	2013		Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Improving	13%	14%	18%	13%		13%	19%	8%	11%	29%	7%	1%	10%	23%	14%	15%	8%	13%	14%	12%	14%	13%
Staying the same	60%	57%	55%	56%		69%	54%	55%	61%	61%	69%	34%	64%	55%	54%	63%	65%	47%	61%	52%	59%	60%
Worsening	25%	29%	25%	30%		18%	25%	34%	25%	6%	22%	65%	25%	21%	29%	21%	24%	34%	21%	36%	25%	25%
Prefer not to answer	3%	0%	2%	1%		1%	2%	3%	3%	3%	3%	0%	2%	1%	2%	1%	3%	6%	4%	0%	1%	3%
Q22. Which of the following industry sector	do you th	ink will ha	ave a posi	tive impac	t on the e	conom	nic vita	lity of	your g	eograp	hic area i	in the n	ext thi	ree to fi	ve years?							
							Reg	ion			Cluster		С	ompan	y Size			Industr	у		Rev	enue
	Upstate	Upstate	Upstate	Upstate									50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015	2014	2013		Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Education	47%	45%	45%	43%		51%	40%	45%	56%	57%	44%	39%	44%	59%	48%	50%	44%	43%	50%	43%	49%	47%
Tourism	32%	35%	32%	33%		23%	45%	31%	33%	37%	30%	30%	32%	27%	36%	19%	31%	40%	36%	26%	27%	33%
Technology	61%	63%	59%	57%		80%	49%	58%	49%	67%	60%	51%	54%	68%	72%	62%	56%	57%	62%	62%	55%	62%
Transportation	16%	14%	16%	12%		15%	22%	10%	17%	21%	14%	15%	16%	22%	11%	18%	17%	26%	13%	19%	14%	17%
Medical	57%	58%	60%	56%		52%	71%	61%	46%	58%	56%	62%	52%	65%	70%	65%	51%	57%	61%	60%	44%	60%
Green and sustainable energy	26%	30%	26%	24%		22%	29%	23%	32%	34%	22%	20%	25%	29%	23%	18%	32%	19%	36%	10%	24%	26%
Manufacturing	35%	40%	37%	38%		37%	34%	43%	19%	38%	32%	34%	35%	28%	40%	31%	45%	38%	29%	43%	27%	36%
Other	3%	2%	4%	3%		2%	4%	0%	4%	3%	3%	0%	2%	3%	5%	5%	4%	2%	0%	0%	3%	2%
None of the above	7%	6%	7%	6%		4%	6%	8%	11%	4%	9%	6%	9%	3%	2%	4%	6%	11%	6%	12%	8%	7%
Q23. Of those, which SINGLE industry sector	do you th	ink will ha	ve the gre	atest pos	itive impa	ct on t	he ecc	nomic	vitalit	y of yo	ur geogra	l aphic ar	rea in t	he next	three to fi	ve years		ļ				<u> </u>
							Reg	ion			Cluster		С	ompan	y Size			Industr	у		Rev	enue
	Upstate	Upstate	Upstate	Upstate									50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015	2014	2013		Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Education	9%	10%	14%	8%		11%	5%	8%	17%	12%	7%	11%	9%	10%	10%	14%	8%	13%	8%	5%	13%	9%
Tourism	8%	8%	6%	7%		4%	8%	10%	15%	9%	10%	2%	10%	3%	7%	1%	6%	11%	11%	2%	8%	8%
Technology	27%	31%	30%	26%		53%	4%	26%	17%	30%	29%	16%	22%	35%	30%	33%	19%	21%	30%	24%	28%	27%
Transportation	3%	3%	2%	1%		4%	3%	0%	1%	3%	1%	4%	3%	3%	0%	4%	3%	2%	1%	5%	4%	2%
8 4 - d' l	28%	24%	26%	29%		11%	48%	31%	25%	23%	29%	37%	25%	37%	34%	32%	27%	26%	30%	31%	20%	30%
Medical						40/	10%	2%	1%	6%	3%	7%	4%	4%	6%	3%	5%	4%	8%	0%	4%	5%
Medical Green and sustainable energy	5%	7%	4%	3%		4%	10%	270	170	070	370	7 /0	470	770	070	370	370	470	070	070	470	3/0
	5% 12%	7% 15%	4% 16%	3% 16%		10%	14%	14%	10%	11%	11%	17%	15%	6%	10%	6%	26%	13%	8%	21%	11%	+
Green and sustainable energy	1	-										_										12% 1%

