

Q1. Which of the following industry categories best describes the type of business your company is engaged in?																						
	Upstate Total 2013	Upstate Total 2012	Region												Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse									High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Engineering and Construction	17%	15%	20%	16%	12%	22%									24%	14%	13%	17%	17%	15%	22%	11%
Food and Beverage	3%	5%	1%	5%	5%	1%									3%	4%	2%	3%	4%	3%	2%	5%
Financial	6%	8%	10%	3%	5%	7%									8%	6%	3%	5%	8%	5%	5%	9%
Manufacturing	19%	19%	12%	22%	20%	25%									16%	21%	19%	19%	20%	19%	21%	19%
Retail	12%	14%	15%	12%	13%	7%									13%	11%	14%	15%	8%	14%	15%	6%
Service	27%	26%	29%	28%	28%	28%									24%	29%	30%	22%	35%	22%	21%	41%
Wholesale and Distribution	15%	14%	15%	15%	17%	10%									12%	15%	19%	19%	8%	22%	12%	9%
Other	0%	0%	0%	0%	0%	0%									0%	0%	0%	0%	0%	0%	0%	0%

Q2. As you think about the current business or economic conditions in New York as compared to six months ago, would you say they are considerably better, a little better, about the same, a little worse, or considerably worse?																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Considerably better	2%	1%	3%	3%	0%	2%	3%	0%	3%	1%	1%	3%	2%	6%	0%	0%	3%	1%	3%	1%	1%
A little better	24%	21%	26%	23%	20%	27%	34%	24%	29%	20%	20%	25%	16%	63%	9%	1%	20%	30%	19%	25%	27%
About the same	46%	44%	54%	42%	46%	44%	45%	57%	58%	50%	46%	41%	44%	30%	74%	13%	47%	46%	46%	47%	46%
A little worse	22%	28%	15%	22%	28%	17%	13%	10%	11%	21%	26%	27%	26%	0%	17%	59%	22%	19%	22%	22%	19%
Considerably worse	7%	7%	3%	9%	6%	9%	5%	10%	0%	9%	6%	4%	12%	0%	0%	27%	9%	4%	10%	4%	6%

Q3. Looking forward from today through next year, that is, the entire 2014 year, how would you describe your expectations for the economy in New York?																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Considerably better	2%	2%	3%	2%	2%	1%	3%	5%	5%	2%	0%	2%	1%	6%	0%	0%	2%	3%	2%	1%	3%
A little better	28%	31%	35%	29%	24%	24%	31%	24%	24%	26%	36%	28%	27%	71%	14%	1%	25%	34%	24%	29%	33%
About the same	40%	32%	43%	37%	34%	45%	45%	33%	50%	40%	36%	38%	37%	23%	66%	13%	43%	36%	39%	45%	36%
A little worse	24%	25%	18%	23%	32%	17%	17%	29%	21%	23%	24%	26%	28%	0%	20%	61%	24%	23%	27%	21%	22%
Considerably worse	6%	10%	1%	9%	4%	13%	4%	10%	0%	10%	4%	6%	8%	0%	0%	25%	7%	4%	8%	4%	6%

Q4. Now thinking specifically about your industry, how would you describe the current business or economic conditions in New York as compared with six months ago?																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Considerably better	3%	2%	3%	3%	3%	1%	4%	5%	8%	2%	1%	2%	3%	9%	0%	0%	3%	2%	4%	1%	3%
A little better	20%	17%	25%	19%	14%	23%	31%	14%	29%	18%	19%	17%	13%	57%	3%	2%	17%	24%	15%	24%	21%
About the same	44%	41%	46%	40%	47%	45%	40%	67%	39%	50%	44%	42%	42%	34%	72%	6%	44%	45%	40%	48%	44%
A little worse	25%	31%	20%	27%	30%	23%	20%	10%	24%	24%	25%	31%	29%	0%	23%	63%	27%	22%	31%	20%	23%
Considerably worse	8%	8%	5%	11%	6%	8%	5%	5%	0%	6%	11%	8%	13%	0%	1%	29%	9%	7%	10%	7%	8%

Q5. And looking forward from today through the next year, how would you describe your expectations for your industry here in New York?																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Considerably better	3%	2%	4%	2%	4%	1%	5%	5%	11%	1%	1%	3%	2%	9%	0%	0%	3%	3%	4%	2%	3%
A little better	25%	27%	30%	25%	19%	28%	33%	29%	26%	25%	30%	18%	22%	68%	8%	0%	21%	32%	17%	30%	29%
About the same	38%	33%	41%	33%	42%	39%	40%	33%	39%	38%	36%	40%	35%	23%	66%	8%	39%	36%	38%	40%	35%
A little worse	25%	27%	20%	27%	28%	19%	18%	29%	21%	27%	25%	26%	26%	0%	26%	54%	26%	20%	29%	20%	23%
Considerably worse	9%	10%	4%	13%	7%	13%	5%	5%	3%	9%	8%	12%	15%	0%	0%	38%	10%	8%	11%	8%	9%

