

Siena College Research Institute
Sponsored by The Business Council of New York State

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

2014: 524 Upstate NY CEOs, MOE +/- 4.3%

2013: 651 Upstate NY CEOs, MOE +/- 3.8%

2012: 592 Upstate NY CEOs, MOE +/- 4.0%

Q1. Which of the following industry categories best describes the type of business your company is engaged in?																			
	Upstate				Region				Cluster			Company Size							
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100					
Engineering and Construction	16%	17%	17%	15%	24%	11%	16%	14%	28%	12%	11%	17%	23%	11%					
Food and Beverage	5%	3%	3%	5%	1%	9%	5%	4%	3%	4%	8%	4%	6%	6%					
Financial	5%	8%	6%	8%	8%	3%	3%	5%	5%	5%	3%	4%	2%	7%					
Manufacturing	24%	21%	19%	19%	15%	30%	26%	22%	22%	26%	21%	25%	28%	17%					
Retail	12%	12%	12%	14%	11%	9%	15%	14%	11%	11%	16%	14%	11%	11%					
Service	25%	23%	27%	26%	30%	24%	21%	29%	20%	29%	25%	20%	22%	36%					
Wholesale and Distribution	11%	15%	15%	14%	11%	10%	12%	13%	9%	11%	15%	15%	8%	7%					
Other	2%	0%	0%	0%	1%	3%	2%	0%	3%	2%	0%	1%	0%	3%					
Refused	0%	1%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	1%	0%					

Q2. As you think about the current business or economic conditions in New York State 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				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Considerably better	2%	4%	2%	1%	1%	4%	2%	1%	7%	0%	0%	2%	3%	3%	5%	1%	2%	1%	5%
A little better	24%	32%	24%	21%	27%	22%	24%	27%	65%	12%	0%	23%	27%	25%	39%	26%	18%	22%	17%
About the same	44%	44%	46%	44%	51%	46%	37%	38%	28%	70%	12%	45%	49%	39%	37%	44%	42%	48%	42%
A little worse	22%	16%	22%	28%	17%	20%	26%	25%	0%	17%	59%	22%	17%	24%	15%	24%	32%	21%	20%
Considerably worse	8%	4%	7%	7%	3%	8%	10%	9%	0%	1%	29%	8%	4%	8%	5%	6%	6%	8%	17%
Refused	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, that is, the entire 2016 year, how would you describe your expectations for the economy in New York State?																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Considerably better	3%	5%	2%	2%	1%	4%	3%	3%	8%	0%	0%	2%	3%	3%	5%	2%	3%	1%	3%
A little better	27%	37%	28%	31%	33%	26%	25%	25%	70%	14%	2%	27%	30%	28%	39%	26%	26%	26%	27%
About the same	40%	39%	40%	32%	44%	39%	38%	37%	22%	66%	12%	41%	37%	42%	34%	38%	38%	47%	32%
A little worse	24%	15%	24%	25%	20%	25%	25%	25%	0%	19%	62%	24%	28%	19%	16%	29%	28%	18%	32%
Considerably worse	6%	4%	6%	10%	2%	5%	8%	10%	0%	1%	25%	7%	1%	8%	6%	5%	5%	8%	7%
Refused	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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Q4. Now thinking specifically about your industry, how would you describe the current business or economic conditions in New York State as compared with six months ago:																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Considerably better	3%	4%	3%	2%	3%	3%	3%	4%	10%	0%	1%	3%	5%	3%	9%	2%	3%	1%	5%
A little better	21%	24%	20%	17%	22%	19%	20%	23%	61%	6%	0%	21%	26%	17%	32%	16%	25%	19%	17%
About the same	39%	42%	44%	41%	47%	40%	35%	35%	26%	64%	8%	39%	43%	38%	37%	46%	32%	38%	33%
A little worse	29%	24%	25%	31%	24%	29%	32%	33%	4%	27%	63%	31%	22%	31%	18%	31%	35%	32%	30%
Considerably worse	8%	6%	8%	8%	4%	9%	11%	5%	0%	3%	28%	7%	4%	12%	3%	6%	5%	10%	15%
Refused	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Q5. And looking forward from today through the next year, how would you describe your expectations for your industry here in New York?																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Considerably better	3%	5%	3%	2%	1%	4%	3%	4%	9%	0%	0%	3%	3%	3%	9%	1%	5%	1%	2%
A little better	24%	30%	25%	27%	27%	22%	23%	24%	68%	9%	0%	23%	29%	21%	31%	21%	23%	23%	27%
About the same	41%	36%	38%	33%	47%	37%	42%	37%	23%	67%	11%	44%	41%	38%	39%	45%	35%	37%	42%
A little worse	25%	24%	25%	27%	19%	31%	24%	25%	0%	23%	60%	24%	25%	25%	16%	27%	31%	28%	22%
Considerably worse	7%	5%	9%	10%	6%	6%	8%	10%	0%	1%	29%	6%	1%	13%	5%	6%	6%	11%	8%
Refused	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 company, what are your expectations for revenue through the year 2016? Do you believe your revenue will...?																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Grow substantially	3%	4%	3%	2%	3%	3%	3%	0%	6%	1%	2%	2%	3%	3%	5%	3%	5%	1%	0%
Grow moderately	42%	45%	39%	36%	48%	39%	40%	44%	68%	43%	9%	40%	47%	43%	36%	52%	38%	40%	40%
Stay about the same	36%	33%	36%	35%	33%	38%	37%	34%	24%	43%	36%	39%	33%	32%	46%	30%	31%	39%	28%
Decrease moderately	17%	16%	18%	23%	13%	18%	18%	20%	3%	12%	45%	17%	17%	16%	11%	14%	23%	18%	25%
Decrease substantially	2%	1%	3%	4%	2%	3%	3%	1%	0%	0%	9%	1%	0%	5%	2%	1%	3%	2%	7%
Refused	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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Q7. Continuing to focus on your company, please think quickly about profitability. Between today and the end of the calendar year 2016 do you expect your profits to...?																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Grow substantially	2%	3%	2%	2%	2%	1%	2%	1%	3%	1%	1%	1%	2%	2%	2%	2%	0%	1%	0%
Grow moderately	33%	38%	29%	28%	40%	31%	29%	29%	56%	33%	4%	31%	37%	32%	32%	40%	29%	30%	33%
Stay about the same	36%	35%	38%	32%	38%	34%	40%	30%	33%	42%	30%	39%	39%	31%	41%	33%	32%	40%	33%
Decrease moderately	25%	22%	26%	33%	18%	26%	25%	35%	8%	21%	53%	24%	22%	28%	21%	21%	35%	25%	27%
Decrease substantially	4%	3%	4%	6%	1%	5%	4%	4%	0%	2%	12%	4%	0%	6%	3%	3%	3%	3%	7%
Refused	1%	0%	0%	0%	1%	1%	0%	0%	0%	1%	0%	0%	0%	1%	0%	2%	0%	1%	0%
Q8. Businesses and the executives that direct them strive to enhance profitability in many ways. Through which of the following strategies do you plan to MOST enhance your company's profitability over the next year?																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Market/demand growth	39%	43%	40%	38%	47%	34%	36%	41%	55%	38%	23%	38%	40%	41%	51%	39%	34%	39%	28%
Cost reduction	31%	29%	34%	34%	26%	33%	31%	37%	17%	32%	46%	31%	33%	30%	24%	31%	43%	28%	40%
Price increase	12%	15%	13%	12%	10%	16%	11%	11%	8%	12%	16%	14%	8%	12%	17%	6%	8%	14%	15%
New technology	9%	7%	10%	9%	8%	9%	12%	6%	12%	9%	6%	9%	10%	8%	3%	16%	6%	10%	10%
Other	7%	6%	3%	6%	6%	7%	10%	4%	8%	6%	8%	6%	9%	7%	5%	7%	8%	7%	5%
Refused	1%	1%	1%	1%	3%	1%	1%	1%	0%	2%	1%	1%	0%	2%	0%	1%	2%	2%	2%
Q9. Please indicate which of the following are major areas of concentration for your company now and through 2016.																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Expansion of existing markets	54%	56%	61%	58%	56%	57%	50%	53%	63%	53%	44%	55%	57%	50%	60%	64%	37%	44%	65%
Growth in existing products	52%	54%	53%	50%	53%	53%	49%	56%	55%	52%	50%	54%	53%	48%	41%	60%	57%	46%	65%
Entry into new markets	30%	33%	37%	33%	28%	30%	31%	34%	29%	34%	25%	29%	34%	30%	30%	42%	23%	25%	32%
New product lines	27%	25%	31%	31%	26%	30%	27%	20%	27%	27%	25%	26%	26%	27%	11%	39%	26%	22%	33%
Acquisition of new businesses	15%	14%	11%	13%	20%	11%	13%	15%	18%	16%	8%	9%	20%	22%	9%	14%	9%	16%	22%
Technology innovation	27%	26%	28%	27%	31%	25%	28%	24%	28%	30%	21%	22%	26%	37%	18%	33%	22%	31%	23%
Construction of new locations	9%	10%	10%	8%	12%	10%	9%	4%	13%	9%	6%	6%	8%	16%	18%	4%	12%	11%	5%
Internal restructuring	28%	25%	28%	33%	31%	24%	30%	28%	26%	24%	39%	30%	35%	20%	29%	26%	29%	31%	22%
Other	0%	3%	5%	4%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Refused	1%	1%	2%	2%	1%	1%	1%	0%	1%	2%	0%	1%	1%	1%	1%	2%	0%	1%	0%