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

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

		1	1	1			Re	gion			Cluster		C	ompan	y Size	1		Industi	'y		Rev	enue
	Upstate	Upstate	Upstate	Upstate									50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015	2014	2013		Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Excellent	9%	12%	12%	15%		6%	13%	12%	4%	10%	8%	9%	9%	6%	11%	8%	5%	11%	8%	7%	8%	9%
Good	39%	42%	50%	50%		46%	39%	27%	35%	47%	39%	23%	36%	37%	40%	42%	35%	38%	38%	45%	38%	39%
Fair	40%	34%	29%	26%		37%	34%	44%	50%	32%	39%	52%	42%	41%	40%	31%	46%	36%	42%	40%	44%	39%
Poor	11%	12%	7%	8%		11%	12%	14%	10%	8%	12%	16%	11%	15%	8%	18%	12%	13%	8%	7%	10%	12%
Refused	2%	1%	2%	1%		0%	2%	2%	1%	3%	1%	0%	2%	0%	1%	1%	3%	2%	3%	0%	0%	2%
Q24B. How would you rate your lo	ocal area on each of	the follow	ing - Cons	umer con	fidence																	
							Re	gion			Cluster		C	ompan	y Size			Industi	Υ		Rev	enue
	Upstate	Upstate	Upstate	Upstate									50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015	2014	2013		Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Excellent	2%	2%	2%	1%		2%	2%	1%	3%	3%	1%	1%	2%	0%	2%	1%	1%	11%	1%	0%	4%	2%
Good	41%	38%	32%	27%		48%	37%	43%	29%	51%	41%	23%	42%	44%	34%	46%	37%	36%	37%	45%	48%	39%
Fair	45%	49%	54%	54%		40%	53%	45%	47%	35%	48%	57%	42%	51%	55%	37%	54%	43%	49%	45%	39%	47%
Poor	9%	9%	11%	16%		8%	7%	7%	18%	6%	8%	16%	11%	5%	6%	14%	3%	6%	8%	10%	7%	9%
Refused	3%	2%	2%	2%		2%	2%	3%	3%	4%	2%	2%	3%	0%	2%	1%	5%	4%	4%	0%	1%	3%
•																					1	
Q24C. How would you rate your lo	ocal area on each of t	he follow	ing - Trans	sportation	infrastru	cture																
Q24C. How would you rate your lo	ocal area on each of t				infrastru	cture	Reg	ion			Cluster			ompan	í			Industi	ry			enue
Q24C. How would you rate your lo	Upstate	Upstate	Upstate	Upstate	infrastru									51 to	More	Eng &				Whole	Up to	
Q24C. How would you rate your lo				Upstate 2013	n infrastru	cture		gion Roch	Syr	High	Cluster		50 or less	51 to 100	í	Eng & Constr	Manuf	Retail	y Service	Whole & Dist		\$5M
Q24C. How would you rate your lo	Upstate	Upstate	Upstate	Upstate 2013 5%	n infrastru	Alb	Buff 4%	Roch	1%	2%	Middle 3%	2%	50 or less 3%	51 to 100 1%	More	_	Manuf 4%	Retail 9%			Up to	\$5M 2%
	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	n infrastru	Alb	Buff 4% 43%	Roch 3% 39%	1% 36%	2% 43%	Middle	2% 38%	50 or less 3% 41%	51 to 100	More than 100	Constr		Retail 9% 47%	Service	& Dist	Up to \$5M	\$5M
Excellent	Upstate 2016 3%	Upstate 2015 4%	Upstate 2014 4%	Upstate 2013 5%	n infrastru	Alb	Buff 4% 43% 31%	Roch	1%	2%	Middle 3%	2%	50 or less 3%	51 to 100 1%	More than 100 2%	Constr 1%	4%	Retail 9%	Service 0%	& Dist 2%	Up to \$5M	\$5M 2%
Excellent Good	Upstate 2016 3% 39% 37% 19%	Upstate 2015 4% 40%	Upstate 2014 4% 44%	Upstate 2013 5% 47%	n infrastru	Alb 1% 37%	Buff 4% 43%	Roch 3% 39%	1% 36%	2% 43%	Middle 3% 36%	2% 38%	50 or less 3% 41%	51 to 100 1% 37%	More than 100 2% 37%	1% 33%	4% 38%	Retail 9% 47%	Service 0% 34%	& Dist 2% 48% 33% 14%	Up to \$5M 4% 38%	\$5M 2% 39%
Excellent Good Fair	Upstate 2016 3% 39% 37%	Upstate 2015 4% 40% 40%	Upstate 2014 4% 44% 38%	Upstate 2013 5% 47% 35%	n infrastru	Alb 1% 37% 40%	Buff 4% 43% 31%	Roch 3% 39% 35%	1% 36% 44%	2% 43% 31%	Middle 3% 36% 40%	2% 38% 37%	50 or less 3% 41% 35%	51 to 100 1% 37% 42%	More than 100 2% 37% 36%	1% 33% 36%	4% 38% 42%	Retail 9% 47% 32%	Service 0% 34% 39%	& Dist 2% 48% 33%	Up to \$5M 4% 38% 38%	\$5M 2% 39% 36%
Excellent Good Fair Poor Refused	Upstate 2016 3% 39% 37% 19% 3%	Upstate 2015 4% 40% 40% 15% 2%	Upstate 2014 4% 44% 38% 12% 2%	Upstate 2013 5% 47% 35% 10% 2%		Alb 1% 37% 40% 21%	Buff 4% 43% 31% 18%	Roch 3% 39% 35% 20%	1% 36% 44% 15%	2% 43% 31% 18%	Middle 3% 36% 40% 18%	2% 38% 37% 22%	50 or less 3% 41% 35% 19%	51 to 100 1% 37% 42% 19%	More than 100 2% 37% 36% 22%	Constr 1% 33% 36% 28%	4% 38% 42% 12%	Retail 9% 47% 32% 6%	Service 0% 34% 39% 24%	& Dist 2% 48% 33% 14%	Up to \$5M 4% 38% 38% 20%	\$5M 2% 39% 36% 19%
Excellent Good Fair Poor	Upstate 2016 3% 39% 37% 19% 3%	Upstate 2015 4% 40% 40% 15% 2%	Upstate 2014 4% 44% 38% 12% 2%	Upstate 2013 5% 47% 35% 10% 2%		Alb 1% 37% 40% 21%	Buff 4% 43% 31% 18%	Roch 3% 39% 35% 20%	1% 36% 44% 15%	2% 43% 31% 18%	Middle 3% 36% 40% 18%	2% 38% 37% 22%	50 or less 3% 41% 35% 19%	51 to 100 1% 37% 42% 19%	More than 100 2% 37% 36% 22%	Constr 1% 33% 36% 28%	4% 38% 42% 12%	Retail 9% 47% 32% 6%	Service 0% 34% 39% 24%	& Dist 2% 48% 33% 14%	Up to \$5M 4% 38% 38% 20%	\$5M 2% 39% 36% 19%
Excellent Good Fair Poor Refused	Upstate 2016 3% 39% 37% 19% 3%	Upstate 2015 4% 40% 40% 15% 2%	Upstate 2014 4% 44% 38% 12% 2%	Upstate 2013 5% 47% 35% 10% 2%		Alb 1% 37% 40% 21%	Buff 4% 43% 31% 18% 3%	Roch 3% 39% 35% 20%	1% 36% 44% 15%	2% 43% 31% 18%	Middle 3% 36% 40% 18%	2% 38% 37% 22%	50 or less 3% 41% 35% 19% 3%	51 to 100 1% 37% 42% 19%	More than 100 2% 37% 36% 22% 2%	Constr 1% 33% 36% 28%	4% 38% 42% 12%	Retail 9% 47% 32% 6%	Service 0% 34% 39% 24% 4%	& Dist 2% 48% 33% 14%	Up to \$5M 4% 38% 38% 20% 0%	\$5M 2% 39% 36% 19%
Excellent Good Fair Poor Refused	Upstate 2016 3% 39% 37% 19% 3%	Upstate 2015 4% 40% 40% 15% 2%	Upstate 2014 4% 44% 38% 12% 2%	Upstate 2013 5% 47% 35% 10% 2%		Alb 1% 37% 40% 21%	Buff 4% 43% 31% 18% 3%	Roch 3% 39% 35% 20% 3%	1% 36% 44% 15%	2% 43% 31% 18%	Middle 3% 36% 40% 18% 2%	2% 38% 37% 22%	50 or less 3% 41% 35% 19% 3%	51 to 100 1% 37% 42% 19% 0%	More than 100 2% 37% 36% 22% 2%	Constr 1% 33% 36% 28%	4% 38% 42% 12%	Retail 9% 47% 32% 6% 6%	Service 0% 34% 39% 24% 4%	& Dist 2% 48% 33% 14%	Up to \$5M 4% 38% 38% 20% 0%	\$5M 2% 39% 36% 19% 4% enue
Excellent Good Fair Poor Refused	Upstate 2016 3% 39% 37% 19% 3% 0cal area on each of	Upstate 2015 4% 40% 40% 15% 2%	Upstate 2014 4% 44% 38% 12% 2%	Upstate 2013 5% 47% 35% 10% 2%		Alb 1% 37% 40% 21%	Buff 4% 43% 31% 18% 3%	Roch 3% 39% 35% 20% 3%	1% 36% 44% 15%	2% 43% 31% 18%	Middle 3% 36% 40% 18% 2%	2% 38% 37% 22%	50 or less 3% 41% 35% 19% 3%	51 to 100 1% 37% 42% 19% 0%	More than 100 2% 37% 36% 22% 2%	Constr 1% 33% 36% 28% 1%	4% 38% 42% 12%	Retail 9% 47% 32% 6% 6%	Service 0% 34% 39% 24% 4%	& Dist 2% 48% 33% 14% 2%	Up to \$5M 4% 38% 38% 20% 0%	\$5M 2% 39% 36% 19% 4%
Excellent Good Fair Poor Refused	Upstate 2016 3% 39% 37% 19% 3% 0cal area on each of	Upstate 2015 4% 40% 40% 15% 2% the follow Upstate	Upstate 2014 4% 44% 38% 12% 2%	Upstate 2013 5% 47% 35% 10% 2%		Alb 1% 37% 40% 21% 0%	Buff 4% 43% 31% 18% 3%	Roch 3% 39% 35% 20% 3%	1% 36% 44% 15% 3%	2% 43% 31% 18% 5%	Middle 3% 36% 40% 18% 2%	2% 38% 37% 22% 1%	50 or less 3% 41% 35% 19% 3%	51 to 100 1% 37% 42% 19% 0%	More than 100 2% 37% 36% 22% 2% y Size More	Constr 1% 33% 36% 28% 1%	4% 38% 42% 12% 4%	Retail 9% 47% 32% 6% 6% Industr	Service 0% 34% 39% 24% 4%	& Dist 2% 48% 33% 14% 2%	Up to \$5M 4% 38% 38% 20% 0%	\$5M 2% 39% 36% 19% 4% enue \$5M
Excellent Good Fair Poor Refused Q24D. How would you rate your lo	Upstate 2016 3% 39% 37% 19% 3% ocal area on each of Upstate 2016	Upstate 2015 4% 40% 40% 15% 2% the follow Upstate 2015	Upstate 2014 4% 44% 38% 12% 2%	Upstate 2013 5% 47% 35% 10% 2%		Alb 1% 37% 40% 21% 0%	Buff 4% 43% 31% 18% 3% Rep	Roch 3% 39% 35% 20% 3% Gion Roch	1% 36% 44% 15% 3%	2% 43% 31% 18% 5%	Middle	2% 38% 37% 22% 1%	50 or less 3% 41% 35% 19% 3% CO 50 or less	51 to 100 1% 37% 42% 19% 0%	More than 100 2% 37% 36% 22% 2% W Size More than 100	Constr 1% 33% 36% 28% 1% Eng & Constr	4% 38% 42% 12% 4%	Retail 9% 47% 32% 6% 6%	Service 0% 34% 39% 24% 4%	& Dist 2% 48% 33% 14% 2% Whole & Dist	Up to \$5M 4% 38% 38% 20% 0% Revo	\$5M 2% 39% 36% 19% 4% enue \$5M 7%
Excellent Good Fair Poor Refused Q24D. How would you rate your lo	Upstate 2016 3% 39% 37% 19% 3% ocal area on each of Upstate 2016 7%	Upstate 2015 4% 40% 40% 15% 2% the follow Upstate 2015 8%	Upstate 2014 4% 44% 38% 12% 2%	Upstate 2013 5% 47% 35% 10% 2%		Alb 1% 37% 40% 21% 0% Alb 6%	Buff 4% 43% 31% 18% 3% Rep Buff 16%	Roch 3% 39% 35% 20% 3% gion Roch 2%	1% 36% 44% 15% 3% Syr 0%	2% 43% 31% 18% 5% High 10%	Middle	2% 38% 37% 22% 1% Low 5%	50 or less 3% 41% 35% 19% 3% CC 50 or less 6%	51 to 100 1% 37% 42% 19% 0% Compan 51 to 100 8%	More than 100 2% 37% 36% 22% 2% y Size More than 100 8%	Constr 1% 33% 36% 28% 1% Eng & Constr 5%	4% 38% 42% 12% 4% Manuf 6%	Retail 9% 47% 32% 6% 6%	Service 0% 34% 39% 24% 4% Y Service 4%	& Dist 2% 48% 33% 14% 2% Whole & Dist 10%	Up to \$5M 4% 38% 38% 20% 0% Revo	\$5M 2% 39% 36% 19% 4% enue \$5M 7% 43%
Excellent Good Fair Poor Refused Q24D. How would you rate your lo	Upstate 2016 3% 39% 37% 19% 3% ocal area on each of Upstate 2016 7% 42%	Upstate 2015 4% 40% 40% 15% 2% the follow Upstate 2015 8% 47%	Upstate 2014 4% 44% 38% 12% 2%	Upstate 2013 5% 47% 35% 10% 2%		Alb 1% 37% 40% 21% 0% Alb 6% 39%	Buff 4% 43% 31% 18% 3% Rep Buff 16% 60%	Roch 3% 39% 35% 20% 3% Sion Roch 2% 36%	1% 36% 44% 15% 3% Syr 0% 29%	2% 43% 31% 18% 5% High 10% 39%	Middle	2% 38% 37% 22% 1% Low 5% 49%	50 or less 3% 41% 35% 19% 3% Contraction of the second of the seco	51 to 100 1% 37% 42% 19% 0% 51 to 100 8% 38%	More than 100 2% 37% 36% 22% 2% y Size More than 100 8% 46%	Constr 1% 33% 36% 28% 1% Eng & Constr 5% 33%	4% 38% 42% 12% 4% Manuf 6% 45%	Retail 9% 47% 32% 6% 6% Industr Retail 11% 53%	Service	& Dist 2% 48% 33% 14% 2% Whole & Dist 10% 36%	Up to \$5M 4% 38% 20% 0% Revi Up to \$5M 7% 37%	\$5M 2% 39% 36% 19% 4% enue

