

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q1. Which of the following industry categories best describes the type of business your company is engaged in?																				
	Region								Cluster			Company Size								
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100						
Engineering and Construction	13%	15%	22%	14%	10%	8%	12%	12%	19%	15%	8%	13%	16%	11%						
Food and Beverage	7%	6%	5%	5%	10%	7%	5%	6%	7%	6%	8%	6%	11%	6%						
Financial	6%	4%	4%	8%	4%	17%	1%	3%	6%	7%	5%	5%	4%	10%						
Manufacturing	19%	19%	11%	23%	25%	2%	30%	22%	17%	18%	20%	19%	30%	11%						
Retail	13%	14%	16%	11%	13%	4%	13%	12%	9%	11%	18%	16%	7%	9%						
Service	34%	32%	33%	27%	29%	61%	26%	37%	31%	35%	35%	31%	28%	49%						
Wholesale and Distribution	8%	9%	7%	13%	8%	1%	12%	9%	10%	8%	7%	10%	4%	6%						
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%						

  

Q2. As you think about the current business or economic conditions in New York 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?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Considerably better	3%	3%	1%	2%	5%	3%	1%	3%	13%	0%	0%	3%	3%	0%	3%	1%	1%	3%	8%
A little better	14%	14%	13%	16%	13%	16%	15%	14%	57%	8%	0%	16%	12%	9%	19%	17%	10%	11%	15%
About the same	47%	49%	59%	38%	47%	51%	41%	44%	29%	78%	15%	45%	44%	51%	59%	38%	39%	51%	47%
A little worse	26%	27%	24%	34%	21%	17%	30%	31%	1%	13%	57%	25%	32%	29%	14%	31%	36%	25%	26%
Considerably worse	10%	8%	3%	11%	13%	12%	12%	8%	0%	1%	27%	10%	8%	11%	5%	13%	14%	10%	4%

  

Q3. Looking forward from today through next year, that is, the entire 2020 year, how would you describe your expectations for the economy in New York State?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Considerably better	2%	1%	1%	0%	2%	3%	2%	3%	9%	0%	0%	2%	2%	2%	1%	0%	2%	3%	4%
A little better	17%	18%	16%	19%	20%	22%	16%	17%	64%	11%	1%	16%	19%	12%	20%	15%	13%	18%	17%
About the same	38%	39%	47%	33%	42%	37%	33%	30%	26%	63%	11%	39%	34%	39%	45%	38%	29%	38%	38%
A little worse	34%	35%	33%	42%	25%	26%	37%	42%	1%	26%	62%	33%	37%	38%	28%	38%	44%	31%	36%
Considerably worse	9%	6%	3%	6%	10%	12%	12%	7%	0%	1%	26%	10%	8%	9%	5%	9%	13%	10%	6%

  

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?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Considerably better	2%	2%	2%	0%	2%	2%	2%	3%	11%	1%	0%	3%	4%	0%	5%	2%	1%	2%	8%
A little better	15%	15%	18%	17%	15%	18%	13%	12%	67%	6%	0%	16%	14%	12%	19%	19%	11%	11%	15%
About the same	39%	42%	44%	39%	41%	41%	30%	39%	22%	69%	8%	39%	42%	36%	45%	34%	34%	43%	36%
A little worse	33%	31%	29%	30%	32%	27%	40%	33%	0%	22%	64%	34%	25%	37%	26%	34%	38%	32%	36%
Considerably worse	11%	10%	7%	14%	9%	11%	13%	13%	0%	2%	29%	9%	14%	15%	5%	11%	15%	13%	6%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q5. And looking forward from today through the next year, how would you describe your expectations for your industry here in New York?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Considerably better	2%	1%	1%	2%	1%	3%	1%	2%	10%	0%	0%	2%	4%	0%	6%	1%	1%	2%	2%
A little better	16%	16%	13%	16%	21%	22%	15%	16%	58%	11%	0%	16%	17%	11%	20%	19%	7%	15%	21%
About the same	37%	38%	48%	38%	33%	40%	34%	31%	31%	61%	9%	38%	34%	34%	40%	35%	32%	41%	34%
A little worse	33%	32%	32%	27%	33%	26%	34%	36%	1%	28%	56%	32%	33%	38%	27%	31%	44%	28%	40%
Considerably worse	13%	12%	6%	19%	11%	9%	16%	16%	0%	1%	35%	12%	12%	16%	7%	15%	16%	14%	4%

  

Q6. Now thinking specifically about your company, what are your expectations for revenue through the year 2020? Do you believe your revenue will...?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Grow substantially	3%	2%	2%	2%	3%	11%	2%	1%	8%	2%	2%	3%	4%	2%	1%	2%	1%	4%	8%
Grow moderately	38%	40%	50%	33%	35%	52%	28%	36%	68%	41%	18%	33%	48%	41%	44%	39%	25%	38%	40%
Stay about the same	36%	37%	31%	41%	45%	19%	38%	35%	19%	44%	34%	39%	27%	34%	37%	40%	46%	31%	40%
Decrease moderately	19%	16%	15%	20%	10%	16%	24%	21%	3%	13%	34%	19%	18%	18%	15%	16%	21%	22%	9%
Decrease substantially	5%	5%	2%	5%	6%	2%	7%	7%	1%	0%	13%	6%	3%	5%	3%	4%	7%	5%	4%

  

