

Siena College Research Institute  
 Sponsored by The Business Council of New York State  
 2018: 427 Upstate NY, MOE +/-4.7%; 116 Buffalo CEOs, MOE +/-9.1%  
 2017: 462 Upstate NY, 143 Buffalo CEOs; 2016: 440 Upstate NY, 119 Buffalo CEOs

<b>Q1. Which of the following industry categories best describes the type of business your company is engaged in?</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Engineering and Construction	17%	16%	18%	13%	17%	19%	12%	18%	20%	11%	16%	12%	17%
Food and Beverage	5%	7%	5%	6%	3%	3%	7%	5%	4%	9%	5%	6%	3%
Financial	6%	3%	7%	3%	6%	8%	4%	7%	9%	3%	5%	6%	8%
Manufacturing	20%	25%	18%	21%	19%	19%	24%	18%	16%	30%	24%	24%	21%
Retail	13%	12%	13%	10%	10%	10%	12%	11%	10%	9%	12%	12%	12%
Service	30%	30%	29%	40%	36%	34%	33%	32%	31%	24%	25%	23%	23%
Wholesale and Distribution	9%	8%	10%	8%	8%	8%	9%	10%	10%	10%	11%	16%	15%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%	2%	NA	NA
<b>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?</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Considerably better	4%	3%	5%	3%	4%	4%	3%	1%	1%	4%	2%	9%	4%
A little better	23%	24%	23%	22%	23%	24%	27%	26%	26%	22%	24%	30%	32%
About the same	46%	41%	48%	46%	47%	48%	47%	48%	48%	46%	44%	36%	44%
A little worse	20%	24%	19%	24%	20%	18%	21%	21%	21%	20%	22%	19%	16%
Considerably worse	6%	8%	5%	4%	5%	5%	3%	4%	4%	8%	8%	6%	4%
<b>Q3. Looking forward from today through next year, that is, the entire 2018 year, how would you describe your expectations for the economy in New York State?</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Considerably better	3%	3%	4%	3%	5%	5%	6%	5%	4%	4%	3%	9%	5%
A little better	24%	22%	25%	28%	29%	30%	39%	37%	36%	26%	27%	34%	37%
About the same	43%	40%	44%	34%	36%	37%	34%	37%	38%	39%	40%	36%	39%
A little worse	23%	30%	21%	26%	24%	23%	18%	19%	20%	25%	24%	16%	15%
Considerably worse	7%	6%	7%	9%	6%	5%	3%	3%	3%	5%	6%	4%	4%
<b>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?</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Considerably better	4%	2%	5%	2%	3%	4%	3%	2%	2%	3%	3%	4%	4%
A little better	21%	20%	22%	15%	18%	19%	20%	18%	16%	19%	21%	24%	24%
About the same	42%	44%	41%	43%	45%	45%	42%	47%	49%	40%	39%	37%	42%
A little worse	25%	23%	26%	32%	27%	24%	28%	27%	26%	29%	29%	25%	24%
Considerably worse	7%	11%	6%	7%	7%	7%	8%	7%	7%	9%	8%	10%	6%
				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 Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Considerably better	5%	3%	5%	2%	5%	6%	6%	5%	5%	4%	3%	6%	5%
A little better	22%	20%	23%	19%	24%	26%	31%	30%	31%	22%	24%	27%	30%
About the same	41%	41%	41%	37%	35%	35%	33%	35%	35%	37%	41%	31%	36%
A little worse	23%	23%	23%	31%	27%	24%	23%	24%	25%	31%	25%	30%	24%
Considerably worse	10%	13%	8%	10%	8%	7%	8%	6%	5%	6%	7%	5%	5%

Q6. Now thinking specifically about your company, what are your expectations for revenue through the year 2019? Do you believe your revenue will...?													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Grow substantially	4%	8%	2%	3%	4%	5%	4%	3%	2%	3%	3%	6%	4%
Grow moderately	46%	36%	49%	45%	44%	43%	43%	48%	50%	39%	42%	41%	45%
Stay about the same	35%	34%	35%	28%	35%	39%	34%	33%	33%	38%	36%	32%	33%
Decrease moderately	13%	18%	11%	20%	13%	10%	16%	14%	13%	18%	17%	19%	16%
Decrease substantially	3%	3%	2%	3%	3%	3%	3%	2%	2%	3%	2%	1%	1%