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

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

							Re	ion		<u> </u>	Cluster		C	ompan	y Size			Industr	У		Rev	enue
	Upstate	Upstate											50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015				Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Excellent	1%	3%				1%	0%	1%	1%	2%	0%	1%	0%	1%	1%	0%	1%	2%	0%	2%	3%	1%
Good	15%	27%				11%	20%	12%	21%	12%	14%	21%	17%	13%	13%	13%	14%	21%	14%	17%	10%	16%
Fair	35%	38%				32%	37%	39%	36%	33%	39%	28%	35%	36%	41%	41%	40%	30%	31%	33%	32%	35%
Poor	43%	26%				54%	38%	38%	36%	45%	42%	44%	42%	50%	40%	41%	40%	38%	50%	31%	49%	42%
Refused	6%	5%				3%	5%	9%	6%	8%	5%	6%	7%	0%	5%	5%	5%	9%	5%	17%	6%	6%
Q24F. How would you rate your	local area on each of	he follow	ing - Loca	l governm	ental supp	port fo	r busir	ess														
							Re	ion			Cluster		C	ompan	y Size			Industr	у		Rev	enue
	Upstate	Upstate											50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015				Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M-
Excellent	2%	2%				1%	2%	3%	1%	2%	3%	0%	3%	0%	0%	0%	1%	2%	1%	2%	6%	1%
Good	17%	17%				14%	23%	16%	18%	22%	15%	15%	13%	23%	25%	15%	23%	17%	17%	2%	17%	17%
Fair	48%	48%				48%	50%	46%	46%	51%	48%	41%	51%	42%	43%	41%	47%	51%	53%	52%	51%	47%
Poor	30%	31%				37%	24%	30%	33%	20%	32%	44%	30%	35%	30%	41%	26%	26%	26%	40%	25%	31%
Refused	3%	2%				0%	3%	4%	1%	5%	2%	0%	3%	0%	1%	3%	3%	4%	3%	2%	1%	3%
Q24G. How would you rate your	r local area on each of	the follow	/ing - As a	l n area wh	ere busine	esses c	an suc	ceed														
Q24G. How would you rate your	r local area on each of	the follow	ring - As a	n area wh	ere busine	esses c		ceed		<u> </u>	Cluster		C	Compan	y Size			Industr	у		Reve	enue
Q24G. How would you rate your	r local area on each of Upstate	the follow Upstate			ere busine	esses c					Cluster		50 or		y Size More	Eng &		Industr	у	Whole	Reve	enue
Q24G. How would you rate your					ere busine	esses c	Re		Syr	High	Cluster	Low			Ť .	Eng & Constr	Manuf		y Service	Whole & Dist		enue \$5M-
Q24G. How would you rate your	Upstate	Upstate	Upstate	Upstate	ere busine		Re	ion	Syr 1%	High		Low 0%	50 or	51 to	More		Manuf				Up to	
	Upstate 2016	Upstate 2015	Upstate 2014	Upstate 2013	ere busine	Alb	Re _i Buff	ion Roch			Middle		50 or less	51 to 100	More than 100	Constr		Retail	Service	& Dist	Up to \$5M	\$5M-
Excellent	Upstate 2016 3%	Upstate 2015 3%	Upstate 2014 2%	Upstate 2013 3%	ere busino	Alb	Reg Buff 3%	Roch	1%	3%	Middle 3%	0%	50 or less 3%	51 to 100 0%	More than 100	Constr 4%	1%	Retail 4%	Service	& Dist 2%	Up to \$5M	\$5M- 2%
Excellent Good	Upstate 2016 3% 25%	Upstate 2015 3% 27%	Upstate 2014 2% 25%	Upstate 2013 3% 24%	ere busino	Alb 1% 32%	Rep Buff 3% 25%	Roch 5% 16%	1% 26%	3% 39%	Middle 3% 21%	0% 13%	50 or less 3% 23%	51 to 100 0% 29%	More than 100 1% 31%	Constr 4% 23%	1% 21%	Retail 4% 32%	Service 1% 31%	& Dist 2% 12%	Up to \$5M 3% 31%	\$5M- 2% 24%
Excellent Good Fair	Upstate 2016 3% 25% 51%	Upstate 2015 3% 27% 49%	Upstate 2014 2% 25% 49%	Upstate 2013 3% 24% 51%	ere busine	Alb 1% 32% 50%	Rep Buff 3% 25% 52%	Roch 5% 16% 56%	1% 26% 44%	3% 39% 48%	Middle 3% 21% 53%	0% 13% 51%	50 or less 3% 23% 52%	51 to 100 0% 29% 50%	More than 100 1% 31% 53%	Constr 4% 23% 38%	1% 21% 55%	Retail 4% 32% 43%	Service 1% 31% 50%	& Dist 2% 12% 74%	Up to \$5M 3% 31% 51%	\$5M- 2% 24% 51%
Excellent Good Fair Poor	Upstate 2016 3% 25% 51% 18%	Upstate 2015 3% 27% 49% 19%	Upstate 2014 2% 25% 49% 21%	Upstate 2013 3% 24% 51% 21%	ere busine	Alb 1% 32% 50% 16%	Reg Buff 3% 25% 52% 16%	Roch 5% 16% 56% 21%	1% 26% 44% 24%	3% 39% 48% 6%	Middle 3% 21% 53% 20%	0% 13% 51% 34%	50 or less 3% 23% 52% 20%	51 to 100 0% 29% 50% 19%	More than 100 1% 31% 53% 10%	Constr 4% 23% 38% 29%	1% 21% 55% 19%	Retail 4% 32% 43% 17%	Service 1% 31% 50% 15%	& Dist 2% 12% 74% 10%	Up to \$5M 3% 31% 51% 15%	\$5M- 2% 24% 51% 18%
Excellent Good Fair Poor	Upstate 2016 3% 25% 51% 18% 3%	Upstate 2015 3% 27% 49% 19% 3%	Upstate 2014 2% 25% 49% 21% 3%	Upstate 2013 3% 24% 51% 21% 1%		Alb 1% 32% 50% 16% 1%	Rep Buff 3% 25% 52% 16% 4%	Roch 5% 16% 56% 21% 2%	1% 26% 44% 24%	3% 39% 48% 6%	Middle 3% 21% 53% 20%	0% 13% 51% 34%	50 or less 3% 23% 52% 20%	51 to 100 0% 29% 50% 19%	More than 100 1% 31% 53% 10%	Constr 4% 23% 38% 29%	1% 21% 55% 19%	Retail 4% 32% 43% 17%	Service 1% 31% 50% 15%	& Dist 2% 12% 74% 10%	Up to \$5M 3% 31% 51% 15%	\$5M- 2% 24% 51% 18%
Excellent Good Fair Poor Refused	Upstate 2016 3% 25% 51% 18% 3%	Upstate 2015 3% 27% 49% 19% 3%	Upstate 2014 2% 25% 49% 21% 3%	Upstate 2013 3% 24% 51% 21% 1%		Alb 1% 32% 50% 16% 1%	Rep Buff 3% 25% 52% 16% 4%	Roch 5% 16% 56% 21% 2%	1% 26% 44% 24%	3% 39% 48% 6%	Middle 3% 21% 53% 20%	0% 13% 51% 34%	50 or less 3% 23% 52% 20% 2%	51 to 100 0% 29% 50% 19%	More than 100 1% 31% 53% 10% 5%	Constr 4% 23% 38% 29%	1% 21% 55% 19%	Retail 4% 32% 43% 17%	Service 1% 31% 50% 15% 3%	& Dist 2% 12% 74% 10%	Up to \$5M 3% 31% 51% 15% 0%	\$5M- 2% 24% 51% 18%
Excellent Good Fair Poor Refused	Upstate 2016 3% 25% 51% 18% 3%	Upstate 2015 3% 27% 49% 19% 3%	Upstate 2014 2% 25% 49% 21% 3%	Upstate 2013 3% 24% 51% 21% 1%		Alb 1% 32% 50% 16% 1%	Rep Buff 3% 25% 52% 16% 4%	Roch 5% 16% 56% 21% 2%	1% 26% 44% 24%	3% 39% 48% 6%	Middle 3% 21% 53% 20% 3%	0% 13% 51% 34%	50 or less 3% 23% 52% 20% 2%	51 to 100 0% 29% 50% 19% 1%	More than 100 1% 31% 53% 10% 5%	Constr 4% 23% 38% 29%	1% 21% 55% 19%	Retail 4% 32% 43% 17% 4%	Service 1% 31% 50% 15% 3%	& Dist 2% 12% 74% 10%	Up to \$5M 3% 31% 51% 15% 0%	\$5M- 2% 24% 51% 18% 4%
Excellent Good Fair Poor Refused	Upstate 2016 3% 25% 51% 18% 3%	Upstate 2015 3% 27% 49% 19% 3%	Upstate 2014 2% 25% 49% 21% 3%	Upstate 2013 3% 24% 51% 21% 1%		Alb 1% 32% 50% 16% 1%	Rep Buff 3% 25% 52% 16% 4% ant to	Roch 5% 16% 56% 21% 2%	1% 26% 44% 24%	3% 39% 48% 6%	Middle 3% 21% 53% 20% 3%	0% 13% 51% 34% 1%	50 or less 3% 23% 52% 20% 2%	51 to 100 0% 29% 50% 19% 1%	More than 100 1% 31% 53% 10% 5%	Constr 4% 23% 38% 29% 5%	1% 21% 55% 19%	Retail 4% 32% 43% 17% 4%	Service 1% 31% 50% 15% 3%	& Dist 2% 12% 74% 10% 2%	Up to \$5M 3% 31% 51% 15% 0%	\$5M- 2% 24% 51% 18% 4%
Excellent Good Fair Poor Refused	Upstate 2016 3% 25% 51% 18% 3% r local area on each of Upstate	Upstate 2015 3% 27% 49% 19% 3% the follow Upstate	Upstate 2014 2% 25% 49% 21% 3% Ving - As a	Upstate 2013 3% 24% 51% 21% 1% Upstate		Alb 1% 32% 50% 16% 1%	Rep Buff 3% 25% 52% 16% 4% ant to	Roch 5% 16% 56% 21% 2% live	1% 26% 44% 24% 4%	3% 39% 48% 6% 4%	Middle 3% 21% 53% 20% 3%	0% 13% 51% 34% 1%	50 or less 3% 23% 52% 20% 2%	51 to 100 0% 29% 50% 19% 1%	More than 100 1% 31% 53% 10% 5% y Size More	Constr 4% 23% 38% 29% 5%	1% 21% 55% 19% 4%	Retail 4% 32% 43% 17% 4%	Service 1% 31% 50% 15% 3%	& Dist 2% 12% 74% 10% 2%	Up to \$5M 3% 31% 51% 15% 0% Revi	\$5M- 2% 24% 51% 18% 4%
Excellent Good Fair Poor Refused Q24H. How would you rate your	Upstate 2016 3% 25% 51% 18% 3% r local area on each of Upstate 2016	Upstate 2015 3% 27% 49% 19% 3% the follow Upstate 2015	Upstate 2014 2% 25% 49% 21% 3% Ving - As a Upstate 2014	Upstate 2013 3% 24% 51% 21% 1% Upstate 2013		Alb 1% 32% 50% 16% 1% mers w	Rep Buff 3% 25% 52% 16% 4% ant to Rep Buff	Roch 5% 16% 56% 21% 2% live gion Roch	1% 26% 44% 24% 4%	3% 39% 48% 6% 4% High	Middle	0% 13% 51% 34% 1%	50 or less 3% 23% 52% 20% 2% 50 or less	51 to 100 0% 29% 50% 19% 1% Compan 51 to 100	More than 100 1% 31% 53% 10% 5% y Size More than 100	Constr 4% 23% 38% 29% 5% Eng & Constr	1% 21% 55% 19% 4% Manuf	Retail 4% 32% 43% 17% 4% Industr	Service 1% 31% 50% 15% 3%	& Dist 2% 12% 74% 10% 2% Whole & Dist	Up to \$5M 3% 31% 51% 15% 0% Revo	\$5M- 24% 51% 18% 4% enue \$5M- 10%
Excellent Good Fair Poor Refused Q24H. How would you rate your	Upstate 2016 3% 25% 51% 18% 3% r local area on each of Upstate 2016 10%	Upstate 2015 3% 27% 49% 19% 3% the follow Upstate 2015 10%	Upstate 2014 2% 25% 49% 21% 3% Vring - As a Upstate 2014 12%	Upstate 2013 3% 24% 51% 21% 1% place whee Upstate 2013 14%		Alb 1% 32% 50% 16% 1% mers w Alb 13%	Rep Buff 3% 25% 52% 16% 4% ant to Rep Buff 7%	Roch 5% 16% 56% 21% 2% live cion Roch	1% 26% 44% 24% 4% Syr 7%	3% 39% 48% 6% 4% High 17%	Middle	0% 13% 51% 34% 1% Low 10%	50 or less 3% 23% 52% 20% 2% 50 or less 9%	51 to 100 0% 29% 50% 19% 1% Compan 51 to 100	More than 100 1% 31% 53% 10% 5% y Size More than 100 12%	Constr 4% 23% 38% 29% 5% Eng & Constr 9%	1% 21% 55% 19% 4% Manuf 4%	Retail 4% 32% 43% 17% 4% Industr Retail 19%	Service 1% 31% 50% 15% 3% y Service 11%	8. Dist 2% 12% 74% 10% 2% Whole 8. Dist 7%	Up to \$5M 3% 31% 51% 0% Revo	\$5M- 2% 24% 51% 18% 4% enue \$5M- 10% 44%
Excellent Good Fair Poor Refused Q24H. How would you rate your Excellent Good	Upstate 2016 3% 25% 51% 18% 3% r local area on each of Upstate 2016 10% 45%	Upstate 2015 3% 27% 49% 19% 3% the follow Upstate 2015 10% 43%	Upstate 2014 2% 25% 49% 21% 3% Ving - As a Upstate 2014 12% 45%	Upstate 2013 3% 24% 51% 21% 1% Place whee Upstate 2013 14% 44%		Alb 1% 32% 50% 16% 1% mers w Alb 13% 51%	Reg Buff 3% 25% 52% 16% 4% ant to Reg Buff 7% 49%	Roch 5% 16% 56% 21% 2% live gion Roch 11% 38%	1% 26% 44% 24% 4% Syr 7% 38%	3% 39% 48% 6% 4% High 17% 52%	Middle 3% 21% 53% 20% 3% Cluster Middle 7% 45%	0% 13% 51% 34% 1% Low 10% 30%	50 or less 3% 23% 52% 20% 2% 50 or less 9% 43%	51 to 100 0% 29% 50% 19% 1% Compan 51 to 100 10% 46%	More than 100 1% 31% 53% 10% 5% y Size More than 100 12% 47%	Constr 4% 23% 38% 29% 5% Eng & Constr 9% 47%	1% 21% 55% 19% 4% Manuf 4% 46%	Retail 4% 32% 43% 17% 4% Industr Retail 19% 36%	Service 1% 31% 50% 15% 3% Y Service 11% 42%	& Dist 2% 12% 74% 10% 2% Whole & Dist 7% 55%	Up to \$5M 3% 31% 51% 15% 0% Revi Up to \$5M 11% 48%	\$5M- 2% 24% 51% 18% 4%