Q7. Continuing to focus on your company, please think quickly about profitability. Between today and the end of the calendar year 2020 do you expect your profits to...?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Grow substantially	2%	1%	2%	2%	2%	9%	1%	0%	7%	2%	1%	3%	1%	2%	1%	1%	2%	2%	6%
Grow moderately	32%	32%	33%	27%	35%	43%	26%	33%	59%	35%	12%	31%	36%	33%	43%	37%	16%	32%	34%
Stay about the same	34%	36%	42%	33%	33%	26%	39%	34%	28%	41%	29%	34%	36%	34%	26%	35%	36%	36%	38%
Decrease moderately	26%	24%	20%	31%	23%	20%	29%	25%	6%	21%	42%	27%	25%	25%	26%	23%	37%	23%	19%
Decrease substantially	6%	6%	3%	8%	6%	2%	5%	8%	0%	1%	15%	6%	3%	6%	3%	4%	9%	7%	4%
Don't know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	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?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Market/demand growth	38%	37%	40%	30%	39%	47%	35%	37%	52%	44%	23%	40%	40%	33%	48%	31%	29%	38%	51%
Cost reduction	23%	26%	25%	25%	28%	10%	23%	24%	13%	19%	33%	23%	17%	28%	15%	25%	31%	27%	19%
Price increase	17%	16%	16%	20%	11%	17%	16%	17%	15%	16%	19%	17%	20%	12%	23%	13%	13%	12%	23%
New technology	8%	8%	4%	14%	9%	6%	9%	9%	8%	7%	8%	6%	7%	12%	3%	17%	6%	6%	2%
Other	13%	12%	14%	8%	12%	19%	13%	11%	12%	11%	15%	12%	13%	15%	9%	11%	21%	15%	6%
Don't know	2%	1%	1%	3%	0%	1%	4%	2%	0%	2%	2%	2%	4%	0%	1%	2%	1%	2%	0%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q9. Please indicate which of the following are major areas of concentration for your company now and through 2020.																			
	Upstate 2019*	CR, CNY, FL, WNY*	Region						Cluster			Company Size			Industry				
			Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Expansion of existing markets	55%	52%	61%	45%	52%	67%	57%	47%	60%	60%	45%	55%	64%	50%	65%	55%	39%	57%	60%
Growth in existing products	50%	52%	54%	58%	48%	49%	45%	50%	57%	52%	42%	49%	54%	51%	30%	56%	55%	48%	57%
Entry into new markets	26%	25%	24%	23%	27%	36%	24%	26%	24%	28%	26%	26%	23%	32%	25%	28%	21%	30%	26%
New product lines	22%	23%	19%	20%	30%	23%	22%	23%	21%	22%	21%	23%	20%	20%	5%	30%	29%	18%	32%
Acquisition of new businesses	12%	13%	16%	17%	9%	14%	12%	10%	12%	13%	11%	7%	14%	26%	10%	11%	6%	16%	6%
Technology innovation	29%	31%	35%	30%	28%	25%	26%	29%	31%	32%	24%	23%	38%	41%	28%	31%	23%	33%	21%
Construction of new locations	8%	8%	9%	5%	8%	9%	7%	8%	12%	9%	3%	4%	10%	15%	14%	5%	7%	9%	6%
Internal restructuring	27%	28%	27%	28%	25%	25%	24%	31%	15%	29%	31%	24%	34%	32%	25%	26%	31%	29%	25%
Expansion into export markets	3%	3%	1%	8%	2%	2%	4%	5%	2%	4%	3%	3%	8%	2%	1%	9%	0%	1%	9%
Other	6%	5%	3%	2%	9%	4%	11%	6%	5%	4%	9%	7%	5%	4%	2%	3%	13%	6%	9%
Don't know	3%	2%	2%	0%	1%	1%	5%	3%	1%	3%	4%	3%	2%	2%	2%	3%	7%	2%	2%
Q10. Do you intend to invest between today through 2020 in any fixed assets for your company designed to meet growing demand, reduce costs or enhance productivity?																			
	Upstate 2019*	CR, CNY, FL, WNY*	Region						Cluster			Company Size			Industry				
			Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Yes	51%	55%	64%	41%	52%	39%	49%	54%	60%	56%	41%	45%	64%	64%	60%	60%	40%	49%	45%
No	30%	27%	21%	38%	27%	34%	35%	28%	19%	27%	39%	36%	24%	16%	25%	24%	44%	29%	32%
Not sure	19%	18%	14%	22%	21%	27%	16%	17%	21%	17%	20%	20%	12%	20%	15%	15%	16%	22%	23%
Q11. Now thinking about the people that work for your company, between today and the end of 2020, do you plan to...?																			
	Upstate 2019*	CR, CNY, FL, WNY*	Region						Cluster			Company Size			Industry				
			Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Substantially increase your workforce	1%	1%	1%	0%	3%	4%	0%	0%	3%	1%	1%	1%	3%	2%	0%	1%	0%	2%	2%
Moderately increase your workforce	29%	31%	33%	28%	27%	40%	21%	34%	43%	31%	20%	25%	40%	33%	49%	28%	20%	31%	21%
Remain about the same	57%	57%	57%	61%	58%	43%	60%	52%	51%	61%	53%	62%	42%	52%	41%	61%	62%	55%	66%
Decrease your workforce	12%	11%	8%	9%	12%	10%	18%	13%	1%	6%	26%	11%	14%	13%	9%	10%	18%	10%	9%
Don't know	1%	0%	0%	2%	0%	2%	1%	1%	2%	1%	1%	1%	1%	1%	0%	0%	0%	2%	2%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q12. And thinking about other challenges that your company faces, which of the following are you concerned with?																			
	Upstate 2019*	CR, CNY, FL, WNY*	Region						Cluster			Company Size			Industry				
			Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Existing U.S. competition	24%	23%	27%	16%	24%	26%	26%	21%	28%	26%	20%	23%	24%	30%	20%	30%	21%	20%	38%
Governmental regulation	65%	64%	64%	58%	71%	53%	78%	62%	49%	59%	80%	62%	69%	73%	58%	68%	66%	61%	57%
Taxation	58%	59%	56%	64%	61%	40%	67%	60%	54%	51%	68%	62%	56%	49%	58%	65%	62%	54%	62%
Foreign competition	9%	8%	6%	8%	9%	1%	18%	9%	8%	8%	9%	10%	13%	3%	1%	30%	7%	2%	15%
Energy costs	22%	20%	25%	19%	19%	23%	30%	14%	19%	21%	24%	24%	15%	22%	17%	23%	28%	23%	25%
Risk management	22%	24%	27%	17%	17%	16%	21%	30%	17%	25%	20%	18%	24%	33%	31%	10%	21%	23%	21%
Adverse economic conditions	44%	45%	47%	44%	44%	43%	41%	42%	26%	48%	49%	47%	41%	42%	45%	34%	54%	45%	45%
Health care costs	66%	71%	70%	83%	71%	43%	70%	65%	60%	65%	71%	65%	71%	72%	65%	71%	80%	66%	60%
Global political instability	12%	12%	13%	13%	13%	9%	12%	10%	6%	14%	12%	12%	12%	13%	15%	14%	11%	9%	17%
Rising supplier costs	34%	34%	39%	30%	35%	28%	41%	28%	27%	36%	35%	38%	28%	30%	34%	38%	53%	29%	36%
Human resources	45%	47%	53%	48%	39%	34%	50%	48%	36%	47%	47%	38%	56%	60%	52%	45%	48%	44%	38%
Cash flow	29%	28%	26%	27%	27%	36%	27%	30%	24%	28%	32%	30%	28%	26%	27%	23%	37%	36%	19%
Ability to obtain suitable financing	8%	8%	8%	11%	6%	11%	9%	7%	3%	10%	9%	9%	7%	7%	10%	6%	8%	11%	6%
U.S. trade agreements	16%	17%	16%	9%	18%	8%	23%	21%	15%	15%	18%	17%	23%	10%	7%	27%	25%	7%	38%
None of the above	1%	1%	1%	2%	1%	5%	0%	1%	2%	2%	1%	2%	1%	0%	0%	1%	0%	3%	2%