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Q10. Do you intend to invest between today through 2016 in any fixed assets for your company designed to meet growing demand, reduce costs or enhance productivity:																			
					Region				Cluster			Company Size			Industry				
	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 & Distr
Yes	55%	58%	52%	52%	58%	54%	54%	53%	64%	56%	42%	46%	63%	67%	61%	63%	48%	52%	48%
No	34%	31%	36%	38%	33%	36%	33%	37%	25%	34%	47%	43%	28%	20%	26%	27%	38%	38%	45%
Not sure	11%	11%	12%	11%	10%	10%	13%	10%	12%	10%	11%	10%	9%	13%	13%	10%	14%	10%	7%
Q11. (If investing in fixed assets) What is the main way you expect to finance those assets?																			
					Region				Cluster			Company Size			Industry				
	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 & Distr
Internally generated funds	60%	63%	57%	58%	59%	66%	58%	50%	61%	60%	57%	62%	53%	59%	58%	58%	58%	64%	59%
Borrow from a financial institution	31%	31%	34%	33%	36%	23%	34%	36%	30%	30%	36%	26%	41%	34%	26%	34%	29%	31%	38%
Private equity	4%	2%	2%	3%	2%	5%	6%	2%	5%	3%	6%	4%	5%	4%	8%	0%	0%	4%	3%
Not sure	5%	4%	7%	6%	2%	6%	2%	12%	4%	6%	2%	9%	2%	2%	8%	8%	13%	0%	0%
Q12. Now thinking about the people that work for your company, between today and the end of 2016, do you plan to...?																			
					Region				Cluster			Company Size			Industry				
	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 & Distr
Substantially increase your workforce	1%	2%	1%	1%	2%	1%	0%	0%	2%	0%	1%	0%	2%	1%	1%	2%	0%	0%	0%
Moderately increase your workforce	32%	30%	27%	26%	39%	32%	28%	27%	46%	32%	15%	29%	37%	36%	46%	36%	26%	33%	20%
Remain about the same	57%	59%	59%	58%	54%	53%	64%	58%	50%	59%	63%	61%	54%	50%	48%	52%	57%	58%	70%
Decrease your workforce	9%	9%	12%	15%	5%	14%	7%	15%	3%	8%	21%	10%	7%	11%	5%	10%	15%	9%	8%
Refused	1%	1%	1%	1%	0%	1%	1%	0%	0%	1%	1%	0%	0%	1%	0%	1%	2%	0%	2%

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Q13. Now thinking about other challenges that your company faces, which of the following are you concerned with?																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Existing U.S. competition	25%	29%	25%	27%	31%	19%	25%	23%	30%	26%	17%	23%	30%	24%	25%	23%	20%	25%	37%
Governmental regulation	68%	69%	70%	69%	66%	72%	65%	71%	61%	67%	78%	65%	64%	76%	72%	63%	69%	71%	53%
Taxation	65%	65%	67%	67%	54%	72%	67%	66%	58%	64%	75%	70%	66%	53%	70%	67%	72%	57%	75%
Foreign competition	11%	12%	12%	12%	5%	12%	17%	8%	12%	10%	13%	13%	15%	6%	0%	34%	2%	3%	13%
Energy costs	19%	30%	31%	44%	19%	18%	19%	24%	14%	20%	25%	22%	14%	18%	16%	25%	14%	16%	35%
Risk management	26%	22%	21%	22%	29%	28%	24%	19%	37%	23%	17%	22%	28%	32%	39%	13%	23%	29%	12%
Adverse economic conditions	48%	46%	55%	65%	44%	43%	54%	53%	37%	48%	60%	51%	48%	42%	51%	58%	46%	36%	58%
Health care costs	78%	77%	80%	79%	74%	77%	83%	76%	77%	74%	86%	77%	77%	80%	77%	80%	82%	81%	78%
Global political instability	15%	16%	15%	22%	17%	15%	15%	10%	15%	16%	13%	15%	22%	8%	14%	19%	14%	13%	20%
Rising supplier costs	25%	35%	39%	42%	23%	28%	27%	22%	25%	22%	33%	27%	25%	22%	28%	27%	26%	21%	30%
Human resources	38%	30%	27%	24%	44%	45%	31%	28%	40%	41%	31%	32%	41%	48%	44%	32%	34%	48%	37%
Cash flow	26%	29%	35%	35%	26%	27%	26%	27%	25%	28%	25%	29%	25%	24%	31%	21%	26%	29%	35%
Ability to obtain suitable financing	8%	8%	10%	13%	8%	7%	8%	10%	8%	7%	11%	10%	7%	7%	7%	10%	6%	10%	8%
Other	7%	4%	3%	4%	3%	8%	9%	6%	5%	6%	10%	6%	10%	8%	7%	6%	8%	6%	5%
Refused	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%

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Q14. Which of the challenges you selected are you MOST concerned with?																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Existing U.S. competition	7%	7%	8%	6%	8%	4%	6%	9%	7%	9%	2%	6%	12%	4%	6%	6%	6%	7%	15%
Governmental regulation	26%	25%	23%	24%	19%	30%	26%	33%	25%	23%	33%	23%	20%	36%	24%	20%	23%	36%	17%
Taxation	11%	14%	14%	12%	10%	9%	12%	15%	6%	12%	14%	13%	10%	8%	9%	12%	9%	10%	18%
Foreign competition	2%	3%	4%	3%	0%	3%	3%	3%	1%	3%	2%	3%	3%	1%	0%	8%	0%	1%	3%
Energy costs	1%	1%	1%	3%	1%	3%	1%	0%	1%	1%	2%	1%	1%	1%	1%	1%	3%	0%	2%
Risk management	2%	2%	2%	1%	1%	2%	3%	4%	6%	1%	1%	3%	3%	1%	7%	1%	2%	1%	0%
Adverse economic conditions	14%	13%	15%	24%	18%	12%	13%	11%	12%	14%	15%	16%	12%	10%	17%	18%	14%	6%	17%
Health care costs	17%	15%	18%	11%	19%	15%	21%	13%	19%	14%	22%	17%	19%	16%	15%	19%	20%	16%	17%
Global political instability	2%	2%	1%	1%	3%	2%	1%	0%	3%	2%	0%	2%	1%	1%	1%	2%	2%	2%	2%
Rising supplier costs	1%	3%	3%	2%	1%	2%	1%	0%	2%	1%	1%	2%	1%	0%	1%	0%	5%	1%	0%
Human resources	8%	5%	3%	2%	13%	9%	5%	4%	12%	8%	4%	6%	10%	12%	11%	6%	8%	11%	3%
Cash flow	4%	7%	6%	6%	5%	3%	3%	5%	3%	6%	2%	4%	4%	3%	2%	4%	5%	4%	3%
Ability to obtain suitable financing	1%	0%	1%	2%	2%	1%	1%	0%	1%	2%	0%	1%	2%	1%	0%	1%	2%	1%	2%
Other	3%	2%	1%	2%	0%	5%	4%	4%	2%	4%	3%	3%	4%	3%	5%	2%	3%	2%	2%
Refused	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%

Q15. 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				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Excellent	1%	1%	1%	1%	0%	2%	0%	0%	2%	0%	0%	1%	0%	1%	1%	1%	0%	1%	0%
Good	4%	4%	7%	9%	3%	6%	4%	4%	6%	3%	3%	4%	4%	5%	2%	7%	3%	4%	2%
Fair	29%	30%	26%	34%	35%	26%	24%	33%	45%	32%	5%	28%	36%	27%	38%	33%	28%	21%	27%
Poor	64%	63%	65%	55%	62%	62%	70%	58%	45%	61%	92%	63%	60%	66%	57%	56%	65%	72%	70%
Don't know	2%	2%	2%	2%	0%	3%	3%	5%	2%	4%	0%	4%	0%	2%	1%	3%	5%	3%	2%

