

Siena College Research Institute  
 Sponsored by Gramercy Communications and The Business Council of New York State  
 2014: 524 Upstate New York CEOs, MOE +/- 4.3%  
 2013: 661 Upstate New York CEOs, MOE +/- 3.8%  
 2012: 592 Upstate New York CEOs, MOE +/- 4.0%

Which of the following industry categories best describes the type of business your company is engaged in?																											
	Region							Industry							Cluster			Company Size				Gender					
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female			
Engineering and Construction	17%	17%	15%	19%	12%	18%	24%											20%	19%	7%	20%	15%	21%	19%	13%	17%	21%
Food and Beverage	3%	3%	5%	0%	6%	3%	0%											3%	2%	3%	2%	4%	2%	2%	5%	3%	4%
Financial	8%	6%	8%	11%	6%	7%	7%											6%	9%	9%	6%	10%	6%	7%	11%	9%	2%
Manufacturing	21%	19%	19%	19%	24%	20%	22%											17%	26%	17%	21%	20%	19%	26%	17%	21%	16%
Retail	12%	12%	14%	14%	12%	12%	12%											11%	11%	19%	14%	10%	12%	16%	8%	13%	5%
Service	23%	27%	26%	24%	23%	22%	21%											27%	19%	23%	16%	31%	14%	20%	36%	20%	46%
Wholesale and Distribution	15%	15%	14%	12%	16%	18%	14%											14%	15%	20%	20%	9%	26%	11%	9%	17%	4%
Refused	1%	0%	0%	1%	1%	0%	0%											1%	0%	1%	0%	1%	1%	1%	0%	2%	

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?																									
	Region							Industry							Cluster			Company Size				Gender			
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female	
Considerably better	4%	2%	1%	3%	9%	1%	1%	8%	0%	0%	1%	0%	6%	5%	9%	1%	0%	5%	3%	7%	2%	3%	4%	4%	4%
A little better	32%	24%	21%	32%	30%	34%	32%	34%	43%	27%	29%	23%	40%	29%	72%	8%	0%	26%	39%	25%	32%	40%	31%	43%	46%
About the same	44%	46%	44%	52%	36%	46%	41%	46%	36%	51%	50%	49%	36%	41%	19%	76%	19%	46%	41%	44%	46%	40%	45%	34%	34%
A little worse	16%	22%	28%	12%	19%	15%	20%	9%	14%	20%	20%	13%	18%	18%	0%	15%	57%	19%	13%	19%	16%	13%	17%	11%	11%
Considerably worse	4%	7%	7%	1%	6%	3%	7%	3%	7%	2%	1%	3%	6%	8%	0%	0%	24%	4%	4%	4%	4%	4%	4%	7%	7%
Refused	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	2%	2%

Looking forward from today through next year, that is, the entire 2015 year, how would you describe your expectations for the economy in New York?																									
	Region							Industry							Cluster			Company Size				Gender			
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female	
Considerably better	5%	2%	2%	3%	9%	1%	4%	7%	0%	0%	3%	5%	8%	3%	11%	0%	0%	5%	4%	7%	3%	5%	4%	7%	7%
A little better	37%	28%	31%	37%	34%	37%	41%	38%	29%	29%	33%	40%	37%	41%	75%	16%	0%	31%	45%	32%	34%	46%	36%	45%	45%
About the same	39%	40%	32%	39%	36%	44%	37%	44%	57%	44%	45%	38%	33%	29%	13%	70%	19%	42%	34%	38%	43%	34%	40%	29%	29%
A little worse	15%	24%	25%	19%	16%	13%	12%	8%	14%	22%	17%	12%	16%	19%	0%	13%	57%	17%	13%	16%	17%	12%	16%	13%	13%
Considerably worse	4%	6%	10%	3%	4%	4%	7%	3%	0%	5%	2%	3%	5%	9%	0%	0%	24%	5%	4%	6%	4%	3%	4%	5%	5%
Refused	0%	0%	0%	0%	1%	1%	0%	0%	0%	0%	0%	2%	1%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	2%	2%

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?																									
	Region							Industry							Cluster			Company Size				Gender			
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female	
Considerably better	4%	3%	2%	3%	4%	2%	5%	5%	0%	2%	3%	2%	6%	3%	9%	0%	0%	4%	4%	4%	2%	5%	4%	2%	2%
A little better	24%	20%	17%	23%	24%	29%	21%	29%	21%	24%	20%	22%	28%	23%	57%	5%	0%	18%	33%	18%	27%	30%	24%	34%	34%
About the same	42%	44%	41%	48%	37%	40%	46%	46%	50%	49%	47%	35%	36%	41%	34%	64%	3%	44%	40%	42%	44%	40%	43%	38%	38%
A little worse	24%	25%	31%	23%	25%	24%	21%	16%	29%	15%	28%	29%	23%	27%	0%	30%	62%	29%	16%	30%	22%	17%	24%	18%	18%
Considerably worse	6%	8%	8%	3%	10%	4%	7%	3%	0%	10%	3%	11%	8%	8%	0%	1%	35%	6%	7%	6%	5%	8%	6%	7%	7%
Refused	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	2%	2%

And looking forward from today through the next year, how would you describe your expectations for your industry here in New York?																									
	Region							Industry							Cluster			Company Size				Gender			
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female	
Considerably better	5%	3%	2%	3%	6%	5%	5%	9%	14%	0%	3%	6%	5%	4%	13%	0%	0%	6%	4%	8%	2%	5%	4%	9%	9%
A little better	30%	25%	27%	30%	27%	34%	30%	32%	21%	24%	31%	34%	32%	27%	64%	11%	1%	23%	40%	21%	34%	36%	30%	36%	36%
About the same	36%	38%	33%	41%	31%	35%	37%	40%	36%	46%	36%	26%	36%	34%	22%	59%	5%	37%	35%	39%	33%	36%	36%	32%	32%
A little worse	24%	25%	27%	23%	30%	21%	20%	16%	29%	27%	29%	26%	20%	28%	1%	29%	66%	29%	18%	25%	28%	17%	25%	18%	18%
Considerably worse	5%	9%	10%	3%	5%	5%	8%	3%	0%	2%	2%	8%	8%	8%	0%	1%	28%	6%	4%	7%	4%	5%	5%	5%	5%
Refused	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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Now thinking specifically about your company, what are your expectations for revenue through the year 2015? Do you believe your revenue will...?																								
	Region							Industry							Cluster			Company Size			Company Size		Gender	
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Grow substantially	4%	3%	2%	2%	6%	2%	8%	4%	7%	0%	7%	3%	5%	1%	9%	1%	0%	4%	5%	4%	3%	7%	4%	4%
Grow moderately	45%	39%	36%	50%	41%	46%	42%	43%	36%	63%	44%	42%	44%	46%	69%	35%	15%	37%	56%	35%	45%	57%	46%	36%
Stay about the same	33%	36%	35%	32%	32%	33%	39%	42%	43%	22%	33%	29%	33%	30%	20%	45%	30%	36%	29%	42%	30%	27%	32%	45%
Decrease moderately	16%	18%	23%	17%	19%	18%	8%	11%	14%	15%	14%	22%	16%	22%	1%	17%	49%	21%	9%	16%	21%	8%	16%	16%
Decrease substantially	1%	3%	4%	0%	1%	1%	3%	0%	0%	0%	1%	5%	1%	1%	0%	0%	6%	1%	1%	2%	1%	1%	0%	
Refused	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%

Continuing to focus on your company, please think quickly about profitability. Between today and the end of the calendar year 2015 do you expect your profits to grow substantially, grow moderately, stay about the same, decrease moderately or decrease substantially?																								
	Region							Industry							Cluster			Company Size			Company Size		Gender	
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Grow substantially	3%	2%	2%	1%	5%	0%	7%	2%	0%	0%	5%	0%	5%	3%	6%	1%	1%	3%	3%	4%	1%	5%	3%	4%
Grow moderately	38%	29%	28%	46%	31%	36%	38%	40%	21%	51%	41%	31%	36%	35%	58%	30%	10%	31%	46%	28%	39%	47%	39%	32%
Stay about the same	35%	38%	32%	30%	36%	39%	36%	38%	50%	24%	33%	31%	36%	39%	32%	41%	27%	36%	33%	42%	32%	30%	34%	45%
Decrease moderately	22%	26%	33%	21%	25%	21%	17%	19%	21%	24%	20%	31%	20%	20%	4%	25%	52%	26%	15%	21%	26%	15%	22%	20%
Decrease substantially	3%	4%	6%	2%	3%	3%	3%	1%	7%	0%	2%	8%	3%	3%	0%	3%	9%	3%	3%	4%	2%	3%	3%	0%
Refused	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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?																								
	Region							Industry							Cluster			Company Size			Company Size		Gender	
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Market/demand growth	43%	40%	38%	47%	37%	46%	39%	46%	29%	56%	42%	38%	41%	39%	59%	36%	22%	41%	46%	39%	46%	43%	43%	41%
Cost reduction	29%	34%	34%	30%	33%	27%	24%	27%	21%	29%	32%	42%	27%	23%	16%	32%	52%	30%	27%	29%	28%	30%	29%	23%
Price increase	15%	13%	12%	12%	17%	14%	16%	14%	43%	5%	14%	11%	18%	15%	12%	18%	13%	17%	11%	19%	12%	12%	14%	20%
New technology	7%	10%	9%	8%	8%	4%	9%	5%	7%	2%	9%	5%	8%	9%	9%	6%	7%	5%	11%	5%	8%	9%	7%	5%
Other	6%	3%	6%	3%	4%	7%	11%	5%	0%	5%	4%	3%	7%	11%	4%	7%	6%	6%	5%	6%	6%	6%	5%	9%
Refused	1%	1%	1%	0%	1%	2%	1%	1%	0%	2%	0%	2%	0%	3%	0%	2%	0%	1%	0%	2%	1%	1%	1%	2%