Q7. Continuing to focus on your company, please think quickly about profitability. Between today and the end of the calendar year 2019 do you expect your profits to...?													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Grow substantially	2%	3%	2%	5%	3%	3%	5%	2%	1%	1%	2%	5%	3%
Grow moderately	35%	28%	37%	32%	36%	38%	38%	41%	43%	31%	33%	31%	38%
Stay about the same	37%	35%	38%	34%	35%	36%	33%	34%	34%	34%	36%	36%	35%
Decrease moderately	20%	26%	18%	24%	20%	18%	20%	20%	20%	26%	25%	25%	22%
Decrease substantially	5%	6%	5%	4%	4%	4%	4%	3%	3%	5%	4%	3%	3%
Don't know/Refused	0%	1%	0%	1%	1%	1%	0%	0%	0%	1%	1%	0%	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 Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Market/demand growth	40%	41%	39%	39%	42%	43%	50%	48%	48%	34%	39%	37%	43%
Cost reduction	21%	22%	21%	31%	25%	22%	21%	25%	26%	33%	31%	33%	29%
Price increase	21%	22%	21%	11%	13%	14%	16%	13%	11%	16%	12%	17%	15%
New technology	10%	3%	13%	11%	11%	10%	8%	9%	10%	9%	9%	8%	7%
Other	7%	9%	6%	7%	8%	9%	4%	4%	4%	7%	7%	4%	6%
Don't know/Refused	1%	1%	1%	0%	1%	1%	1%	1%	1%	1%	1%	1%	1%

<b>Q9. Please indicate which of the following are major areas of concentration for your company now and through 2019.</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Expansion of existing markets	54%	51%	55%	60%	57%	56%	49%	53%	54%	57%	54%	53%	56%
Growth in existing products	51%	49%	51%	50%	54%	56%	56%	58%	59%	53%	52%	56%	54%
Entry into new markets	29%	28%	29%	26%	28%	29%	35%	32%	31%	30%	30%	33%	33%
New product lines	25%	22%	26%	24%	24%	24%	23%	23%	24%	30%	27%	24%	25%
Acquisition of new businesses	13%	14%	13%	20%	15%	12%	16%	15%	15%	11%	15%	9%	14%
Technology innovation	31%	25%	33%	36%	34%	34%	31%	28%	27%	25%	27%	21%	26%
Construction of new locations	10%	11%	10%	9%	8%	8%	10%	10%	9%	10%	9%	7%	10%
Internal restructuring	28%	28%	28%	29%	28%	27%	27%	25%	24%	24%	28%	24%	25%
Expansion into export markets	4%	3%	4%	6%	5%	4%	4%	4%	4%	NA	NA	NA	NA
Other	6%	10%	4%	8%	5%	4%	3%	4%	4%	5%	0%	4%	3%
Don't know/Refused	3%	3%	3%	0%	0%	0%	1%	2%	3%	1%	1%	1%	1%
<b>Q10. Do you intend to invest between today through 2019 in any fixed assets for your company designed to meet growing demand, reduce costs or enhance productivity?</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Yes	57%	53%	59%	56%	56%	56%	52%	51%	50%	54%	55%	57%	58%
No	28%	31%	27%	29%	28%	27%	36%	36%	37%	36%	34%	35%	31%
Not sure	15%	16%	14%	15%	16%	17%	12%	13%	13%	10%	11%	8%	11%
<b>Q11. Now thinking about the people that work for your company, between today and the end of 2019, do you plan to...?</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Substantially increase your workforce	1%	2%	1%	3%	2%	1%	3%	2%	1%	1%	1%	2%	2%
Moderately increase your workforce	37%	41%	36%	36%	35%	34%	37%	37%	37%	32%	32%	29%	30%
Remain about the same	53%	47%	55%	48%	53%	56%	50%	52%	53%	53%	57%	58%	59%
Decrease your workforce	8%	9%	8%	12%	9%	8%	10%	8%	7%	14%	9%	11%	9%
Don't know/Refused	0%	0%	0%	1%	1%	1%	0%	1%	2%	1%	1%	1%	1%