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Q16. Of the following, what would you like to see the Governor and Legislature of New York focus on?																			
	Region				Cluster			Company Size			Industry								
	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 & Distr
Personal Income Tax Reform	54%	NA	NA	NA	49%	58%	57%	52%	54%	54%	56%	57%	54%	50%	52%	53%	65%	50%	67%
Business Income Tax Reform	63%	NA	NA	NA	59%	68%	63%	63%	54%	68%	67%	68%	64%	54%	57%	62%	63%	61%	78%
Estate Tax Reform	34%	NA	NA	NA	32%	34%	33%	37%	27%	35%	39%	33%	37%	31%	34%	37%	34%	31%	42%
Spending Cuts	58%	64%	72%	74%	50%	65%	62%	54%	48%	59%	69%	59%	59%	56%	49%	62%	62%	57%	65%
Infrastructure Development	42%	42%	32%	37%	48%	35%	40%	49%	52%	40%	33%	44%	45%	37%	62%	37%	37%	41%	45%
Business Development Incentives	36%	38%	43%	47%	34%	32%	38%	43%	41%	38%	25%	36%	37%	36%	38%	42%	20%	35%	38%
Ethics Reform	42%	40%	39%	35%	46%	41%	40%	42%	35%	42%	51%	47%	40%	34%	38%	48%	40%	44%	38%
Sales Tax Reform	25%	NA	NA	NA	23%	32%	25%	20%	21%	22%	37%	26%	26%	23%	23%	26%	32%	26%	22%
Other	14%	16%	11%	17%	10%	16%	13%	19%	15%	13%	15%	13%	12%	17%	16%	13%	11%	18%	8%
Refused	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%

Q17. Of those, which SINGLE area would you most like to see the Governor and Legislature focus on?																			
	Region				Cluster			Company Size			Industry								
	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 & Distr
Personal Income Tax Reform	12%	NA	NA	NA	13%	11%	11%	13%	14%	12%	9%	10%	12%	15%	11%	10%	11%	10%	18%
Business Income Tax Reform	18%	NA	NA	NA	15%	19%	22%	16%	12%	20%	23%	21%	17%	15%	7%	18%	20%	18%	37%
Estate Tax Reform	2%	NA	NA	NA	1%	5%	3%	1%	3%	2%	4%	1%	5%	3%	2%	3%	3%	1%	5%
Spending Cuts	21%	31%	35%	40%	18%	24%	22%	20%	18%	20%	28%	23%	19%	21%	21%	21%	28%	17%	20%
Infrastructure Development	14%	15%	9%	10%	22%	9%	10%	15%	22%	14%	4%	12%	19%	14%	33%	12%	9%	10%	8%
Business Development Incentives	10%	11%	15%	13%	8%	7%	10%	18%	11%	10%	8%	9%	11%	12%	9%	13%	5%	11%	5%
Ethics Reform	11%	9%	6%	5%	14%	10%	12%	4%	11%	10%	11%	12%	11%	7%	6%	12%	11%	16%	5%
Sales Tax Reform	3%	NA	NA	NA	3%	3%	2%	1%	2%	3%	3%	4%	0%	1%	1%	0%	9%	4%	0%
Other	8%	4%	6%	9%	6%	10%	7%	11%	8%	8%	10%	7%	8%	11%	9%	10%	5%	12%	2%
Refused	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%

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Q18. How confident are you in the ability of the government of the State of New York to improve the business climate for businesses like yours here in New York over the next year? Are you...																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Very confident	1%	1%	0%	2%	1%	1%	1%	1%	2%	1%	0%	1%	0%	1%	0%	1%	3%	1%	2%
Somewhat confident	12%	12%	15%	23%	13%	14%	8%	13%	24%	9%	3%	13%	10%	12%	16%	14%	9%	9%	10%
Not very confident	50%	47%	48%	44%	52%	50%	46%	53%	54%	54%	36%	50%	53%	47%	57%	46%	55%	46%	45%
Not at all confident	37%	38%	37%	31%	34%	33%	46%	32%	20%	35%	60%	36%	37%	38%	26%	39%	32%	43%	42%
Refused	1%	1%	1%	0%	0%	1%	0%	1%	0%	1%	1%	0%	0%	2%	0%	0%	0%	1%	2%
Q19. And thinking about the efforts of the federal government, overall would you say the federal government is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Excellent	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Good	2%	4%	3%	6%	3%	0%	4%	0%	2%	2%	2%	2%	4%	1%	3%	2%	2%	3%	0%
Fair	22%	21%	18%	21%	31%	17%	22%	19%	35%	23%	6%	23%	26%	20%	30%	21%	15%	20%	18%
Poor	73%	72%	76%	71%	65%	78%	74%	77%	61%	72%	90%	74%	68%	76%	63%	76%	83%	74%	78%
Don't know	2%	2%	3%	2%	1%	5%	0%	4%	1%	2%	3%	2%	2%	3%	3%	2%	0%	3%	3%
Q20. How confident are you in the ability of the federal government to improve the business climate for businesses like yours here in New York over the next year? Are you:																			
	Upstate				Region				Cluster			Company Size			Industry				
	2015	2014	2013	2012	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Very confident	0%	1%	0%	1%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Somewhat confident	7%	8%	7%	13%	8%	5%	10%	4%	13%	6%	2%	8%	6%	5%	13%	7%	5%	6%	2%
Not very confident	50%	45%	46%	42%	56%	47%	47%	53%	58%	56%	30%	49%	52%	52%	53%	46%	57%	48%	50%
Not at all confident	41%	44%	46%	43%	35%	47%	43%	41%	28%	37%	66%	42%	42%	39%	33%	47%	38%	44%	43%
Refused	1%	2%	1%	1%	1%	1%	1%	3%	0%	2%	2%	0%	0%	4%	1%	0%	0%	2%	3%

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Q21A. For each of the following national proposals please indicate whether you support it or oppose it.-Pass Comprehensive Immigration Reform that both secures the borders and provides a path to citizenship for those already in the United States

	Upstate 2015	Region				Cluster			Company Size			Industry				
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Support	78%	77%	72%	83%	80%	79%	79%	75%	74%	83%	81%	77%	75%	85%	79%	73%
Oppose	22%	23%	28%	17%	20%	21%	21%	25%	26%	17%	19%	23%	25%	15%	21%	27%
No opinion	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Q21B. For each of the following national proposals please indicate whether you support it or oppose it.-Pass a Balanced Budget Constitutional Amendment

	Upstate 2015	Upstate 2014	Upstate 2013	Upstate 2012	Region				Cluster			Company Size			Industry				
					Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Support	78%	77%	78%	80%	75%	76%	80%	86%	77%	77%	81%	80%	74%	77%	79%	78%	83%	72%	87%
Oppose	22%	10%	9%	11%	25%	24%	20%	14%	23%	23%	19%	20%	26%	23%	21%	22%	17%	28%	13%
No opinion	0%	13%	13%	9%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Q21C. For each of the following national proposals please indicate whether you support it or oppose it.-Increase Federal Spending on Infrastructure

	Upstate 2015	Upstate 2014	Upstate 2013	Upstate 2012	Region				Cluster			Company Size			Industry				
					Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Support	63%	62%	47%	49%	69%	66%	55%	58%	74%	64%	46%	62%	65%	64%	79%	64%	62%	54%	60%
Oppose	37%	18%	30%	35%	31%	34%	45%	42%	26%	36%	54%	38%	35%	36%	21%	36%	38%	46%	40%
No opinion	0%	19%	23%	17%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Q21D. For each of the following national proposals please indicate whether you support it or oppose it.-Reduce the Corporate Income Tax Rates