Please indicate which of the following are major areas of concentration for your firm now and through 2015:																								
	Region							Industry							Cluster			Company Size			Company Size		Gender	
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Expansion of existing markets	56%	61%	58%	61%	53%	59%	50%	66%	43%	51%	63%	45%	57%	51%	63%	54%	48%	55%	59%	53%	56%	62%	57%	54%
Growth in existing products	54%	53%	50%	56%	56%	51%	50%	43%	43%	54%	69%	45%	48%	65%	59%	52%	48%	55%	54%	58%	53%	52%	54%	52%
Entry into new markets	33%	37%	33%	37%	33%	31%	30%	32%	29%	32%	42%	14%	33%	41%	32%	33%	36%	31%	37%	31%	28%	44%	33%	34%
New product lines	25%	31%	31%	26%	24%	25%	29%	9%	21%	20%	40%	26%	19%	37%	23%	26%	28%	24%	27%	25%	24%	27%	26%	20%
Acquisition of new businesses	14%	11%	13%	14%	9%	16%	18%	9%	14%	34%	17%	8%	13%	10%	14%	16%	7%	6%	23%	6%	10%	26%	15%	5%
Technology innovation	26%	28%	27%	37%	21%	21%	26%	23%	7%	39%	34%	22%	28%	16%	25%	28%	22%	24%	29%	19%	29%	30%	26%	25%
Construction of new locations	10%	10%	8%	10%	7%	10%	12%	14%	7%	2%	9%	15%	8%	6%	10%	10%	7%	10%	9%	8%	10%	10%	9%	11%
Internal restructuring	25%	28%	33%	25%	24%	27%	25%	32%	14%	22%	23%	28%	23%	25%	23%	26%	28%	26%	24%	22%	30%	23%	26%	14%
Other	3%	5%	4%	4%	4%	3%	3%	1%	7%	0%	3%	11%	3%	4%	2%	3%	5%	4%	3%	5%	3%	2%	4%	4%
Refused	1%	2%	2%	0%	1%	3%	0%	1%	0%	0%	0%	0%	4%	0%	2%	1%	1%	0%	1%	2%	1%	1%	1%	4%

Do you intend to invest between today through 2015 in any fixed assets for your firm designed to meet growing demand, reduce costs or enhance productivity?																								
	Region							Industry							Cluster			Company Size			Company Size		Gender	
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Yes	58%	52%	52%	59%	57%	56%	59%	55%	43%	56%	70%	49%	59%	52%	64%	55%	49%	50%	68%	46%	58%	70%	59%	48%
No	31%	36%	38%	28%	35%	32%	28%	31%	43%	32%	20%	38%	31%	39%	24%	33%	41%	38%	23%	44%	29%	20%	31%	29%
Not sure	11%	12%	11%	14%	8%	12%	13%	14%	14%	12%	10%	12%	10%	9%	11%	12%	10%	13%	9%	10%	13%	9%	10%	23%

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

(If investing in fixed assets) What is the main way you expect to finance those assets?																								
	Region							Industry							Cluster			Company Size					Gender	
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Internally generated funds	63%	57%	58%	72%	61%	60%	56%	68%	17%	87%	63%	63%	62%	51%	66%	62%	55%	67%	60%	63%	65%	61%	63%	70%
Borrow from a financial institution	31%	34%	33%	28%	28%	31%	40%	24%	67%	13%	32%	38%	31%	37%	27%	33%	38%	25%	35%	28%	30%	32%	32%	15%
Private equity	2%	2%	3%	0%	3%	4%	2%	4%	17%	0%	3%	0%	0%	5%	4%	1%	2%	4%	1%	4%	2%	2%	3%	0%
Not sure	4%	7%	6%	0%	8%	5%	2%	4%	0%	0%	3%	0%	7%	4%	4%	5%	5%	3%	5%	3%	5%	3%	15%	

Now thinking about the people that work for your company, between today and the end of 2015, do you plan to...																								
	Region							Industry							Cluster			Company Size					Gender	
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Substantially increase your workforce	2%	1%	1%	3%	2%	0%	3%	1%	0%	2%	4%	2%	2%	0%	2%	1%	1%	3%	2%	1%	3%	2%	2%	
Moderately increase your workforce	30%	27%	26%	27%	29%	34%	28%	40%	14%	32%	38%	17%	33%	15%	42%	25%	12%	25%	36%	22%	30%	38%	31%	25%
Remain about the same	59%	59%	58%	64%	58%	53%	63%	51%	79%	56%	49%	69%	58%	72%	53%	64%	59%	62%	54%	64%	58%	53%	58%	63%
Decrease your workforce	9%	12%	15%	5%	11%	12%	5%	8%	7%	5%	10%	12%	7%	11%	1%	9%	27%	10%	7%	9%	11%	5%	9%	9%
Refused	1%	1%	1%	1%	1%	1%	1%	1%	0%	5%	0%	0%	1%	1%	1%	1%	1%	0%	2%	0%	1%	1%	2%	

Now thinking about other challenges that your company faces, which of the following are you concerned with:																								
	Region							Industry							Cluster			Company Size					Gender	
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Existing U.S. competition	29%	25%	27%	26%	28%	31%	30%	23%	21%	37%	32%	29%	23%	35%	26%	32%	24%	30%	28%	28%	31%	28%	30%	20%
Governmental regulation	69%	70%	69%	68%	69%	74%	63%	70%	86%	90%	70%	68%	60%	71%	61%	73%	78%	67%	71%	64%	69%	73%	71%	50%
Taxation	65%	67%	67%	65%	63%	70%	61%	69%	79%	59%	69%	69%	52%	76%	54%	71%	74%	69%	59%	68%	69%	55%	64%	66%
Foreign competition	12%	12%	12%	14%	11%	12%	9%	4%	7%	2%	25%	12%	4%	18%	12%	13%	8%	12%	11%	12%	13%	11%	13%	5%
Energy costs	30%	31%	44%	24%	25%	36%	32%	21%	29%	7%	38%	43%	25%	39%	22%	35%	37%	29%	30%	30%	27%	32%	29%	30%
Risk management	22%	21%	22%	20%	19%	25%	25%	35%	7%	49%	13%	14%	23%	13%	23%	21%	21%	17%	28%	17%	21%	29%	21%	27%
Adverse economic conditions	46%	55%	65%	48%	39%	48%	49%	49%	14%	54%	51%	49%	34%	51%	36%	49%	60%	49%	42%	45%	51%	41%	47%	38%
Health care costs	77%	80%	79%	83%	74%	78%	70%	49%	71%	63%	83%	78%	74%	75%	73%	78%	85%	73%	83%	70%	80%	82%	79%	61%
Global political instability	16%	15%	22%	23%	13%	16%	9%	10%	14%	20%	30%	17%	8%	15%	18%	17%	10%	16%	17%	12%	18%	19%	18%	7%
Rising supplier costs	35%	39%	42%	32%	36%	38%	33%	29%	57%	0%	42%	51%	30%	41%	34%	35%	36%	41%	28%	44%	36%	25%	34%	45%
Human resources	30%	27%	24%	26%	29%	33%	30%	32%	29%	17%	30%	25%	41%	22%	34%	29%	20%	26%	36%	25%	27%	40%	31%	27%
Cash flow	29%	35%	35%	28%	26%	31%	32%	27%	36%	12%	25%	31%	33%	33%	28%	27%	34%	30%	28%	32%	29%	26%	28%	34%
Availability of equity financing	4%	5%	9%	3%	2%	6%	5%	7%	7%	0%	2%	0%	3%	9%	3%	5%	2%	5%	2%	5%	4%	3%	4%	4%
Ability to obtain suitable financing	8%	10%	13%	6%	10%	8%	11%	9%	14%	0%	10%	5%	8%	14%	7%	8%	13%	10%	7%	10%	10%	5%	8%	9%
Other	4%	3%	4%	6%	4%	3%	3%	7%	7%	0%	2%	9%	5%	1%	4%	5%	3%	5%	4%	3%	6%	4%	4%	11%

Which of the challenges you selected are you MOST concerned with?																								
	Region							Industry							Cluster			Company Size					Gender	
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Existing U.S. competition	7%	8%	6%	6%	7%	9%	8%	9%	0%	12%	5%	8%	6%	9%	8%	8%	2%	7%	7%	7%	8%	6%	8%	5%
Governmental regulation	25%	23%	24%	26%	23%	24%	30%	27%	57%	54%	14%	22%	23%	23%	22%	24%	35%	23%	29%	21%	25%	31%	26%	23%
Taxation	14%	14%	12%	10%	16%	16%	11%	14%	21%	12%	12%	18%	13%	13%	12%	13%	19%	17%	8%	16%	15%	7%	13%	13%
Foreign competition	3%	4%	3%	3%	3%	3%	1%	0%	0%	0%	11%	2%	1%	0%	3%	4%	0%	2%	4%	2%	4%	3%	3%	0%
Energy costs	1%	1%	3%	0%	1%	0%	3%	0%	0%	0%	0%	2%	3%	0%	1%	0%	0%	1%	1%	1%	0%	1%	1%	0%
Risk management	2%	2%	1%	2%	1%	2%	4%	5%	0%	5%	2%	2%	0%	1%	2%	2%	1%	2%	3%	2%	3%	1%	2%	2%
Adverse economic conditions	13%	15%	24%	13%	12%	15%	11%	10%	7%	7%	20%	15%	8%	16%	12%	13%	15%	14%	11%	12%	15%	10%	12%	14%
Health care costs	15%	18%	11%	17%	17%	12%	13%	9%	14%	7%	18%	14%	19%	18%	15%	16%	14%	12%	19%	16%	12%	18%	16%	9%
Global political instability	2%	1%	1%	4%	1%	1%	0%	2%	0%	2%	2%	2%	1%	3%	3%	1%	0%	2%	2%	2%	1%	3%	2%	2%
Rising supplier costs	3%	3%	2%	4%	4%	2%	1%	5%	0%	0%	4%	3%	3%	1%	3%	4%	1%	4%	2%	5%	3%	1%	3%	7%
Human resources	5%	3%	2%	5%	6%	5%	5%	7%	0%	0%	5%	2%	10%	5%	8%	4%	3%	5%	6%	4%	5%	9%	5%	5%
Cash flow	7%	6%	6%	7%	5%	7%	11%	8%	0%	0%	6%	8%	8%	9%	8%	7%	6%	8%	5%	9%	6%	6%	6%	13%
Availability of equity financing	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%
Ability to obtain suitable financing	0%	1%	2%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	1%	0%	1%	1%	0%	0%	2%
Other	2%	1%	2%	2%	3%	3%	1%	3%	0%	0%	2%	5%	4%	0%	2%	3%	2%	2%	3%	2%	3%	2%	2%	5%
Don't know/Refused	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%

Siena College Research Institute  
 Sponsored by Gramercy Communications and The Business Council of New York State  
 2014: 524 Upstate New York CEOs, MOE +/- 4.3%  
 2013: 661 Upstate New York CEOs, MOE +/- 3.8%  
 2012: 592 Upstate New York CEOs, MOE +/- 4.0%

Thinking specifically about New York and the relationship between the state government and businesses like yours, overall would you say the government of the State of New York is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Excellent	1%	1%	1%	0%	2%	1%	0%	2%	0%	2%	0%	1%	0%	2%	0%	0%	1%	0%	2%	1%	0%	1%	0%	
Good	4%	7%	9%	2%	6%	5%	5%	2%	7%	2%	4%	0%	3%	6%	10%	1%	0%	4%	5%	7%	1%	7%	4%	5%
Fair	30%	26%	34%	34%	26%	31%	32%	26%	50%	24%	30%	32%	33%	29%	43%	29%	6%	27%	35%	24%	34%	34%	30%	34%
Poor	63%	65%	55%	63%	63%	63%	62%	65%	43%	68%	66%	63%	61%	62%	43%	69%	94%	64%	60%	64%	64%	58%	63%	55%
Don't know/Refused	2%	2%	2%	1%	3%	0%	1%	1%	0%	2%	1%	0%	2%	2%	2%	0%	2%	0%	3%	1%	1%	1%	5%	