Q6. Now thinking specifically about your company, what are your expectations for revenue through the year 2014? Do you believe your revenue will...																						
	Upstate		Region				Industry							Cluster			Company Size		Company Size			
	Total 2013	Total 2012	Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Grow substantially	3%	2%	6%	2%	1%	3%	5%	0%	3%	2%	0%	5%	3%	8%	1%	1%	2%	4%	3%	3%	4%	
Grow moderately	39%	36%	39%	38%	41%	40%	34%	48%	58%	50%	39%	35%	32%	65%	38%	8%	36%	47%	34%	40%	48%	
Stay about the same	36%	35%	40%	35%	36%	39%	45%	38%	32%	27%	39%	37%	35%	25%	43%	39%	39%	31%	38%	39%	29%	
Decrease moderately	18%	23%	13%	22%	20%	13%	13%	14%	8%	17%	21%	19%	27%	2%	17%	41%	20%	14%	22%	14%	17%	
Decrease substantially	3%	4%	2%	3%	2%	6%	3%	0%	0%	5%	1%	3%	4%	0%	0%	12%	3%	3%	4%	4%	2%	
Refused	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Q7. Again as you consider your company and your existing customer base, do you expect to realize additional revenue from your existing customers, about the same revenue from your existing customers as you currently realize or less revenue from your existing customers than you currently do?																						
	Upstate		Region				Industry							Cluster			Company Size		Company Size			
	Total 2013	Total 2012	Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Additional revenue	21%	22%	22%	21%	19%	20%	20%	5%	45%	28%	18%	19%	13%	40%	17%	4%	17%	26%	17%	20%	27%	
About the same revenue	54%	47%	60%	50%	56%	58%	56%	76%	42%	42%	56%	61%	53%	56%	60%	41%	57%	52%	57%	58%	49%	
Less revenue	25%	30%	18%	29%	25%	22%	24%	19%	13%	30%	26%	20%	33%	4%	22%	55%	25%	22%	25%	22%	24%	
Refused	0%	0%	1%	0%	1%	0%	0%	0%	0%	1%	0%	0%	1%	0%	1%	0%	1%	0%	1%	0%	0%	
Q8. Continuing to focus on your company, please think quickly about profitability. Between today and the end of the calendar year 2014 do you expect your profits to grow substantially, grow moderately, stay about the same, decrease moderately or decrease substantially?																						
	Upstate		Region				Industry							Cluster			Company Size		Company Size			
	Total 2013	Total 2012	Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Grow substantially	2%	2%	3%	1%	1%	3%	4%	0%	0%	3%	0%	1%	3%	5%	0%	1%	1%	3%	1%	1%	3%	
Grow moderately	29%	28%	32%	29%	28%	33%	22%	14%	42%	37%	25%	31%	29%	51%	25%	9%	29%	33%	29%	30%	34%	
Stay about the same	38%	32%	41%	38%	40%	32%	50%	62%	29%	30%	34%	40%	34%	33%	47%	28%	37%	39%	36%	41%	36%	
Decrease moderately	26%	33%	23%	28%	27%	27%	22%	24%	29%	25%	38%	25%	26%	9%	27%	46%	28%	21%	28%	24%	24%	
Decrease substantially	4%	6%	2%	5%	5%	5%	3%	0%	0%	6%	4%	3%	9%	0%	1%	15%	4%	4%	6%	4%	3%	
Refused	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Q9. Businesses and the executives that direct them strive to enhance profitability in many ways. Through which of the following strategies do you plan to MOST enhance your firm's profitability over the next year?																						
	Upstate		Region				Industry							Cluster			Company Size		Company Size			
	Total 2013	Total 2012	Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Market/Demand growth	40%	38%	39%	41%	40%	43%	41%	43%	53%	38%	41%	36%	42%	59%	35%	24%	41%	40%	36%	46%	39%	
Cost reduction	34%	34%	35%	34%	32%	35%	35%	29%	29%	33%	39%	35%	33%	17%	37%	51%	34%	34%	33%	35%	33%	
Price increase	13%	12%	12%	14%	15%	8%	11%	10%	13%	11%	11%	13%	17%	8%	16%	13%	14%	11%	17%	9%	13%	
New technology	10%	9%	10%	7%	8%	13%	5%	14%	3%	17%	5%	12%	7%	11%	10%	8%	9%	9%	11%	7%	9%	
Other	3%	6%	3%	3%	4%	1%	5%	5%	3%	2%	4%	3%	1%	4%	2%	4%	2%	4%	2%	3%	5%	
Refused	1%	1%	1%	1%	1%	0%	3%	0%	0%	0%	0%	1%	0%	1%	1%	0%	0%	1%	0%	0%	2%	

Q10. Please indicate which of the following are major areas of concentration for your firm now and through 2014:																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size				
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Expansion of existing markets	61%	58%	63%	59%	63%	60%	69%	57%	63%	70%	45%	60%	57%	68%	65%	45%	60%	64%	58%	65%	61%
Growth in existing products	53%	50%	52%	52%	51%	58%	37%	57%	74%	65%	57%	44%	58%	57%	54%	44%	51%	55%	51%	53%	55%
Entry into new markets	37%	33%	35%	39%	35%	42%	32%	33%	39%	54%	26%	33%	40%	37%	37%	38%	38%	36%	36%	39%	36%
New product lines	31%	31%	28%	31%	31%	33%	12%	48%	18%	40%	43%	25%	43%	28%	32%	32%	32%	28%	31%	31%	29%
Acquisition of new businesses	11%	13%	6%	13%	12%	15%	6%	14%	18%	14%	1%	12%	17%	14%	10%	10%	9%	15%	7%	12%	17%
Technology innovation	28%	27%	31%	22%	29%	28%	20%	29%	34%	32%	13%	36%	26%	35%	24%	25%	25%	32%	20%	29%	35%
Construction of new locations	10%	8%	8%	9%	11%	8%	15%	10%	11%	5%	13%	9%	7%	14%	8%	8%	7%	13%	5%	7%	19%
Internal restructuring	28%	33%	28%	26%	29%	26%	35%	19%	37%	16%	35%	32%	20%	21%	29%	35%	26%	31%	25%	30%	29%
Other	5%	4%	4%	6%	5%	3%	8%	5%	3%	2%	5%	7%	2%	4%	3%	8%	4%	6%	4%	4%	5%
Refused	2%	2%	0%	3%	1%	2%	2%	0%	0%	0%	1%	3%	1%	1%	1%	3%	2%	1%	2%	1%	1%

Q11. Please indicate which of the following is the MAIN area of concentration for your company now and through 2014:																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size				
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Expansion of existing markets	33%	28%	36%	32%	35%	31%	39%	33%	29%	31%	29%	35%	32%	35%	38%	22%	32%	36%	34%	32%	36%
Growth in existing products	21%	23%	18%	23%	21%	25%	13%	14%	42%	21%	28%	16%	30%	23%	20%	22%	23%	20%	21%	22%	21%
Entry into new markets	14%	13%	13%	14%	14%	15%	16%	19%	13%	22%	8%	9%	12%	13%	14%	13%	15%	12%	14%	14%	13%
New product lines	7%	8%	6%	7%	5%	8%	1%	14%	3%	10%	8%	6%	8%	5%	7%	8%	7%	7%	5%	7%	9%
Acquisition of new businesses	2%	3%	1%	4%	1%	5%	1%	5%	0%	2%	0%	3%	2%	3%	2%	1%	1%	3%	1%	2%	2%
Technology innovation	5%	5%	6%	3%	5%	5%	2%	10%	3%	6%	4%	6%	5%	5%	4%	4%	4%	4%	4%	5%	4%
Construction of new locations	3%	2%	4%	2%	3%	2%	7%	0%	0%	2%	4%	2%	0%	3%	1%	4%	2%	3%	1%	4%	3%
Internal restructuring	11%	12%	11%	10%	13%	6%	13%	5%	8%	3%	15%	15%	10%	8%	9%	17%	11%	10%	13%	11%	7%
Other	4%	3%	5%	4%	2%	2%	6%	0%	3%	2%	5%	4%	0%	2%	3%	6%	3%	4%	4%	3%	4%
Refused	2%	2%	0%	3%	1%	2%	2%	0%	0%	0%	1%	3%	1%	1%	1%	3%	2%	1%	2%	1%	1%

Q12. Do you intend to invest between today through 2014 in any fixed assets for your firm designed to meet growing demand, reduce costs or enhance productivity?																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size				
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Yes	52%	52%	54%	45%	54%	57%	48%	67%	47%	66%	40%	53%	48%	63%	53%	37%	45%	63%	36%	57%	69%
No	36%	38%	34%	41%	33%	38%	42%	24%	50%	22%	41%	35%	43%	26%	36%	50%	41%	29%	47%	34%	25%
Not sure	12%	11%	12%	14%	13%	6%	10%	10%	3%	12%	19%	13%	9%	11%	11%	13%	14%	8%	18%	9%	7%

Q13. (If investing in fixed assets) What is the main way you expect to finance those assets?																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size				
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Internally generated funds	57%	58%	58%	60%	53%	57%	43%	43%	83%	60%	55%	56%	65%	52%	61%	57%	55%	62%	50%	60%	62%
Borrow from a financial institution	34%	33%	34%	29%	38%	37%	52%	50%	11%	31%	42%	27%	29%	38%	31%	30%	34%	32%	38%	31%	32%
Private equity	2%	3%	2%	3%	3%	0%	2%	0%	0%	1%	3%	4%	2%	3%	2%	2%	2%	3%	2%	2%	3%
Not sure	7%	6%	6%	8%	7%	6%	4%	7%	6%	7%	0%	13%	4%	6%	6%	12%	9%	3%	10%	7%	4%

Q14. Now thinking about the people that work for your company, do you intend to substantially increase, moderately increase, remain about the same or decrease your workforce between today and the end of 2014?