	Upstate 2015	Upstate 2014	Upstate 2013	Upstate 2012	Region				Cluster			Company Size			Industry				
					Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Support	82%	82%	79%	72%	75%	89%	85%	78%	75%	82%	91%	87%	78%	74%	79%	87%	83%	75%	87%
Oppose	18%	8%	12%	16%	25%	11%	15%	22%	25%	18%	9%	13%	22%	26%	21%	13%	17%	25%	13%
No opinion	0%	10%	9%	12%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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Q21E. For each of the following national proposals please indicate whether you support it or oppose it.-Reduce the Corporate Income Tax on Overseas Earnings																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Support	33%			31%	36%	33%	30%	30%	28%	48%	30%	36%	36%	28%	35%	31%	26%	52%	
Oppose	67%			69%	64%	67%	70%	70%	72%	52%	70%	64%	64%	72%	65%	69%	74%	48%	
No opinion	0%			0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Q21F. For each of the following national proposals please indicate whether you support it or oppose it.-Increase the federal minimum wage from \$7.25 to \$10.10 per hour																			
	Upstate 2015	Upstate 2014		Region				Cluster			Company Size			Industry					
	Upstate 2015	Upstate 2014		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Support	32%	24%		42%	23%	31%	30%	46%	30%	18%	29%	44%	28%	47%	30%	25%	36%	23%	
Oppose	68%	61%		58%	77%	69%	70%	54%	70%	82%	71%	56%	72%	53%	70%	75%	64%	77%	
No opinion	0%	15%		0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Q21G. For each of the following national proposals please indicate whether you support it or oppose it.-Increase personal federal income tax rates on those earning over \$1 million a year																			
	Upstate 2015			Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Support	38%			39%	37%	36%	41%	46%	36%	29%	40%	36%	34%	32%	37%	34%	48%	32%	
Oppose	62%			61%	63%	64%	59%	54%	64%	71%	60%	64%	66%	68%	63%	66%	52%	68%	
No opinion	0%			0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Q21H. For each of the following national proposals please indicate whether you support it or oppose it.-Increase trade restrictions, like tariffs, on goods imported from foreign countries																			
	Upstate 2015			Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Support	42%			42%	43%	43%	38%	41%	41%	44%	45%	38%	38%	45%	39%	43%	43%	45%	
Oppose	58%			58%	57%	57%	62%	59%	59%	56%	55%	62%	62%	55%	61%	57%	57%	55%	
No opinion	0%			0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	

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Q21. For each of the following national proposals please indicate whether you support it or oppose it.-Adopt additional free trade agreements with foreign nations																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Support	42%			42%	41%	38%	48%	48%	41%	34%	40%	47%	41%	39%	46%	42%	40%	43%	
Oppose	58%			58%	59%	62%	52%	52%	59%	66%	60%	53%	59%	61%	54%	58%	60%	57%	
No opinion	0%			0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Q22. Thinking specifically about your immediate geographic area, including yours and adjacent counties, is the general business climate...?																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015	Upstate 2014	Upstate 2013	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Improving	21%	24%	15%	25%	30%	13%	8%	43%	14%	5%	18%	20%	25%	32%	18%	20%	20%	20%	
Staying the same	56%	56%	55%	64%	51%	60%	48%	52%	72%	31%	57%	60%	55%	54%	57%	49%	57%	52%	
Worsening	23%	20%	28%	11%	19%	26%	43%	5%	13%	63%	25%	21%	19%	14%	24%	31%	22%	28%	
Refused	0%	1%	3%	0%	0%	1%	1%	0%	0%	1%	0%	0%	1%	0%	1%	0%	1%	0%	
Q23. And continuing to consider the local market, are conditions locally improving, staying the same or worsening for businesses in your industry?																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015	Upstate 2014	Upstate 2013	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Improving	14%	18%	13%	18%	15%	11%	8%	35%	6%	2%	12%	15%	17%	25%	9%	17%	9%	17%	
Staying the same	57%	55%	56%	65%	51%	59%	53%	57%	72%	28%	58%	68%	49%	59%	59%	52%	57%	55%	
Worsening	29%	25%	30%	17%	34%	30%	38%	8%	21%	71%	31%	18%	34%	16%	33%	31%	33%	28%	
Refused	0%	2%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	

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Q24. 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 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Education	45%	45%	43%	52%	35%	49%	44%	57%	40%	42%	44%	51%	44%	43%	42%	48%	49%	40%	
Tourism	35%	32%	33%	24%	47%	33%	33%	34%	40%	25%	39%	30%	31%	26%	40%	46%	27%	32%	
Technology	63%	59%	57%	73%	55%	67%	49%	75%	60%	51%	58%	69%	67%	71%	57%	66%	65%	53%	
Transportation	14%	16%	12%	20%	14%	8%	15%	19%	10%	15%	13%	14%	17%	21%	15%	11%	13%	8%	
Medical	58%	60%	56%	49%	70%	62%	46%	61%	58%	54%	57%	61%	58%	60%	52%	45%	69%	62%	
Green and sustainable energy	30%	26%	24%	29%	43%	21%	27%	39%	28%	24%	28%	31%	34%	32%	26%	37%	34%	22%	
Manufacturing	40%	37%	38%	39%	45%	40%	33%	43%	42%	33%	40%	39%	42%	46%	57%	31%	33%	33%	
Other	2%	4%	3%	1%	1%	4%	1%	3%	2%	2%	2%	5%	1%	3%	2%	3%	1%	2%	
None of the above	6%	7%	6%	6%	3%	4%	15%	1%	7%	11%	8%	4%	5%	7%	6%	11%	4%	8%	
Q25. 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 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Education	10%	14%	8%	10%	8%	10%	18%	11%	8%	14%	9%	14%	10%	11%	10%	9%	12%	9%	
Tourism	8%	6%	7%	5%	10%	9%	6%	6%	10%	5%	11%	1%	7%	7%	10%	10%	2%	11%	
Technology	31%	30%	26%	54%	10%	31%	30%	39%	27%	30%	28%	34%	35%	37%	22%	40%	33%	27%	
Transportation	3%	2%	1%	7%	1%	1%	3%	5%	2%	1%	2%	2%	4%	5%	1%	2%	3%	2%	
Medical	24%	26%	29%	8%	44%	25%	13%	19%	28%	23%	23%	27%	24%	19%	24%	16%	29%	27%	
Green and sustainable energy	7%	4%	3%	2%	13%	6%	6%	7%	7%	8%	7%	7%	8%	6%	7%	7%	9%	7%	
Manufacturing	15%	16%	16%	13%	13%	17%	22%	13%	16%	16%	18%	13%	12%	14%	25%	17%	12%	15%	
Other	1%	2%	2%	1%	0%	2%	1%	1%	1%	2%	1%	2%	0%	1%	1%	0%	1%	2%	
None of the above	0%	1%	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Q26A. How would you rate your local area on each of the following:-Suitable workforce																			
	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Excellent	12%	12%	15%	8%	12%	15%	14%	17%	9%	11%	13%	10%	12%	18%	6%	12%	10%	8%	
Good	42%	50%	50%	42%	38%	44%	48%	41%	45%	38%	44%	42%	38%	34%	36%	42%	46%	63%	
Fair	34%	29%	26%	37%	33%	35%	28%	30%	35%	37%	33%	36%	36%	32%	44%	35%	31%	20%	
Poor	12%	7%	8%	14%	16%	6%	9%	11%	11%	13%	10%	11%	14%	14%	13%	9%	12%	8%	
Refused	1%	2%	1%	0%	1%	1%	1%	1%	0%	1%	1%	1%	0%	1%	1%	2%	0%	0%	

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Q26B. How would you rate your local area on each of the following:-Consumer confidence																			
	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Excellent	2%	2%	1%	0%	3%	3%	4%	4%	2%	1%	3%	0%	3%	5%	0%	5%	1%	2%	
Good	38%	32%	27%	48%	42%	35%	19%	46%	40%	25%	38%	38%	40%	36%	36%	46%	40%	37%	
Fair	49%	54%	54%	45%	45%	51%	59%	45%	49%	53%	48%	54%	46%	53%	49%	38%	49%	57%	
Poor	9%	11%	16%	4%	9%	10%	15%	4%	8%	19%	10%	7%	8%	7%	12%	9%	10%	5%	
Refused	2%	2%	2%	3%	1%	1%	3%	1%	2%	2%	1%	1%	3%	0%	3%	2%	1%	0%	
Q26C. How would you rate your local area on each of the following:-Transportation infrastructure																			
	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Excellent	4%	4%	5%	1%	5%	4%	3%	5%	3%	4%	4%	2%	2%	1%	6%	3%	3%	7%	
Good	40%	44%	47%	40%	47%	44%	19%	42%	40%	36%	41%	45%	33%	38%	44%	52%	28%	42%	
Fair	40%	38%	35%	40%	35%	37%	54%	36%	40%	44%	36%	40%	48%	39%	34%	32%	53%	37%	
Poor	15%	12%	10%	18%	11%	12%	22%	16%	14%	14%	17%	11%	14%	21%	14%	11%	13%	13%	
Refused	2%	2%	2%	2%	2%	3%	3%	1%	3%	2%	2%	2%	3%	1%	2%	2%	3%	2%	
Q26D. How would you rate your local area on each of the following:-As an area where businesses can succeed																			
	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Excellent	3%	2%	3%	1%	3%	4%	1%	6%	2%	2%	3%	2%	3%	5%	4%	2%	2%	2%	
Good	27%	25%	24%	31%	24%	27%	19%	40%	28%	8%	27%	22%	29%	32%	21%	35%	25%	20%	
Fair	49%	49%	51%	53%	47%	50%	47%	43%	50%	55%	45%	61%	50%	48%	43%	45%	51%	57%	
Poor	19%	21%	21%	13%	23%	14%	30%	10%	17%	33%	23%	13%	14%	13%	29%	18%	19%	17%	
Refused	3%	3%	1%	1%	3%	4%	3%	1%	4%	3%	3%	3%	3%	2%	3%	0%	3%	5%	