Of the following, what would you like to see the Governor and Legislature of New York focus on?																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Income Tax Reform	69%	69%	59%	66%	70%	73%	62%	66%	64%	73%	68%	75%	63%	79%	63%	69%	79%	70%	66%	73%	67%	66%	69%	61%
Spending Cuts	64%	72%	74%	57%	72%	63%	63%	57%	64%	73%	76%	66%	51%	71%	52%	70%	77%	70%	56%	71%	65%	54%	65%	50%
Infrastructure Development	42%	32%	37%	47%	37%	44%	38%	60%	36%	27%	41%	49%	38%	33%	46%	45%	26%	40%	44%	38%	43%	44%	42%	41%
Business Development Incentives	38%	43%	47%	42%	34%	39%	39%	40%	21%	27%	35%	32%	48%	42%	33%	33%	39%	37%	38%	39%	36%	37%	48%	
Ethics Reform	40%	39%	35%	44%	42%	33%	42%	45%	21%	51%	37%	45%	33%	42%	34%	45%	42%	43%	36%	42%	38%	39%	40%	38%
Increasing State Revenues through consumer oriented taxes	5%	6%	8%	4%	8%	3%	3%	3%	14%	2%	5%	5%	8%	1%	5%	5%	2%	5%	4%	3%	5%	5%	5%	2%
Other	16%	11%	17%	15%	16%	18%	12%	18%	14%	10%	13%	11%	22%	16%	13%	16%	20%	16%	15%	15%	17%	14%	16%	16%

Of those, which SINGLE area would you most like to see the Governor and Legislature focus on?																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Income Tax Reform	27%	25%	18%	28%	29%	24%	25%	24%	21%	20%	24%	29%	29%	32%	31%	24%	23%	27%	26%	28%	27%	26%	27%	27%
Spending Cuts	31%	35%	40%	24%	36%	33%	30%	23%	43%	49%	33%	34%	24%	34%	19%	35%	49%	35%	25%	35%	31%	26%	31%	25%
Infrastructure Development	15%	9%	10%	21%	13%	11%	12%	29%	14%	5%	10%	17%	12%	11%	21%	12%	6%	12%	19%	12%	14%	19%	15%	14%
Business Development Incentives	11%	15%	13%	13%	7%	15%	11%	9%	7%	10%	14%	6%	13%	15%	16%	8%	12%	12%	12%	13%	11%	11%	11%	14%
Ethics Reform	9%	6%	5%	8%	8%	10%	13%	8%	0%	12%	12%	11%	10%	4%	9%	10%	6%	8%	10%	7%	10%	9%	9%	13%
Increasing State Revenues through consumer oriented taxes	0%	1%	1%	0%	1%	0%	1%	0%	0%	0%	0%	0%	2%	0%	0%	1%	0%	0%	0%	0%	1%	0%	0%	2%
(Vol) Reducing regulations	2%	2%	2%	1%	3%	2%	3%	1%	7%	0%	2%	3%	3%	1%	0%	3%	2%	1%	2%	2%	1%	2%	2%	2%
(Vol) Workers compensation reform	1%	1%	1%	1%	1%	2%	0%	1%	7%	0%	0%	0%	2%	1%	0%	2%	1%	1%	1%	1%	1%	1%	1%	0%
Other	4%	6%	9%	4%	3%	4%	5%	5%	0%	5%	5%	0%	5%	1%	4%	5%	0%	3%	5%	2%	5%	4%	4%	2%
Don't know/Refused	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	2%

How confident are you in the ability of the government of the State of New York to improve the business climate for businesses like yours here in New York over the next year? Are you...																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Very confident	1%	0%	2%	1%	3%	0%	0%	3%	0%	2%	1%	0%	2%	2%	1%	0%	2%	0%	2%	1%	1%	1%	1%	2%
Somewhat confident	12%	15%	23%	11%	13%	12%	14%	11%	14%	7%	10%	14%	16%	14%	24%	6%	1%	12%	14%	13%	13%	12%	12%	21%
Not very confident	47%	48%	44%	53%	38%	52%	43%	47%	21%	41%	44%	45%	52%	51%	50%	51%	30%	43%	51%	44%	42%	55%	46%	48%
Not at all confident	38%	37%	31%	33%	44%	35%	42%	37%	50%	49%	45%	40%	29%	35%	21%	42%	67%	42%	34%	39%	43%	31%	40%	25%
Don't know/Refused	1%	1%	0%	1%	1%	1%	0%	1%	14%	0%	0%	2%	2%	0%	1%	1%	1%	1%	1%	1%	1%	1%	1%	4%

And thinking about the efforts of the federal government, overall would you say the federal government is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Excellent	0%	0%	1%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%
Good	4%	3%	6%	8%	3%	3%	3%	4%	0%	5%	1%	6%	7%	4%	6%	4%	1%	4%	5%	4%	5%	4%	4%	11%
Fair	21%	18%	21%	17%	21%	22%	24%	20%	21%	22%	20%	14%	28%	16%	27%	20%	7%	20%	21%	21%	19%	21%	19%	36%
Poor	72%	76%	71%	72%	74%	70%	74%	71%	64%	73%	77%	78%	63%	77%	63%	74%	88%	73%	72%	71%	76%	70%	75%	50%
Don't know	2%	3%	2%	2%	3%	4%	0%	3%	14%	0%	2%	2%	3%	3%	3%	2%	3%	2%	3%	3%	3%	2%	4%	

How confident are you in the ability of the federal government to improve the business climate for businesses like yours here in New York over the next year? Are you																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Very confident	1%	0%	1%	1%	1%	0%	0%	2%	0%	0%	0%	2%	0%	0%	1%	1%	0%	1%	0%	1%	1%	0%	1%	0%
Somewhat confident	8%	7%	13%	12%	8%	6%	4%	11%	7%	7%	4%	0%	13%	10%	14%	6%	1%	7%	10%	6%	9%	9%	6%	23%
Not very confident	45%	46%	42%	43%	37%	53%	53%	44%	29%	49%	48%	43%	45%	48%	49%	33%	47%	42%	50%	43%	42%	45%	43%	43%
Not at all confident	44%	46%	43%	41%	51%	39%	43%	40%	43%	44%	49%	52%	40%	41%	34%	44%	64%	43%	46%	42%	45%	46%	46%	27%
Don't know/Refused	2%	1%	1%		4%	2%	0%	3%	21%	0%	0%	3%	2%	1%	2%	2%	2%	2%	2%	2%	2%	3%	1%	7%
For each of the following national proposals indicate whether you support it or oppose it? - Repeal the Health Care Reform Legislation																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Support	67%	67%	66%	67%	71%	68%	59%	71%	71%	80%	69%	68%	54%	75%	56%	70%	88%	71%	63%	67%	72%	62%	70%	50%
Oppose	19%	23%	27%	19%	15%	18%	29%	15%	14%	7%	17%	20%	18%	28%	17%	8%	17%	22%	19%	18%	21%	17%	36%	
No opinion	14%	9%	7%	14%	14%	14%	12%	13%	14%	12%	11%	14%	18%	18%	13%	3%	12%	15%	15%	10%	16%	13%	14%	
For each of the following national proposals indicate whether you support it or oppose it? - Pass a Balanced Budget Constitutional Amendment																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Support	77%	78%	80%	79%	75%	76%	79%	75%	71%	85%	77%	75%	71%	86%	72%	79%	85%	78%	76%	78%	78%	74%	80%	54%
Oppose	10%	9%	11%	10%	11%	9%	11%	9%	7%	10%	14%	11%	11%	4%	10%	13%	2%	10%	10%	9%	11%	9%	10%	9%
No opinion	13%	13%	9%	12%	14%	15%	11%	16%	21%	5%	9%	14%	18%	10%	18%	9%	13%	12%	14%	13%	11%	17%	10%	38%
For each of the following national proposals indicate whether you support it or oppose it? - Increase Federal Spending on Infrastructure																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Support	62%	47%	49%	66%	61%	59%	64%	70%	57%	54%	56%	68%	62%	62%	73%	60%	45%	63%	63%	64%	60%	65%	64%	55%
Oppose	18%	30%	35%	17%	16%	23%	17%	12%	21%	15%	23%	14%	22%	20%	12%	21%	27%	20%	15%	19%	20%	14%	18%	18%
No opinion	19%	23%	17%	18%	23%	18%	18%	18%	21%	32%	21%	18%	17%	18%	15%	20%	28%	17%	22%	17%	19%	21%	18%	27%
For each of the following national proposals indicate whether you support it or oppose it? - Reduce the Corporate Income Tax Rates																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Support	82%	79%	72%	77%	86%	84%	82%	78%	86%	83%	85%	78%	78%	94%	79%	83%	90%	87%	77%	88%	83%	75%	83%	79%
Oppose	8%	12%	16%	10%	5%	7%	12%	9%	0%	7%	7%	11%	9%	4%	10%	7%	5%	6%	11%	5%	10%	9%	8%	7%
No opinion	10%	9%	12%	14%	8%	9%	7%	13%	14%	10%	8%	11%	13%	3%	12%	10%	6%	8%	12%	7%	7%	15%	9%	14%
For each of the following national proposals indicate whether you support it or oppose it? - Lessen Corporate Income Tax Deductions																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014	Upstate Total 2013	Upstate 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	Male	Female
Support	35%	36%	38%	27%	37%	39%	39%	33%	21%	46%	32%	43%	33%	37%	37%	28%	32%	38%	36%	30%	40%	36%	27%	
Oppose	44%	44%	45%	47%	45%	42%	43%	42%	50%	41%	48%	43%	42%	47%	43%	41%	53%	48%	42%	44%	49%	41%	46%	38%
No opinion	20%	20%	18%	26%	18%	19%	17%	25%	29%	12%	20%	14%	26%	20%	22%	19%	20%	20%	20%	21%	19%	18%	36%	
For each of the following national proposals indicate whether you support it or oppose it? - Increase the federal minimum wage from \$7.25 to \$10.10 per hour																								
	Region							Industry							Cluster			Company Size				Gender		
	Upstate Total 2014			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	Male	Female
Support	24%			27%	21%	20%	29%	26%	7%	15%	21%	26%	29%	34%	20%	12%	23%	26%	22%	25%	26%	23%	32%	
Oppose	61%			54%	67%	62%	59%	49%	64%	73%	66%	60%	57%	68%	49%	65%	80%	63%	57%	63%	60%	59%	62%	50%
No opinion	15%			19%	12%	18%	12%	24%	29%	12%	13%	14%	13%	11%	18%	16%	8%	14%	17%	15%	15%	15%	18%	