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 York is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?

	Upstate 2019*	CR, CNY, FL, WNY*	Region						Cluster			Company Size			Industry				
			Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	1%	1%	0%	0%	1%	2%	0%	2%	3%	1%	0%	1%	1%	0%	1%	0%	1%	1%	0%
Good	5%	4%	4%	3%	3%	10%	6%	6%	11%	5%	2%	6%	5%	2%	5%	2%	8%	6%	4%
Fair	25%	25%	33%	19%	21%	29%	17%	20%	34%	34%	8%	22%	21%	33%	28%	26%	24%	26%	19%
Poor	66%	67%	61%	72%	71%	54%	76%	70%	47%	59%	86%	67%	73%	63%	65%	72%	66%	60%	74%
Don't know	3%	3%	1%	6%	4%	5%	1%	3%	4%	3%	4%	4%	1%	2%	1%	1%	1%	6%	4%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q14. Of the following, what would you like to see the Governor and Legislature of New York focus on?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Personal Income Tax Reform	50%	50%	44%	52%	48%	53%	54%	56%	53%	48%	52%	50%	55%	49%	58%	49%	51%	52%	49%
Business Income Tax Reform	52%	52%	44%	52%	58%	46%	60%	57%	55%	49%	54%	55%	54%	41%	51%	58%	57%	49%	58%
Estate Tax Reform	24%	23%	24%	13%	26%	16%	33%	27%	24%	20%	29%	23%	26%	24%	28%	24%	26%	21%	30%
Sales Tax Reform	25%	25%	21%	22%	25%	23%	32%	30%	21%	22%	30%	27%	25%	20%	22%	26%	32%	23%	28%
Infrastructure Development (roads, bridges, water, sewer)	42%	40%	50%	30%	34%	52%	45%	39%	41%	46%	37%	41%	48%	45%	61%	35%	37%	44%	32%
Energy Infrastructure (power generation and transmission, natural gas)	24%	20%	27%	9%	17%	38%	22%	21%	29%	24%	21%	25%	23%	22%	35%	23%	24%	24%	17%
Business Development Incentives	36%	33%	39%	25%	33%	52%	35%	31%	40%	36%	35%	34%	39%	43%	34%	35%	33%	41%	32%
Ethics Reform	28%	31%	37%	30%	30%	23%	26%	26%	19%	27%	32%	27%	30%	31%	31%	28%	26%	29%	23%
Spending Cuts	53%	57%	51%	48%	66%	37%	55%	61%	40%	50%	63%	58%	46%	46%	50%	63%	60%	43%	58%
Other	17%	16%	14%	22%	15%	18%	16%	15%	10%	17%	21%	16%	22%	20%	19%	15%	15%	20%	11%
Don't know	2%	2%	0%	3%	2%	3%	2%	3%	6%	1%	1%	3%	0%	1%	0%	2%	0%	3%	6%

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:																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Very confident	1%	1%	1%	3%	1%	0%	0%	2%	3%	0%	0%	1%	1%	1%	0%	1%	1%	1%	0%
Somewhat confident	12%	11%	12%	6%	8%	24%	10%	14%	24%	14%	3%	11%	14%	11%	15%	7%	11%	15%	9%
Not very confident	40%	39%	42%	41%	40%	44%	35%	33%	46%	46%	29%	40%	34%	45%	43%	41%	36%	44%	34%
Not at all confident	45%	48%	45%	48%	51%	30%	54%	49%	24%	39%	65%	45%	51%	43%	42%	50%	51%	38%	55%
Don't know	2%	1%	0%	2%	0%	2%	1%	3%	3%	0%	3%	2%	0%	0%	0%	1%	1%	2%	2%

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?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	12%	13%	11%	13%	16%	3%	13%	12%	14%	8%	17%	14%	8%	9%	13%	15%	20%	8%	21%
Good	27%	29%	27%	41%	26%	19%	34%	29%	30%	26%	28%	28%	34%	21%	40%	30%	26%	20%	30%
Fair	32%	30%	36%	25%	25%	42%	33%	30%	33%	34%	28%	30%	34%	36%	27%	35%	24%	37%	25%
Poor	25%	25%	24%	20%	30%	30%	16%	22%	20%	27%	24%	23%	24%	30%	20%	19%	24%	31%	19%
Don't know	4%	3%	1%	2%	2%	6%	4%	6%	3%	5%	2%	4%	0%	4%	1%	2%	6%	4%	6%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

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:																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Very confident	7%	7%	5%	9%	9%	5%	7%	5%	9%	4%	9%	8%	3%	4%	7%	7%	13%	4%	9%
Somewhat confident	30%	30%	29%	31%	24%	26%	37%	38%	40%	28%	28%	33%	33%	22%	38%	40%	29%	21%	30%
Not very confident	42%	43%	48%	44%	46%	41%	39%	33%	35%	48%	39%	40%	43%	50%	41%	37%	44%	48%	38%
Not at all confident	19%	19%	18%	14%	20%	24%	16%	23%	14%	18%	24%	18%	21%	23%	14%	15%	15%	24%	19%
Don't know	1%	1%	0%	2%	0%	5%	1%	2%	3%	1%	1%	1%	0%	1%	0%	1%	0%	2%	4%