	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size			
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Substantially increase	1%	1%	1%	1%	1%	2%	0%	5%	3%	2%	1%	1%	1%	1%	1%	1%	2%	1%	2%	0%	1%	2%
Moderately increase	27%	26%	25%	32%	22%	24%	35%	24%	18%	35%	18%	26%	19%	40%	26%	11%	23%	31%	19%	30%	29%	
Remain about the same	59%	58%	62%	54%	63%	64%	52%	62%	71%	50%	70%	61%	62%	55%	62%	59%	64%	54%	69%	55%	55%	
Decrease	12%	15%	10%	12%	13%	10%	13%	10%	5%	12%	11%	12%	14%	2%	10%	27%	11%	13%	10%	12%	14%	
Refused	1%	1%	2%	2%	1%	0%	1%	0%	3%	1%	0%	1%	3%	1%	1%	1%	1%	0%	1%	1%	0%	

Q15. Now thinking about other challenges that your company faces, which of the following are you concerned with:

	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Existing U.S. competition	25%	27%	29%	20%	28%	25%	24%	38%	18%	28%	26%	18%	37%	28%	27%	19%	26%	25%	26%	27%	21%
Governmental regulation	70%	69%	71%	71%	71%	65%	72%	81%	89%	66%	70%	71%	64%	61%	70%	83%	67%	75%	61%	72%	79%
Taxation	67%	67%	66%	66%	71%	64%	71%	62%	74%	73%	73%	54%	73%	52%	72%	78%	70%	65%	71%	67%	64%
Foreign competition	12%	12%	10%	14%	13%	10%	4%	10%	3%	40%	10%	1%	13%	14%	11%	11%	13%	10%	11%	15%	10%
Energy costs	31%	44%	29%	29%	34%	31%	30%	43%	3%	39%	35%	31%	29%	22%	31%	44%	31%	31%	33%	27%	33%
Risk management	21%	22%	21%	21%	19%	23%	33%	0%	39%	11%	14%	22%	19%	19%	20%	25%	17%	26%	18%	18%	29%
Adverse economic conditions	55%	65%	54%	58%	57%	52%	48%	52%	58%	56%	64%	55%	57%	49%	56%	64%	61%	45%	61%	56%	47%
Health care costs	80%	79%	82%	80%	79%	84%	83%	76%	71%	79%	83%	83%	79%	74%	81%	88%	78%	85%	79%	79%	86%
Global political instability	15%	22%	13%	14%	15%	16%	11%	24%	8%	26%	14%	10%	17%	19%	14%	12%	15%	14%	14%	16%	13%
Rising supplier costs	39%	42%	34%	39%	40%	40%	39%	67%	11%	46%	46%	29%	46%	34%	39%	45%	43%	33%	44%	39%	32%
Human resources	27%	24%	29%	27%	28%	18%	30%	19%	21%	19%	30%	32%	22%	25%	28%	27%	24%	31%	20%	28%	35%
Cash flow	35%	35%	29%	36%	36%	41%	42%	24%	13%	25%	45%	41%	35%	31%	34%	43%	36%	32%	40%	33%	28%
Availability of equity financing	5%	9%	4%	5%	5%	8%	10%	0%	8%	1%	3%	7%	4%	4%	6%	5%	6%	5%	4%	6%	6%
Ability to obtain suitable financing	10%	13%	10%	9%	10%	8%	14%	0%	5%	12%	8%	9%	7%	7%	8%	15%	10%	9%	10%	12%	5%
Other	3%	4%	4%	3%	3%	2%	4%	0%	0%	3%	5%	3%	2%	3%	3%	3%	3%	2%	2%	5%	1%
Don't know/Refused	1%	0%	0%	3%	1%	0%	0%	0%	0%	0%	0%	2%	4%	2%	1%	0%	1%	1%	1%	1%	1%

Q16. Which of the challenges you selected are you MOST concerned with?

	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Existing U.S. competition	8%	6%	9%	4%	9%	9%	8%	10%	3%	7%	10%	5%	11%	12%	7%	3%	8%	7%	7%	8%	6%
Governmental regulation	23%	24%	24%	23%	20%	28%	24%	29%	66%	14%	14%	28%	17%	18%	23%	30%	19%	29%	19%	20%	33%
Taxation	14%	12%	14%	12%	15%	15%	12%	10%	8%	12%	14%	20%	14%	8%	13%	24%	16%	10%	16%	14%	9%
Foreign competition	4%	3%	3%	5%	3%	2%	0%	0%	0%	15%	1%	0%	3%	4%	4%	1%	3%	4%	1%	5%	5%
Energy costs	1%	3%	1%	1%	2%	1%	0%	5%	0%	0%	1%	2%	1%	1%	2%	0%	1%	1%	2%	0%	1%
Risk management	2%	1%	3%	1%	1%	1%	5%	0%	0%	1%	0%	2%	1%	3%	1%	1%	1%	3%	1%	1%	3%
Adverse economic conditions	15%	24%	17%	15%	15%	14%	14%	19%	8%	15%	19%	15%	17%	17%	16%	12%	17%	13%	16%	17%	12%
Health care costs	18%	11%	15%	20%	20%	15%	19%	19%	13%	18%	19%	20%	15%	19%	17%	18%	17%	21%	19%	17%	20%
Global political instability	1%	1%	1%	1%	1%	0%	1%	0%	0%	2%	1%	0%	0%	1%	0%	0%	1%	0%	1%	0%	0%
Rising supplier costs	3%	2%	3%	2%	4%	5%	2%	0%	0%	5%	4%	2%	3%	4%	2%	2%	3%	3%	3%	4%	3%
Human resources	3%	2%	2%	3%	4%	1%	5%	10%	3%	2%	1%	2%	4%	3%	4%	1%	3%	3%	1%	4%	4%
Cash flow	6%	6%	6%	7%	4%	8%	5%	0%	0%	4%	10%	7%	6%	5%	6%	6%	7%	5%	8%	6%	3%
Availability of equity financing	0%	1%	0%	1%	1%	0%	1%	0%	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%	0%	0%	0%
Ability to obtain suitable financing	1%	2%	1%	2%	1%	0%	2%	0%	0%	2%	0%	1%	1%	1%	1%	2%	1%	0%	1%	1%	0%
Other	1%	2%	1%	2%	1%	0%	2%	0%	0%	2%	0%	1%	1%	2%	1%	1%	1%	1%	1%	2%	0%
Don't know/Refused	1%	0%	0%	3%	1%	1%	1%	0%	0%	1%	0%	1%	4%	1%	2%	0%	1%	1%	1%	1%	1%