Thinking specifically about your immediate geographic area, including yours and adjacent counties, is the general business climate improving, staying the same or worsening?																							
	Upstate		Region				Industry							Cluster			Company Size			Company Size		Gender	
	Total 2014	Total 2013	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	Male	Female
Improving	24%	15%	26%	34%	18%	11%	29%	36%	24%	20%	22%	27%	18%	46%	13%	0%	21%	28%	19%	21%	34%	24%	25%
Staying the same	56%	55%	63%	47%	55%	59%	59%	36%	56%	61%	51%	57%	51%	51%	67%	37%	55%	56%	53%	61%	51%	55%	55%
Worsening	20%	28%	10%	17%	25%	30%	11%	14%	20%	19%	28%	15%	32%	1%	20%	62%	23%	15%	27%	18%	13%	20%	16%
Don't know/Refused	1%	3%	1%	1%	1%	0%	1%	14%	0%	0%	0%	2%	0%	1%	0%	1%	1%	1%	0%	1%	0%	4%	

And continuing to consider the local market, are conditions locally improving, staying the same or worsening for businesses in your industry?																							
	Upstate		Region				Industry							Cluster			Company Size			Company Size		Gender	
	Total 2014	Total 2013	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	Male	Female
Improving	18%	13%	17%	25%	15%	9%	29%	21%	22%	9%	14%	19%	14%	38%	6%	0%	18%	18%	18%	15%	22%	17%	23%
Staying the same	55%	56%	66%	48%	52%	58%	49%	43%	56%	63%	54%	59%	51%	56%	67%	24%	51%	60%	50%	59%	57%	55%	57%
Worsening	25%	30%	17%	25%	31%	33%	21%	21%	22%	26%	31%	20%	35%	4%	26%	74%	29%	21%	31%	26%	19%	27%	16%
Don't know/Refused	2%	1%	1%	2%	3%	0%	1%	14%	0%	2%	2%	2%	0%	1%	2%	1%	2%	1%	2%	1%	1%	4%	

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		Region				Industry							Cluster			Company Size			Company Size		Gender	
	Total 2014	Total 2013	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	Male	Female
Education	45%	43%	37%	43%	51%	57%	47%	29%	49%	46%	48%	44%	43%	53%	42%	37%	44%	48%	43%	45%	50%	46%	46%
Tourism	32%	33%	23%	39%	36%	28%	29%	36%	32%	28%	43%	35%	28%	37%	31%	26%	37%	27%	41%	30%	25%	33%	27%
Technology	59%	57%	81%	50%	56%	43%	65%	36%	61%	56%	63%	60%	56%	64%	60%	49%	55%	66%	54%	58%	69%	62%	43%
Transportation	16%	12%	19%	13%	10%	29%	25%	7%	7%	14%	8%	18%	16%	16%	19%	6%	15%	18%	15%	17%	17%	13%	
Medical	60%	56%	45%	72%	63%	57%	62%	50%	63%	55%	65%	61%	58%	61%	61%	53%	57%	64%	54%	60%	66%	59%	63%
Green and sustainable energy	26%	24%	23%	29%	25%	24%	31%	14%	12%	25%	31%	28%	22%	32%	25%	14%	26%	26%	26%	25%	27%	25%	30%
Manufacturing	37%	38%	32%	37%	42%	39%	44%	29%	17%	52%	31%	28%	43%	39%	39%	29%	42%	32%	44%	36%	33%	39%	27%
Other	4%	3%	3%	3%	7%	0%	4%	0%	7%	5%	2%	4%	1%	4%	4%	2%	4%	4%	4%	5%	3%	3%	9%
None of the above	7%	6%	8%	6%	7%	8%	4%	21%	5%	5%	8%	9%	9%	4%	7%	15%	8%	7%	8%	6%	8%	6%	16%

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		Region				Industry							Cluster			Company Size			Company Size		Gender	
	Total 2014	Total 2013	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	Male	Female
Education	14%	8%	6%	11%	15%	31%	17%	18%	15%	9%	7%	15%	19%	19%	10%	12%	13%	15%	13%	14%	14%	14%	13%
Tourism	6%	7%	3%	8%	8%	6%	2%	36%	13%	6%	8%	6%	1%	7%	6%	5%	8%	3%	6%	8%	3%	5%	10%
Technology	30%	26%	66%	10%	21%	17%	31%	9%	41%	25%	30%	33%	27%	34%	28%	23%	26%	36%	24%	31%	36%	30%	29%
Transportation	2%	1%	4%	1%	1%	3%	5%	0%	3%	2%	2%	0%	3%	0%	4%	1%	2%	2%	1%	4%	1%	2%	4%
Medical	26%	29%	7%	48%	25%	16%	20%	27%	23%	26%	36%	27%	23%	25%	26%	30%	25%	26%	25%	25%	28%	26%	25%
Green and sustainable energy	4%	3%	1%	5%	5%	4%	8%	0%	0%	2%	3%	7%	1%	3%	4%	7%	5%	4%	6%	4%	2%	4%	4%
Manufacturing	16%	16%	10%	14%	19%	23%	13%	9%	3%	29%	13%	8%	22%	11%	19%	18%	19%	11%	22%	12%	12%	16%	8%
Other	2%	2%	1%	2%	4%	0%	5%	0%	3%	2%	0%	3%	1%	2%	3%	3%	3%	2%	3%	2%	2%	2%	4%
None of the above	1%	7%	0%	1%	1%	0%	0%	0%	0%	0%	2%	1%	1%	1%	0%	0%	1%	0%	1%	1%	0%	2%	

How would you rate your local area on each of the following: - Suitable workforce																							
	Upstate		Region				Industry							Cluster			Company Size			Company Size		Gender	
	Total 2014	Total 2013	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	Male	Female
Excellent	12%	15%	11%	11%	16%	8%	14%	14%	20%	5%	11%	15%	13%	14%	9%	15%	12%	13%	14%	10%	14%	13%	7%
Good	50%	50%	48%	53%	45%	54%	43%	21%	59%	48%	55%	48%	56%	50%	53%	41%	49%	50%	46%	56%	45%	51%	38%
Fair	29%	26%	33%	23%	31%	32%	34%	36%	15%	35%	29%	26%	27%	29%	29%	30%	28%	31%	27%	30%	32%	28%	39%
Poor	7%	8%	6%	11%	6%	7%	7%	14%	5%	12%	3%	8%	5%	5%	8%	12%	9%	5%	11%	4%	7%	7%	11%
Don't know/Refused	2%	1%	2%	2%	2%	0%	2%	14%	2%	0%	2%	3%	0%	2%	1%	2%	2%	1%	2%	1%	2%	1%	5%

Siena College Research Institute  
 Sponsored by Gramercy Communications and The Business Council of New York State  
 2014: 524 Upstate New York CEOs, MOE +/- 4.3%  
 2013: 661 Upstate New York CEOs, MOE +/- 3.8%  
 2012: 592 Upstate New York CEOs, MOE +/- 4.0%

How would you rate your local area on each of the following: - Consumer confidence																							
	Upstate Total 2014	Upstate Total 2013	Region				Industry							Cluster			Company Size				Gender		
			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	Male	Female
Excellent	2%	1%	3%	3%	1%	0%	3%	0%	0%	0%	3%	2%	1%	2%	2%	0%	2%	1%	3%	1%	1%	4%	
Good	32%	27%	37%	26%	37%	22%	34%	36%	37%	33%	25%	34%	28%	42%	29%	16%	31%	35%	27%	35%	36%	31%	39%
Fair	54%	54%	51%	55%	52%	62%	52%	43%	49%	54%	57%	55%	56%	51%	56%	55%	54%	54%	54%	55%	52%	55%	41%
Poor	11%	16%	8%	14%	8%	14%	9%	0%	12%	13%	14%	6%	15%	2%	13%	24%	12%	8%	14%	8%	9%	10%	9%
Don't know/Refused	2%	2%	3%	3%	2%	1%	2%	21%	2%	1%	2%	3%	0%	2%	1%	5%	2%	3%	2%	2%	3%	2%	7%

How would you rate your local area on each of the following: - Transportation infrastructure																							
	Upstate Total 2014	Upstate Total 2013	Region				Industry							Cluster			Company Size				Gender		
			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	Male	Female
Excellent	4%	5%	3%	3%	7%	4%	4%	0%	5%	5%	2%	3%	5%	7%	2%	3%	5%	4%	6%	3%	3%	4%	7%
Good	44%	47%	39%	39%	56%	39%	43%	43%	54%	38%	51%	40%	48%	42%	44%	50%	46%	41%	46%	45%	39%	45%	34%
Fair	38%	35%	46%	42%	29%	36%	40%	43%	29%	48%	35%	37%	33%	37%	40%	35%	37%	41%	32%	41%	44%	39%	41%
Poor	12%	10%	10%	13%	7%	21%	11%	0%	12%	8%	9%	17%	14%	12%	12%	9%	11%	12%	15%	9%	12%	12%	9%
Don't know/Refused	2%	2%	2%	3%	1%	0%	2%	14%	0%	0%	3%	3%	0%	2%	2%	2%	2%	2%	2%	2%	2%	1%	9%

How would you rate your local area on each of the following: - Local governmental support for business																							
	Upstate Total 2014	Upstate Total 2013	Region				Industry							Cluster			Company Size				Gender		
			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	Male	Female
Excellent	2%	2%	1%	3%	2%	1%	3%	0%	0%	3%	0%	2%	3%	3%	1%	0%	2%	1%	4%	1%	2%	4%	
Good	24%	24%	23%	23%	29%	18%	26%	29%	32%	22%	18%	24%	22%	32%	22%	10%	23%	25%	21%	22%	30%	23%	34%
Fair	46%	43%	46%	41%	47%	53%	36%	21%	41%	49%	57%	48%	46%	46%	48%	44%	44%	49%	42%	49%	47%	48%	32%
Poor	25%	30%	26%	30%	19%	28%	29%	36%	24%	24%	23%	23%	30%	16%	27%	43%	29%	21%	32%	26%	18%	25%	23%
Don't know/Refused	3%	1%	3%	4%	3%	0%	5%	14%	2%	3%	2%	3%	0%	3%	2%	6%	2%	4%	2%	3%	4%	2%	7%

How would you rate your local area on each of the following: - As an area where businesses can succeed																							
	Upstate Total 2014	Upstate Total 2013	Region				Industry							Cluster			Company Size				Gender		
			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	Male	Female
Excellent	2%	3%	2%	3%	3%	1%	3%	0%	0%	3%	2%	2%	4%	4%	0%	3%	3%	2%	4%	2%	1%	2%	4%
Good	25%	24%	32%	21%	24%	18%	30%	21%	22%	22%	23%	30%	16%	36%	20%	12%	23%	28%	22%	23%	31%	24%	34%
Fair	49%	51%	46%	45%	52%	55%	43%	50%	59%	43%	48%	51%	57%	46%	55%	36%	47%	51%	45%	49%	52%	50%	43%
Poor	21%	21%	17%	28%	18%	22%	20%	14%	17%	29%	25%	15%	22%	11%	22%	43%	26%	14%	26%	22%	13%	21%	16%
Don't know/Refused	3%	1%	4%	3%	3%	3%	4%	14%	2%	4%	3%	3%	1%	2%	3%	6%	2%	4%	3%	3%	3%	3%	4%