Q18. Thinking specifically about your immediate geographic area, including yours and adjacent counties, is the general business climate improving, staying the same or worsening?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Improving	12%	12%	9%	11%	11%	17%	12%	16%	27%	13%	4%	11%	18%	14%	14%	6%	13%	14%	13%
Staying the same	53%	57%	64%	50%	60%	45%	50%	49%	64%	66%	31%	55%	46%	54%	65%	54%	42%	56%	53%
Worsening	32%	29%	24%	38%	26%	31%	35%	32%	5%	19%	61%	31%	35%	31%	19%	37%	43%	25%	32%
Don't know	3%	3%	3%	2%	3%	6%	2%	4%	3%	3%	4%	4%	1%	1%	2%	2%	2%	5%	2%

Q19. 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?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Education	23%	25%	23%	23%	27%	9%	30%	25%	23%	25%	20%	23%	19%	28%	28%	24%	26%	21%	19%
Tourism	20%	20%	23%	14%	15%	8%	16%	24%	19%	19%	23%	19%	25%	21%	14%	16%	28%	20%	13%
Technology	17%	17%	25%	16%	13%	24%	22%	11%	16%	18%	17%	17%	19%	13%	22%	16%	17%	17%	25%
Transportation	4%	3%	4%	3%	2%	4%	5%	3%	1%	5%	3%	4%	4%	2%	7%	2%	2%	3%	9%
Medical	14%	14%	8%	11%	19%	27%	10%	17%	14%	15%	13%	11%	18%	20%	13%	15%	10%	17%	9%
Green and sustainable energy	4%	3%	4%	2%	2%	13%	1%	4%	7%	4%	3%	6%	3%	2%	5%	2%	3%	6%	4%
Manufacturing	8%	9%	7%	9%	12%	4%	10%	10%	12%	7%	9%	9%	8%	6%	3%	17%	7%	6%	11%
Other	4%	5%	3%	9%	6%	4%	1%	4%	2%	4%	5%	4%	4%	5%	3%	3%	1%	6%	2%
None of the above	5%	5%	4%	13%	3%	8%	5%	4%	7%	4%	6%	7%	1%	3%	5%	6%	5%	4%	8%

Q20A. How would you rate your local area on each of the following? - Suitable workforce																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	4%	3%	2%	3%	7%	13%	2%	2%	7%	3%	5%	5%	2%	6%	3%	2%	3%	5%	8%
Good	35%	38%	35%	34%	45%	41%	28%	36%	44%	36%	28%	34%	32%	37%	31%	27%	42%	38%	34%
Fair	39%	38%	41%	36%	35%	33%	37%	39%	34%	42%	36%	39%	43%	33%	41%	46%	33%	33%	45%
Poor	20%	19%	21%	23%	9%	9%	33%	21%	12%	18%	28%	20%	21%	23%	22%	23%	21%	20%	13%
Don't know	2%	2%	1%	3%	3%	4%	0%	2%	3%	1%	3%	2%	2%	1%	2%	1%	1%	3%	0%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q20B. How would you rate your local area on each of the following? - Consumer confidence																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	3%	3%	3%	2%	5%	2%	2%	2%	3%	2%	3%	3%	2%	4%	5%	2%	3%	3%	0%
Good	52%	54%	59%	47%	43%	67%	35%	61%	64%	57%	39%	51%	51%	55%	48%	44%	57%	54%	64%
Fair	37%	36%	33%	45%	40%	24%	48%	30%	26%	35%	44%	38%	36%	35%	37%	40%	35%	36%	30%
Poor	5%	4%	2%	5%	4%	5%	12%	6%	3%	3%	10%	5%	10%	4%	8%	9%	3%	4%	4%
Don't know	3%	3%	3%	2%	7%	2%	2%	1%	4%	2%	4%	4%	1%	2%	2%	6%	1%	3%	2%

  

Q20C. How would you rate your local area on each of the following? - Transportation infrastructure																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	3%	3%	2%	6%	3%	4%	4%	3%	6%	3%	3%	4%	2%	3%	2%	4%	2%	3%	4%
Good	36%	40%	44%	30%	49%	28%	28%	33%	38%	35%	37%	37%	38%	34%	33%	38%	52%	27%	57%
Fair	39%	39%	41%	36%	33%	46%	45%	43%	38%	43%	34%	41%	39%	35%	40%	38%	31%	43%	32%
Poor	19%	16%	13%	23%	13%	20%	23%	18%	16%	18%	23%	17%	21%	26%	23%	19%	13%	25%	6%
Don't know	2%	2%	0%	5%	1%	2%	0%	3%	3%	1%	3%	2%	1%	2%	2%	1%	1%	3%	2%

  

Q20D. How would you rate your local area on each of the following? - As an area where business can succeed																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	2%	1%	1%	0%	3%	8%	1%	1%	5%	1%	2%	3%	1%	2%	2%	1%	0%	4%	2%
Good	26%	26%	33%	23%	25%	41%	18%	20%	39%	31%	14%	27%	21%	27%	29%	18%	30%	25%	30%
Fair	48%	50%	50%	44%	47%	32%	49%	58%	42%	52%	45%	46%	51%	53%	48%	49%	49%	49%	47%
Poor	22%	20%	16%	25%	23%	16%	32%	19%	9%	16%	37%	23%	27%	17%	21%	30%	21%	21%	21%
Don't know	2%	2%	0%	8%	1%	2%	0%	2%	4%	0%	2%	2%	0%	2%	0%	2%	0%	2%	0%

  