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Q26E. How would you rate your local area on each of the following:-As a place where consumers want to live																			
	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Excellent	10%	12%	14%	9%	11%	12%	5%	11%	10%	8%	10%	6%	12%	13%	10%	9%	9%	8%	
Good	43%	45%	44%	49%	47%	38%	37%	53%	42%	34%	43%	47%	41%	47%	42%	46%	39%	53%	
Fair	33%	30%	30%	33%	28%	36%	35%	26%	35%	37%	29%	35%	39%	31%	33%	29%	38%	32%	
Poor	12%	10%	11%	7%	12%	13%	20%	9%	10%	19%	15%	11%	7%	9%	12%	14%	14%	7%	
Refused	2%	2%	1%	1%	1%	1%	3%	1%	2%	2%	2%	1%	1%	0%	4%	2%	0%	0%	
Q26F. How would you rate your local area on each of the following:-Airline service																			
	Upstate 2015			Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Excellent	8%			3%	16%	4%	4%	10%	7%	6%	8%	7%	6%	5%	8%	9%	10%	7%	
Good	47%			38%	66%	46%	30%	43%	48%	48%	50%	44%	42%	48%	46%	57%	40%	50%	
Fair	31%			45%	16%	35%	25%	32%	32%	27%	27%	33%	36%	30%	28%	23%	38%	35%	
Poor	14%			13%	2%	15%	37%	15%	12%	16%	13%	15%	16%	17%	17%	11%	13%	8%	
Refused	1%			1%	1%	1%	4%	0%	1%	2%	2%	1%	0%	0%	2%	0%	0%	0%	
Q26G. How would you rate your local area on each of the following:-Taxi/car service																			
	Upstate 2015			Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Excellent	3%			1%	5%	3%	5%	1%	3%	6%	4%	3%	2%	2%	2%	5%	3%	7%	
Good	27%			17%	39%	27%	25%	27%	25%	32%	32%	25%	18%	29%	29%	31%	24%	28%	
Fair	38%			35%	37%	44%	38%	41%	37%	38%	36%	45%	41%	40%	40%	45%	34%	37%	
Poor	26%			42%	13%	22%	28%	26%	29%	21%	24%	21%	35%	25%	24%	17%	35%	28%	
Refused	5%			6%	6%	4%	4%	4%	6%	4%	5%	7%	4%	3%	6%	3%	4%	0%	

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Q26H. How would you rate your local area on each of the following:-Local governmental support for business																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Excellent	2%	1%	3%	3%	1%	2%	2%	2%	2%	2%	2%	1%	4%	1%	5%	2%	1%	3%	
Good	17%	17%	18%	18%	14%	23%	17%	10%	17%	18%	16%	25%	15%	17%	16%	12%			
Fair	48%	49%	48%	47%	48%	52%	47%	45%	47%	51%	50%	45%	44%	60%	50%	47%			
Poor	31%	31%	30%	28%	35%	22%	31%	40%	32%	27%	28%	26%	33%	20%	34%	37%			
Refused	2%	2%	1%	4%	1%	1%	2%	3%	3%	3%	1%	2%	4%	2%	0%	2%			

Q27. Thinking specifically about health care and the Affordable Care Act (ACA), known as Obamacare, and its impact on your business. Do you think it is having a...? (2013: Do you expect it to have a positive impact on your business, a negative impact or no real impact?)																			
	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Positive impact	6%	7%	6%	4%	5%	8%	10%	9%	8%	1%	8%	2%	8%	5%	6%	8%	10%	2%	
Negative impact	74%	71%	69%	76%	76%	71%	71%	65%	74%	85%	68%	79%	79%	74%	75%	75%	75%	75%	
No impact	19%	20%	22%	18%	18%	21%	19%	25%	18%	13%	24%	18%	11%	21%	20%	17%	15%	20%	
Refused	1%	2%	3%	2%	1%	0%	0%	1%	1%	2%	0%	1%	2%	1%	0%	0%	0%	3%	

Q28A. Have you made any of the following adjustments due to the Affordable Care Act?-Increasing benefits to retain employees																			
	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Yes	14%	15%	7%	17%	16%	11%	11%	18%	13%	10%	15%	14%	12%	17%	16%	12%	13%	8%	
No	84%	82%	87%	81%	82%	88%	86%	79%	85%	88%	84%	83%	85%	82%	81%	86%	85%	90%	
Refused	2%	3%	6%	2%	3%	1%	3%	3%	2%	2%	1%	3%	3%	1%	3%	2%	1%	2%	

Q28B. Have you made any of the following adjustments due to the Affordable Care Act?-Decreasing benefits to cut costs																			
	Upstate 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Yes	40%	40%	32%	39%	42%	38%	42%	25%	42%	53%	36%	45%	45%	44%	40%	40%	40%	38%	
No	58%	56%	64%	60%	55%	59%	57%	71%	56%	46%	62%	53%	52%	54%	56%	58%	60%	60%	
Refused	2%	3%	5%	1%	3%	3%	1%	4%	2%	1%	2%	2%	2%	2%	4%	2%	1%	2%	

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Q28C. Have you made any of the following adjustments due to the Affordable Care Act?-Offering defined contribution health insurance																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015	Upstate 2014	Upstate 2013	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Yes	37%	36%	28%	30%	41%	41%	35%	33%	39%	39%	35%	43%	36%	39%	37%	32%	40%	40%	
No	60%	58%	66%	67%	55%	56%	59%	64%	57%	59%	62%	54%	60%	57%	57%	62%	60%	60%	
Refused	3%	6%	6%	3%	3%	3%	5%	3%	4%	2%	3%	3%	4%	3%	6%	6%	1%	0%	
Q28D. Have you made any of the following adjustments due to the Affordable Care Act?-Hiring more part-time employees																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015	Upstate 2014	Upstate 2013	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Yes	25%	28%	24%	13%	36%	28%	23%	17%	21%	43%	24%	16%	34%	16%	21%	42%	28%	22%	
No	73%	68%	71%	85%	62%	71%	75%	80%	77%	56%	73%	83%	64%	84%	75%	55%	72%	77%	
Refused	2%	4%	4%	2%	2%	2%	3%	3%	2%	2%	3%	1%	2%	0%	4%	3%	1%	2%	
Q28E. Have you made any of the following adjustments due to the Affordable Care Act?-Reducing the number of hours current employees work																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015	Upstate 2014	Upstate 2013	Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Yes	17%	20%	18%	13%	22%	19%	9%	10%	12%	33%	15%	12%	22%	8%	11%	34%	19%	18%	
No	82%	76%	78%	86%	76%	79%	89%	87%	86%	66%	83%	86%	75%	91%	86%	65%	80%	80%	
Refused	2%	4%	5%	1%	2%	2%	3%	3%	2%	2%	1%	2%	3%	1%	3%	2%	1%	2%	
Q28F. Have you made any of the following adjustments due to the Affordable Care Act?-Terminating benefits for current employees																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015	Upstate 2014		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Yes	9%	9%		5%	10%	12%	5%	7%	6%	16%	9%	4%	11%	8%	8%	8%	9%	12%	
No	89%	86%		93%	87%	85%	91%	90%	91%	81%	88%	93%	86%	91%	89%	89%	88%	85%	
Refused	3%	5%		2%	3%	3%	4%	3%	3%	3%	3%	3%	3%	1%	3%	3%	3%	3%	

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Q28G. Have you made any of the following adjustments due to the Affordable Care Act?-Terminating benefits for retired employees																			
	Region				Cluster			Company Size			Industry								
	Upstate 2015	Upstate 2014			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Yes	6%	7%			3%	7%	10%	3%	3%	5%	13%	4%	8%	10%	6%	8%	11%	7%	2%
No	89%	86%			93%	89%	83%	91%	94%	90%	79%	91%	89%	83%	92%	87%	80%	88%	95%
Refused	5%	7%			3%	4%	7%	6%	3%	5%	8%	5%	3%	7%	2%	5%	9%	5%	3%

Q29. Do you agree more with the supporters of the ACA that the law requires only minor tinkering in order to be successful, or with ACA's critics that seek to repeal the law and replace it with a better health care system?																			
	Region				Cluster			Company Size			Industry								
	Upstate 2015				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Agree more with the Supporters	16%				17%	11%	17%	20%	23%	15%	9%	17%	18%	14%	15%	17%	18%	19%	8%
Agree more with the Critics	69%				67%	74%	68%	63%	53%	71%	83%	68%	68%	69%	63%	67%	66%	69%	75%
Don't know	16%				16%	15%	15%	16%	25%	14%	9%	15%	15%	17%	22%	16%	15%	12%	17%

Thinking specifically about some issues in New York State, for each, indicate whether you support or oppose the proposal or simply do not know enough about it in order to say.