Q12. And thinking about other challenges that your company faces, which of the following are you concerned with?													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Existing U.S. competition	25%	17%	28%	22%	24%	25%	28%	27%	27%	19%	25%	28%	29%
Governmental regulation	64%	68%	63%	68%	61%	58%	73%	68%	67%	72%	68%	69%	69%
Taxation	58%	60%	57%	60%	61%	61%	58%	57%	57%	72%	65%	63%	65%
Foreign competition	9%	11%	8%	15%	10%	8%	10%	9%	9%	12%	11%	11%	12%
Energy costs	24%	21%	25%	14%	18%	20%	24%	24%	24%	18%	19%	25%	30%
Risk management	22%	22%	22%	26%	26%	25%	24%	22%	22%	28%	26%	19%	22%
Adverse economic conditions	39%	39%	40%	33%	37%	39%	43%	42%	41%	43%	48%	39%	46%
Health care costs	73%	75%	72%	74%	78%	80%	78%	79%	80%	77%	78%	74%	77%
Global political instability	12%	15%	11%	15%	15%	16%	11%	12%	12%	15%	15%	13%	16%
Rising supplier costs	40%	45%	38%	31%	32%	33%	24%	27%	28%	28%	25%	36%	35%
Human resources	48%	53%	46%	43%	43%	44%	41%	36%	35%	45%	38%	29%	30%
Cash flow	28%	31%	27%	31%	27%	25%	24%	28%	29%	27%	26%	26%	29%
Ability to obtain suitable financing	7%	9%	5%	11%	10%	9%	6%	8%	10%	7%	8%	10%	8%
U.S. trade agreements	19%	21%	18%	11%	9%	8%	7%	8%	9%	NA	NA	NA	NA
None of the above	0%	0%	1%	2%	2%	2%	0%	1%	1%	0%	0%	0%	0%

Q13. 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 is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Excellent	1%	2%	1%	1%	1%	1%	2%	1%	1%	2%	1%	2%	1%
Good	6%	8%	5%	6%	7%	8%	10%	8%	6%	6%	4%	6%	4%
Fair	24%	21%	25%	22%	25%	27%	30%	29%	29%	26%	29%	26%	30%
Poor	67%	69%	67%	67%	64%	62%	56%	61%	64%	62%	64%	63%	63%
Don't know/Refused	1%	1%	2%	3%	3%	3%	2%	1%	1%	3%	2%	3%	2%

Q14. Of the following, what would you like to see the Governor and Legislature of New York focus on?													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Personal Income Tax Reform	57%	59%	56%	61%	58%	57%	55%	55%	54%	58%	54%	NA	NA
Business Income Tax Reform	57%	61%	55%	65%	63%	62%	66%	62%	60%	68%	63%	NA	NA
Estate Tax Reform	30%	32%	29%	34%	29%	28%	34%	31%	30%	34%	34%	NA	NA
Sales Tax Reform	29%	36%	26%	30%	24%	22%	24%	22%	22%	32%	25%	NA	NA
Infrastructure Development (roads, bridges, water, sewer)	44%	44%	44%	49%	52%	54%	45%	43%	43%	35%	42%	37%	42%
Energy Infrastructure (power generation and transmission, natural gas)	19%	18%	19%	24%	24%	24%	NA	NA	NA	NA	NA	NA	NA
Business Development Incentives	27%	28%	27%	28%	31%	32%	39%	36%	35%	32%	36%	34%	38%
Ethics Reform	46%	53%	44%	39%	43%	45%	58%	52%	50%	41%	42%	42%	40%
Spending Cuts	59%	66%	56%	58%	53%	51%	50%	51%	52%	65%	58%	72%	64%
Other	20%	21%	20%	18%	16%	15%	14%	13%	13%	16%	14%	16%	16%
Don't know/Refused	1%	0%	1%	0%	0%	0%	1%	1%	1%	0%	0%	0%	0%