How would you rate your local area on each of the following: - As a place where consumers want to live																							
	Upstate Total 2014	Upstate Total 2013	Region				Industry							Cluster			Company Size				Gender		
			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	Male	Female
Excellent	12%	14%	12%	14%	16%	4%	11%	14%	27%	10%	12%	15%	6%	15%	10%	13%	12%	14%	11%	13%	14%	13%	13%
Good	45%	44%	51%	45%	46%	33%	44%	29%	41%	46%	49%	47%	41%	51%	43%	36%	46%	42%	43%	45%	44%	45%	39%
Fair	30%	30%	26%	34%	22%	49%	30%	36%	24%	31%	29%	30%	35%	26%	35%	28%	28%	35%	27%	33%	32%	30%	36%
Poor	10%	11%	8%	7%	13%	14%	13%	0%	7%	10%	8%	6%	18%	5%	10%	20%	13%	7%	16%	8%	6%	10%	9%
Don't know/Refused	2%	1%	3%	1%	3%	0%	2%	21%	0%	2%	2%	3%	0%	2%	2%	3%	2%	2%	2%	1%	3%	2%	4%

Thinking specifically about health care and the Affordable Care Act, known as Obamacare. 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 Total 2014	Upstate Total 2013	Region				Industry							Cluster			Company Size				Gender		
			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	Male	Female
Positive impact	7%	6%	7%	5%	7%	7%	5%	7%	0%	4%	8%	11%	6%	10%	5%	2%	6%	7%	7%	5%	9%	6%	13%
Negative impact	71%	69%	72%	74%	66%	72%	74%	57%	73%	73%	68%	70%	73%	60%	74%	88%	69%	73%	65%	76%	70%	73%	50%
No impact	20%	22%	18%	19%	23%	21%	19%	14%	27%	24%	22%	16%	19%	26%	19%	8%	24%	17%	26%	19%	17%	19%	32%
Don't know/Refused	2%	3%	3%	2%	3%	0%	2%	21%	0%	0%	3%	3%	1%	3%	2%	1%	1%	3%	1%	1%	4%	2%	5%

Have you made any of the following adjustments due to the Affordable Care Act? - Increasing benefits to retain employees																							
	Upstate		Region				Industry							Cluster			Company Size					Gender	
	Total 2014	Total 2013	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	Male	Female
Yes	15%	7%	17%	18%	15%	5%	12%	14%	2%	10%	18%	23%	18%	15%	17%	9%	13%	16%	12%	16%	15%	15%	9%
No	82%	87%	80%	80%	82%	92%	84%	64%	93%	89%	78%	76%	81%	82%	80%	87%	85%	81%	85%	82%	81%	82%	88%
Don't know/Refused	3%	6%	3%	2%	3%	3%	4%	21%	5%	1%	3%	2%	1%	2%	3%	3%	2%	4%	2%	2%	4%	2%	4%
Have you made any of the following adjustments due to the Affordable Care Act? - Decreasing benefits to cut costs																							
	Upstate		Region				Industry							Cluster			Company Size					Gender	
	Total 2014	Total 2013	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	Male	Female
Yes	40%	32%	37%	43%	39%	43%	44%	29%	32%	51%	34%	31%	47%	31%	41%	62%	41%	40%	36%	47%	36%	43%	20%
No	56%	64%	58%	56%	56%	55%	52%	43%	63%	49%	62%	67%	52%	66%	55%	35%	56%	57%	61%	51%	60%	54%	75%
Don't know/Refused	3%	5%	5%	1%	5%	1%	4%	29%	5%	0%	5%	3%	1%	2%	4%	3%	3%	3%	2%	4%	3%	5%	
Have you made any of the following adjustments due to the Affordable Care Act? - Offering defined contribution health insurance																							
	Upstate		Region				Industry							Cluster			Company Size					Gender	
	Total 2014	Total 2013	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	Male	Female
Yes	36%	28%	32%	37%	39%	37%	38%	50%	27%	38%	35%	37%	34%	35%	38%	36%	35%	38%	32%	40%	35%	38%	18%
No	58%	66%	59%	58%	56%	58%	56%	29%	68%	56%	57%	59%	62%	61%	55%	68%	61%	57%	66%	54%	59%	57%	73%
Don't know/Refused	6%	6%	8%	5%	4%	5%	5%	21%	5%	5%	8%	4%	4%	4%	7%	6%	5%	6%	4%	6%	6%	5%	9%
Have you made any of the following adjustments due to the Affordable Care Act? - Hiring more part-time employees																							
	Upstate		Region				Industry							Cluster			Company Size					Gender	
	Total 2014	Total 2013	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	Male	Female
Yes	28%	24%	25%	35%	22%	33%	15%	43%	24%	25%	45%	32%	28%	20%	26%	55%	29%	28%	25%	28%	32%	29%	20%
No	68%	71%	70%	62%	73%	64%	78%	29%	71%	74%	51%	66%	71%	78%	70%	40%	68%	68%	71%	70%	63%	67%	75%
Don't know/Refused	4%	4%	5%	3%	5%	3%	7%	29%	5%	2%	5%	3%	1%	3%	4%	6%	3%	4%	4%	3%	5%	3%	5%
Have you made any of the following adjustments due to the Affordable Care Act? - Reducing the number of hours current employees work																							
	Upstate		Region				Industry							Cluster			Company Size					Gender	
	Total 2014	Total 2013	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	Male	Female
Yes	20%	18%	18%	25%	16%	22%	11%	36%	15%	17%	34%	23%	15%	11%	20%	43%	19%	22%	14%	22%	23%	20%	18%
No	76%	78%	77%	72%	80%	75%	82%	36%	80%	81%	62%	73%	84%	86%	76%	51%	78%	74%	82%	76%	71%	76%	79%
Don't know/Refused	4%	5%	6%	4%	4%	3%	7%	29%	5%	2%	5%	3%	1%	3%	4%	6%	3%	4%	4%	2%	5%	4%	4%
Have you made any of the following adjustments due to the Affordable Care Act? - Terminating benefits for current employees																							
	Upstate		Region				Industry							Cluster			Company Size					Gender	
	Total 2014	Total 2013	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	Male	Female
Yes	9%		6%	11%	11%	5%	10%	7%	7%	8%	11%	6%	10%	5%	8%	17%	11%	7%	12%	8%	7%	9%	9%
No	86%		88%	85%	84%	88%	84%	71%	88%	88%	83%	90%	87%	92%	86%	74%	86%	88%	84%	89%	86%	87%	84%
Don't know/Refused	5%		6%	4%	5%	7%	7%	21%	5%	4%	6%	4%	3%	3%	6%	8%	4%	6%	5%	3%	7%	4%	7%
Have you made any of the following adjustments due to the Affordable Care Act? - Terminating benefits for retired employees																							
	Upstate		Region				Industry							Cluster			Company Size					Gender	
	Total 2014	Total 2013	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	Male	Female
Yes	7%		4%	8%	8%	5%	4%	21%	2%	6%	3%	7%	10%	4%	7%	12%	6%	6%	5%	8%	5%	7%	5%
No	86%		89%	86%	85%	86%	86%	57%	90%	88%	89%	87%	86%	92%	84%	80%	87%	87%	89%	86%	87%	87%	86%
Don't know/Refused	7%		7%	6%	7%	9%	10%	21%	7%	5%	8%	7%	4%	4%	10%	8%	6%	7%	5%	7%	7%	6%	9%



Siena College Research Institute  
 Sponsored by Gramercy Communications and The Business Council of New York State  
 2014: 524 Upstate New York CEOs, MOE +/- 4.3%  
 2013: 661 Upstate New York CEOs, MOE +/- 3.8%  
 2012: 592 Upstate New York CEOs, MOE +/- 4.0%

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Interstate highways**

	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Excellent	8%	8%	6%	8%	11%	5%	7%	2%	9%	9%	12%	6%	7%	9%	8%	7%	9%	8%	8%	9%	8%	11%
Good	49%	49%	48%	50%	53%	52%	29%	46%	52%	46%	56%	53%	49%	41%	48%	52%	50%	47%	53%	50%	45%	
Fair	29%	30%	31%	28%	25%	23%	36%	29%	32%	34%	29%	26%	31%	30%	31%	26%	27%	33%	25%	29%	27%	
Poor	5%	5%	6%	5%	5%	9%	7%	5%	4%	6%	4%	4%	5%	5%	7%	5%	5%	4%	5%	5%	2%	
Don't know	8%	8%	9%	9%	7%	11%	21%	17%	4%	5%	10%	5%	9%	5%	14%	9%	8%	9%	8%	7%	16%	

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Bridges**

	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Excellent	2%	1%	3%	3%	1%	0%	0%	0%	4%	5%	2%	1%	1%	2%	2%	2%	2%	3%	2%	1%	2%	5%
Good	26%	25%	25%	25%	36%	31%	14%	20%	28%	23%	27%	28%	27%	29%	19%	24%	30%	25%	28%	28%	27%	23%
Fair	40%	43%	36%	39%	41%	34%	36%	34%	44%	40%	44%	35%	37%	40%	45%	38%	40%	32%	44%	41%	39%	41%
Poor	24%	24%	28%	24%	14%	26%	29%	27%	20%	28%	20%	28%	28%	22%	19%	27%	20%	32%	19%	22%	25%	14%
Don't know	8%	8%	8%	8%	8%	9%	21%	20%	5%	5%	8%	8%	6%	7%	15%	8%	8%	8%	8%	7%	16%	

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Local roads**

	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Excellent	2%	1%	3%	3%	1%	1%	0%	2%	4%	2%	3%	1%	1%	3%	2%	2%	2%	2%	2%	2%	4%	
Good	33%	37%	26%	35%	37%	35%	21%	32%	30%	45%	33%	29%	33%	34%	33%	31%	37%	30%	34%	36%	33%	38%
Fair	42%	39%	44%	43%	41%	35%	50%	34%	46%	40%	42%	47%	41%	43%	37%	43%	39%	45%	40%	39%	43%	32%
Poor	16%	17%	20%	10%	16%	21%	7%	12%	15%	12%	17%	15%	18%	15%	17%	15%	15%	17%	15%	16%	14%	
Don't know	7%	6%	7%	9%	5%	8%	21%	20%	5%	2%	6%	8%	7%	5%	13%	7%	7%	7%	6%	8%	6%	13%