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

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

Q25A. Adopt public (i.e., taxpa	ne issues in New York St aver) funding for statewi									• •						<u> </u>					
Q23A. Adopt public (i.e., taxpo	ayer / runding for statewi	lue and ste	le legislati	ive election	13	Re	gion			Cluster		С	ompany	v Size			Industr	v		Rev	enue
	Upstate	Upstate										50 or		More	Eng &			ĺ	Whole	Up to	T
	2016	2015			Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Support	19%	21%			25%	15%	13%	15%	19%	19%	17%	18%	22%	16%	21%	12%	23%	25%	17%	21%	18%
Oppose	53%	59%			43%	58%	67%	56%	48%	53%	65%	55%	56%	54%	51%	63%	51%	44%	55%	48%	54%
Don't know	28%	21%			32%	27%	20%	29%	34%	28%	18%	27%	22%	30%	28%	26%	26%	31%	29%	31%	27%
Q25B. Reduce the cost of prov	viding workers' compens	ation insu	rance																		
-						Re	gion			Cluster		С	ompany	y Size			Industr	у		Rev	enue
	Upstate	Upstate										50 or	51 to	More	Eng &				Whole	Up to	
	2016	2015			Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M+
Support	90%	92%			92%	87%	91%		87%	91%	90%	90%	90%	90%	94%	90%	89%	89%	88%	92%	89%
Oppose	1%	2%			1%	2%	0%	1%	0%	2%	0%	1%	0%	1%	3%	0%	0%	1%	2%	3%	1%
Don't know	9%	6%			6%	11%	9%	10%	13%	7%	10%	9%	10%	8%	4%	10%	11%	9%	10%	6%	10%
Q25C. Require employers with	acut noncion or 401K pla	ns to mak	o available	to their on	nnlovoos a st	ato cun	orvico	d rotire	mont r	lan thro	ugh vol	untan	navroll	withholdi	na						
Q25C. Require employers with	iout pension of 401k pia	liis to iliak	e available	to their en	iipioyees a st		gion	u retire	inent p	Cluster	ugii voi		ompany		i ig		Industr	24		Pov	enue
	Upstate					I NE	BIOII			Ciustei		50 or		More	Eng &		illuusti	у 	Whole	Up to	T
	2016				Alb	Ruff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M-
Support	40%				45%	-	33%	<u> </u>	43%	41%	33%	39%	42%	36%	47%	32%	38%	46%	31%	44%	39%
Oppose	40%				37%		47%	33%	38%	37%	49%	39%	46%	43%	32%	40%	43%	35%	48%	38%	40%
Don't know	20%				18%	_	20%	+	20%	21%	18%	22%	12%	20%	21%	28%	19%	18%	21%	18%	21%
DOII (KIIOW	20%				10%	1/70	20%	25%	20%	21%	10%	2270	1270	20%	21%	20%	1970	10%	2170	10%	21/0
Q25D. Reform the Scaffold Lav	W	1																			
Q2551 Neiotili tile Seatiola 2a						Re	gion			Cluster		C	ompany	v Size			Industr	·v		Rev	enue
	Upstate					1				Cidotei		50 or		More	Eng &		Industr		Whole	Up to	
	2016				Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M+
Support	53%				63%		_		48%	55%	57%	53%	65%	49%	73%	55%	49%	46%	50%	54%	53%
Oppose	3%				3%	2%	2%	6%	3%	2%	2%	4%	0%	1%	4%	3%	4%	2%	2%	7%	2%
Don't know	44%				35%		44%		48%	43%	40%	43%	35%	49%	23%	42%	47%	52%	48%	39%	45%
	1175				337	1,,,,	, , ,	3370	.070	.070	.070	.070	3370	1370	2070	1270	,.	32,0	1070	3370	1070
As you consider the recently e	nacted changes to both	the minim	num wage a	and paid fai	mily leave in	New Yo	ork. for	each.	indicat	the imp	act voi	u expe	ct it to h	ave on vo	ur profita	bility:		l			
Q26A1. Minimum Wage Chan	•				,									,							
						Re	gion			Cluster		С	ompany	v Size			Industr	v		Rev	enue
	Upstate												51 to	More	Eng &				Whole	Up to	
	2016				Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M+
Positive	2%				4%	3%	0%	3%	1%	4%	0%	2%	1%	1%	0%	1%	4%	3%	2%	1%	2%
No Effect	41%				49%	-	37%	31%	43%	43%	30%	42%	44%	34%	58%	26%	21%	46%	48%	49%	39%
Negative	55%				48%	_	62%	63%	53%	51%	68%	54%	55%	61%	40%	72%	70%	49%	50%	49%	56%
Don't know	2%	1			0%	3%	1%	4%	3%	2%	1%	2%	0%	4%	3%	1%	4%	3%	0%	0%	2%
		1	1			_	+	+				-		· ·		· ·					+

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

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

Q26A2. Paid Family Leave Act	Ī		ı	1	1	ı					a l .				•	ı					-	
							Reg	gion			Cluster			Compan	1		1	Industi	'y			enue
	Upstate						- "		_			١.	50 or		More	Eng &				Whole	Up to	
	2016					Alb		Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf		Service	& Dist	\$5M	
Positive	3%					5%	4%	1%	1%	3%	4%	0%	3%	4%	1%	1%	3%	2%	4%	0%	1%	4%
No Effect	33%					42%	30%	31%	28%	40%	33%	23%	36%	35%	24%	40%	29%	21%	37%	33%	51%	30%
Negative	61%					53%	63%	67%	67%	54%	61%	76%	58%	62%	71%	56%	67%	70%	56%	67%	46%	64%
Don't know	2%					1%	3%	1%	4%	3%	2%	1%	2%	0%	4%	3%	1%	6%	3%	0%	1%	2%
					f'1 - 1							<u> </u>										<u> </u>
As you consider the recently enact	ted changes to both	the minim	num wage	and paid	family lea	ve in N	iew Yo	rk, for	eacn,	indicat	e the imp	act you	ı expe	ct it to i	nave on yo	ur workt	orce stat	oility.				
Q26B1. Minimum Wage Changes	1		1	1		1					Cl		_		C'	l						
							Ке	gion			Cluster			Compan	Ī	F 0		Industi	y	144-1-		enue
	Upstate 2016					Alb	D#	Roch	C	High	Middle	10		51 to	More	Eng &	Manue	Doto!!	Service	Whole	Up to \$5M	\$5M
Danisi							6%	9%	Syr		11%	Low	less	100 10%	than 100 6%	Constr	Manuf 8%		-	& Dist	-	
Positive	10% 59%					11% 65%	56%	56%	14% 54%	10% 65%	58%	6% 50%	10%	64%		9% 69%	50%	15% 45%	11% 62%	7% 67%	13% 68%	9%
No Effect								_					60%		51%							57%
Negative	29%					23%	35%	34%	28%	22%	28%	43%	27%	26%	40%	19%	41%	34%	24%	26%	18%	31%
Don't know	3%					1%	3%	1%	4%	3%	3%	1%	2%	0%	4%	3%	1%	6%	4%	0%	1%	3%
Q26B2. Paid Family Leave Act																			1			
Q2002: I did I dillily Leave Act							Res	gion			Cluster		-	Compan	v Size			Industi	v		Rev	enue
	Upstate												50 or		More	Eng &		111000	<u>'</u>	Whole	Up to	
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	
Positive	13%					15%	10%	15%	11%	16%	13%	11%	13%	14%	16%	13%	14%	9%	19%	2%	8%	14%
No Effect	55%					58%	55%	54%	53%	57%	57%	45%	58%	63%	40%	62%	50%	49%	52%	62%	69%	52%
Negative	30%					25%	32%	30%	33%	24%	28%	43%	27%	23%	41%	23%	33%	36%	26%	36%	21%	31%
Don't know	3%					2%	3%	1%	3%	3%	3%	1%	2%	0%	4%	3%	3%	6%	3%	0%	1%	3%
						-																1
Considering the energy required to	o operate your busin	ess, how	satisfied a	are with e	ach of the	follow	ing:									ı				I		
Q27A. The cost of energy																						
							Reg	gion			Cluster		C	Compan	y Size			Industi	'n		Rev	enue
	Upstate												50 or	51 to	More	Eng &				Whole	Up to	
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Completely Satisfied	8%					9%	11%	3%	7%	10%	8%	4%	8%	3%	11%	4%	5%	6%	10%	10%	13%	7%
Somewhat Satisfied	54%					56%	51%	55%	53%	56%	51%	56%	51%	63%	54%	58%	56%	43%	55%	43%	48%	55%
Not Very Satisfied	28%					28%	24%	33%	28%	23%	30%	28%	29%	31%	23%	28%	27%	34%	24%	36%	31%	27%
Not At All Satisfied	7%					5%	10%	6%	7%	5%	7%	11%	9%	3%	6%	8%	9%	13%	5%	10%	7%	7%
			-	+	1																1%	4%
Prefer not to answer	4%					1%	3%	3%	6%	6%	3%	1%	3%	1%	6%	3%	3%	4%	6%	2%	1%	

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

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

					Reg	gion			Cluster		C	ompany	y Size			Industi	у		Rev	enue
	Upstate										50 or	51 to	More	Eng &				Whole	Up to	
	2016			Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Completely Satisfied	31%			30%	39%	25%	31%	39%	29%	23%	30%	32%	33%	29%	29%	28%	32%	31%	45%	28%
Somewhat Satisfied	53%			58%	44%	57%	54%	46%	56%	55%	55%	50%	54%	55%	54%	49%	51%	64%	45%	54%
Not Very Satisfied	10%			9%	12%	10%	10%	8%	9%	16%	9%	14%	8%	12%	10%	13%	9%	5%	8%	11%
Not At All Satisfied	3%			1%	4%	5%	1%	1%	3%	6%	4%	1%	1%	3%	4%	6%	2%	0%	1%	3%
Prefer not to answer	3%			1%	2%	3%	4%	6%	3%	0%	2%	3%	4%	1%	3%	4%	6%	0%	0%	4%
Q27C. The capacity of the grid to me	eet your needs							1								1				
					Reg	gion			Cluster		C	ompany	y Size			Industi	у		Rev	enue
	Upstate										50 or	51 to	More	Eng &				Whole	Up to	
	2016			Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Completely Satisfied	40%			42%	45%	31%	42%	47%	39%	29%	42%	36%	35%	47%	31%	38%	39%	48%	52%	37%
Somewhat Satisfied	50%			51%	46%	57%	49%	45%	50%	61%	49%	59%	57%	45%	59%	49%	50%	48%	39%	52%
Not Very Satisfied	5%			5%	7%	5%	4%	3%	7%	7%	6%	4%	4%	6%	5%	6%	5%	5%	7%	5%
Not At All Satisfied	1%			0%	1%	4%	1%	0%	2%	2%	2%	0%	1%	0%	3%	2%	1%	0%	1%	1%
Prefer not to answer	3%			1%	2%	3%	4%	6%	3%	0%	2%	1%	4%	1%	3%	4%	6%	0%	0%	4%
Q27D. Access to natural gas								<u> </u>												
					Reg	gion			Cluster		C	ompany	y Size			Industi	у		Rev	enue
	Upstate										50 or	51 to	More	Eng &				Whole	Up to	
	2016			Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Completely Satisfied	48%			43%	63%	39%	46%	52%	44%	51%	45%	50%	53%	41%	46%	49%	48%	60%	48%	48%
Somewhat Satisfied	35%			40%	27%	40%	36%	27%	41%	35%	36%	42%	31%	37%	40%	32%	35%	33%	34%	36%
Not Very Satisfied	6%			6%	3%	8%	7%	6%	6%	4%	7%	4%	6%	10%	6%	4%	4%	0%	3%	6%
Not At All Satisfied	4%			6%	3%	6%	1%	3%	4%	6%	7%	0%	2%	6%	5%	4%	2%	5%	6%	4%
Prefer not to answer	7%			4%	5%	6%	10%	12%	5%	4%	6%	4%	7%	5%	3%	11%	11%	2%	10%	6%
																				1