Q20E. How would you rate your local area on each of the following? - As a place where consumers want to live																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	12%	10%	16%	3%	9%	28%	5%	8%	13%	11%	12%	13%	8%	13%	12%	7%	15%	14%	6%
Good	41%	44%	48%	38%	40%	40%	32%	48%	47%	45%	33%	40%	42%	44%	37%	40%	44%	42%	42%
Fair	32%	33%	29%	38%	36%	28%	35%	33%	30%	33%	33%	33%	32%	32%	37%	34%	24%	31%	40%
Poor	14%	11%	7%	19%	13%	1%	28%	10%	9%	11%	20%	14%	18%	11%	14%	19%	16%	10%	13%
Don't know	1%	1%	0%	3%	1%	2%	0%	1%	2%	0%	2%	1%	0%	1%	0%	0%	0%	2%	0%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q20F. How would you rate your local area on each of the following? - Airline service																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	6%	6%	7%	5%	3%	11%	4%	9%	6%	6%	6%	7%	5%	2%	9%	7%	7%	5%	4%
Good	36%	42%	41%	33%	38%	36%	26%	50%	42%	37%	33%	38%	34%	36%	33%	30%	43%	36%	49%
Fair	32%	32%	35%	33%	33%	38%	23%	28%	31%	33%	30%	29%	39%	35%	29%	37%	23%	35%	28%
Poor	22%	17%	14%	25%	23%	13%	46%	10%	16%	21%	27%	22%	22%	24%	26%	23%	26%	20%	17%
Don't know	3%	3%	2%	5%	2%	2%	1%	4%	5%	2%	4%	4%	1%	3%	3%	2%	1%	4%	2%

  

Q20G. How would you rate your local area on each of the following? - Local governmental support for business																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	3%	3%	3%	5%	3%	5%	1%	2%	6%	2%	2%	3%	2%	2%	2%	3%	3%	3%	2%
Good	25%	24%	25%	33%	23%	33%	22%	17%	26%	28%	21%	23%	29%	28%	22%	23%	21%	27%	25%
Fair	42%	45%	43%	34%	49%	42%	44%	49%	48%	44%	36%	41%	39%	47%	44%	41%	44%	45%	42%
Poor	28%	27%	28%	27%	21%	18%	32%	31%	16%	24%	39%	30%	27%	22%	30%	31%	30%	23%	32%
Don't know	2%	2%	1%	2%	3%	2%	1%	2%	4%	1%	2%	2%	3%	0%	1%	1%	1%	3%	0%

  

Q21. Turning to your impressions of the local workforce. Is there an ample supply of local workers that are appropriately trained for your employment needs?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Yes	21%	21%	17%	20%	24%	27%	17%	25%	27%	21%	16%	22%	13%	24%	20%	13%	23%	22%	23%
No	71%	71%	79%	72%	63%	60%	76%	68%	64%	70%	76%	67%	86%	72%	74%	81%	70%	68%	72%
Don't know	8%	8%	4%	8%	13%	13%	7%	7%	9%	8%	8%	11%	1%	3%	6%	6%	7%	10%	6%

  

Q22A. Based on the job applicants that you have seen over the last couple of years, how would you assess those job applicants on the following skills or attributes? - Technical skills																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	3%	2%	1%	0%	7%	6%	6%	2%	3%	4%	2%	4%	4%	2%	5%	2%	2%	4%	2%
Good	29%	29%	37%	20%	22%	40%	23%	28%	35%	31%	23%	27%	29%	36%	26%	13%	30%	36%	26%
Fair	38%	41%	36%	53%	41%	34%	30%	40%	35%	39%	39%	37%	36%	43%	45%	44%	34%	34%	45%
Poor	23%	22%	22%	19%	22%	10%	35%	23%	15%	19%	32%	24%	29%	17%	24%	35%	27%	17%	15%
N/A	7%	6%	4%	8%	7%	11%	5%	6%	11%	7%	4%	8%	2%	2%	0%	6%	7%	8%	11%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY



Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q22B. Based on the job applicants that you have seen over the last couple of years, how would you assess those job applicants on the following skills or attributes? - Verbal skills																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	2%	2%	1%	0%	5%	5%	1%	3%	2%	3%	1%	3%	1%	1%	2%	0%	2%	3%	2%
Good	27%	25%	27%	31%	19%	35%	28%	24%	30%	28%	24%	28%	24%	26%	29%	19%	28%	29%	32%
Fair	44%	47%	46%	50%	46%	35%	34%	49%	44%	44%	45%	42%	48%	50%	43%	50%	38%	44%	43%
Poor	22%	21%	22%	14%	24%	14%	33%	21%	16%	21%	27%	21%	25%	22%	24%	27%	27%	17%	19%
N/A	5%	4%	3%	5%	5%	11%	4%	4%	9%	4%	4%	6%	2%	2%	1%	4%	5%	7%	4%

Q22C. Based on the job applicants that you have seen over the last couple of years, how would you assess those job applicants on the following skills or attributes? - Writing skills																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	1%	1%	1%	0%	3%	2%	1%	2%	1%	2%	1%	2%	1%	1%	2%	0%	1%	2%	0%
Good	17%	15%	19%	14%	15%	24%	16%	13%	20%	17%	14%	17%	16%	15%	20%	8%	17%	18%	21%
Fair	41%	43%	46%	42%	39%	37%	30%	43%	49%	41%	37%	40%	39%	49%	37%	41%	43%	42%	43%
Poor	34%	34%	32%	36%	33%	25%	46%	36%	21%	33%	40%	32%	41%	34%	37%	44%	30%	30%	28%
N/A	7%	6%	3%	8%	9%	11%	6%	6%	9%	7%	7%	9%	4%	2%	3%	7%	8%	8%	8%

Q22D. Based on the job applicants that you have seen over the last couple of years, how would you assess those job applicants on the following skills or attributes? - Initiative																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	2%	2%	1%	0%	3%	1%	2%	4%	2%	2%	1%	2%	1%	1%	3%	0%	2%	1%	2%
Good	21%	20%	22%	14%	23%	34%	16%	18%	22%	23%	17%	20%	19%	25%	20%	15%	17%	25%	19%
Fair	40%	43%	46%	55%	38%	36%	32%	36%	45%	40%	38%	39%	34%	46%	44%	39%	41%	40%	47%
Poor	32%	30%	30%	25%	29%	18%	46%	36%	23%	31%	39%	33%	44%	24%	31%	44%	34%	26%	30%
N/A	5%	5%	1%	6%	6%	11%	4%	6%	8%	5%	4%	6%	2%	3%	1%	3%	6%	7%	2%