Q15. 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 Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Very confident	1%	1%	1%	0%	1%	1%	2%	1%	1%	1%	1%	3%	1%
Somewhat confident	11%	9%	12%	10%	15%	17%	16%	14%	13%	14%	12%	13%	12%
Not very confident	42%	36%	44%	51%	48%	47%	44%	48%	51%	50%	50%	38%	47%
Not at all confident	46%	52%	44%	38%	35%	33%	39%	36%	35%	33%	37%	44%	38%
Don't know/Refused	1%	2%	0%	1%	2%	2%	0%	1%	0%	1%	1%	1%	1%

Q16. And thinking about the efforts of the federal government, overall would you say the federal government is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Excellent	18%	16%	19%	5%	6%	6%	1%	1%	1%	0%	0%	1%	0%
Good	33%	37%	32%	24%	22%	20%	3%	6%	7%	0%	2%	3%	4%
Fair	25%	22%	26%	34%	35%	35%	31%	29%	28%	17%	22%	21%	21%
Poor	22%	22%	22%	31%	33%	34%	61%	59%	60%	78%	73%	74%	72%
Don't know/Refused	2%	3%	1%	6%	5%	5%	5%	5%	4%	5%	2%	3%	2%

Q17. How confident are you in the ability of the federal government to improve the business climate for businesses like yours here in New York over the next year? Are you:													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Very confident	8%	9%	8%	4%	3%	3%	4%	5%	5%	0%	0%	1%	1%
Somewhat confident	38%	37%	39%	36%	36%	36%	34%	27%	25%	5%	7%	8%	8%
Not very confident	38%	37%	38%	42%	42%	42%	35%	44%	47%	47%	50%	37%	45%
Not at all confident	15%	16%	15%	17%	18%	18%	24%	22%	22%	47%	41%	51%	44%
Don't know/Refused	0%	0%	0%	1%	1%	1%	2%	2%	1%	1%	1%	4%	2%

Q18. Has the new New York State Paid Family Leave law had a positive, negative or no impact on your business?													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018										
Positive impact	2%	3%	2%										
Negative impact	48%	59%	44%										
No impact	50%	39%	54%										
Don't know/Refused	0%	0%	1%										

Q19. Which of the following has your business employed over the past year to develop workforce skills of new employees?												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Apprenticeships	23%	28%	21%									
Employer provided training	69%	66%	70%									
Worked with community college(s)	19%	23%	17%									
Worked with local high school/BOCES	17%	19%	16%									
Used NYS DOL workforce programs	9%	9%	9%									
Other	5%	6%	5%									
None of the above	21%	22%	21%									

Do you support or oppose the following proposals related to hiring processes and employment practices?

Q20A. Placing restrictions on questions about criminal history												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	9%	9%	10%									
Oppose	84%	84%	84%									
Don't know/Refused	7%	7%	6%									

Q20B. Placing restrictions on questions about salary history												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	14%	11%	15%									
Oppose	75%	74%	75%									
Don't know/Refused	12%	15%	10%									

Q20C. Placing restrictions on questions about credit history												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	19%	18%	19%									
Oppose	63%	65%	62%									
Don't know/Refused	19%	17%	19%									

Q20D. Instituting restrictions on use of non-compete agreements unrelated to trade secrets												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	27%	32%	25%									
Oppose	51%	51%	51%									
Don't know/Refused	22%	17%	24%									