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

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

2014: 524 Upstate NY CEOs, MOE +/- 4.3% And when you take a moment and predict what it will be like to be in business here in New York ten years from today, that is, in 2026, do you anticipate that it will be much better than it is today, somewhat better, about the same, somewhat worse or much worse than it is today? Q29A. Being able to make a profit in NY Region Cluster Company Size Industry Revenue Upstate 50 or 51 to More Eng & Whole Up to 2016 Alb Buff Roch Syr High Middle Low less 100 than 100 Constr Manuf Retail Service & Dist \$5M \$5M+ Much better 1% 2% 3% 0% 0% 3% 0% 0% 2% 1% 1% 3% 0% 2% 1% 0% 1% 1% 18% 19% 24% 12% 17% 31% 15% 5% 18% 17% 18% 14% 21% 26% 17% 12% 18% 18% Somewhat better 34% 34% 35% 22% 36% 33% About the same 36% 33% 38% 36% 32% 29% 32% 33% 28% 39% 40% 41% Somewhat worse 30% 28% 26% 38% 33% 17% 34% 45% 28% 35% 39% 35% 27% 19% 32% 31% 24% 31% Much worse 12% 11% 12% 15% 11% 7% 10% 26% 14% 13% 8% 14% 14% 21% 6% 14% 13% 12% 4% 4% 3% 1% 4% 3% 5% 2% 2% 3% 5% 3% 5% 4% 5% 2% 3% 4% Prefer not to answer Q29B. Being able to make a profit in your industry in NY Cluster **Company Size** Revenue Region Industry Upstate 50 or 51 to More Eng & Whole Up to Syr High 2016 Alb Buff Roch Middle Low less 100 than 100 Constr Manuf Retail Service & Dist \$5M \$5M+ Much better 1% 1% 3% 0% 1% 3% 1% 0% 2% 1% 0% 3% 0% 2% 2% 0% 3% 1% 20% Somewhat better 20% 24% 24% 10% 17% 35% 15% 5% 14% 20% 18% 22% 21% 20% 12% 15% 20% 29% 31% 29% 29% 29% 35% 12% 29% 38% 20% 26% 28% 37% 28% About the same 31% 29% 32% 31% Somewhat worse 30% 25% 39% 36% 21% 32% 41% 30% 28% 39% 33% 23% 23% 30% 38% 24% 31% Much worse 15% 13% 16% 18% 13% 6% 11% 39% 16% 14% 14% 17% 19% 21% 10% 17% 18% 14% Prefer not to answer 5% 4% 3% 4% 4% 4% 6% 2% 3% 4% 6% 4% 6% 4% 6% 2% 3% 5% Q29C. Being able to hire appropriately skilled workers Region Cluster **Company Size** Industry Revenue Upstate 50 or 51 to More Eng & Whole Up to High \$5M 2016 Alb Buff Roch Syr Middle Low less 100 than 100 Constr Manuf Retail Service & Dist \$5M+ Much better 1% 2% 2% 0% 0% 3% 0% 0% 1% 1% 1% 0% 0% 2% 2% 0% 1% 1% 12% 12% 10% 11% 5% 12% 12% 15% 17% 13% 12% Somewhat better 14% 18% 11% 14% 9% 12% 7% 40% 47% 45% About the same 45% 50% 46% 43% 42% 48% 45% 47% 36% 38% 45% 40% 47% 48% 48% Somewhat worse 23% 19% 22% 30% 26% 17% 27% 24% 23% 23% 29% 23% 29% 23% 20% 24% 21% 24% Much worse 13% 12% 13% 14% 15% 10% 11% 27% 15% 10% 14% 26% 10% 13% 11% 12% 14% 13% 5% 5% 3% 2% 6% 4% 6% 4% 2% 4% 7% 4% 4% 6% 5% 7% 4% 5% Prefer not to answer Q29D. Being able to count on demand for your product/service Region Cluster Company Size Industry Revenue Upstate 50 or 51 to More Eng & Whole Up to High than 100 2016 Alb Buff Roch Syr Middle Low less 100 Constr Manuf Retail Service & Dist \$5M \$5M+ Much better 3% 3% 6% 1% 1% 6% 2% 1% 3% 5% 1% 1% 3% 6% 4% 0% 4% 3% 23% 26% 21% 15% 21% 22% Somewhat better 24% 18% 21% 29% 17% 29% 19% 26% 26% 25% 12% 23% 48% 51% 46% 49% 47% 45% 49% 43% 40% 45% 49% About the same 50% 48% 55% 46% 47% 46% 64% Somewhat worse 18% 14% 16% 27% 17% 10% 19% 27% 20% 15% 16% 26% 13% 13% 18% 19% 20% 17% Much worse 4% 4% 3% 4% 8% 1% 4% 10% 4% 5% 5% 5% 5% 11% 2% 2% 6% 4%

Prefer not to answer

4%

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6%

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2%

3%

6%

3%

6%

4%

5%

2%

3%

4%

3%

1%

5%

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

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				Re	gion			Cluster		С	ompan	y Size			Industi	у		Rev	enue
	Upstate									50 or	51 to	More	Eng &				Whole	Up to	
	2016		Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5N
Much better	2%		1%	4%	1%	1%	3%	1%	1%	2%	0%	2%	1%	4%	4%	1%	0%	1%	2%
Somewhat better	23%		30%	24%	14%	24%	34%	22%	9%	23%	24%	27%	21%	17%	28%	26%	19%	30%	229
About the same	45%		44%	45%	49%	47%	42%	44%	54%	47%	49%	41%	40%	60%	47%	43%	45%	44%	469
Somewhat worse	18%		18%	19%	22%	17%	15%	19%	22%	17%	21%	20%	23%	9%	11%	20%	21%	18%	189
Much worse	6%		3%	4%	12%	7%	2%	7%	11%	8%	4%	4%	13%	3%	6%	3%	12%	4%	6%
Prefer not to answer	5%		6%	3%	1%	4%	4%	6%	4%	3%	3%	6%	3%	8%	4%	6%	2%	3%	5%
Q29F. The business friendliness of lo	ocal government																		
				Re	gion			Cluster		С	ompan	y Size			Industi	γ		Rev	enue
	Upstate									50 or	51 to	More	Eng &				Whole	Up to	
ı	2016		Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Much better	1%		1%	2%	2%	0%	1%	1%	1%	0%	1%	2%	0%	1%	2%	2%	0%	0%	1%
Somewhat better	12%		10%	17%	10%	10%	21%	9%	4%	9%	14%	18%	13%	8%	13%	12%	12%	18%	119
About the same	53%		56%	52%	53%	54%	60%	52%	40%	57%	49%	47%	50%	59%	40%	56%	55%	54%	53%
Somewhat worse	20%		21%	20%	23%	18%	10%	22%	34%	21%	23%	22%	24%	15%	28%	18%	19%	20%	21%
Much worse	8%		6%	7%	11%	11%	3%	9%	17%	9%	10%	4%	9%	12%	11%	6%	12%	3%	9%
Prefer not to answer	5%		6%	3%	1%	7%	4%	7%	4%	4%	3%	7%	4%	5%	6%	6%	2%	6%	5%
Q29G. The business friendliness of s	tate government														1				
				Re	gion			Cluster		С	ompan	y Size			Industi	у		Rev	enue
1	Upstate									50 or	51 to	More	Eng &				Whole	Up to	
Î																			
1	2016		Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Much better	2016 0%		Alb 0%	Buff 2%	Roch 0%	Syr 0%	High 1%	Middle 0%	Low 0%	less 1%	100 0%	0%	Constr 0%	Manuf 1%	Retail 0%	Service 1%		\$ 5M	\$5M
Much better Somewhat better				_	-									-	1		& Dist	<u> </u>	+
	0%		0%	2%	0%	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	1%	& Dist 0%	0%	1%
Somewhat better	0% 11%		0% 13%	2% 13%	0% 10%	0% 7%	1% 18%	0% 8%	0% 6%	1% 9%	0% 9%	0% 16%	0% 13%	1% 6%	0% 19%	1% 10%	& Dist 0% 14%	0% 15%	1%
Somewhat better About the same	0% 11% 43%		0% 13% 42%	2% 13% 42%	0% 10% 36%	0% 7% 58%	1% 18% 52%	0% 8% 45%	0% 6% 23%	1% 9% 43%	0% 9% 42%	0% 16% 46%	0% 13% 41%	1% 6% 45%	0% 19% 23%	1% 10% 51%	& Dist 0% 14% 43%	0% 15% 45%	1% 10% 43% 28%
Somewhat better About the same Somewhat worse	0% 11% 43% 28%		0% 13% 42% 32%	2% 13% 42% 29%	0% 10% 36% 34%	0% 7% 58% 15%	1% 18% 52% 20%	0% 8% 45% 29%	0% 6% 23% 40%	1% 9% 43% 31%	0% 9% 42% 28%	0% 16% 46% 23%	0% 13% 41% 22%	1% 6% 45% 29%	0% 19% 23% 36%	1% 10% 51% 25%	& Dist 0% 14% 43% 29%	0% 15% 45% 30%	1% 10% 43%
Somewhat better About the same Somewhat worse Much worse	0% 11% 43% 28% 12% 5%	t	0% 13% 42% 32% 8%	2% 13% 42% 29% 13%	0% 10% 36% 34% 15%	0% 7% 58% 15% 15%	1% 18% 52% 20% 5%	0% 8% 45% 29% 12%	0% 6% 23% 40% 26%	1% 9% 43% 31% 13%	0% 9% 42% 28% 14%	0% 16% 46% 23% 10%	0% 13% 41% 22% 19%	1% 6% 45% 29% 14%	0% 19% 23% 36% 13%	1% 10% 51% 25% 7%	& Dist 0% 14% 43% 29% 12%	0% 15% 45% 30% 7%	1% 10% 43% 28% 13%
Somewhat better About the same Somewhat worse Much worse Prefer not to answer	0% 11% 43% 28% 12% 5%	it	0% 13% 42% 32% 8%	2% 13% 42% 29% 13% 2%	0% 10% 36% 34% 15%	0% 7% 58% 15% 15%	1% 18% 52% 20% 5%	0% 8% 45% 29% 12%	0% 6% 23% 40% 26%	1% 9% 43% 31% 13% 2%	0% 9% 42% 28% 14%	0% 16% 46% 23% 10% 6%	0% 13% 41% 22% 19%	1% 6% 45% 29% 14%	0% 19% 23% 36% 13%	1% 10% 51% 25% 7% 6%	& Dist 0% 14% 43% 29% 12%	0% 15% 45% 30% 7% 3%	1% 10% 43% 28% 13%
Somewhat better About the same Somewhat worse Much worse Prefer not to answer	0% 11% 43% 28% 12% 5%	ıt	0% 13% 42% 32% 8%	2% 13% 42% 29% 13% 2%	0% 10% 36% 34% 15% 4%	0% 7% 58% 15% 15%	1% 18% 52% 20% 5%	0% 8% 45% 29% 12% 5%	0% 6% 23% 40% 26%	1% 9% 43% 31% 13% 2%	0% 9% 42% 28% 14% 6%	0% 16% 46% 23% 10% 6%	0% 13% 41% 22% 19%	1% 6% 45% 29% 14%	0% 19% 23% 36% 13% 9%	1% 10% 51% 25% 7% 6%	& Dist 0% 14% 43% 29% 12%	0% 15% 45% 30% 7% 3%	1% 10% 43% 28% 13% 5%
Somewhat better About the same Somewhat worse Much worse Prefer not to answer	0% 11% 43% 28% 12% 5% he federal governmen	ıt	0% 13% 42% 32% 8%	2% 13% 42% 29% 13% 2%	0% 10% 36% 34% 15% 4%	0% 7% 58% 15% 15%	1% 18% 52% 20% 5%	0% 8% 45% 29% 12% 5%	0% 6% 23% 40% 26% 5%	1% 9% 43% 31% 13% 2%	0% 9% 42% 28% 14% 6%	0% 16% 46% 23% 10% 6%	0% 13% 41% 22% 19% 5%	1% 6% 45% 29% 14%	0% 19% 23% 36% 13% 9%	1% 10% 51% 25% 7% 6%	& Dist 0% 14% 43% 29% 12% 2%	0% 15% 45% 30% 7% 3%	1% 10% 43% 28% 13% 5%
Somewhat better About the same Somewhat worse Much worse Prefer not to answer	0% 11% 43% 28% 12% 5% he federal governmen	t	0% 13% 42% 32% 8% 6%	2% 13% 42% 29% 13% 2%	0% 10% 36% 34% 15% 4%	0% 7% 58% 15% 15% 4%	1% 18% 52% 20% 5% 5%	0% 8% 45% 29% 12% 5%	0% 6% 23% 40% 26% 5%	1% 9% 43% 31% 13% 2% C	0% 9% 42% 28% 14% 6% ompan 51 to	0% 16% 46% 23% 10% 6%	0% 13% 41% 22% 19% 5%	1% 6% 45% 29% 14% 4%	0% 19% 23% 36% 13% 9%	1% 10% 51% 25% 7% 6%	& Dist 0% 14% 43% 29% 12% 2%	0% 15% 45% 30% 7% 3% Rev	1% 10% 43% 28% 13% 5%
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Somewhat better About the same Somewhat worse Much worse Prefer not to answer Q29H. The business friendliness of the same Much better Somewhat better About the same	0% 11% 43% 28% 12% 5% he federal governmen Upstate 2016 5% 19% 39%	t .	0% 13% 42% 32% 8% 6% Alb 6% 21% 37%	2% 13% 42% 29% 13% 2% Reg Buff 5% 22% 40%	0% 10% 36% 34% 15% 4% gion Roch 4% 16% 37%	0% 7% 58% 15% 15% 4% Syr 6% 18% 42%	1% 18% 52% 20% 5% 5% High 6% 29% 42%	0% 8% 45% 29% 12% 5% Cluster Middle 6% 16% 41%	0% 6% 23% 40% 26% 5% Low 1% 10% 27%	1% 9% 43% 31% 13% 2% C 50 or less 6% 19% 38%	0% 9% 42% 28% 14% 6% ompan 51 to 100 4% 18% 47%	0% 16% 46% 23% 10% 6% y Size More than 100 4% 24% 34%	0% 13% 41% 22% 19% 5% Eng & Constr 1% 23% 40%	1% 6% 45% 29% 14% 4% Manuf 9% 18% 38%	0% 19% 23% 36% 13% 9% Industr Retail 9% 15% 32%	1% 10% 51% 25% 7% 6% Service 1% 17% 48%	& Dist 0% 14% 43% 29% 12% 2% Whole & Dist 7% 21% 29%	0% 15% 45% 30% 7% 3% Rev Up to \$5M 4% 20% 38%	1% 109 439 289 139 5% enue \$5M 199