Q22E. Based on the job applicants that you have seen over the last couple of years, how would you assess those job applicants on the following skills or attributes? - Work ethic																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	2%	2%	0%	0%	4%	5%	4%	3%	1%	4%	1%	3%	2%	2%	3%	1%	2%	2%	4%
Good	26%	26%	29%	27%	26%	36%	23%	23%	32%	28%	21%	25%	25%	33%	23%	21%	21%	32%	23%
Fair	37%	40%	44%	41%	37%	36%	32%	38%	37%	39%	36%	38%	34%	40%	48%	31%	37%	38%	45%
Poor	29%	28%	26%	28%	27%	12%	39%	32%	22%	25%	38%	29%	38%	23%	26%	43%	34%	23%	25%
N/A	5%	4%	1%	5%	5%	11%	2%	5%	8%	4%	4%	5%	1%	3%	0%	4%	6%	6%	4%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q22F. Based on the job applicants that you have seen over the last couple of years, how would you assess those job applicants on the following skills or attributes? - Realistic about compensation																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	1%	2%	1%	0%	2%	0%	0%	3%	2%	1%	1%	1%	1%	1%	3%	0%	3%	0%	0%
Good	23%	23%	24%	20%	21%	29%	18%	24%	23%	25%	19%	23%	20%	24%	19%	15%	19%	27%	34%
Fair	41%	41%	44%	42%	39%	42%	41%	36%	47%	43%	36%	40%	36%	50%	47%	42%	40%	40%	36%
Poor	30%	31%	27%	33%	32%	18%	38%	32%	21%	26%	40%	29%	42%	24%	30%	40%	31%	26%	26%
N/A	5%	4%	3%	5%	5%	11%	2%	6%	8%	5%	4%	6%	2%	2%	1%	3%	7%	7%	4%

Q22G. Based on the job applicants that you have seen over the last couple of years, how would you assess those job applicants on the following skills or attributes? - Professionalism																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Excellent	3%	3%	1%	0%	3%	7%	2%	6%	4%	3%	2%	4%	2%	2%	2%	0%	3%	4%	4%
Good	26%	26%	33%	20%	23%	30%	21%	24%	32%	29%	18%	25%	25%	28%	33%	13%	20%	31%	28%
Fair	47%	49%	44%	61%	53%	39%	48%	43%	44%	47%	50%	47%	48%	50%	49%	52%	58%	42%	42%
Poor	19%	18%	19%	13%	17%	13%	27%	23%	12%	17%	26%	19%	25%	18%	16%	29%	13%	17%	25%
N/A	5%	4%	2%	6%	4%	11%	2%	5%	7%	4%	4%	6%	1%	2%	0%	6%	6%	5%	2%

Q23A. To what extent have each of the following impacted your business' ability to attract and/or retain employees? - Availability of housing																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Significant adverse impact	5%	1%	3%	0%	2%	13%	7%	0%	4%	6%	5%	5%	4%	6%	3%	2%	5%	5%	6%
Adverse impact	12%	6%	7%	8%	5%	30%	15%	4%	7%	12%	15%	11%	12%	17%	6%	10%	17%	15%	6%
No impact	66%	75%	75%	75%	73%	40%	68%	76%	63%	69%	64%	69%	65%	62%	67%	77%	62%	63%	74%
Positive impact	12%	14%	10%	11%	17%	5%	9%	16%	17%	10%	12%	11%	16%	13%	15%	9%	12%	13%	13%
Significant positive impact	1%	1%	0%	0%	1%	1%	0%	3%	2%	0%	1%	1%	0%	1%	0%	0%	2%	1%	0%
Refused	4%	3%	4%	6%	2%	10%	1%	2%	7%	3%	3%	4%	3%	2%	8%	2%	2%	4%	2%

Q23B. To what extent have each of the following impacted your business' ability to attract and/or retain employees? - Cost of housing																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Significant adverse impact	7%	2%	4%	2%	3%	24%	6%	0%	4%	9%	7%	8%	4%	8%	6%	6%	6%	6%	8%
Adverse impact	19%	13%	21%	8%	13%	39%	13%	6%	16%	20%	19%	18%	23%	19%	17%	13%	26%	25%	8%
No impact	54%	61%	61%	64%	56%	22%	60%	66%	49%	54%	55%	57%	50%	49%	53%	60%	52%	49%	58%
Positive impact	14%	17%	8%	19%	24%	4%	18%	19%	22%	11%	13%	11%	18%	20%	14%	16%	12%	13%	25%
Significant positive impact	2%	3%	1%	0%	2%	1%	1%	6%	2%	2%	2%	2%	3%	2%	1%	2%	2%	4%	0%
Refused	4%	4%	5%	8%	2%	10%	1%	2%	7%	4%	3%	5%	3%	2%	8%	3%	2%	4%	2%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q23C. To what extent have each of the following impacted your business' ability to attract and/or retain employees? - Availability of child care services																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Significant adverse impact	4%	2%	2%	3%	4%	12%	4%	1%	3%	5%	3%	4%	3%	7%	5%	2%	3%	4%	4%
Adverse impact	26%	22%	24%	23%	19%	27%	27%	21%	16%	28%	29%	22%	28%	40%	17%	27%	27%	29%	13%
No impact	55%	61%	64%	59%	59%	46%	56%	61%	58%	55%	54%	59%	58%	42%	65%	56%	53%	53%	72%
Positive impact	8%	8%	4%	5%	13%	5%	12%	11%	15%	6%	8%	8%	7%	9%	5%	8%	13%	8%	6%
Significant positive impact	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%
Refused	6%	6%	6%	9%	5%	10%	1%	6%	8%	5%	6%	6%	5%	2%	8%	6%	2%	6%	6%

  

Q23D. To what extent have each of the following impacted your business' ability to attract and/or retain employees? - Cost of child care services																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Significant adverse impact	8%	6%	4%	5%	10%	19%	7%	6%	5%	9%	9%	9%	5%	9%	7%	10%	8%	6%	6%
Adverse impact	32%	28%	30%	36%	24%	31%	33%	25%	20%	33%	35%	28%	34%	44%	21%	31%	38%	35%	17%
No impact	49%	55%	59%	47%	55%	38%	49%	56%	59%	48%	45%	51%	52%	40%	62%	47%	45%	47%	70%
Positive impact	5%	4%	1%	2%	5%	2%	10%	7%	9%	4%	4%	5%	5%	3%	2%	5%	7%	5%	2%
Significant positive impact	0%	1%	0%	2%	1%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%	0%	1%	1%	0%
Refused	6%	6%	7%	9%	5%	10%	1%	6%	7%	6%	6%	6%	5%	3%	8%	6%	1%	6%	6%