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Railroads**

	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Excellent	1%	1%	1%	3%	0%	2%	0%	0%	5%	0%	0%	0%	0%	2%	1%	2%	1%	2%	1%	1%	4%	
Good	27%	32%	25%	20%	36%	34%	29%	22%	26%	32%	22%	25%	26%	30%	21%	28%	26%	27%	30%	23%	27%	30%
Fair	26%	32%	23%	27%	21%	23%	14%	29%	25%	28%	28%	28%	26%	27%	27%	24%	28%	21%	29%	26%	26%	23%
Poor	11%	14%	11%	9%	12%	9%	0%	12%	9%	14%	14%	11%	14%	10%	8%	12%	12%	13%	7%	15%	12%	5%
Don't know	34%	22%	41%	41%	32%	32%	57%	37%	35%	26%	36%	35%	34%	31%	43%	35%	34%	36%	33%	34%	34%	38%

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Broadband internet**

	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Excellent	7%	6%	7%	7%	7%	7%	0%	5%	5%	5%	10%	8%	7%	7%	6%	6%	8%	7%	5%	8%	6%	13%
Good	52%	50%	50%	54%	55%	57%	29%	63%	59%	55%	41%	49%	50%	55%	50%	53%	51%	54%	55%	46%	53%	38%
Fair	26%	30%	25%	24%	25%	22%	36%	17%	19%	28%	33%	32%	29%	22%	30%	24%	27%	20%	29%	28%	26%	29%
Poor	6%	6%	8%	5%	3%	7%	0%	5%	6%	8%	6%	3%	4%	7%	5%	6%	5%	6%	5%	6%	5%	
Don't know	10%	9%	11%	10%	11%	8%	36%	10%	11%	5%	11%	9%	11%	10%	9%	11%	9%	13%	7%	11%	9%	16%

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Electrical power grid**

	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Excellent	9%	5%	12%	9%	11%	9%	0%	10%	7%	6%	12%	10%	10%	7%	10%	9%	11%	6%	11%	9%	11%	
Good	52%	54%	51%	50%	57%	52%	50%	63%	52%	60%	48%	48%	56%	52%	44%	50%	56%	53%	53%	52%	53%	46%
Fair	25%	30%	23%	24%	20%	26%	29%	15%	24%	23%	24%	29%	20%	28%	27%	26%	22%	21%	28%	23%	24%	25%
Poor	6%	4%	6%	7%	4%	2%	0%	5%	7%	5%	7%	8%	4%	5%	9%	6%	5%	5%	5%	6%	6%	4%
Don't know	9%	8%	8%	10%	9%	11%	21%	7%	10%	6%	9%	5%	10%	7%	9%	9%	8%	10%	8%	7%	8%	14%

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Cell phone system**

	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Excellent	10%	8%	12%	10%	7%	12%	0%	15%	5%	12%	9%	10%	11%	8%	10%	9%	10%	10%	9%	9%	9%	13%	
Good	65%	66%	65%	65%	67%	66%	50%	71%	75%	65%	62%	58%	66%	69%	55%	64%	67%	64%	66%	66%	66%	55%	
Fair	19%	19%	19%	17%	21%	16%	21%	10%	16%	18%	18%	16%	18%	26%	20%	17%	19%	20%	20%	17%	18%	23%	
Poor	2%	4%	1%	3%	1%	2%	0%	2%	2%	3%	5%	0%	2%	3%	3%	2%	3%	2%	3%	3%	0%		
Don't know	4%	3%	4%	5%	4%	3%	29%	2%	2%	2%	6%	4%	5%	3%	6%	4%	4%	4%	3%	5%	3%	9%	

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Water supply systems**

	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Excellent	19%	13%	19%	23%	25%	20%	14%	20%	13%	23%	22%	23%	23%	18%	13%	19%	20%	18%	20%	20%	19%	20%	
Good	55%	54%	62%	53%	43%	51%	36%	49%	65%	60%	53%	48%	52%	56%	58%	53%	56%	61%	49%	54%	55%	45%	
Fair	14%	16%	12%	12%	18%	15%	29%	7%	16%	11%	11%	18%	13%	14%	16%	15%	12%	10%	18%	13%	14%	14%	
Poor	3%	5%	2%	3%	5%	8%	0%	2%	1%	2%	3%	5%	3%	3%	5%	4%	3%	2%	5%	3%	3%	5%	
Don't know	9%	12%	5%	10%	8%	7%	21%	22%	5%	5%	12%	6%	9%	9%	8%	9%	8%	8%	10%	8%	16%		

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Sewage systems**

	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Excellent	10%	6%	9%	16%	9%	10%	0%	5%	5%	11%	16%	11%	11%	9%	10%	10%	10%	9%	9%	9%	18%		
Good	53%	49%	57%	55%	50%	45%	36%	54%	61%	62%	48%	56%	53%	55%	48%	52%	53%	57%	48%	54%	55%	34%	
Fair	19%	25%	19%	12%	20%	22%	36%	15%	25%	14%	14%	19%	16%	20%	24%	21%	17%	16%	23%	18%	20%	14%	
Poor	7%	8%	6%	3%	12%	13%	7%	5%	3%	6%	6%	8%	8%	5%	7%	6%	7%	5%	8%	5%	6%	11%	
Don't know	11%	13%	8%	14%	9%	10%	21%	22%	6%	8%	17%	6%	12%	11%	10%	10%	13%	10%	11%	13%	10%	23%	

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Natural gas system**

	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Excellent	16%	12%	19%	17%	14%	14%	7%	20%	12%	20%	17%	19%	17%	14%	17%	15%	18%	18%	14%	16%	16%	18%	
Good	57%	54%	64%	52%	59%	54%	43%	49%	66%	60%	54%	57%	54%	61%	53%	56%	58%	57%	57%	57%	58%	45%	
Fair	12%	15%	6%	12%	14%	14%	29%	7%	12%	11%	12%	9%	11%	11%	16%	13%	10%	8%	16%	11%	12%	13%	
Poor	3%	3%	2%	4%	4%	4%	0%	0%	1%	3%	3%	6%	2%	3%	5%	4%	2%	4%	2%	3%	3%	2%	
Don't know	12%	17%	8%	14%	8%	13%	21%	24%	9%	6%	14%	9%	16%	10%	8%	12%	12%	13%	11%	13%	11%	23%	

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Airports**

	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Excellent	13%	11%	19%	15%	3%	12%	7%	12%	12%	23%	13%	9%	18%	9%	14%	13%	14%	14%	10%	17%	14%	11%	
Good	57%	57%	65%	54%	46%	56%	29%	61%	62%	52%	50%	67%	53%	62%	51%	61%	52%	62%	60%	48%	58%	52%	
Fair	18%	20%	11%	20%	26%	20%	43%	12%	16%	18%	23%	11%	17%	17%	24%	16%	20%	13%	19%	20%	17%	23%	
Poor	5%	6%	1%	3%	14%	4%	0%	5%	5%	2%	5%	8%	6%	4%	2%	4%	6%	4%	5%	6%	5%	2%	
Don't know	7%	7%	5%	8%	11%	8%	21%	10%	5%	5%	9%	5%	7%	7%	8%	7%	8%	7%	7%	8%	7%	13%	

**Now, thinking about each of the following aspects of the infrastructure of New York State, please indicate whether you would rank each as excellent, good, - Ports and water traffic**

	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Excellent	4%	6%	6%	4%	0%	4%	0%	5%	5%	49%	30%	34%	34%	37%	36%	35%	37%	38%	38%	31%	36%	32%	
Good	36%	40%	37%	28%	38%	33%	36%	37%	36%	49%	30%	34%	34%	37%	36%	35%	37%	38%	38%	31%	36%	32%	
Fair	20%	19%	17%	22%	20%	23%	14%	20%	24%	11%	19%	18%	20%	17%	24%	19%	20%	16%	20%	21%	19%	23%	
Poor	3%	2%	2%	4%	8%	4%	0%	0%	5%	2%	3%	6%	2%	4%	5%	4%	3%	5%	2%	4%	4%	0%	
Don't know	37%	33%	38%	41%	34%	35%	50%	39%	30%	32%	46%	37%	39%	38%	31%	37%	37%	36%	35%	40%	37%	36%	

Of those infrastructure components please select the one most immediately in need of improvement?																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender		
		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	Male	Female	
Interstate highways	8%		6%	7%	8%	12%	9%	14%	0%	8%	11%	4%	11%	5%	10%	6%	6%	9%	7%	8%	7%	9%	
Bridges	39%		36%	37%	51%	29%	36%	57%	54%	34%	42%	37%	42%	42%	39%	33%	44%	35%	48%	36%	37%	41%	34%
Local roads	24%		24%	33%	16%	24%	29%	7%	27%	24%	23%	22%	22%	21%	27%	27%	24%	24%	23%	24%	25%	24%	18%
Railroads	3%		6%	2%	2%	5%	0%	0%	7%	4%	5%	4%	4%	5%	3%	1%	2%	6%	1%	3%	7%	4%	2%
Broadband internet	5%		4%	5%	3%	9%	3%	7%	5%	5%	4%	4%	4%	7%	2%	6%	5%	4%	3%	7%	3%	4%	11%
Electrical power grid	7%		8%	6%	10%	4%	5%	0%	2%	13%	8%	6%	9%	5%	7%	14%	6%	9%	5%	9%	7%	11%	
Cell phone systems	2%		1%	3%	1%	1%	1%	0%	0%	2%	2%	3%	3%	2%	1%	2%	2%	1%	2%	2%	1%	2%	2%
Water supply systems	2%		3%	0%	1%	4%	4%	0%	0%	1%	0%	1%	3%	1%	2%	1%	2%	1%	2%	1%	1%	4%	
Sewage systems	4%		6%	7%	0%	3%	7%	7%	5%	3%	3%	6%	1%	4%	3%	7%	4%	5%	3%	5%	5%	5%	
Natural gas system	2%		1%	0%	4%	0%	1%	0%	0%	3%	0%	3%	1%	3%	1%	0%	1%	2%	0%	2%	2%	2%	
Airports	2%		3%	1%	1%	7%	3%	0%	0%	3%	2%	4%	0%	2%	3%	2%	3%	2%	4%	1%	3%	2%	4%
Ports and water traffic	0%		0%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%
Refused	2%		2%	0%	2%	3%	1%	7%	0%	3%	3%	1%	0%	1%	2%	1%	1%	2%	2%	2%	1%	2%	0%
Don't know/Refused	0%		0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%

Which of the following ways of financing infrastructure improvements would you support or oppose? - Increasing business income taxes																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender		
		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	Male	Female	
Support	4%		3%	5%	3%	5%	5%	0%	5%	0%	8%	3%	3%	5%	3%	5%	3%	5%	2%	4%	5%	4%	5%
Oppose	91%		88%	92%	95%	88%	91%	100%	93%	96%	97%	83%	92%	89%	93%	92%	94%	88%	95%	91%	87%	92%	88%
Don't know	5%		8%	3%	2%	7%	3%	0%	3%	4%	3%	9%	5%	6%	4%	3%	3%	7%	2%	5%	7%	4%	7%