Sponsored by The Business Council of New York State

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

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

						Re	gion			Cluster		С	ompan	y Size			Industr	у		Reve	enue
	Upstate											50 or	51 to	More	Eng &				Whole	Up to	
	2016				Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5N
Much better	15%				17%	11%	15%	15%	23%	11%	10%	13%	18%	18%	12%	9%	13%	18%	10%	11%	15%
Somewhat better	48%				58%	51%	43%	36%	51%	47%	48%	47%	53%	55%	51%	50%	47%	44%	50%	45%	49%
About the same	30%				20%	34%	33%	40%	22%	32%	38%	34%	26%	19%	31%	33%	34%	31%	33%	37%	299
Somewhat worse	2%				0%	2%	4%	3%	1%	2%	2%	2%	1%	2%	3%	3%	0%	1%	0%	3%	2%
Much worse	1%				0%	1%	3%	1%	0%	2%	0%	2%	0%	0%	1%	1%	0%	0%	5%	0%	1%
Prefer not to answer	4%				5%	2%	1%	4%	3%	5%	2%	2%	3%	5%	3%	4%	6%	5%	2%	4%	4%
Q29J. The costs you experience in	vour husiness due to	governme	ntal regu	lation																	
Q233. The costs you experience in	your business due to	governine	iitai regu	liation		Rec	gion			Cluster		(ompan	v Size			Industr	v		Reve	enue
	Upstate					i ne				Siustel		50 or	51 to	More	Eng &		austi	7	Whole	Up to	I
	2016				Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Much better	1%				1%	2%	1%	1%	2%	1%	0%	2%	1%	0%	0%	3%	4%	1%	0%	0%	2%
Somewhat better	13%				16%	11%	12%	11%	17%	12%	6%	14%	4%	19%	12%	21%	17%	7%	14%	11%	13%
About the same	25%				23%	24%	23%	35%	34%	22%	15%	26%	28%	16%	23%	23%	17%	29%	24%	32%	23%
Somewhat worse	37%				33%	43%	40%	31%	32%	41%	34%	36%	41%	39%	37%	33%	34%	42%	36%	35%	37%
Much worse	20%				20%	18%	22%	17%	11%	17%	41%	20%	22%	19%	26%	14%	21%	15%	21%	18%	20%
Prefer not to answer	5%				6%	3%	2%	6%	3%	7%	4%	2%	4%	7%	3%	6%	6%	6%	5%	3%	5%
Q29K. The opportunities for growt	h/profitability you e	xperience			1	Do	gion	•		61		(ompan	· Ci		•	•	•	•		•
1			l I			ĸeį	gion			Cluster		•	umpun	y Size			Industr	у		Reve	enue
	Upstate					Ke	31011			Cluster		50 or	•	More	Eng &		Industr	у	Whole	Reve Up to	enue
	Upstate 2016				Alb	Buff	Roch	Syr	High	Middle	Low		•		Eng & Constr	Manuf	Industr Retail	Service	Whole & Dist		
Much better					Alb			Syr 0%	High			50 or	51 to	More	_					Up to	\$5M
Much better Somewhat better	2016				1	Buff	Roch		_	Middle	Low	50 or less	51 to 100	More than 100	Constr	Manuf	Retail	Service	& Dist	Up to \$5M	\$5M 1%
	2016 2%				4%	Buff 3%	Roch	0%	4%	Middle 1%	Low 0%	50 or less 2%	51 to 100 1%	More than 100 1%	Constr 0%	Manuf 3%	Retail 2%	Service 3%	& Dist 0%	Up to \$5M 4%	\$5M 1% 22%
Somewhat better	2016 2% 23%				4% 29%	Buff 3% 24%	Roch 0% 18%	0% 22%	4% 36%	Middle 1% 20%	0% 9%	50 or less 2% 26%	51 to 100 1% 15%	More than 100 1% 27%	0% 18%	Manuf 3% 28%	Retail 2% 28%	Service 3% 21%	& Dist 0% 24%	Up to \$5M 4% 31%	\$5M 1% 22% 40% 26%
Somewhat better About the same	2% 2% 23% 38%				4% 29% 39%	Buff 3% 24% 40%	Roch 0% 18% 35%	0% 22% 42%	4% 36% 40%	Middle 1% 20% 42%	0% 9% 27%	50 or less 2% 26% 38%	51 to 100 1% 15% 44%	More than 100 1% 27% 31%	0% 18% 46%	Manuf 3% 28% 41%	Retail 2% 28% 34%	Service 3% 21% 35%	& Dist 0% 24% 40%	Up to \$5M 4% 31% 31%	\$5M 1% 22% 40%
Somewhat better About the same Somewhat worse	2016 2% 23% 38% 25%				4% 29% 39% 18%	Buff 3% 24% 40% 27%	Roch 0% 18% 35% 38%	0% 22% 42% 21%	4% 36% 40% 13%	Middle 1% 20% 42% 27%	9% 27% 41%	50 or less 2% 26% 38% 23%	51 to 100 1% 15% 44% 31%	More than 100 1% 27% 31% 33%	Constr 0% 18% 46% 24%	Manuf 3% 28% 41% 17%	Retail 2% 28% 34% 23%	Service 3% 21% 35% 31%	& Dist 0% 24% 40% 24%	Up to \$5M 4% 31% 31% 23%	\$5M 1% 22% 40% 26%
Somewhat better About the same Somewhat worse Much worse Prefer not to answer	2016 2% 23% 38% 25% 7% 5%				4% 29% 39% 18% 6%	Buff 3% 24% 40% 27% 4%	Roch 0% 18% 35% 38% 8%	0% 22% 42% 21% 10%	4% 36% 40% 13% 3%	Middle 1% 20% 42% 27% 5%	0% 9% 27% 41% 18%	50 or less 2% 26% 38% 23% 8%	51 to 100 1% 15% 44% 31% 5%	More than 100 1% 27% 31% 33% 4%	0% 18% 46% 24% 9%	Manuf 3% 28% 41% 17% 5%	Retail 2% 28% 34% 23% 6%	Service 3% 21% 35% 31% 6%	& Dist 0% 24% 40% 24% 10%	Up to \$5M 4% 31% 31% 23% 8%	\$5M 1% 22% 40% 26% 7%
Somewhat better About the same Somewhat worse Much worse	2016 2% 23% 38% 25% 7% 5%				4% 29% 39% 18% 6%	Buff 3% 24% 40% 27% 4% 3%	Roch 0% 18% 35% 38% 8%	0% 22% 42% 21% 10%	4% 36% 40% 13% 3%	Middle 1% 20% 42% 27% 5%	0% 9% 27% 41% 18%	50 or less 2% 26% 38% 23% 8% 3%	51 to 100 1% 15% 44% 31% 5%	More than 100 1% 27% 31% 33% 4% 5%	0% 18% 46% 24% 9%	Manuf 3% 28% 41% 17% 5% 6%	Retail 2% 28% 34% 23% 6%	Service 3% 21% 35% 31% 6% 5%	& Dist 0% 24% 40% 24% 10%	Up to \$5M 4% 31% 31% 23% 8% 3%	\$5M 1% 22% 40% 26% 7%
Somewhat better About the same Somewhat worse Much worse Prefer not to answer	2016 2% 23% 38% 25% 7% 5%				4% 29% 39% 18% 6%	Buff 3% 24% 40% 27% 4% 3%	Roch 0% 18% 35% 38% 8% 1%	0% 22% 42% 21% 10%	4% 36% 40% 13% 3%	Middle 1% 20% 42% 27% 5% 5%	0% 9% 27% 41% 18% 5%	50 or less 2% 26% 38% 23% 8% 3%	51 to 100 1% 15% 44% 31% 5% 4%	More than 100 1% 27% 31% 33% 4% 5%	0% 18% 46% 24% 9%	Manuf 3% 28% 41% 17% 5% 6%	Retail 2% 28% 34% 23% 6%	Service 3% 21% 35% 31% 6% 5%	& Dist 0% 24% 40% 24% 10%	Up to \$5M 4% 31% 31% 23% 8% 3%	\$5M 1% 22% 40% 26% 7% 5%
Somewhat better About the same Somewhat worse Much worse Prefer not to answer	2016 2% 23% 38% 25% 7% 5%				4% 29% 39% 18% 6%	Buff 3% 24% 40% 27% 4% 3%	Roch 0% 18% 35% 38% 8% 1%	0% 22% 42% 21% 10%	4% 36% 40% 13% 3%	Middle 1% 20% 42% 27% 5% 5%	0% 9% 27% 41% 18%	50 or less 2% 26% 38% 23% 8% 3%	51 to 100 1% 15% 44% 31% 5% 4%	More than 100 1% 27% 31% 33% 4% 5%	Constr 0% 18% 46% 24% 9% 3%	Manuf 3% 28% 41% 17% 5% 6%	Retail 2% 28% 34% 23% 6% 6%	Service 3% 21% 35% 31% 6% 5%	& Dist 0% 24% 40% 24% 10% 2%	Up to \$5M 4% 31% 31% 23% 8% 3%	\$5M 1% 22% 40% 26% 7% 5%
Somewhat better About the same Somewhat worse Much worse Prefer not to answer	2016 2% 23% 38% 25% 7% 5% Upstate				4% 29% 39% 18% 6% 5%	Buff 3% 24% 40% 27% 4% 3%	Roch 0% 18% 35% 38% 8% 1%	0% 22% 42% 21% 10% 6%	4% 36% 40% 13% 3% 3%	Middle 1% 20% 42% 5% 5% Cluster	0% 9% 27% 41% 18% 5%	50 or less 2% 26% 38% 23% 8% 3% C	51 to 100 1% 15% 44% 31% 5% 4%	More than 100 1% 27% 31% 33% 4% 5% y Size More	Constr 0% 18% 46% 24% 9% 3% Eng &	Manuf 3% 28% 41% 17% 5% 6%	Retail 2% 28% 34% 23% 6% 6%	Service 3% 21% 35% 31% 6% 5%	& Dist 0% 24% 40% 24% 10% 2% Whole	Up to \$5M 4% 31% 31% 23% 8% 3%	\$5M 1% 22% 40% 26% 7% 5%
Somewhat better About the same Somewhat worse Much worse Prefer not to answer Q29L. The fairness of the taxes you	2016 2% 23% 38% 25% 7% 5% Upstate 2016				4% 29% 39% 18% 6% 5%	Buff 3% 24% 40% 27% 4% 3% Reg	Roch 0% 18% 35% 38% 8% 1% gion Roch	0% 22% 42% 21% 10% 6%	4% 36% 40% 13% 3% 3%	Middle 1% 20% 42% 5% 5% Cluster Middle	18% 5% Low	50 or less 2% 26% 38% 23% 8% 3% C C 50 or less	51 to 100 1% 15% 44% 31% 5% 4% ompan 51 to 100	More than 100 1% 27% 31% 33% 4% 5% y Size More than 100	Constr 0% 18% 46% 24% 9% 3% Eng & Constr	Manuf 3% 28% 41% 17% 5% 6%	Retail 2% 28% 34% 23% 6% 6% Industr	Service 3% 21% 35% 31% 6% 5% 9	& Dist 0% 24% 40% 24% 10% 2% Whole & Dist	Up to \$5M 4% 31% 31% 23% 8% 3% Reve	\$5M 1% 22% 40% 26% 5% enue \$5M
Somewhat better About the same Somewhat worse Much worse Prefer not to answer Q29L. The fairness of the taxes you Much better	2016 2% 23% 38% 25% 7% 5% Upstate 2016 1%				4% 29% 39% 18% 6% 5% Alb	Buff 3% 24% 40% 27% 4% 3% Reg Buff 2%	Roch	0% 22% 42% 21% 10% 6% Syr 0%	4% 36% 40% 13% 3% 3% High 3%	Middle 1% 20% 42% 5% 5% Cluster Middle 0%	Low 0% 9% 27% 41% 18% 5% Low 0%	50 or less 2% 26% 38% 23% 8% 3% C 50 or less 1%	51 to 100 1% 15% 44% 31% 5% 4% ompan 51 to 100	More than 100 1% 27% 31% 33% 4% 5% y Size More than 100 0%	Constr 0% 18% 46% 24% 9% 3% Eng & Constr 0%	Manuf 3% 28% 41% 17% 5% 6% Manuf 1%	Retail 2% 28% 34% 6% 6% Industr Retail 2%	Service 3% 211% 355% 311% 6% 5% 9	& Dist 0% 24% 40% 24% 10% 2% Whole & Dist 0%	Up to \$5M 4% 31% 23% 8% 3% Reverous to \$5M 1%	\$5M 1% 22% 40% 26% 7% 5% enue \$5M 1%
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Somewhat better About the same Somewhat worse Much worse Prefer not to answer Q29L. The fairness of the taxes you Much better Somewhat better About the same	2016 2% 23% 38% 25% 7% 5% Upstate 2016 1% 10% 35%				4% 29% 39% 18% 6% 5% Alb 1% 13% 30%	Buff 3% 24% 40% 27% 4% 3% Reg Buff 2% 8% 39%	Roch 0% 18% 35% 38% 8% 1% Roch 0% 9% 34%	0% 22% 42% 21% 10% 6% Syr 0% 8% 44%	4% 36% 40% 13% 3% 3% High 3% 43%	Middle 1% 20% 42% 5% 5% Cluster Middle 0% 9% 35%	Low 9% 27% 41% 18% 5% Low 0% 4% 23%	50 or less 2% 26% 38% 8% 3% C 50 or less 1% 11% 35%	51 to 100 1% 15% 44% 31% 5% 4% ompan 51 to 100 1% 5% 33%	More than 100 1% 27% 31% 33% 4% 5% y Size More than 100 0% 13% 35%	Constr 0% 18% 46% 244% 9% 3% Eng & Constr 0% 6% 35%	Manuf 3% 28% 41% 17% 5% 6% Manuf 1% 10% 44%	Retail 2% 23% 6% 6% 1ndustr Retail 2% 21% 23%	Service 3% 21% 35% 31% 6% 5% Y Service 1% 6% 39%	& Dist 0% 24% 40% 24% 10% 2% Whole & Dist 0% 12% 31%	Up to \$5M 4% 31% 23% 8% 3% Reve Up to \$5M 1% 10% 41%	\$5M 1% 22% 40% 26% 5% 5% enue \$5M 1% 34%