<b>Q20E. Placing restrictions on drug testing (e.g., related to recreational use of marijuana)</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	22%	22%	21%									
Oppose	69%	67%	70%									
Don't know/Refused	9%	10%	9%									
<b>Q20F. Instituting requirements for advanced scheduling and mandated pay premiums for schedule changes</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	8%	8%	9%									
Oppose	66%	70%	65%									
Don't know/Refused	26%	22%	27%									
<b>Do you support or oppose the following aspects of recent federal tax reform?</b>												
<b>Q21A. The new 20% income tax deduction for pass-through businesses</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	67%	67%	67%									
Oppose	8%	7%	8%									
Don't know/Refused	25%	26%	24%									
<b>Q21B. The limits on taxation of non-repatriated foreign earnings</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	36%	34%	37%									
Oppose	19%	24%	17%									
Don't know/Refused	45%	41%	47%									
<b>Q21C. The \$10,000 cap on deductibility of state and local taxes</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	25%	27%	25%									
Oppose	65%	65%	65%									
Don't know/Refused	9%	9%	10%									
<b>Q21D. Lowering the tax rates used to compute personal income taxes</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	87%	89%	86%									
Oppose	6%	7%	6%									
Don't know/Refused	7%	4%	8%									

<b>Q21E. Lowering the maximum tax rate on corporations from 35% to 21%</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	80%	81%	80%									
Oppose	13%	13%	13%									
Don't know/Refused	7%	6%	7%									
<b>Q21F. Being able to expense capital investments</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	88%	86%	89%									
Oppose	4%	4%	4%									
Don't know/Refused	8%	9%	8%									
<b>Q21G. Reducing federal revenues by up to \$1 Trillion over the next ten years and adding to future deficits</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Support	23%	28%	21%									
Oppose	58%	55%	59%									
Don't know/Refused	19%	16%	20%									
<b>Q22. Overall, has the recently passed federal tax reform had a positive, negative or no impact on your business?</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Positive impact	52%	52%	53%									
Negative impact	5%	7%	4%									
No impact	42%	41%	42%									
Don't know/Refused	1%	1%	1%									
<b>Q23. Have the new federal tariffs had a positive, negative or no impact on your business?</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Positive impact	6%	9%	5%									
Negative impact	34%	34%	34%									
No impact	60%	55%	61%									
Don't know/Refused	0%	1%	0%									



Consider each of the following national issues. Indicate whether over the last year you think the country has been on the right track, moved in the wrong direction or is neither on the right track nor moving in the wrong direction												
<b>Q24A. The cost of health care</b>												
		<b>Upstate Total 2018</b>	<b>Buffalo 2018</b>	<b>Other MSAs 2018</b>	<b>Buffalo 2017</b>	<b>Upstate Total 2017</b>	<b>Other MSAs 2017</b>					
Right track		19%	19%	19%	16%	16%	16%					
Wrong direction		62%	60%	62%	60%	61%	61%					
Neither		16%	16%	17%	16%	18%	18%					
Don't know/Refused		3%	5%	2%	8%	6%	5%					
<b>Q24B. Our immigration system</b>												
		<b>Upstate Total 2018</b>	<b>Buffalo 2018</b>	<b>Other MSAs 2018</b>	<b>Buffalo 2017</b>	<b>Upstate Total 2017</b>	<b>Other MSAs 2017</b>					
Right track		36%	33%	37%	41%	38%	37%					
Wrong direction		52%	53%	51%	45%	46%	46%					
Neither		9%	9%	9%	9%	12%	13%					
Don't know/Refused		4%	6%	3%	4%	4%	4%					
<b>Q24C. The federal budget deficit</b>												
		<b>Upstate Total 2018</b>	<b>Buffalo 2018</b>	<b>Other MSAs 2018</b>	<b>Buffalo 2017</b>	<b>Upstate Total 2017</b>	<b>Other MSAs 2017</b>					
Right track		15%	16%	14%	13%	15%	16%					
Wrong direction		68%	62%	70%	57%	59%	59%					
Neither		12%	14%	11%	18%	18%	17%					
Don't know/Refused		6%	8%	6%	11%	8%	7%					
<b>Q24D. The taxes businesses pay</b>												
		<b>Upstate Total 2018</b>	<b>Buffalo 2018</b>	<b>Other MSAs 2018</b>	<b>Buffalo 2017</b>	<b>Upstate Total 2017</b>	<b>Other MSAs 2017</b>					
Right track		64%	58%	67%	43%	43%	43%					
Wrong direction		23%	26%	22%	32%	32%	31%					
Neither		9%	12%	8%	17%	18%	19%					
Don't know/Refused		4%	4%	3%	7%	7%	7%					
<b>Q24E. The health of our economy</b>												
		<b>Upstate Total 2018</b>	<b>Buffalo 2018</b>	<b>Other MSAs 2018</b>	<b>Buffalo 2017</b>	<b>Upstate Total 2017</b>	<b>Other MSAs 2017</b>					
Right track		66%	65%	66%	53%	48%	46%					
Wrong direction		16%	19%	16%	24%	27%	28%					
Neither		12%	12%	12%	14%	18%	20%					
Don't know/Refused		6%	4%	6%	9%	7%	6%					