Which of the following ways of financing infrastructure improvements would you support or oppose? - Increasing the tax on gasoline																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender		
		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	Male	Female	
Support	20%		21%	21%	17%	24%	25%	21%	20%	19%	23%	19%	15%	24%	19%	14%	18%	22%	15%	21%	24%	21%	14%
Oppose	72%		71%	73%	75%	67%	67%	71%	70%	74%	69%	70%	82%	69%	73%	77%	75%	69%	78%	72%	67%	72%	77%
Don't know	8%		8%	6%	8%	9%	8%	7%	10%	7%	8%	11%	3%	7%	8%	9%	7%	8%	7%	7%	9%	7%	9%

Which of the following ways of financing infrastructure improvements would you support or oppose? - Increasing usage fees including tolls or other fees based on the use of an improved infrastructure component																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender		
		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	Male	Female	
Support	39%		46%	40%	36%	34%	43%	36%	48%	35%	46%	39%	33%	47%	36%	33%	38%	42%	36%	40%	44%	39%	43%
Oppose	51%		46%	51%	57%	49%	47%	50%	43%	56%	43%	50%	59%	45%	53%	60%	52%	48%	53%	52%	46%	51%	45%
Don't know	10%		8%	9%	8%	17%	10%	14%	10%	8%	11%	11%	8%	8%	11%	7%	10%	10%	10%	8%	11%	9%	13%

Which of the following ways of financing infrastructure improvements would you support or oppose? - Increasing personal income taxes																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender		
		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	Male	Female	
Support	3%		3%	3%	1%	5%	3%	0%	3%	1%	3%	3%	5%	4%	1%	3%	2%	3%	2%	4%	1%	2%	5%
Oppose	93%		92%	95%	95%	88%	91%	100%	95%	95%	94%	92%	92%	92%	94%	94%	94%	92%	95%	91%	94%	94%	89%
Don't know	4%		6%	2%	3%	7%	5%	0%	3%	4%	3%	6%	3%	4%	5%	2%	3%	5%	3%	5%	5%	4%	5%

Which of the following ways of financing infrastructure improvements would you support or oppose? - Reallocating dollars in the budget from education																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender		
		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	Male	Female	
Support	30%		28%	34%	27%	29%	27%	50%	20%	33%	28%	27%	37%	20%	34%	40%	32%	27%	35%	28%	28%	32%	11%
Oppose	58%		60%	57%	58%	54%	57%	50%	57%	53%	63%	60%	57%	68%	50%	53%	58%	57%	54%	61%	58%	56%	73%
Don't know	13%		12%	9%	15%	17%	15%	0%	23%	15%	9%	13%	6%	11%	16%	7%	10%	16%	12%	12%	14%	16%	

Which of the following ways of financing infrastructure improvements would you support or oppose? - Reallocating dollars in the budget from Medicaid																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Support	44%	36%	55%	42%	37%	43%	64%	50%	46%	48%	33%	48%	36%	45%	58%	45%	41%	44%	44%	42%	45%	30%	
Oppose	43%	49%	37%	43%	43%	41%	36%	33%	42%	42%	50%	43%	50%	39%	36%	44%	42%	45%	41%	45%	42%	52%	
Don't know	13%	15%	7%	14%	20%	16%	0%	18%	12%	11%	17%	9%	14%	15%	6%	11%	17%	12%	15%	13%	13%	18%	

Which of the following ways of financing infrastructure improvements would you support or oppose? - Using public/private partnerships																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Support	75%	74%	79%	74%	74%	70%	64%	73%	75%	75%	83%	76%	78%	78%	65%	77%	74%	76%	76%	76%	77%	70%	
Oppose	13%	13%	14%	13%	12%	16%	21%	18%	12%	11%	11%	13%	13%	11%	19%	13%	13%	13%	13%	13%	12%	21%	
Don't know	11%	12%	7%	13%	14%	13%	14%	10%	14%	14%	7%	11%	10%	11%	16%	10%	12%	10%	12%	11%	11%	9%	

Which of the following ways of financing infrastructure improvements would you support or oppose? - Pursuing federal funding																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Support	75%	75%	74%	75%	74%	80%	71%	68%	61%	80%	79%	80%	80%	76%	58%	74%	76%	80%	67%	81%	77%	64%	
Oppose	17%	17%	17%	18%	16%	15%	29%	25%	23%	14%	13%	15%	14%	14%	31%	19%	15%	16%	23%	11%	17%	18%	
Don't know	8%	8%	9%	6%	11%	4%	0%	8%	16%	6%	8%	5%	6%	9%	10%	7%	9%	4%	10%	9%	6%	18%	

Which of the following ways of financing infrastructure improvements would you support or oppose? - Fully privatizing infrastructure development in some cases																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Support	52%	46%	61%	55%	37%	51%	29%	53%	58%	52%	51%	51%	51%	52%	55%	54%	50%	53%	51%	52%	52%	48%	
Oppose	23%	28%	17%	22%	30%	25%	43%	28%	19%	20%	21%	28%	25%	23%	23%	25%	23%	23%	24%	24%	21%	21%	
Don't know	25%	26%	21%	23%	33%	24%	29%	20%	23%	28%	28%	22%	23%	26%	24%	24%	26%	24%	26%	23%	24%	30%	

Switching to another topic area, women in business, in each of the following roles within companies in your industry, would you say that women have as much - Senior management																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Same opportunity	69%	67%	68%	73%	71%	59%	57%	83%	70%	71%	68%	78%	65%	70%	78%	67%	72%	68%	68%	72%	72%	50%	
More opportunity	6%	5%	8%	5%	4%	2%	0%	5%	4%	6%	8%	8%	5%	4%	10%	6%	5%	5%	7%	4%	6%	4%	
Less opportunity	22%	26%	21%	18%	21%	34%	29%	13%	23%	18%	21%	13%	27%	21%	10%	23%	21%	22%	22%	21%	19%	43%	
Don't know	3%	3%	3%	4%	4%	4%	14%	0%	4%	5%	3%	1%	3%	4%	4%	4%	4%	4%	3%	3%	3%	4%	

Switching to another topic area, women in business, in each of the following roles within companies in your industry, would you say that women have as much - Ownership																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Same opportunity	62%	59%	61%	63%	64%	56%	64%	70%	68%	63%	55%	65%	58%	61%	72%	64%	60%	67%	62%	57%	64%	50%	
More opportunity	9%	10%	9%	8%	7%	10%	7%	3%	6%	6%	13%	9%	11%	6%	12%	11%	6%	10%	10%	5%	8%	13%	
Less opportunity	20%	19%	20%	21%	17%	27%	14%	5%	15%	18%	21%	23%	20%	22%	12%	19%	20%	15%	20%	23%	18%	34%	
Don't know	10%	11%	10%	8%	12%	7%	14%	23%	10%	12%	11%	4%	11%	11%	5%	7%	13%	8%	8%	15%	10%	4%	

Switching to another topic area, women in business, in each of the following roles within companies in your industry, would you say that women have as much - Marketing/public relations																							
	Upstate Total 2014	Region				Industry								Cluster			Company Size		Company Size			Gender	
		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	Male	Female	
Same opportunity	72%	74%	69%	74%	72%	66%	71%	83%	71%	69%	71%	84%	67%	76%	76%	73%	72%	75%	70%	72%	73%	66%	
More opportunity	21%	19%	26%	19%	20%	25%	14%	18%	25%	22%	22%	14%	24%	18%	22%	21%	21%	19%	24%	21%	22%	14%	
Less opportunity	2%	2%	2%	1%	3%	4%	0%	0%	1%	2%	2%	0%	2%	1%	1%	1%	3%	2%	1%	3%	1%	11%	
Don't know	5%	4%	3%	6%	5%	4%	14%	0%	4%	8%	6%	3%	6%	4%	1%	5%	4%	4%	5%	3%	4%	9%	

Switching to another topic area, women in business, in each of the following roles within companies in your industry, would you say that women have as much - Human resources																										
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender					
		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	Male	Female				
Same opportunity	70%					71%	65%	70%	76%	63%	86%	80%	70%	68%	71%	71%	66%	72%	72%	70%	69%	72%	69%	68%	70%	70%
More opportunity	25%					24%	30%	24%	20%	30%	0%	20%	26%	26%	24%	24%	28%	23%	26%	24%	27%	21%	28%	27%	26%	20%
Less opportunity	1%					2%	1%	1%	0%	3%	0%	0%	1%	0%	2%	0%	2%	1%	0%	0%	2%	1%	0%	3%	1%	2%
Don't know	4%					3%	4%	5%	4%	4%	14%	0%	3%	6%	3%	5%	4%	4%	2%	5%	2%	7%	3%	1%	3%	9%

Switching to another topic area, women in business, in each of the following roles within companies in your industry, would you say that women have as much - Line staff supervision																										
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender					
		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	Male	Female				
Same opportunity	66%					68%	63%	65%	74%	51%	71%	78%	70%	66%	66%	75%	62%	69%	71%	65%	67%	64%	66%	69%	69%	45%
More opportunity	9%					8%	13%	8%	8%	7%	7%	18%	4%	17%	10%	6%	10%	7%	13%	7%	12%	5%	12%	11%	9%	9%
Less opportunity	16%					19%	17%	16%	9%	27%	14%	0%	23%	6%	14%	13%	17%	17%	10%	18%	14%	21%	14%	13%	15%	29%
Don't know	9%					6%	8%	12%	9%	15%	7%	5%	4%	11%	10%	6%	11%	7%	6%	9%	8%	10%	9%	7%	7%	18%

Switching to another topic area, women in business, in each of the following roles within companies in your industry, would you say that women have as much - Line staff																										
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender					
		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	Male	Female				
Same opportunity	71%					73%	68%	68%	78%	55%	71%	78%	78%	71%	68%	81%	67%	72%	76%	70%	71%	71%	68%	73%	72%	59%
More opportunity	11%					8%	16%	9%	7%	9%	7%	18%	5%	15%	13%	6%	11%	9%	14%	9%	13%	7%	13%	12%	11%	5%
Less opportunity	10%					13%	8%	10%	5%	20%	7%	0%	11%	3%	10%	8%	11%	10%	5%	10%	9%	11%	9%	9%	9%	21%
Don't know	9%					6%	8%	13%	11%	16%	14%	5%	5%	11%	9%	5%	11%	8%	6%	11%	7%	12%	9%	5%	8%	14%