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

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

							Re	gion			Cluster		C	ompan	y Size			Indust	γ		Reve	enue
	Upstate												50 or	51 to	More	Eng &				Whole	Up to	
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Much better	1%					1%	3%	1%	0%	3%	0%	1%	2%	0%	0%	0%	3%	2%	1%	0%	1%	1%
Somewhat better	20%					25%	24%	15%	13%	35%	16%	4%	21%	19%	20%	18%	22%	30%	16%	21%	25%	19%
About the same	39%					40%	37%	34%	50%	43%	44%	21%	40%	37%	36%	40%	41%	30%	44%	33%	41%	39%
Somewhat worse	25%					21%	29%	33%	17%	13%	23%	49%	23%	28%	33%	27%	21%	15%	25%	31%	15%	27%
Much worse	10%					6%	5%	14%	15%	3%	10%	21%	11%	12%	4%	13%	9%	15%	7%	10%	13%	9%
Prefer not to answer	5%					6%	3%	2%	6%	3%	7%	5%	3%	4%	7%	3%	5%	9%	6%	5%	4%	5%
Q30. Do you think your company w	ill ha in husinass in	Now York	ton voar	from tod	lay or not	<u> </u>																
Q30. Do you think your company w	in be in business in	New Tolk	l ten years		lay or not	<u> </u>	Res	gion			Cluster			ompan	v Size			Industi	v		Reve	enue
	Upstate												50 or	51 to	More	Eng &			1	Whole	Up to	1
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
Yes	64%					68%	63%	63%	67%	78%	64%	43%	58%	73%	83%	63%	59%	64%	68%	45%	52%	67%
No	10%					8%	8%	18%	10%	3%	10%	24%	15%	8%	0%	10%	8%	15%	11%	17%	14%	10%
Don't know	25%					25%	29%	20%	24%	19%	27%	33%	27%	19%	17%	27%	33%	21%	22%	38%	34%	24%
Q31. If you had it all to do all over a	gain, considering a	II factors,	would you	u locate y	our busine	ess in N			omepl	ace els											1	
							Re	gion			Cluster			ompan	ĺ			Indust	'y			enue
	Upstate		Upstate	Upstate									50 or	51 to	More	Eng &	_			Whole	Up to	
	2016	2015	2014	2013		Alb	Buff	Roch	Syr		Middle	Low	less	100	than 100	Constr	Manuf		Service	& Dist	\$5M	\$5M
New York	39%	29%	28%	29%		42%	41%	34%	40%	50%	38%	21%	39%	38%	42%	40%	32%	38%	46%	21%	44%	38%
Someplace else	56%	67%	69%	65%		55%	55%	61%	60%	46%	57%	74%	58%	59%	51%	59%	67%	55%	46%	74%	56%	56%
Prefer not to answer	5%	3%	4%	6%		4%	4%	5%	0%	4%	6%	5%	3%	3%	7%	1%	1%	6%	8%	5%	0%	6%
Q32. Switching to another topic, mi	inorities including A	 \frican-Δm	l nericans I	atinos an	d Δsians 1	would	vou sa	v that t	hev h	ave mo	re onnor	tunity t	han W	/hite An	nericans to	he succe	essful in	industri	es like voi	ırs here i	n Hinsta	te Nev
York, as much opportunity as Whit	U					u.u	, ou su	, chac .		aveo	те оррог	· · · · · ·		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	incricans to	De succi		austii	es inte yo		Горога	
эт э							Res	gion			Cluster		C	ompan	v Size			Industi	'v		Reve	enue
	Upstate												50 or		More	Eng &			<u> </u>	Whole	Up to	
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M
More opportunity	15%					20%	14%	14%	11%	19%	14%	13%	16%	17%	10%	28%	9%	11%	12%	19%	15%	15%
As much opportunity	64%					60%	67%	65%	71%	60%	67%	65%	62%	64%	77%	54%	73%	68%	63%	60%	65%	64%
		1	t — — —	l	i			400/	450/	470/	450/	2007	400/	4.00/	11%	17%	13%	19%	21%	4.40/	18%	4.00
Less opportunity	17%					18%	16%	19%	15%	17%	15%	20%	19%	18%	11%	1/%	13%	19%	21%	14%	18%	16%