Q30A. Increasing the minimum wage to \$15 per hour for fast food workers																			
	Region				Cluster			Company Size			Industry								
	Upstate 2015				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Support	7%				13%	1%	7%	8%	12%	7%	2%	7%	8%	7%	11%	4%	5%	11%	5%
Oppose	89%				81%	95%	90%	90%	81%	90%	97%	89%	90%	87%	84%	92%	88%	89%	88%
No opinion	4%				6%	4%	3%	3%	8%	4%	1%	4%	2%	6%	5%	4%	8%	0%	7%

Q30B. Increasing the minimum wage for all workers to \$15 per hour																			
	Region				Cluster			Company Size			Industry								
	Upstate 2015				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr
Support	8%				15%	3%	7%	8%	13%	8%	2%	9%	9%	6%	11%	6%	3%	13%	5%
Oppose	87%				78%	91%	90%	90%	80%	88%	95%	87%	87%	87%	83%	89%	89%	84%	93%
No opinion	5%				8%	5%	3%	3%	7%	4%	3%	4%	4%	7%	6%	5%	8%	3%	2%

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Q30C. Adopt public (i.e., taxpayer) funding for statewide and state legislative elections																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Support	21%			22%	19%	21%	22%	23%	18%	21%	22%	18%	20%	22%	19%	20%	20%	25%	
Oppose	59%			56%	64%	56%	58%	51%	59%	67%	60%	62%	53%	55%	66%	54%	57%	62%	
No opinion	21%			22%	17%	22%	20%	26%	22%	11%	18%	21%	27%	23%	15%	26%	23%	13%	

Q30D. Reduce the cost of providing workers' compensation insurance																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Support	92%			92%	91%	93%	91%	93%	89%	97%	95%	90%	88%	97%	89%	94%	90%	100%	
Oppose	2%			1%	4%	2%	1%	2%	3%	1%	1%	4%	3%	1%	5%	0%	2%	0%	
No opinion	6%			6%	5%	5%	8%	5%	8%	2%	4%	6%	8%	2%	6%	6%	7%	0%	

Q30E. Require that employers provide paid family leave to employees																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Support	11%			14%	5%	12%	16%	17%	11%	5%	11%	11%	12%	13%	7%	8%	16%	12%	
Oppose	78%			74%	83%	78%	76%	74%	75%	88%	79%	81%	73%	77%	83%	85%	70%	78%	
No opinion	11%			13%	11%	11%	8%	9%	14%	7%	10%	8%	15%	10%	10%	8%	13%	10%	

Now turning to some of the risks that companies face, for each of the following, indicate whether you see it as a very significant risk, a somewhat significant risk, not a very significant risk or not at all a significant risk.

Q31A. Work related accidents																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	21%			25%	20%	17%	25%	25%	20%	17%	21%	21%	22%	47%	16%	15%	18%	17%	
Somewhat	32%			27%	34%	33%	33%	35%	31%	29%	31%	32%	33%	30%	29%	34%	34%	35%	
Not very	29%			30%	31%	26%	28%	23%	33%	26%	28%	32%	28%	10%	39%	32%	28%	28%	
Not at all	10%			13%	7%	11%	4%	8%	8%	14%	10%	8%	8%	3%	9%	9%	13%	8%	
Don't know	9%			5%	8%	13%	10%	8%	8%	13%	10%	7%	10%	9%	8%	9%	7%	12%	

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2015: 531 Upstate NY CEOs, MOE +/- 4.3%
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2013: 651 Upstate NY CEOs, MOE +/- 3.8%
2012: 592 Upstate NY CEOs, MOE +/- 4.0%

Q31B. Accidents affecting non-employees that you may be liable for																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	16%			15%	18%	13%	16%	19%	15%	13%	17%	11%	16%	29%	10%	17%	12%	20%	
Somewhat	31%			27%	33%	34%	32%	31%	31%	33%	31%	29%	36%	33%	22%	37%	32%	33%	
Not very	37%			40%	34%	34%	42%	32%	41%	33%	35%	45%	35%	30%	46%	34%	36%	37%	
Not at all	15%			17%	14%	16%	10%	17%	12%	18%	17%	13%	12%	7%	21%	11%	20%	7%	
Don't know	1%			1%	1%	3%	0%	1%	1%	2%	1%	2%	1%	1%	1%	2%	0%	3%	
Q31C. Product liability																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	9%			8%	11%	6%	10%	10%	8%	10%	11%	3%	7%	3%	9%	8%	8%	10%	
Somewhat	28%			28%	26%	27%	34%	25%	28%	31%	28%	35%	22%	32%	33%	32%	20%	30%	
Not very	42%			44%	41%	44%	39%	43%	44%	37%	43%	39%	45%	51%	43%	40%	37%	48%	
Not at all	19%			18%	20%	20%	16%	20%	18%	20%	15%	19%	24%	10%	15%	15%	33%	10%	
Don't know	2%			2%	3%	3%	0%	2%	2%	2%	2%	4%	1%	3%	1%	5%	2%	2%	
Q31D. Industrial espionage																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	4%			3%	1%	6%	5%	4%	4%	2%	4%	4%	3%	3%	3%	2%	4%	5%	
Somewhat	13%			13%	17%	10%	9%	13%	11%	17%	14%	12%	10%	13%	22%	15%	7%	3%	
Not very	42%			37%	44%	46%	44%	39%	45%	42%	45%	42%	39%	33%	50%	35%	39%	60%	
Not at all	36%			41%	34%	33%	35%	41%	35%	33%	32%	39%	41%	44%	23%	42%	44%	25%	
Don't know	5%			6%	4%	5%	6%	4%	5%	6%	5%	3%	6%	7%	2%	6%	6%	7%	

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2012: 592 Upstate NY CEOs, MOE +/- 4.0%

Q31E. Data security																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	30%			31%	30%	27%	32%	33%	28%	29%	29%	21%	36%	29%	21%	11%	46%	25%	
Somewhat	40%			46%	39%	40%	34%	37%	41%	44%	39%	47%	38%	41%	42%	46%	35%	47%	
Not very	20%			17%	22%	21%	24%	21%	22%	17%	21%	24%	19%	18%	28%	31%	13%	18%	
Not at all	7%			5%	7%	8%	9%	8%	7%	6%	9%	6%	3%	8%	9%	5%	4%	8%	
Don't know	3%			1%	3%	4%	1%	1%	3%	4%	2%	3%	4%	3%	1%	8%	1%	2%	
Q31F. Employee theft																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	10%			9%	8%	8%	16%	12%	8%	10%	12%	8%	6%	13%	4%	18%	6%	17%	
Somewhat	36%			36%	39%	37%	32%	30%	38%	40%	35%	31%	43%	39%	29%	55%	31%	32%	
Not very	42%			43%	44%	40%	41%	45%	43%	37%	38%	50%	44%	39%	56%	22%	45%	40%	
Not at all	11%			10%	9%	13%	10%	12%	10%	11%	14%	10%	4%	7%	11%	3%	17%	10%	
Don't know	2%			1%	1%	3%	1%	2%	1%	2%	1%	1%	3%	2%	1%	2%	1%	2%	
Q31G. Professional errors and omissions																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	10%			9%	13%	6%	14%	10%	9%	12%	10%	10%	9%	14%	5%	5%	15%	3%	
Somewhat	37%			40%	37%	35%	34%	34%	41%	32%	37%	40%	35%	40%	29%	40%	41%	35%	
Not very	41%			38%	36%	47%	46%	45%	39%	42%	42%	41%	41%	38%	49%	43%	37%	47%	
Not at all	9%			8%	11%	8%	5%	7%	9%	10%	9%	6%	10%	5%	15%	6%	6%	10%	
Don't know	3%			4%	3%	3%	1%	3%	2%	4%	2%	3%	5%	3%	2%	6%	1%	5%	