Switching to another topic area, women in business, in each of the following roles within companies in your industry, would you say that women have as much - Accounting																										
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender					
		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	Male	Female				
Same opportunity	76%					80%	72%	73%	82%	66%	71%	90%	73%	77%	77%	85%	76%	76%	77%	76%	76%	78%	72%	79%	76%	73%
More opportunity	18%					15%	22%	20%	14%	27%	7%	8%	24%	20%	14%	13%	18%	19%	19%	19%	18%	16%	23%	15%	19%	16%
Less opportunity	2%					1%	3%	2%	1%	3%	0%	3%	2%	0%	3%	0%	2%	2%	1%	1%	3%	1%	2%	4%	1%	7%
Don't know	4%					3%	3%	5%	3%	3%	21%	0%	2%	3%	6%	3%	4%	3%	3%	4%	3%	5%	4%	1%	4%	4%

Switching to another topic area, women in business, in each of the following roles within companies in your industry, would you say that women have as much - Data processing																										
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender					
		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	Male	Female				
Same opportunity	75%					79%	70%	74%	76%	67%	79%	93%	75%	80%	69%	78%	71%	76%	78%	73%	78%	70%	73%	83%	76%	66%
More opportunity	19%					14%	24%	20%	20%	29%	7%	8%	19%	15%	19%	19%	21%	19%	16%	23%	16%	24%	22%	12%	19%	25%
Less opportunity	2%					3%	1%	1%	1%	1%	0%	0%	3%	0%	3%	0%	3%	1%	0%	1%	2%	1%	1%	3%	1%	7%
Don't know	4%					4%	5%	5%	3%	3%	14%	0%	3%	5%	8%	3%	5%	3%	6%	4%	4%	5%	4%	2%	4%	2%

Switching to another topic area, women in business, in each of the following roles within companies in your industry, would you say that women have as much - Clerical																										
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender					
		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	Male	Female				
Same opportunity	61%					66%	55%	60%	63%	44%	79%	70%	65%	63%	57%	70%	61%	59%	63%	57%	65%	59%	54%	70%	62%	48%
More opportunity	35%					31%	41%	34%	36%	51%	14%	28%	32%	32%	39%	28%	35%	37%	33%	39%	31%	36%	43%	27%	35%	46%
Less opportunity	0%					0%	0%	1%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	0%	2%
Don't know	4%					3%	4%	5%	1%	4%	7%	3%	2%	5%	4%	3%	3%	4%	5%	4%	3%	4%	3%	3%	3%	4%

How big a problem do you think each of the following are for women in companies like yours in New York? - Receiving equal pay																						
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Very big problem	5%	3%	7%	3%	5%	7%	0%	0%	5%	0%	6%	4%	5%	4%	3%	6%	4%	8%	3%	3%	3%	20%
Somewhat a problem	22%	22%	22%	23%	22%	22%	29%	10%	15%	22%	29%	29%	26%	22%	16%	23%	21%	22%	23%	21%	21%	36%
Not very much of a problem	33%	34%	34%	36%	29%	38%	21%	43%	35%	38%	28%	27%	35%	32%	33%	32%	35%	33%	33%	34%	35%	20%
Not at all a problem	38%	41%	35%	36%	42%	31%	50%	48%	41%	40%	36%	39%	33%	39%	48%	38%	39%	36%	39%	41%	40%	23%
Don't know/Refused	2%	1%	2%	2%	1%	2%	0%	0%	3%	0%	2%	1%	1%	3%	0%	2%	1%	1%	2%	1%	1%	2%

  

How big a problem do you think each of the following are for women in companies like yours in New York? - Encountering the glass ceiling																						
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Very big problem	5%	6%	6%	2%	5%	5%	0%	0%	5%	5%	7%	3%	6%	4%	3%	7%	3%	8%	4%	3%	4%	14%
Somewhat a problem	26%	23%	24%	33%	20%	26%	36%	18%	21%	14%	31%	37%	31%	25%	17%	26%	25%	25%	28%	23%	24%	38%
Not very much of a problem	31%	29%	34%	30%	30%	31%	29%	30%	34%	42%	29%	23%	30%	33%	27%	27%	37%	29%	27%	38%	32%	20%
Not at all a problem	36%	40%	33%	32%	43%	33%	29%	53%	39%	40%	31%	36%	31%	35%	52%	38%	35%	36%	38%	36%	38%	25%
Don't know/Refused	2%	2%	3%	2%	1%	4%	7%	0%	2%	0%	3%	1%	2%	3%	0%	3%	1%	2%	3%	1%	2%	4%

  

How big a problem do you think each of the following are for women in companies like yours in New York? - Sexual harassment																						
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Very big problem	4%	3%	5%	4%	7%	5%	7%	0%	3%	2%	7%	4%	5%	3%	6%	5%	3%	7%	3%	3%	4%	11%
Somewhat a problem	26%	26%	24%	29%	25%	35%	7%	13%	25%	28%	27%	27%	27%	27%	20%	28%	25%	31%	25%	23%	25%	34%
Not very much of a problem	39%	37%	38%	42%	38%	31%	57%	48%	35%	38%	44%	39%	39%	41%	36%	35%	43%	30%	43%	42%	39%	38%
Not at all a problem	28%	32%	30%	22%	26%	24%	21%	40%	35%	29%	21%	28%	25%	27%	38%	30%	27%	30%	27%	28%	29%	16%
Don't know/Refused	3%	1%	3%	3%	4%	4%	7%	0%	3%	3%	2%	3%	4%	3%	0%	2%	3%	2%	3%	3%	3%	2%

  

How big a problem do you think each of the following are for women in companies like yours in New York? - Balancing work and family																						
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Very big problem	19%	21%	23%	17%	12%	25%	21%	15%	11%	17%	23%	19%	21%	19%	12%	19%	19%	19%	16%	23%	19%	21%
Somewhat a problem	49%	49%	48%	49%	54%	48%	43%	55%	52%	52%	51%	41%	52%	48%	48%	46%	54%	43%	53%	51%	49%	54%
Not very much of a problem	18%	19%	15%	19%	20%	13%	21%	15%	18%	26%	13%	25%	18%	17%	21%	18%	19%	16%	21%	17%	19%	13%
Not at all a problem	12%	10%	13%	12%	12%	9%	14%	15%	16%	5%	11%	14%	7%	13%	20%	15%	7%	19%	8%	7%	12%	9%
Don't know/Refused	2%	1%	1%	3%	3%	4%	0%	0%	3%	0%	2%	1%	2%	2%	0%	2%	1%	2%	2%	1%	2%	4%

  

How big a problem do you think each of the following are for women in companies like yours in New York? - Age discrimination																						
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Very big problem	4%	3%	2%	5%	7%	4%	7%	0%	1%	2%	3%	9%	4%	1%	9%	4%	3%	5%	3%	3%	3%	9%
Somewhat a problem	20%	14%	23%	23%	21%	22%	21%	8%	19%	17%	24%	22%	26%	20%	9%	25%	15%	27%	19%	14%	18%	41%
Not very much of a problem	37%	42%	38%	32%	36%	40%	43%	33%	32%	42%	42%	33%	34%	41%	31%	34%	41%	35%	38%	40%	37%	36%
Not at all a problem	35%	38%	34%	36%	33%	30%	21%	55%	45%	35%	28%	34%	33%	34%	47%	34%	37%	31%	36%	40%	38%	13%
Don't know/Refused	4%	3%	3%	5%	4%	4%	7%	5%	4%	5%	3%	3%	3%	4%	3%	4%	2%	5%	3%	4%	2%	2%

  

How big a problem do you think each of the following are for women in companies like yours in New York? - Being respected equally with men																						
	Upstate Total 2014	Region				Industry								Cluster			Company Size				Gender	
		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	Male	Female
Very big problem	6%	4%	5%	5%	13%	13%	0%	0%	2%	5%	8%	5%	8%	4%	5%	7%	4%	8%	5%	4%	5%	16%
Somewhat a problem	27%	25%	24%	35%	20%	34%	57%	10%	26%	22%	25%	28%	32%	27%	14%	27%	26%	30%	22%	28%	25%	41%
Not very much of a problem	34%	34%	40%	29%	32%	25%	14%	35%	30%	48%	39%	33%	33%	35%	35%	31%	38%	28%	37%	36%	35%	23%
Not at all a problem	32%	36%	30%	28%	34%	25%	21%	55%	38%	26%	27%	33%	26%	32%	43%	32%	31%	32%	33%	31%	33%	20%
Don't know/Refused	2%	1%	1%	3%	1%	2%	7%	0%	4%	0%	2%	1%	1%	2%	3%	2%	1%	2%	3%	1%	2%	0%

Which of the following two statements is closer to your view:																								
	Upstate Total 2014			Region				Industry							Cluster			Company Size		Company Size			Gender	
				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	Male	Female
The old days are over, women have as much opportunity today as men do, especially when it comes to senior management positions. I really don't even notice gender anymore when I work with colleagues, clients or vendors.	70%			66%	70%	72%	71%	71%	50%	85%	73%	65%	63%	76%	61%	73%	81%	70%	72%	72%	68%	74%	75%	38%
Things have changed but in so many circumstances it remains a man's world. Women in leadership remain the exception rather than the norm and let's face it, it is harder for a woman to succeed than it is for a man.	26%			30%	25%	23%	29%	25%	50%	15%	23%	29%	31%	22%	36%	22%	14%	27%	27%	25%	30%	24%	23%	61%
Don't know/Refused	4%			4%	5%	5%	0%	3%	0%	0%	5%	6%	6%	3%	3%	4%	5%	3%	2%	3%	2%	2%	2%	2%
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 2014	Upstate Total 2013		Region				Industry							Cluster			Company Size		Company Size			Gender	
				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	Male	Female
New York	28%	29%		28%	29%	27%	26%	31%	36%	38%	24%	23%	34%	16%	43%	23%	5%	25%	32%	28%	24%	33%	26%	45%
Someplace else	69%	65%		69%	65%	70%	72%	69%	64%	63%	72%	74%	59%	78%	54%	72%	92%	73%	66%	70%	73%	65%	72%	50%
Don't know/Refused	4%	6%		3%	6%	3%	1%	0%	0%	0%	5%	3%	7%	5%	3%	4%	3%	2%	2%	2%	2%	2%	2%	5%
And one final topic, returning veterans, does your company actively recruit returning veterans for available positions at your company?																								
	Upstate Total 2014			Region				Industry							Cluster			Company Size		Company Size			Gender	
				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	Male	Female
Yes	34%			37%	32%	36%	29%	36%	21%	33%	34%	37%	29%	37%	34%	31%	40%	32%	38%	29%	33%	42%	35%	25%
No	51%			49%	54%	50%	54%	48%	50%	48%	53%	49%	58%	47%	50%	55%	44%	55%	49%	52%	59%	43%	51%	63%
Don't know	15%			14%	15%	14%	17%	15%	29%	20%	14%	14%	13%	16%	16%	14%	16%	14%	13%	19%	8%	15%	14%	13%