Q17. Thinking specifically about New York and the relationship between the state government and businesses like yours, overall would you say the government of the State of New York is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?																					
	Upstate		Region				Industry							Cluster			Company Size		Company Size		
	Total 2013	Total 2012	Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Excellent	1%	1%	0%	1%	2%	0%	1%	0%	0%	0%	0%	1%	1%	1%	0%	0%	1%	0%	1%	0%	0%
Good	7%	9%	9%	6%	4%	13%	5%	0%	13%	8%	3%	9%	7%	14%	6%	1%	7%	8%	7%	7%	8%
Fair	26%	34%	25%	29%	22%	35%	27%	57%	21%	24%	25%	26%	22%	41%	25%	9%	27%	27%	23%	29%	30%
Poor	65%	55%	66%	63%	70%	51%	65%	43%	66%	66%	70%	62%	66%	42%	67%	90%	64%	63%	68%	61%	61%
Don't know/Refused	2%	2%	0%	2%	3%	1%	1%	0%	0%	2%	3%	1%	3%	1%	3%	0%	1%	2%	1%	3%	1%

Q18. Of the following, what would you like to see the Governor and Legislature of New York focus on?																					
	Upstate		Region				Industry							Cluster			Company Size		Company Size		
	Total 2013	Total 2012	Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Income Tax Reform	69%	59%	68%	71%	74%	59%	67%	57%	76%	69%	72%	66%	76%	60%	72%	76%	71%	66%	73%	66%	69%
Spending Cuts	72%	74%	60%	76%	77%	70%	69%	81%	74%	76%	72%	69%	72%	60%	72%	88%	73%	69%	76%	70%	67%
Infrastructure Development	32%	37%	38%	34%	27%	28%	49%	24%	29%	32%	23%	26%	34%	35%	31%	29%	31%	35%	30%	32%	36%
Business Development Incentives	43%	47%	40%	41%	41%	51%	41%	29%	32%	46%	43%	44%	46%	55%	40%	31%	41%	44%	45%	35%	49%
Ethics Reform	39%	35%	39%	38%	42%	31%	40%	43%	39%	42%	34%	40%	36%	33%	39%	48%	41%	36%	43%	37%	36%
Increasing State Revenues through consumer oriented taxes	6%	8%	5%	6%	6%	8%	6%	5%	5%	6%	5%	8%	4%	5%	6%	8%	6%	6%	8%	3%	8%
Other	11%	17%	11%	10%	12%	15%	18%	10%	3%	11%	11%	12%	6%	9%	11%	14%	11%	12%	10%	14%	8%
(Vol) Reducing regulations	4%	4%	3%	5%	5%	1%	2%	0%	3%	2%	8%	5%	4%	3%	3%	6%	3%	5%	3%	6%	4%
(Vol) Workers compensation reform	2%	2%	3%	1%	2%	0%	1%	0%	0%	1%	4%	2%	2%	1%	2%	2%	2%	2%	1%	2%	2%
Don't know/Refused	1%	0%	0%	1%	1%	0%	0%	0%	0%	0%	0%	1%	2%	0%	1%	1%	0%	1%	0%	1%	1%

Q19. Of those, which SINGLE area would you most like to see the Governor and Legislature focus on?																					
	Upstate		Region				Industry							Cluster			Company Size		Company Size		
	Total 2013	Total 2012	Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Income Tax Reform	25%	18%	25%	26%	24%	22%	20%	24%	39%	23%	32%	22%	27%	25%	24%	26%	25%	26%	27%	21%	30%
Spending Cuts	35%	40%	27%	38%	41%	33%	25%	43%	32%	41%	34%	37%	38%	28%	37%	41%	37%	32%	37%	39%	27%
Infrastructure Development	9%	10%	16%	6%	6%	11%	24%	14%	8%	2%	4%	7%	8%	12%	10%	3%	7%	13%	6%	11%	13%
Business Development Incentives	15%	13%	18%	14%	11%	18%	15%	10%	13%	18%	16%	12%	14%	21%	13%	8%	16%	13%	17%	11%	17%
Ethics Reform	6%	5%	4%	7%	7%	2%	5%	0%	3%	7%	4%	8%	4%	4%	6%	7%	7%	4%	7%	6%	4%
Increasing State Revenues through consumer oriented taxes	1%	1%	0%	2%	2%	1%	2%	5%	0%	0%	1%	1%	1%	0%	1%	2%	2%	0%	3%	0%	1%
Other	6%	9%	8%	4%	4%	9%	8%	5%	5%	7%	5%	6%	1%	6%	6%	5%	6%	5%	4%	9%	3%
(Vol) Reducing regulations	2%	2%	1%	3%	2%	3%	1%	0%	0%	2%	3%	3%	4%	1%	1%	5%	1%	4%	1%	3%	3%
(Vol) Workers compensation reform	1%	1%	1%	0%	2%	0%	0%	0%	0%	0%	1%	2%	1%	0%	1%	1%	0%	2%	0%	1%	2%
Don't know/Refused	1%	0%	0%	1%	1%	0%	0%	0%	0%	0%	0%	1%	2%	0%	1%	1%	0%	1%	0%	1%	1%

Q20. How confident are you in the ability of the government of the State of New York to improve the business climate for businesses like yours here in New York over the next year? Are you...																					
	Upstate		Region				Industry							Cluster			Company Size		Company Size		
	Total 2013	Total 2012	Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Very confident	0%	2%	0%	1%	1%	0%	0%	0%	0%	0%	0%	1%	1%	0%	0%	0%	1%	0%	1%	0%	0%
Somewhat confident	15%	23%	14%	15%	15%	17%	15%	24%	16%	17%	11%	17%	9%	32%	10%	1%	14%	16%	11%	16%	18%
Not very confident	48%	44%	52%	48%	40%	55%	47%	48%	47%	46%	58%	47%	42%	52%	55%	29%	48%	46%	50%	45%	47%
Not at all confident	37%	31%	34%	35%	44%	28%	38%	29%	37%	37%	30%	35%	45%	15%	34%	69%	37%	38%	38%	38%	35%
Don't know/Refused	1%	0%	1%	1%	1%	0%	0%	0%	0%	0%	0%	1%	2%	0%	1%	1%	1%	0%	0%	1%	0%