Q24F. Safeguarding the environment												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017						
Right track	32%	35%	30%	25%	23%	21%						
Wrong direction	38%	35%	39%	38%	39%	40%						
Neither	22%	23%	21%	27%	28%	29%						
Don't know/Refused	8%	6%	9%	10%	10%	10%						

And consider each of the following New York State issues. Indicate whether over the last year you think the state has been on the right track, moved in the wrong direction or is neither on the right track nor moving in the wrong direction

Q25A. Infrastructure development												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017						
Right track	25%	27%	25%	24%	25%	26%						
Wrong direction	45%	45%	45%	39%	37%	37%						
Neither	20%	18%	21%	22%	24%	25%						
Don't know/Refused	10%	10%	9%	15%	13%	12%						

Q25B. Ethics reform												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017						
Right track	8%	9%	7%	7%	9%	10%						
Wrong direction	69%	66%	71%	61%	61%	62%						
Neither	15%	16%	15%	20%	19%	18%						
Don't know/Refused	8%	9%	7%	12%	10%	10%						

Q25C. State spending												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017						
Right track	8%	7%	9%	5%	9%	11%						
Wrong direction	74%	79%	72%	77%	70%	67%						
Neither	11%	6%	13%	13%	15%	15%						
Don't know/Refused	7%	8%	6%	5%	6%	7%						

Q25D. The regulatory environment												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017						
Right track	8%	7%	8%	3%	8%	10%						
Wrong direction	73%	74%	72%	72%	66%	63%						
Neither	11%	9%	12%	15%	17%	18%						
Don't know/Refused	8%	9%	7%	9%	8%	8%						

Q25E. Workers Compensation reform												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017						
Right track	17%	16%	18%	10%	13%	14%						
Wrong direction	52%	51%	52%	60%	56%	54%						
Neither	16%	15%	16%	15%	16%	17%						
Don't know/Refused	15%	18%	14%	15%	15%	15%						

Q25F. Energy costs												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017						
Right track	14%	15%	14%	10%	14%	16%						
Wrong direction	45%	44%	46%	38%	36%	35%						
Neither	26%	22%	28%	34%	32%	32%						
Don't know/Refused	14%	20%	12%	17%	18%	18%						

Thinking about your company and all the people that work for your company, consider each of the following statements. For each indicate how descriptive that statement is of your company and your workforce.

Q26A. Our company operates as a team; collaboration is part of everything we do												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Completely descriptive	53%	50%	54%									
Somewhat descriptive	44%	46%	44%									
Not very descriptive	2%	3%	2%									
Not at all descriptive	0%	0%	0%									
Don't know/Refused	0%	2%	0%									

Q26B. Our employees are actively encouraged and supported in their personal and professional growth												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Completely descriptive	54%	53%	54%									
Somewhat descriptive	39%	40%	39%									
Not very descriptive	6%	7%	6%									
Not at all descriptive	1%	0%	1%									
Don't know/Refused	0%	1%	0%									