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Q31H. Threats to your online reputation																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	13%			13%	11%	13%	16%	12%	14%	14%	12%	12%	17%	7%	7%	20%	19%	10%	
Somewhat	33%			36%	36%	29%	29%	35%	31%	36%	33%	33%	34%	40%	28%	45%	35%	13%	
Not very	40%			38%	39%	43%	43%	42%	43%	33%	41%	46%	36%	46%	48%	25%	34%	57%	
Not at all	11%			13%	10%	10%	10%	10%	11%	13%	13%	8%	8%	6%	16%	9%	10%	15%	
Don't know	2%			0%	3%	4%	1%	1%	2%	4%	1%	1%	5%	1%	2%	2%	1%	5%	
Q31I. Wrongful termination lawsuits																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	8%			8%	9%	5%	10%	6%	7%	12%	8%	6%	9%	5%	6%	2%	12%	13%	
Somewhat	27%			28%	22%	27%	34%	27%	29%	22%	25%	30%	28%	24%	33%	32%	24%	27%	
Not very	48%			47%	53%	47%	39%	47%	51%	43%	48%	46%	49%	54%	43%	49%	46%	47%	
Not at all	15%			16%	12%	16%	16%	18%	11%	19%	18%	15%	10%	15%	17%	14%	17%	12%	
Don't know	2%			1%	3%	4%	0%	1%	2%	4%	1%	3%	3%	2%	2%	3%	1%	2%	
Q31J. Acts of God																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	5%			5%	5%	6%	6%	6%	6%	5%	4%	9%	4%	6%	5%	5%	4%	5%	
Somewhat	15%			14%	18%	13%	18%	15%	15%	17%	18%	12%	14%	23%	13%	17%	11%	13%	
Not very	56%			57%	57%	53%	56%	54%	58%	53%	51%	61%	61%	54%	56%	52%	60%	62%	
Not at all	19%			21%	16%	22%	14%	21%	17%	19%	21%	17%	17%	15%	24%	17%	20%	17%	
Don't know	5%			3%	3%	6%	6%	3%	4%	6%	5%	2%	4%	2%	3%	9%	4%	3%	

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Q31K. Key employee illness or death																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	15%			15%	16%	13%	18%	16%	12%	18%	19%	15%	6%	16%	17%	17%	14%	15%	
Somewhat	46%			42%	45%	48%	47%	45%	50%	38%	46%	47%	45%	47%	46%	43%	40%	50%	
Not very	31%			33%	32%	29%	28%	30%	32%	30%	26%	30%	40%	30%	30%	31%	35%	27%	
Not at all	6%			6%	5%	6%	8%	8%	4%	10%	6%	7%	5%	5%	6%	5%	9%	7%	
Don't know	3%			3%	3%	4%	0%	2%	2%	4%	2%	1%	5%	2%	2%	5%	1%	2%	
Q31L. Issues related to human rights violations including sexual harassment																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very	8%			8%	11%	5%	10%	7%	9%	9%	8%	6%	9%	8%	6%	5%	10%	15%	
Somewhat	25%			27%	24%	22%	30%	23%	24%	29%	23%	25%	30%	28%	22%	38%	24%	15%	
Not very	50%			51%	48%	53%	44%	55%	51%	39%	49%	57%	46%	60%	49%	37%	49%	52%	
Not at all	16%			14%	17%	17%	14%	14%	14%	21%	19%	12%	13%	3%	21%	18%	16%	17%	
Don't know	1%			0%	1%	3%	1%	1%	1%	2%	1%	1%	2%	1%	1%	2%	1%	2%	

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Q32. Of those risks, which if you had to choose, do you see as the single greatest risk that you worry about?																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Work related accidents	21%	26%	18%	19%	24%	26%	20%	17%	21%	20%	24%	51%	17%	14%	16%	22%			
Accidents affecting non-employees that you may be liable for	7%	2%	9%	7%	10%	7%	7%	6%	5%	9%	10%	10%	1%	14%	5%	7%			
Product liability	6%	4%	9%	5%	4%	6%	6%	5%	6%	6%	4%	3%	10%	2%	4%	5%			
Industrial espionage	0%	1%	1%	0%	0%	0%	0%	1%	0%	0%	1%	0%	1%	0%	0%	2%			
Data security	24%	24%	21%	29%	18%	25%	21%	29%	24%	18%	28%	9%	20%	18%	36%	18%			
Employee theft	3%	5%	2%	4%	1%	3%	4%	2%	3%	2%	3%	3%	0%	11%	1%	5%			
Professional errors and omissions	7%	5%	8%	5%	11%	6%	6%	8%	7%	11%	4%	9%	7%	2%	7%	3%			
Threats to your online reputation	2%	3%	2%	2%	1%	2%	3%	2%	3%	4%	1%	1%	0%	8%	1%	3%			
Wrongful termination lawsuits	2%	1%	1%	2%	3%	1%	2%	2%	2%	0%	2%	1%	2%	0%	3%	2%			
Acts of God	2%	2%	3%	1%	3%	2%	2%	3%	2%	3%	2%	1%	2%	3%	1%	2%			
Key employee illness or death	15%	15%	16%	17%	11%	13%	16%	15%	18%	17%	8%	8%	25%	11%	13%	23%			
Issues related to human rights violations including sexual harassment	3%	1%	4%	2%	4%	1%	4%	3%	3%	2%	3%	0%	4%	3%	4%	5%			
Don't know	8%	10%	7%	6%	10%	7%	9%	7%	6%	10%	10%	2%	11%	15%	8%	3%			

Q33A. Which of the following steps have you taken in the last two years to mitigate any of those risks?-Purchased additional insurance																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Took this step	45%	47%	44%	42%	48%	52%	44%	40%	44%	45%	47%	48%	44%	46%	50%	25%			
Have not	44%	44%	43%	46%	39%	37%	46%	47%	47%	39%	38%	39%	43%	42%	41%	67%			
Have not but planning to	3%	3%	4%	3%	0%	3%	3%	2%	3%	2%	3%	1%	5%	3%	3%	2%			
Refused	9%	7%	9%	8%	13%	8%	8%	11%	6%	14%	11%	11%	9%	9%	6%	7%			

Q33B. Which of the following steps have you taken in the last two years to mitigate any of those risks?-Used services of consultants to plan ways to guard against risks																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Took this step	52%	51%	53%	50%	57%	59%	48%	52%	44%	60%	62%	66%	43%	48%	64%	32%			
Have not	43%	44%	40%	46%	41%	37%	47%	43%	51%	36%	32%	31%	50%	52%	32%	62%			
Have not but planning to	4%	5%	5%	3%	3%	3%	4%	4%	4%	3%	5%	2%	5%	0%	4%	7%			
Refused	1%	0%	2%	2%	0%	1%	1%	2%	1%	1%	1%	1%	2%	0%	0%	0%			