Q21. If the Tax-Free NY plan were to be implemented, what type of impact do you believe it would have on your business?																					
	Upstate Total 2013	Region				Industry							Cluster			Company Size		Company Size			
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Positive impact	34%	29%	41%	28%	42%	39%	38%	26%	30%	38%	32%	39%	42%	30%	33%	35%	33%	33%	36%	35%	
Negative impact	11%	11%	12%	12%	7%	8%	24%	3%	14%	10%	12%	9%	6%	11%	16%	11%	11%	12%	10%	10%	
No impact	49%	54%	41%	53%	48%	44%	19%	71%	50%	47%	51%	46%	47%	51%	46%	49%	49%	50%	47%	51%	
Don't know/Refused	6%	5%	7%	7%	3%	9%	19%	0%	6%	5%	5%	5%	5%	7%	5%	5%	7%	5%	8%	5%	
Q22. And thinking about the efforts of the federal government, overall would you say the federal government is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Excellent	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Good	3%	6%	4%	3%	2%	5%	4%	0%	3%	1%	6%	3%	6%	3%	0%	4%	2%	3%	4%	2%	
Fair	18%	21%	23%	16%	13%	23%	18%	14%	18%	17%	18%	19%	18%	29%	15%	8%	19%	18%	19%	16%	
Poor	76%	71%	72%	78%	81%	69%	78%	86%	79%	77%	80%	70%	76%	60%	78%	92%	76%	77%	75%	76%	
Don't know	3%	2%	1%	4%	4%	3%	1%	0%	0%	5%	1%	5%	3%	4%	4%	0%	2%	4%	3%	2%	
Q23. How confident are you in the ability of the federal government to improve the business climate for businesses like yours here in New York over the next year? Are you...																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Very confident	0%	1%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	
Somewhat confident	7%	13%	8%	7%	5%	10%	10%	10%	3%	2%	4%	11%	6%	16%	5%	1%	7%	7%	8%	6%	
Not very confident	46%	42%	48%	42%	45%	48%	45%	52%	39%	50%	53%	43%	39%	55%	47%	30%	44%	48%	43%	54%	
Not at all confident	46%	43%	43%	50%	49%	42%	44%	38%	58%	46%	43%	45%	53%	28%	47%	69%	48%	44%	48%	39%	
Don't know/Refused	1%	1%	0%	1%	2%	0%	1%	0%	0%	1%	0%	1%	2%	0%	1%	0%	1%	1%	0%	1%	
Q24A. For each of the following national proposals indicate whether you support it or oppose it? - Repeal the Health Care Reform Legislation																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Support	67%	66%	66%	70%	70%	56%	69%	71%	66%	82%	71%	61%	61%	58%	66%	82%	68%	67%	66%	68%	
Oppose	23%	27%	27%	19%	21%	31%	20%	24%	11%	20%	25%	29%	23%	33%	23%	11%	24%	21%	27%	21%	
No opinion	9%	7%	8%	11%	8%	14%	11%	5%	8%	8%	4%	9%	16%	8%	11%	7%	8%	12%	7%	11%	
Q24B. For each of the following national proposals indicate whether you support it or oppose it? - Pass a Balanced Budget Constitutional Amendment																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Support	78%	49%	78%	77%	78%	81%	80%	76%	84%	77%	73%	77%	81%	74%	79%	81%	78%	80%	80%	80%	
Oppose	9%	11%	8%	8%	10%	7%	11%	10%	11%	8%	8%	9%	6%	13%	8%	4%	9%	8%	10%	7%	
No opinion	13%	9%	13%	15%	12%	13%	9%	14%	5%	15%	19%	14%	13%	12%	13%	15%	13%	12%	11%	13%	
Q24C. For each of the following national proposals indicate whether you support it or oppose it? - Increase Federal Spending on Infrastructure																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size		Company Size		
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Support	47%	49%	57%	49%	37%	48%	65%	29%	29%	44%	44%	45%	49%	57%	46%	36%	48%	48%	50%	49%	
Oppose	30%	35%	26%	28%	33%	30%	23%	24%	45%	33%	37%	27%	27%	19%	30%	42%	30%	28%	28%	27%	
No opinion	23%	17%	17%	23%	30%	23%	12%	48%	26%	24%	19%	28%	24%	23%	24%	22%	22%	24%	23%	24%	

Q24D. For each of the following national proposals indicate whether you support it or oppose it? - Reduce the Corporate Income Tax Rates																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size				
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Support	79%	72%	78%	81%	76%	82%	74%	67%	89%	88%	84%	72%	80%	74%	80%	83%	81%	76%	81%	78%	78%
Oppose	12%	16%	11%	11%	14%	10%	15%	24%	5%	7%	13%	16%	7%	16%	10%	9%	12%	12%	13%	11%	12%
No opinion	9%	12%	12%	8%	10%	8%	11%	10%	5%	5%	4%	12%	13%	10%	9%	8%	7%	13%	7%	11%	10%
Q24E. For each of the following national proposals indicate whether you support it or oppose it? - Lessen Corporate Income Tax Deductions																					
	Upstate Total 2013	Upstate Total 2012	Region				Industry							Cluster			Company Size				
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Support	36%	38%	31%	35%	40%	38%	35%	48%	47%	33%	34%	38%	31%	40%	36%	31%	36%	36%	36%	36%	36%
Oppose	44%	45%	48%	45%	39%	42%	49%	19%	32%	50%	44%	40%	47%	41%	45%	46%	45%	42%	44%	46%	41%
No opinion	20%	18%	21%	19%	22%	20%	16%	33%	21%	17%	22%	22%	22%	19%	20%	23%	19%	22%	20%	18%	23%
Q25. Thinking specifically about your immediate geographic area, including yours and adjacent counties, is the general business climate improving, staying the same or worsening?																					
	Upstate Total 2013		Region				Industry							Cluster			Company Size				
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Improving	15%		20%	20%	8%	8%	21%	10%	11%	13%	13%	18%	9%	32%	10%	3%	14%	17%	16%	14%	16%
Staying the same	55%		62%	45%	62%	51%	56%	81%	74%	54%	53%	51%	48%	57%	65%	32%	52%	60%	50%	57%	61%
Worsening	28%		15%	33%	27%	39%	21%	10%	16%	30%	30%	29%	39%	8%	22%	64%	31%	21%	32%	26%	23%
Don't know/Refused	3%		3%	3%	3%	2%	2%	0%	0%	2%	4%	3%	4%	2%	3%	2%	2%	2%	3%	3%	0%
Q26. And continuing to consider the local market, are conditions locally improving, staying the same or worsening for businesses in your industry?																					
	Upstate Total 2013		Region				Industry							Cluster			Company Size				
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Improving	13%		19%	16%	7%	8%	23%	19%	11%	11%	15%	12%	6%	32%	7%	2%	11%	16%	11%	13%	15%
Staying the same	56%		61%	48%	63%	57%	55%	67%	74%	57%	48%	57%	52%	63%	67%	28%	56%	59%	55%	59%	58%
Worsening	30%		20%	35%	29%	35%	21%	14%	16%	31%	37%	31%	41%	6%	25%	70%	32%	25%	33%	27%	26%
Don't know/Refused	1%		0%	1%	1%	0%	1%	0%	0%	1%	0%	1%	1%	0%	1%	0%	1%	0%	0%	0%	1%
Q27. Which of the following industry sectors do you think will have a positive impact on the economic vitality of your geographic area in the next three to five years?																					
	Upstate Total 2013		Region				Industry							Cluster			Company Size				
			Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more
Education	43%		35%	42%	48%	55%	50%	33%	37%	36%	43%	47%	44%	48%	45%	35%	43%	45%	41%	47%	42%
Tourism	33%		22%	42%	35%	33%	31%	38%	34%	25%	28%	41%	36%	39%	33%	28%	36%	31%	36%	33%	33%
Technology	57%		80%	39%	58%	55%	55%	38%	66%	54%	61%	59%	54%	65%	58%	43%	57%	60%	58%	58%	59%
Transportation	12%		14%	13%	7%	16%	12%	19%	3%	15%	11%	10%	14%	16%	10%	10%	12%	12%	10%	14%	12%
Medical	56%		36%	74%	56%	53%	56%	52%	74%	46%	44%	64%	56%	59%	54%	55%	53%	61%	54%	59%	55%
Green and sustainable energy	24%		26%	22%	23%	30%	29%	24%	13%	27%	29%	25%	16%	33%	21%	19%	28%	20%	26%	29%	17%
Manufacturing	38%		31%	40%	44%	34%	36%	24%	24%	54%	38%	33%	39%	39%	39%	36%	40%	36%	39%	40%	35%
Other	3%		3%	4%	4%	2%	6%	10%	3%	2%	1%	3%	3%	3%	3%	3%	4%	2%	4%	5%	1%
None of the above	6%		4%	6%	7%	8%	3%	14%	0%	8%	14%	4%	6%	3%	5%	13%	6%	6%	7%	4%	8%