  

Q24A. Switching to another topic, how big a problem do you think each of the following are for women in companies like yours in New York? - Receiving equal pay																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Very big problem	6%	3%	4%	0%	4%	18%	5%	3%	4%	7%	4%	6%	3%	7%	4%	3%	6%	8%	4%
Somewhat a problem	19%	18%	18%	14%	21%	28%	20%	17%	19%	19%	18%	19%	13%	21%	22%	15%	14%	22%	6%
Not very much of a problem	31%	33%	31%	39%	29%	22%	26%	37%	29%	36%	27%	30%	34%	34%	33%	30%	28%	30%	42%
Not at all a problem	39%	40%	41%	39%	39%	27%	46%	39%	41%	35%	44%	39%	48%	34%	36%	48%	43%	35%	43%
Don't know	5%	5%	5%	8%	6%	5%	4%	4%	7%	4%	6%	6%	2%	4%	5%	4%	9%	4%	6%

  

Q24B. Switching to another topic, 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																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Very big problem	5%	2%	3%	2%	2%	16%	7%	3%	3%	6%	4%	6%	2%	6%	5%	3%	5%	7%	2%
Somewhat a problem	17%	17%	20%	13%	18%	24%	16%	15%	16%	19%	15%	18%	12%	20%	22%	15%	12%	18%	13%
Not very much of a problem	30%	31%	27%	33%	33%	23%	27%	32%	28%	33%	28%	29%	36%	33%	29%	27%	29%	33%	28%
Not at all a problem	37%	39%	41%	41%	32%	27%	38%	39%	38%	32%	42%	36%	45%	34%	32%	44%	41%	33%	42%
Don't know	11%	11%	8%	13%	14%	10%	11%	11%	15%	9%	10%	13%	5%	7%	12%	11%	14%	9%	15%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q24C. Switching to another topic, how big a problem do you think each of the following are for women in companies like yours in New York? - Sexual harassment																			
	Upstate 2019*	CR, CNY, FL, WNY*	Region						Cluster			Company Size			Industry				
			Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Very big problem	4%	2%	2%	0%	1%	11%	2%	6%	3%	4%	4%	4%	3%	3%	4%	3%	1%	5%	0%
Somewhat a problem	18%	16%	16%	19%	16%	18%	22%	17%	15%	18%	18%	18%	15%	19%	20%	15%	15%	18%	21%
Not very much of a problem	34%	37%	35%	38%	40%	33%	22%	36%	34%	36%	31%	34%	36%	36%	35%	34%	34%	36%	26%
Not at all a problem	38%	38%	40%	36%	35%	29%	46%	38%	40%	37%	38%	38%	42%	34%	35%	44%	43%	33%	45%
Don't know	7%	7%	7%	8%	7%	9%	7%	5%	7%	5%	9%	7%	4%	8%	6%	4%	7%	8%	8%

Q24D. Switching to another topic, 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 2019*	CR, CNY, FL, WNY*	Region						Cluster			Company Size			Industry				
			Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Very big problem	9%	7%	7%	5%	9%	22%	7%	5%	6%	11%	8%	10%	7%	7%	7%	4%	9%	14%	0%
Somewhat a problem	44%	45%	47%	48%	40%	50%	38%	46%	44%	42%	47%	41%	41%	59%	33%	37%	44%	49%	47%
Not very much of a problem	24%	27%	30%	23%	26%	13%	21%	27%	26%	27%	19%	24%	30%	20%	36%	27%	21%	21%	21%
Not at all a problem	16%	14%	9%	17%	13%	10%	27%	17%	17%	14%	18%	17%	16%	12%	14%	22%	21%	13%	17%
Don't know	7%	7%	7%	6%	11%	5%	6%	6%	8%	6%	8%	8%	7%	2%	9%	10%	5%	4%	15%

Q24E. Switching to another topic, how big a problem do you think each of the following are for women in companies like yours in New York? - Age discrimination																			
	Upstate 2019*	CR, CNY, FL, WNY*	Region						Cluster			Company Size			Industry				
			Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Very big problem	4%	2%	2%	0%	1%	13%	4%	5%	5%	4%	3%	4%	3%	4%	4%	0%	2%	7%	2%
Somewhat a problem	11%	11%	11%	9%	13%	18%	11%	10%	9%	12%	12%	12%	7%	13%	9%	10%	14%	14%	8%
Not very much of a problem	35%	34%	33%	36%	39%	34%	30%	31%	35%	37%	31%	35%	31%	37%	35%	35%	28%	36%	28%
Not at all a problem	44%	46%	50%	47%	37%	28%	49%	48%	44%	41%	47%	42%	56%	41%	42%	49%	49%	38%	55%
Don't know	7%	7%	4%	8%	9%	6%	6%	6%	7%	5%	8%	7%	4%	5%	9%	6%	7%	6%	8%

Q24F. Switching to another topic, 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 2019*	CR, CNY, FL, WNY*	Region						Cluster			Company Size			Industry				
			Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Very big problem	6%	3%	4%	2%	2%	13%	9%	4%	5%	6%	5%	6%	4%	5%	6%	2%	8%	8%	2%
Somewhat a problem	22%	22%	21%	22%	25%	28%	20%	19%	18%	25%	19%	22%	13%	26%	25%	15%	16%	25%	23%
Not very much of a problem	30%	31%	30%	33%	32%	29%	21%	28%	31%	32%	26%	28%	39%	28%	34%	31%	24%	30%	25%
Not at all a problem	38%	39%	39%	39%	31%	23%	46%	45%	38%	34%	44%	38%	39%	37%	28%	47%	44%	33%	45%
Don't know	5%	6%	5%	5%	9%	6%	5%	4%	9%	4%	6%	5%	6%	4%	7%	5%	7%	4%	6%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q25A. Please tell us whether each of the following has had a positive, negative or no impact on your business? - New York State Paid Family Leave law																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Significant adverse impact	12%	12%	7%	16%	14%	5%	16%	14%	8%	8%	20%	13%	13%	11%	12%	15%	12%	10%	13%
Adverse impact	39%	41%	41%	39%	32%	20%	41%	51%	32%	37%	45%	33%	49%	50%	31%	49%	35%	39%	36%
No impact	42%	41%	47%	38%	49%	59%	38%	28%	48%	48%	31%	48%	31%	32%	47%	32%	48%	44%	49%
Positive impact	4%	3%	4%	6%	1%	9%	2%	4%	6%	5%	2%	4%	6%	4%	9%	2%	3%	3%	2%
Significant positive impact	0%	0%	0%	0%	0%	1%	0%	1%	1%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%
Don't know	2%	2%	1%	2%	3%	7%	2%	3%	5%	2%	2%	3%	1%	2%	1%	1%	2%	4%	0%