<b>Q26C. Overall, we have a company where people love coming to work each day</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Completely descriptive	32%	29%	32%									
Somewhat descriptive	60%	60%	61%									
Not very descriptive	7%	8%	6%									
Not at all descriptive	1%	2%	0%									
Don't know/Refused	1%	1%	1%									
<b>Q26D. Everyone's opinions and suggestions are solicited and taken seriously. We have a process for receiving and acting on feedback</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Completely descriptive	46%	43%	47%									
Somewhat descriptive	45%	46%	45%									
Not very descriptive	8%	9%	8%									
Not at all descriptive	0%	1%	0%									
Don't know/Refused	0%	1%	0%									
<b>Q26E. The entire company knows and understands the company's strategic plan</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Completely descriptive	26%	24%	27%									
Somewhat descriptive	56%	58%	56%									
Not very descriptive	15%	15%	15%									
Not at all descriptive	2%	3%	2%									
Don't know/Refused	0%	1%	0%									
<b>Q26F. Individual departments have short and long term goals as well as a process they use to assess progress on those goals</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Completely descriptive	25%	25%	25%									
Somewhat descriptive	44%	44%	44%									
Not very descriptive	26%	25%	26%									
Not at all descriptive	4%	4%	4%									
Don't know/Refused	1%	2%	1%									

<b>Q26G. We have a vision for our company that informs all our decisions</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Completely descriptive	35%	32%	36%									
Somewhat descriptive	48%	53%	45%									
Not very descriptive	14%	11%	15%									
Not at all descriptive	2%	2%	2%									
Don't know/Refused	2%	2%	2%									
<b>Q26H. Too often different departments seem to be headed in completely different directions</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Completely descriptive	4%	3%	4%									
Somewhat descriptive	14%	9%	16%									
Not very descriptive	52%	61%	48%									
Not at all descriptive	29%	24%	30%									
Don't know/Refused	2%	3%	2%									
<b>Q26I. We do a great job of listening to and responding to the needs of our customers</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Completely descriptive	63%	64%	63%									
Somewhat descriptive	35%	34%	35%									
Not very descriptive	2%	2%	2%									
Not at all descriptive	0%	0%	0%									
Don't know/Refused	0%	1%	0%									
<b>Q26J. Because we look to minimize risk, we are slow to innovate</b>												
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018									
Completely descriptive	6%	8%	6%									
Somewhat descriptive	33%	31%	34%									
Not very descriptive	43%	44%	43%									
Not at all descriptive	15%	14%	16%									
Don't know/Refused	2%	3%	2%									

<b>Q26K. We are on top of how economic, social and technological change affects us</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018										
Completely descriptive	20%	21%	20%										
Somewhat descriptive	57%	53%	58%										
Not very descriptive	20%	22%	19%										
Not at all descriptive	2%	2%	2%										
Don't know/Refused	1%	2%	1%										
<b>Q26L. We constantly review our processes in an effort to always be getting better</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018										
Completely descriptive	43%	44%	43%										
Somewhat descriptive	49%	49%	50%										
Not very descriptive	6%	5%	7%										
Not at all descriptive	0%	0%	1%										
Don't know/Refused	1%	2%	0%										
<b>Q27. Do you think your company will be in business in New York ten years from today or not?</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs				
Yes	66%	60%	68%	56%	65%	70%	63%	64%	66%				
No	13%	17%	12%	13%	12%	12%	8%	10%	11%				
Don't know/Refused	21%	22%	20%	31%	23%	18%	29%	25%	23%				
<b>Q28. If you had it all to do all over again, considering all factors, would you locate your business in New York or someplace else?</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
New York	33%	32%	34%	38%	41%	42%	41%	39%	39%	31%	29%	29%	28%
Someplace else	64%	65%	64%	57%	56%	55%	55%	56%	58%	67%	67%	65%	69%
Don't know/Refused	2%	3%	2%	5%	4%	3%	4%	5%	3%	2%	3%	6%	4%
<b>Q32. Do you offer a pension or 401K to your employees?</b>													
	Upstate Total 2018	Buffalo 2018	Other MSAs 2018	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs				
Yes	85%	86%	85%	79%	83%	85%	84%	82%	84%				
No	13%	11%	14%	16%	14%	13%	14%	15%	15%				
Don't know/Refused	1%	4%	0%	5%	3%	3%	2%	3%	1%				