Q28. Of those, which SINGLE industry sector do you think will have the greatest positive impact on the economic vitality of your geographic area in the next three to five years?																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size				
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Education	8%	4%	6%	11%	16%	12%	0%	21%	6%	6%	8%	7%	10%	9%	5%	10%	6%	10%	9%	5%	
Tourism	7%	4%	6%	10%	9%	2%	0%	3%	4%	8%	11%	13%	7%	7%	7%	8%	6%	6%	8%	7%	
Technology	26%	60%	8%	22%	13%	29%	19%	34%	23%	30%	25%	20%	30%	28%	16%	23%	33%	24%	27%	30%	
Transportation	1%	1%	3%	0%	1%	2%	5%	0%	1%	3%	0%	2%	1%	1%	3%	1%	1%	0%	1%	2%	
Medical	29%	6%	53%	25%	25%	31%	33%	32%	26%	24%	34%	23%	29%	27%	32%	27%	31%	29%	26%	32%	
Green and sustainable energy	3%	4%	2%	2%	8%	5%	10%	0%	2%	4%	3%	3%	5%	3%	3%	4%	2%	5%	4%	0%	
Manufacturing	16%	14%	14%	19%	18%	13%	5%	5%	28%	11%	12%	23%	16%	16%	17%	18%	13%	15%	17%	15%	
Other	2%	1%	1%	4%	1%	3%	14%	0%	1%	1%	1%	3%	1%	3%	2%	2%	1%	2%	3%	0%	
None of the above	7%	6%	7%	7%	9%	4%	14%	5%	10%	13%	5%	6%	3%	6%	15%	7%	6%	9%	4%	8%	

Q29A. How would you rate your local area on each of the following: - Suitable workforce																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size				
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	15%	8%	17%	23%	10%	15%	14%	11%	9%	14%	19%	20%	16%	15%	16%	17%	13%	20%	13%	14%	
Good	50%	51%	50%	51%	44%	52%	48%	68%	51%	52%	48%	41%	55%	51%	42%	47%	56%	44%	54%	53%	
Fair	26%	31%	26%	19%	38%	25%	33%	21%	28%	25%	23%	32%	25%	25%	29%	25%	27%	26%	24%	28%	
Poor	8%	10%	6%	7%	7%	7%	5%	0%	11%	8%	9%	7%	4%	8%	12%	10%	4%	9%	9%	4%	
Don't know/Refused	1%	0%	2%	1%	1%	1%	0%	0%	1%	1%	1%	0%	0%	1%	1%	0%	1%	0%	1%	1%	

Q29B. How would you rate your local area on each of the following: - Consumer confidence																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size				
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	1%	1%	2%	0%	1%	0%	0%	0%	2%	0%	1%	1%	2%	0%	1%	1%	0%	1%	0%	1%	
Good	27%	31%	24%	28%	27%	28%	48%	26%	28%	22%	30%	21%	38%	27%	16%	26%	31%	25%	29%	29%	
Fair	54%	54%	53%	57%	52%	55%	33%	68%	53%	54%	51%	59%	52%	58%	49%	54%	56%	54%	54%	57%	
Poor	16%	12%	18%	15%	18%	15%	14%	5%	15%	22%	15%	19%	7%	12%	34%	17%	12%	17%	15%	11%	
Don't know/Refused	2%	2%	3%	1%	1%	2%	5%	0%	2%	3%	3%	0%	1%	3%	1%	2%	1%	2%	1%	2%	

Q29C. How would you rate your local area on each of the following: - Transportation infrastructure																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size				
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	5%	3%	9%	5%	3%	3%	14%	5%	7%	5%	4%	8%	9%	4%	4%	7%	4%	6%	6%	5%	
Good	47%	44%	45%	53%	44%	51%	48%	61%	51%	51%	40%	45%	53%	46%	44%	48%	47%	45%	52%	45%	
Fair	35%	42%	31%	33%	36%	32%	24%	29%	34%	29%	43%	35%	29%	37%	40%	32%	40%	34%	32%	40%	
Poor	10%	10%	12%	7%	15%	12%	14%	5%	7%	13%	11%	9%	8%	11%	12%	12%	8%	14%	9%	8%	
Don't know/Refused	2%	1%	3%	2%	1%	2%	0%	0%	1%	3%	2%	2%	1%	2%	1%	1%	2%	0%	2%	2%	

Q29D. How would you rate your local area on each of the following: - Local governmental support for business																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size				
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	2%	2%	1%	3%	1%	0%	0%	5%	2%	1%	2%	2%	2%	2%	2%	2%	1%	2%	2%	3%	
Good	24%	19%	24%	27%	27%	24%	48%	16%	23%	19%	28%	20%	36%	23%	10%	24%	24%	22%	24%	27%	
Fair	43%	43%	41%	45%	43%	48%	33%	55%	42%	44%	43%	35%	44%	45%	38%	39%	49%	39%	44%	45%	
Poor	30%	36%	33%	23%	27%	26%	19%	24%	32%	34%	26%	42%	19%	28%	49%	34%	24%	36%	29%	25%	
Don't know/Refused	1%	0%	2%	2%	1%	2%	0%	0%	1%	1%	2%	1%	0%	2%	1%	1%	1%	1%	1%	1%	