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Q33C. Which of the following steps have you taken in the last two years to mitigate any of those risks?-Added additional employees that work specifically to address risks																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Took this step	22%	26%	24%	16%	22%	22%	20%	26%	14%	20%	39%	28%	16%	14%	28%	15%			
Have not	73%	72%	69%	78%	71%	70%	77%	69%	81%	72%	59%	63%	78%	85%	69%	78%			
Have not but planning to	3%	1%	3%	4%	4%	5%	2%	2%	3%	5%	1%	2%	4%	2%	3%	5%			
Refused	2%	0%	4%	2%	4%	4%	1%	2%	3%	4%	1%	7%	2%	0%	1%	2%			
Q33D. Which of the following steps have you taken in the last two years to mitigate any of those risks?-Instituted mandatory trainings for employees to protect against risks																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Took this step	68%	71%	69%	62%	75%	74%	70%	58%	62%	66%	82%	80%	66%	66%	72%	40%			
Have not	26%	24%	26%	30%	19%	20%	26%	33%	32%	26%	13%	15%	28%	32%	23%	45%			
Have not but planning to	5%	5%	3%	8%	6%	5%	4%	8%	6%	6%	4%	3%	6%	2%	4%	15%			
Refused	1%	1%	1%	0%	1%	0%	0%	2%	0%	2%	1%	1%	1%	0%	1%	0%			
Q33E. Which of the following steps have you taken in the last two years to mitigate any of those risks?-Added explanatory materials to policy/procedures manual/materials																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Took this step	64%	65%	64%	61%	66%	62%	68%	57%	58%	67%	72%	67%	60%	55%	73%	50%			
Have not	30%	28%	30%	31%	30%	28%	27%	38%	36%	24%	22%	28%	31%	38%	24%	40%			
Have not but planning to	5%	6%	4%	6%	4%	8%	4%	4%	5%	6%	4%	3%	6%	5%	3%	10%			
Refused	2%	1%	2%	3%	0%	3%	1%	1%	1%	4%	1%	2%	3%	2%	0%	0%			
Q33F. Which of the following steps have you taken in the last two years to mitigate any of those risks?-Added software designed to address risks																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Took this step	38%	48%	34%	37%	32%	39%	37%	40%	33%	35%	50%	26%	28%	43%	56%	27%			
Have not	55%	48%	55%	58%	61%	55%	55%	54%	60%	57%	43%	68%	65%	51%	35%	70%			
Have not but planning to	5%	3%	7%	3%	6%	3%	6%	4%	4%	5%	5%	1%	4%	3%	7%	3%			
Refused	2%	1%	4%	2%	1%	3%	2%	2%	3%	3%	1%	5%	3%	3%	1%	0%			

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Q33G. Which of the following steps have you taken in the last two years to mitigate any of those risks?-Terminated specific products or services that you deemed to be too risky																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Took this step	19%	21%	21%	17%	15%	17%	16%	27%	17%	22%	20%	23%	18%	26%	16%	8%			
Have not	74%	78%	69%	75%	76%	77%	76%	67%	77%	72%	71%	68%	75%	69%	78%	88%			
Have not but planning to	4%	1%	7%	3%	4%	4%	4%	2%	4%	3%	4%	3%	4%	2%	3%	3%			
Refused	3%	1%	3%	4%	5%	2%	4%	4%	3%	4%	4%	6%	2%	3%	3%	0%			

Q34. As you consider the risks that you and your business face, do you feel safer today than you did two years ago, less safe or about as safe today as you did two years ago?																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Safer	14%	17%	11%	13%	14%	25%	10%	6%	13%	11%	17%	15%	17%	9%	11%	12%			
Less safe	40%	33%	45%	40%	43%	28%	38%	59%	42%	30%	41%	32%	37%	38%	47%	42%			
About the same	46%	50%	44%	47%	43%	46%	52%	35%	45%	59%	41%	53%	45%	52%	42%	47%			
Refused	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%	0%	0%			

Q35. 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 2015	Upstate 2014	Upstate 2013	Region				Cluster			Company Size			Industry					
				Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
New York	29%	28%	29%	33%	31%	26%	28%	46%	27%	14%	29%	26%	32%	29%	26%	32%	30%	18%	
Someplace else	67%	69%	65%	63%	67%	72%	68%	52%	69%	83%	68%	71%	62%	67%	72%	62%	66%	80%	
Refused	3%	4%	6%	5%	2%	3%	4%	3%	4%	2%	2%	3%	6%	5%	2%	6%	4%	2%	

For each of the following challenges that some CEOs have mentioned, indicate how significant an obstacle each is as you consider growing your business at your current location(s) in New York.

Q36A. State and Local Project Approval Process																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Very significant obstacle	24%	24%	24%	23%	29%	18%	30%	23%	22%	29%	33%	15%	29%	28%	20%				
Somewhat significant	34%	34%	35%	33%	30%	36%	34%	37%	33%	30%	40%	37%	34%	31%	35%				
Not very significant	25%	24%	22%	26%	33%	24%	27%	25%	31%	22%	15%	26%	22%	27%	25%				
Not at all a significant obstacle	12%	12%	14%	11%	10%	11%	15%	6%	14%	10%	9%	9%	13%	9%	12%	15%			
Refused	5%	6%	6%	6%	1%	6%	4%	6%	2%	4%	10%	2%	8%	6%	3%	5%			

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

2014: 524 Upstate NY CEOs, MOE +/- 4.3%

2013: 651 Upstate NY CEOs, MOE +/- 3.8%

2012: 592 Upstate NY CEOs, MOE +/- 4.0%

Q36B. Cost of Complying with State Regulations																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Very significant obstacle	45%	38%	51%	43%	48%	39%	37%	66%	47%	39%	45%	48%	40%	49%	50%	33%			
Somewhat significant	36%	42%	32%	37%	29%	41%	38%	24%	34%	45%	34%	37%	36%	32%	34%	38%			
Not very significant	13%	13%	9%	15%	15%	13%	16%	6%	15%	14%	9%	11%	16%	9%	12%	20%			
Not at all a significant obstacle	2%	1%	2%	1%	5%	2%	3%	0%	3%	1%	2%	1%	4%	2%	1%	3%			
Refused	5%	6%	5%	4%	3%	5%	5%	4%	1%	1%	10%	2%	5%	8%	4%	5%			
Q36C. Lack of Skilled Workers																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Very significant obstacle	24%	29%	30%	19%	15%	25%	26%	21%	24%	26%	22%	28%	34%	18%	20%	17%			
Somewhat significant	36%	33%	29%	39%	47%	35%	35%	38%	33%	45%	36%	37%	33%	37%	37%	38%			
Not very significant	28%	29%	29%	27%	28%	34%	26%	28%	33%	23%	25%	28%	23%	35%	31%	30%			
Not at all a significant obstacle	8%	4%	8%	12%	8%	3%	10%	10%	9%	6%	8%	6%	5%	3%	9%	13%			
Refused	4%	4%	4%	3%	3%	4%	4%	3%	0%	0%	9%	2%	5%	6%	2%	2%			
Q36D. Lack of Financing																			
	Upstate 2015	Region				Cluster			Company Size			Industry							
		Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr			
Very significant obstacle	8%	7%	5%	8%	11%	5%	8%	10%	9%	7%	6%	6%	7%	11%	7%	8%			
Somewhat significant	18%	10%	22%	22%	20%	15%	18%	24%	20%	15%	20%	13%	18%	12%	23%	20%			
Not very significant	48%	51%	47%	46%	44%	56%	44%	44%	50%	54%	40%	64%	44%	46%	49%	43%			
Not at all a significant obstacle	23%	29%	22%	20%	20%	19%	27%	19%	21%	25%	26%	15%	25%	26%	19%	27%			
Refused	4%	3%	4%	3%	4%	5%	3%	3%	1%	0%	8%	2%	6%	5%	2%	2%			

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

2014: 524 Upstate NY CEOs, MOE +/- 4.3%

2013: 651 Upstate NY CEOs, MOE +/- 3.8%

2012: 592 Upstate NY CEOs, MOE +/- 4.0%

Q36E. Cost of State and Local Taxes																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very significant obstacle	51%			42%	59%	52%	48%	37%	50%	67%	53%	54%	45%	45%	48%	55%	53%	58%	
Somewhat significant	35%			41%	28%	35%	35%	46%	35%	22%	37%	39%	29%	45%	37%	29%	29%	33%	
Not very significant	8%			9%	7%	7%	11%	12%	8%	5%	8%	7%	10%	8%	9%	9%	10%	5%	
Not at all a significant obstacle	2%			3%	1%	2%	4%	2%	3%	2%	1%	0%	6%	0%	1%	2%	7%	0%	
Refused	4%			4%	4%	4%	1%	3%	4%	4%	0%	0%	9%	2%	6%	5%	1%	3%	
Q36F. Access to New/Expanding Markets																			
				Region				Cluster			Company Size			Industry					
	Upstate 2015			Alb	Buff	Roch	Syr	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Whole & Distr	
Very significant obstacle	13%			7%	11%	17%	20%	6%	14%	19%	14%	15%	11%	9%	13%	11%	13%	15%	
Somewhat significant	30%			31%	28%	29%	35%	32%	31%	25%	32%	25%	31%	29%	32%	26%	28%	33%	
Not very significant	37%			40%	41%	35%	29%	42%	34%	37%	40%	48%	26%	46%	37%	38%	36%	35%	
Not at all a significant obstacle	15%			17%	14%	12%	14%	14%	16%	13%	13%	11%	20%	11%	12%	17%	17%	13%	
Refused	5%			5%	7%	6%	1%	6%	5%	6%	1%	2%	12%	5%	6%	8%	5%	3%	