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

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

Upstate 2016	50 or 51	less 100 24% 23% 34% 42% 25% 22%	More than 100	Eng & Constr		Indust	Li y	T.,,,		enue
Alb Buff Roch Syr High Middle Local New York Significant 22% 23% 18% 26% 24% 27% 21% 26% 38% Not very significant 37% 34% 42% 41% 32% 30% 42% 48% 38% Not very significant 12% 16% 8% 10% 15% 10% 11% 18% Prefer not to answer 4% 4% 3% 2% 3% 4% 5% 2% 21% 26% 38% 32% 32% 32% 32% 32% 32% 32% 32% 32% 32	less 10 24% 23% 34% 429 5 25% 229 6 13% 138	less 100 24% 23% 34% 42% 25% 22%	than 100 13%	_					11	. 1
Very significant 22% 23% 18% 26% 24% 27% 21% 16	24% 23° 34% 42° 25% 22° 13% 13°	24% 23% 34% 42% 25% 22%	13%	CONSCI	Manuf	f Retai	il Service	Whole & Dist	Up to \$5M	\$5M
Somewhat significant 37% 37% 34% 42% 41% 32% 30% 42% 38	34% 429 5 25% 229 6 13% 139	34% 42% 25% 22%	+	27%	22%	23%		26%	21%	229
Not very significant 24% 23% 29% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 21% 26% 28% 22% 28% 22% 28% 22% 28% 22% 28% 22% 28% 22% 28% 22% 28% 22%	25% 22° 13% 13°	25% 22%	43%	37%	44%	32%		33%	42%	369
Not at all significant 12% 16% 8% 10% 15% 10% 11% 18	13% 139		27%	21%	21%	30%		26%	20%	25%
Prefer not to answer	3% 0%	13% 13%	13%	14%	9%	11%		7%	14%	129
Upstate 2016 Alb Buff Roch Syr High Middle Lo Very significant 9% 8% 8% 8% 11% 13% 7% 69 80 80 80 80 80 80 80 80 80 80 80 80 80		3% 0%	4%	1%	5%	4%	5%	7%	3%	5%
Upstate 2016 Alb Buff Roch Syr High Middle Lo Very significant 9% 8% 8% 8% 11% 13% 7% 69 80 80 80 80 80 80 80 80 80 80 80 80 80				1					1	
Upstate 2016 Alb Buff Roch Syr High Middle Lo										
Alb Buff Roch Syr High Middle Lower Somewhat significant 9% 8% 8% 8% 8% 11% 13% 7% 6% 10% 10% 10% 10% 10% 10% 10% 10% 10% 10	Comp	Compan	ny Size			Indust	try		Rev	enue
Very significant 9% 8% 8% 8% 11% 13% 7% 69 69 69 69 69 69 69 6	50 or 51	50 or 51 to	More	Eng &				Whole	Up to	
Somewhat significant 28% 30% 30% 31% 22% 28% 32% 20	less 10	less 100	than 100	Constr	Manuf	f Retai	il Service	& Dist	\$5M	\$5N
Not very significant 37% 31% 45% 39% 36% 34% 36% 45 45 45 45 45 45 45 4	10% 5%	10% 5%	5%	6%	5%	13%	11%	12%	13%	8%
Not at all significant 22%	28% 339	28% 33%	25%	31%	33%	21%	28%	33%	24%	299
Prefer not to answer	38% 389	38% 38%	41%	38%	31%	38%	37%	33%	41%	369
Q33C. Receiving equal pay	21% 239	21% 23%	25%	23%	26%	23%	19%	14%	20%	229
Upstate 2016	3% 0%	3% 0%	4%	1%	5%	4%	5%	7%	3%	5%
Upstate 2016										
Alb Buff Roch Syr High Middle Lower Syr Syr High Middle Lower Syr Syr Syr Syr Syr Syr Syr Syr Syr Sy		Compan	1			Indust	try			enue
Very significant 5%				Eng &		_		Whole		
Somewhat significant 15% 15% 18% 13% 11% 17% 14% 11			than 100	_	_			_	\$5M	<u> </u>
Not very significant			2%	1%	5%	11%	_	7%	4%	5%
Not at all significant 35% 37% 29% 28% 49% 33% 32% 44			13%	17%	12%	6%	17%	19%	13%	159
Prefer not to answer 5% 5% 5% 49 Q33D. Receiving equal opportunity for advancement Security			42%	41%	46%	40%		40%	44%	419
Q33D. Receiving equal opportunity for advancement Upstate 2016 Alb Buff Roch Syr High Middle Lo			39%	40%	31%	36%	_	26%	34%	359
	4% 19	4% 1%	4%	1%	6%	6%	6%	7%	6%	5%
					1					
Upstate 2016 Alb Buff Roch Syr High Middle Lo	Comp	Compan	vy Sizo	1		Indust	tru.		Pov	enue
2016 Alb Buff Roch Syr High Middle Lo			T .	Eng &		Illuus	Li y	Whole		
, , ,			than 100			f Retai	il Service		\$5M	
Very significant 7% 6% 6% 8% 7% 11% 4% 5%			5%	4%	4%	13%	_	7%	6%	7%
Somewhat significant 17% 18% 18% 15% 17% 16% 19% 13			11%	18%	17%	15%		21%	18%	179
Not very significant 39% 33% 48% 48% 25% 36% 40% 41			43%	42%	42%	36%		36%	38%	399
Not at all significant 33% 38% 24% 25% 49% 31% 33% 37		32% 36%	36%	35%	32%	30%		29%	34%	339
Prefer not to answer 5% 5% 3% 3% 3% 6% 5% 49	132% 369	4% 1%	5%	1%	5%	6%	6%	7%	4%	59

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

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	1 1	1					_	•			Cl		_		C:			the desired				
							Re	gion			Cluster	1		ompan			1	Industi	'y			enue
	Upstate												50 or		More	Eng &	_			Whole	Up to	I
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100		Manuf		Service	& Dist	\$5M	\$5M-
Very significant	6%					6%	4%	6%	8%	9%	5%	4%	6%	4%	5%	3%	4%	17%	6%	5%	8%	5%
Somewhat significant	19%					21%	23%	16%	15%	20%	18%	21%	20%	22%	14%	26%	26%	13%	18%	19%	20%	19%
Not very significant	37%					30%	42%	46%	35%	31%	43%	35%	37%	37%	46%	40%	33%	30%	37%	43%	34%	38%
Not at all significant	33%					38%	28%	28%	39%	35%	30%	38%	34%	37%	30%	31%	31%	36%	34%	26%	35%	33%
Prefer not to answer	5%					4%	3%	3%	3%	5%	5%	2%	4%	0%	5%	1%	6%	4%	5%	7%	3%	5%
Q34. In general, do you think relations bet	ween minori	ties and V	Vhite Am	ericans is	or is not a	n econ	omic o	levelor	ment	issue ii	l n Upstate	New Y	ork?									
							Res	gion			Cluster		C	Compan	y Size			Industi	γ		Reve	enue
	Upstate												50 or	51 to	More	Eng &			ĺ	Whole	Up to	
	2016					Alb	Buff	Roch	Syr	High	Middle	Low	less	100	than 100	Constr	Manuf	Retail	Service	& Dist	\$5M	\$5M+
Is an economic development issue	31%					27%	29%	41%	29%	31%	32%	29%	30%	31%	35%	27%	26%	30%	42%	26%	35%	30%
Is NOT an economic development issue	63%					66%	67%	56%	65%	62%	62%	68%	65%	67%	61%	69%	67%	64%	52%	67%	59%	63%
Prefer not to answer	6%					6%	4%	3%	6%	8%	6%	2%	6%	3%	4%	4%	8%	6%	6%	7%	6%	6%
Q35. Do you support or oppose partnershi	ips in your ar	ea betwe	en private	e business	s, educatio	nal ins	titutio	ns and	comm	unity g	roups th	at have	as a g	oal incr	easing em	ploymen	t among	both ur	ban youtl	h and und	ler	
Q35. Do you support or oppose partnershi employedor unemployed urban adults?	ps in your ar	ea betwe	en private	e business	, educatio	nal ins			comm	unity g		at have				ploymen	t among		•	h and und		
	ips in your ar	ea betwe	en private	e business	s, educatio	nal ins		ns and	comm	unity g	roups th	at have		Compan		,	t among	both ur	•			enue
	ps in your ar Upstate	ea betwe	en private	e business	s, educatio	nal ins			comm	nunity g		at have		ompan		ploymen Eng &	t among		•	h and und		1
	. ,	ea betwe	en private	e business	, educatio	onal ins		gion		unity g	Cluster		C	Compan	y Size	Eng &	t among Manuf	Industi	•		Reve	1
	Upstate	ea betwe	en private	e business	, educatio		Reg	gion			Cluster		50 or	Compan 51 to	y Size More	Eng &	 	Industi	У	Whole	Reve	
employedor unemployed urban adults?	Upstate 2016	ea betwee	en private	e business	s, educatio	Alb	Reg Buff	gion Roch	Syr	High	Cluster	Low	50 or less	51 to 100	y Size More than 100	Eng & Constr	Manuf	Industi Retail	Service	Whole & Dist	Reve Up to \$5M	\$5M+
employedor unemployed urban adults? Support	Upstate 2016 77%	ea betwe	en private	e business	e, educatio	Alb 82%	Reg Buff 79%	Roch	Syr 68%	High	Cluster Middle 76%	Low 72%	50 or less 75%	51 to 100 87%	y Size More than 100	Eng & Constr	Manuf	Retail 70%	Service 82%	Whole & Dist 64%	Reve Up to \$5M 73%	\$5M+
employedor unemployed urban adults? Support Oppose Don't know	Upstate 2016 77% 7% 16%		en private	e business	s, educatio	Alb 82% 5%	Reg Buff 79% 7%	Roch 79% 8%	Syr 68% 10%	High 83% 5%	Cluster Middle 76% 7%	Low 72% 9%	50 or less 75% 9%	51 to 100 87% 6%	y Size More than 100 86% 4%	Eng & Constr 76% 12%	Manuf 74% 10%	Retail 70% 4%	Service 82% 3%	Whole & Dist 64% 10%	Reve Up to \$5M 73% 1%	\$5M+ 78% 8%
employedor unemployed urban adults? Support Oppose	Upstate 2016 77% 7% 16%		en private	e business	s, educatio	Alb 82% 5%	Reg Buff 79% 7% 14%	Roch 79% 8% 12%	Syr 68% 10%	High 83% 5%	Cluster Middle 76% 7%	Low 72% 9%	75% 9% 16%	51 to 100 87% 6%	y Size More than 100 86% 4% 11%	Eng & Constr 76% 12%	Manuf 74% 10%	Retail 70% 4%	Service 82% 3% 15%	Whole & Dist 64% 10%	Reve Up to \$5M 73% 1% 25%	\$5M+ 78% 8%
employedor unemployed urban adults? Support Oppose Don't know	Upstate 2016 77% 7% 16%		en private	e business	s, educatio	Alb 82% 5%	Reg Buff 79% 7% 14%	Roch 79% 8%	Syr 68% 10%	High 83% 5%	Middle 76% 7% 17%	Low 72% 9%	75% 9% 16%	51 to 100 87% 6% 6%	y Size More than 100 86% 4% 11%	Eng & Constr 76% 12%	Manuf 74% 10%	Retail 70% 4% 26%	Service 82% 3% 15%	Whole & Dist 64% 10%	Reve Up to \$5M 73% 1% 25%	\$5M+ 78% 8% 14% enue
employedor unemployed urban adults? Support Oppose Don't know	Upstate 2016 77% 7% 16% ur employee		en private	e business	s, educatio	Alb 82% 5%	Reg Buff 79% 7% 14%	Roch 79% 8% 12%	Syr 68% 10% 22%	High 83% 5% 12%	Cluster Middle 76% 7% 17% Cluster	Low 72% 9% 20%	50 or less 75% 9% 16%	51 to 100 87% 6% 6%	y Size More than 100 86% 4% 11%	Eng & Constr 76% 12% 13%	Manuf 74% 10% 15%	Retail 70% 4% 26%	Service 82% 3% 15%	Whole & Dist 64% 10% 26%	Revo Up to \$5M 73% 1% 25%	\$5M+ 78% 8% 14% enue
employedor unemployed urban adults? Support Oppose Don't know	Upstate 2016 77% 7% 16% ur employee Upstate		en private	e business	s, educatio	Alb 82% 5% 13%	Reg Buff 79% 7% 14%	Roch 79% 8% 12%	Syr 68% 10% 22%	High 83% 5% 12%	Cluster Middle 76% 7% 17% Cluster	Low 72% 9% 20%	50 or less 75% 9% 16%	51 to 100 87% 6% 6% Compan	y Size More than 100 86% 4% 11% y Size More	Eng & Constr 76% 12% 13%	Manuf 74% 10% 15%	Retail 70% 4% 26%	Service 82% 3% 15%	Whole & Dist 64% 10% 26% Whole	Revo Up to \$5M 73% 1% 25% Revo	\$5M-178% 8% 14% enue \$5M-1
employedor unemployed urban adults? Support Oppose Don't know Q36. Do you offer a pension or 401K to you	Upstate 2016 77% 7% 16% ur employee Upstate 2016		en private	e business	s, educatio	Alb 82% 5% 13%	Reg Buff 79% 7% 14%	Roch 79% 8% 12% gion Roch	Syr 68% 10% 22%	High 83% 5% 12%	Cluster Middle 76% 7% 17% Cluster Middle	Low 72% 9% 20%	50 or less 75% 9% 16%	51 to 100 87% 6% 6% Compan 51 to 100	y Size More than 100 86% 4% 11% y Size More than 100	Eng & Constr 76% 12% 13% Eng & Constr	Manuf 74% 10% 15%	Retail 70% 4% 26% Industr	Service 82% 3% 15%	Whole & Dist 64% 10% 26% Whole & Dist	Revo Up to \$5M 73% 1% 25% Revo Up to \$5M	\$5M+ 78% 8% 14% enue