Q29E. How would you rate your local area on each of the following: - As an area where businesses can succeed																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size		Company Size		
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	3%	4%	4%	4%	0%	3%	10%	8%	2%	1%	6%	1%	7%	2%	2%	3%	5%	4%	2%	6%	
Good	24%	28%	18%	25%	26%	26%	33%	26%	20%	24%	25%	21%	33%	26%	10%	22%	27%	23%	22%	29%	
Fair	51%	47%	49%	59%	45%	55%	38%	53%	49%	48%	52%	52%	54%	51%	46%	49%	54%	47%	56%	50%	
Poor	21%	21%	26%	11%	27%	15%	19%	13%	28%	23%	16%	26%	7%	19%	41%	24%	13%	26%	18%	14%	
Don't know/Refused	1%	1%	3%	1%	1%	1%	0%	0%	1%	4%	2%	0%	1%	2%	1%	1%	1%	1%	1%	1%	

Q29F. How would you rate your local area on each of the following: - As a place where consumers want to live																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size		Company Size		
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	14%	18%	14%	12%	9%	11%	14%	32%	10%	8%	18%	12%	17%	15%	8%	13%	15%	14%	13%	16%	
Good	44%	44%	36%	52%	42%	44%	43%	47%	45%	47%	40%	44%	50%	46%	32%	43%	47%	42%	46%	45%	
Fair	30%	31%	34%	25%	30%	34%	38%	18%	32%	25%	29%	33%	28%	30%	33%	31%	27%	29%	31%	27%	
Poor	11%	7%	14%	10%	18%	8%	0%	3%	13%	19%	12%	12%	6%	8%	26%	12%	10%	14%	9%	11%	
Don't know/Refused	1%	0%	2%	2%	1%	2%	5%	0%	1%	1%	1%	0%	0%	2%	1%	1%	1%	1%	0%	1%	

Q30. Turning to your impressions of the local workforce. Is there an ample supply of local workers that are appropriately trained for your employment needs?																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size		Company Size		
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Yes	51%	45%	55%	56%	42%	44%	48%	68%	42%	54%	55%	56%	56%	47%	52%	52%	51%	55%	47%	52%	
No	44%	51%	40%	40%	51%	51%	48%	27%	50%	44%	41%	40%	40%	47%	44%	44%	45%	40%	50%	43%	
Don't know/Refused	5%	4%	5%	5%	7%	5%	5%	5%	7%	1%	5%	4%	4%	5%	5%	4%	4%	5%	3%	5%	

Based on the job applicants that you have seen over the last couple of years, how would you assess those job applicants on the following skills or attributes?

Q31A. Technical skills																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size		Company Size		
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	6%	4%	6%	9%	5%	9%	0%	5%	4%	6%	7%	5%	7%	5%	8%	7%	6%	7%	6%	6%	
Good	37%	36%	38%	37%	36%	38%	38%	49%	24%	29%	45%	40%	41%	35%	36%	35%	41%	33%	37%	44%	
Fair	36%	42%	33%	30%	45%	38%	38%	38%	39%	38%	32%	34%	33%	41%	30%	35%	38%	36%	36%	37%	
Poor	14%	13%	15%	14%	13%	10%	10%	3%	30%	10%	9%	15%	12%	12%	20%	16%	10%	15%	17%	8%	
Not applicable	7%	4%	7%	11%	1%	5%	14%	5%	3%	16%	7%	5%	7%	7%	7%	7%	5%	9%	4%	5%	

Q31B. Verbal skills																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size		Company Size		
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	3%	1%	2%	2%	6%	4%	0%	0%	2%	1%	3%	2%	3%	2%	3%	2%	3%	1%	4%	3%	
Good	33%	35%	30%	34%	28%	37%	29%	46%	24%	32%	36%	30%	40%	32%	25%	29%	37%	27%	33%	39%	
Fair	48%	51%	45%	45%	56%	42%	43%	54%	52%	52%	47%	46%	45%	48%	50%	48%	49%	49%	47%	48%	
Poor	14%	12%	18%	15%	9%	15%	24%	0%	18%	14%	11%	19%	10%	15%	20%	17%	10%	17%	15%	10%	
Not applicable	3%	1%	4%	4%	1%	2%	5%	0%	4%	1%	3%	3%	3%	3%	3%	3%	1%	5%	1%	1%	

Q31C. Writing skills																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size				
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	2%	1%	1%	2%	5%	4%	0%	0%	2%	0%	3%	1%	2%	2%	3%	2%	2%	1%	3%	2%	
Good	20%	27%	18%	18%	18%	21%	14%	35%	16%	16%	23%	20%	23%	21%	16%	18%	24%	19%	18%	25%	
Fair	42%	46%	41%	40%	45%	43%	29%	49%	42%	48%	43%	37%	44%	40%	44%	42%	44%	41%	43%	47%	
Poor	30%	22%	34%	33%	30%	25%	33%	16%	35%	28%	28%	36%	25%	32%	32%	32%	25%	32%	32%	23%	
Not applicable	6%	4%	6%	8%	2%	7%	24%	0%	6%	8%	4%	5%	6%	6%	5%	6%	4%	8%	4%	3%	
Q31D. Initiative																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size				
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	4%	3%	4%	2%	6%	6%	5%	3%	3%	4%	4%	1%	4%	4%	3%	3%	4%	3%	3%	5%	
Good	28%	22%	28%	29%	38%	31%	29%	54%	28%	23%	25%	27%	35%	27%	23%	25%	33%	19%	32%	35%	
Fair	41%	49%	39%	42%	32%	42%	38%	38%	36%	39%	47%	41%	44%	42%	37%	41%	44%	42%	40%	45%	
Poor	23%	23%	24%	23%	20%	19%	19%	5%	28%	29%	20%	27%	13%	24%	32%	27%	16%	29%	21%	14%	
Not applicable	4%	3%	5%	5%	5%	3%	10%	0%	5%	5%	5%	4%	4%	4%	5%	3%	6%	4%	2%		
Q31E. Work ethic																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size				
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	6%	4%	9%	2%	7%	7%	10%	8%	5%	5%	6%	2%	7%	5%	5%	5%	6%	6%	4%	7%	
Good	31%	27%	33%	31%	35%	36%	29%	46%	31%	27%	28%	30%	39%	28%	26%	29%	35%	24%	34%	38%	
Fair	36%	38%	28%	42%	33%	37%	19%	38%	30%	33%	40%	39%	33%	40%	31%	35%	38%	36%	36%	36%	
Poor	24%	29%	27%	20%	23%	19%	33%	5%	30%	34%	22%	24%	18%	24%	34%	28%	18%	28%	25%	18%	
Not applicable	3%	2%	4%	5%	2%	2%	10%	3%	4%	1%	4%	4%	3%	4%	5%	4%	2%	6%	1%	1%	
Q31F. Realistic about compensation																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size				
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	3%	1%	4%	2%	3%	5%	5%	3%	2%	3%	2%	1%	3%	2%	3%	2%	3%	2%	3%	1%	
Good	29%	30%	30%	32%	22%	30%	33%	41%	28%	25%	31%	26%	38%	28%	20%	26%	35%	23%	30%	39%	
Fair	45%	49%	38%	44%	51%	52%	43%	41%	43%	48%	39%	50%	44%	45%	45%	46%	43%	45%	47%	41%	
Poor	21%	19%	25%	17%	23%	12%	14%	16%	23%	22%	26%	20%	12%	23%	28%	23%	18%	24%	20%	17%	
Not applicable	3%	0%	4%	5%	1%	1%	5%	0%	3%	3%	3%	3%	3%	2%	3%	3%	1%	6%	0%	1%	
Q31G. Professionalism																					
	Upstate Total 2013	Region				Industry								Cluster			Company Size				
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Excellent	4%	2%	5%	4%	5%	8%	0%	3%	3%	1%	4%	1%	4%	3%	5%	4%	4%	4%	3%		
Good	36%	37%	33%	35%	41%	37%	24%	70%	29%	41%	37%	30%	45%	34%	28%	33%	41%	31%	35%	45%	
Fair	42%	47%	38%	46%	36%	44%	43%	27%	41%	34%	45%	48%	40%	43%	44%	41%	46%	42%	44%	43%	
Poor	15%	13%	18%	11%	17%	9%	24%	0%	21%	22%	11%	17%	8%	17%	19%	18%	8%	17%	17%	8%	
Not applicable	3%	1%	5%	4%	1%	1%	10%	0%	6%	3%	3%	4%	3%	3%	5%	4%	1%	7%	1%	1%	

Q32. Thinking specifically about health care and the Affordable Care Act, known as Obamacare. Do you expect it to have a positive impact on your business, a negative impact or no real impact?																					
	Upstate Total 2013	Region				Industry							Cluster			Company Size					
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Positive impact	6%	4%	8%	4%	11%	5%	10%	0%	5%	6%	13%	1%	9%	6%	4%	6%	7%	7%	5%	8%	
Negative impact	69%	69%	70%	72%	61%	70%	67%	84%	72%	72%	60%	72%	55%	72%	82%	69%	74%	68%	72%	73%	
No impact	22%	23%	19%	22%	24%	22%	19%	16%	22%	18%	22%	26%	33%	19%	12%	25%	17%	25%	21%	17%	
Don't know/Refused	3%	3%	3%	2%	3%	3%	5%	0%	1%	4%	5%	1%	3%	3%	3%	0%	2%	0%	1%	1%	
Q33A. Have you made any of the following adjustments due to the Affordable Care Act? - Increasing benefits to retain employees																					
	Upstate Total 2013	Region				Industry							Cluster			Company Size					
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Yes	7%	8%	7%	8%	6%	4%	14%	11%	2%	8%	9%	11%	10%	7%	3%	7%	9%	5%	8%	9%	
No	87%	87%	88%	88%	84%	94%	76%	81%	93%	86%	82%	87%	87%	65%	88%	89%	88%	89%	89%	89%	
Don't know/Refused	6%	5%	6%	4%	10%	2%	10%	8%	4%	6%	9%	2%	3%	6%	9%	4%	3%	6%	3%	1%	
Q33B. Have you made any of the following adjustments due to the Affordable Care Act? - Decreasing benefits to cut costs																					
	Upstate Total 2013	Region				Industry							Cluster			Company Size					
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Yes	32%	29%	32%	34%	27%	39%	14%	38%	31%	30%	30%	30%	24%	31%	44%	29%	37%	27%	36%	33%	
No	64%	66%	63%	63%	65%	59%	76%	57%	65%	63%	63%	68%	73%	65%	50%	69%	60%	70%	62%	65%	
Don't know/Refused	5%	4%	5%	3%	8%	2%	10%	5%	3%	6%	7%	2%	3%	5%	7%	2%	3%	4%	2%	2%	
Q33C. Have you made any of the following adjustments due to the Affordable Care Act? - Offering defined contribution health insurance																					
	Upstate Total 2013	Region				Industry							Cluster			Company Size					
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Yes	28%	23%	29%	32%	30%	30%	29%	19%	31%	32%	28%	26%	24%	33%	26%	30%	29%	28%	32%	30%	
No	66%	73%	65%	62%	60%	69%	62%	76%	64%	62%	61%	72%	73%	61%	65%	66%	67%	67%	66%	66%	
Don't know/Refused	6%	4%	6%	6%	10%	2%	10%	5%	6%	6%	10%	2%	3%	7%	9%	4%	4%	6%	2%	4%	
Q33D. Have you made any of the following adjustments due to the Affordable Care Act? - Hiring more part-time employees																					
	Upstate Total 2013	Region				Industry							Cluster			Company Size					
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Yes	24%	25%	27%	21%	24%	15%	5%	24%	27%	27%	27%	24%	14%	25%	37%	24%	26%	21%	26%	27%	
No	71%	72%	69%	75%	69%	83%	86%	68%	71%	66%	65%	73%	83%	71%	58%	73%	73%	75%	72%	72%	
Don't know/Refused	4%	3%	5%	4%	7%	2%	10%	8%	2%	4%	7%	2%	3%	5%	5%	2%	2%	4%	2%	1%	
Q33E. Have you made any of the following adjustments due to the Affordable Care Act? - Reducing the number of hours current employees work																					
	Upstate Total 2013	Region				Industry							Cluster			Company Size					
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
Yes	18%	12%	19%	20%	18%	12%	14%	5%	17%	19%	20%	24%	9%	16%	32%	17%	20%	15%	18%	21%	
No	78%	85%	76%	76%	74%	86%	76%	86%	80%	77%	73%	71%	88%	79%	63%	81%	78%	82%	79%	78%	
Don't know/Refused	5%	3%	5%	4%	8%	2%	10%	8%	2%	4%	7%	4%	3%	5%	5%	3%	2%	4%	3%	1%	
Q34. If you had it all to do all over again, considering all factors, would you locate your business in New York or someplace else?																					
	Upstate Total 2013	Region				Industry							Cluster			Company Size					
		Albany	Buffalo	Rochester	Syracuse	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low	50 or less	More than 50	Less than 30	30 to 99	100 or more	
New York	29%	28%	30%	28%	32%	36%	38%	24%	22%	36%	32%	21%	48%	28%	8%	29%	30%	27%	31%	31%	
Someplace else	65%	66%	64%	67%	61%	62%	57%	70%	74%	58%	59%	76%	48%	65%	87%	67%	66%	69%	66%	65%	
Don't know/Refused	6%	6%	6%	5%	7%	3%	5%	5%	4%	6%	10%	3%	4%	7%	5%	3%	4%	4%	3%	4%	