  

Q25B. Please tell us whether each of the following has had a positive, negative or no impact on your business? - Federal tax reform																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Significant adverse impact	4%	4%	4%	5%	4%	5%	1%	3%	6%	2%	4%	3%	4%	5%	2%	1%	2%	6%	0%
Adverse impact	12%	11%	10%	9%	12%	28%	7%	11%	15%	12%	11%	13%	11%	12%	13%	9%	13%	16%	6%
No impact	30%	30%	32%	25%	31%	29%	38%	30%	30%	35%	25%	30%	30%	33%	27%	31%	27%	33%	28%
Positive impact	36%	37%	36%	45%	29%	26%	36%	39%	30%	38%	38%	36%	41%	35%	40%	42%	37%	29%	55%
Significant positive impact	11%	12%	12%	13%	14%	6%	12%	11%	8%	8%	16%	12%	8%	10%	14%	13%	15%	8%	8%
Don't know	6%	6%	6%	3%	9%	6%	5%	6%	11%	5%	5%	6%	6%	5%	4%	5%	6%	8%	4%

  

Q25C. Please tell us whether each of the following has had a positive, negative or no impact on your business? - Increase in the state minimum wage																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Significant adverse impact	22%	22%	16%	25%	23%	12%	30%	27%	8%	15%	39%	20%	22%	29%	9%	27%	30%	18%	13%
Adverse impact	31%	31%	25%	33%	34%	26%	27%	34%	32%	33%	28%	32%	34%	27%	26%	36%	36%	29%	36%
No impact	40%	40%	53%	38%	36%	55%	40%	27%	48%	46%	27%	40%	41%	38%	59%	32%	23%	45%	49%
Positive impact	4%	5%	4%	2%	3%	2%	1%	8%	5%	4%	3%	4%	3%	4%	5%	2%	6%	4%	2%
Significant positive impact	1%	0%	0%	2%	0%	1%	0%	1%	3%	0%	0%	1%	1%	0%	1%	0%	1%	1%	0%
Don't know	2%	2%	1%	2%	3%	4%	2%	4%	4%	1%	3%	3%	0%	2%	0%	2%	3%	3%	0%

  

Q26. What steps, if any, have you taken in response to the increase in the minimum wage?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Reduced employees	23%	22%	18%	20%	27%	10%	30%	25%	12%	19%	35%	24%	24%	24%	8%	27%	33%	18%	21%
Limited hours	23%	24%	25%	16%	23%	16%	21%	27%	17%	18%	32%	22%	22%	29%	6%	12%	43%	24%	15%
Increased prices	23%	24%	22%	34%	17%	18%	18%	26%	21%	22%	26%	23%	24%	28%	18%	21%	30%	22%	21%
Other	9%	8%	6%	5%	11%	8%	16%	11%	4%	12%	9%	7%	14%	14%	5%	13%	8%	11%	9%
None	46%	50%	57%	48%	47%	46%	43%	44%	52%	49%	40%	49%	47%	44%	65%	48%	23%	48%	64%
Don't know	2%	1%	0%	0%	3%	8%	1%	1%	4%	1%	1%	1%	0%	2%	1%	1%	0%	2%	0%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Q27A. In 2019, New York adopted legislation to both reach zero carbon emissions in the electricity sector by 2040 and reduce greenhouse gases 85 percent from 1990 levels by 2050. What impact do you believe this legislation will have on: - The New York State economy																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Significant adverse impact	23%	24%	21%	28%	26%	11%	33%	24%	12%	17%	36%	25%	27%	13%	23%	30%	31%	15%	21%
Adverse impact	31%	31%	31%	25%	28%	28%	27%	37%	29%	28%	34%	29%	28%	38%	30%	33%	30%	30%	36%
No impact	17%	17%	18%	20%	15%	13%	15%	16%	19%	18%	13%	17%	16%	16%	12%	18%	16%	17%	23%
Positive impact	19%	18%	19%	19%	19%	31%	19%	14%	24%	25%	9%	18%	19%	24%	25%	11%	10%	25%	17%
Significant positive impact	3%	2%	2%	2%	2%	8%	1%	3%	5%	3%	1%	3%	1%	2%	2%	1%	5%	3%	0%
Don't know	8%	8%	9%	6%	9%	10%	5%	7%	11%	9%	6%	8%	8%	7%	8%	7%	7%	11%	4%
Q27B. In 2019, New York adopted legislation to both reach zero carbon emissions in the electricity sector by 2040 and reduce greenhouse gases 85 percent from 1990 levels by 2050. What impact do you believe this legislation will have on: - Your business																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Significant adverse impact	18%	18%	15%	19%	19%	5%	30%	21%	12%	14%	26%	19%	21%	11%	19%	22%	31%	11%	19%
Adverse impact	29%	30%	31%	27%	32%	23%	26%	28%	30%	25%	34%	31%	30%	24%	25%	38%	28%	25%	40%
No impact	35%	35%	33%	41%	32%	40%	26%	39%	36%	39%	28%	33%	29%	46%	26%	28%	24%	44%	30%
Positive impact	11%	9%	13%	8%	6%	18%	14%	8%	15%	14%	5%	10%	14%	12%	20%	6%	8%	12%	9%
Significant positive impact	2%	1%	1%	2%	3%	4%	1%	0%	3%	2%	1%	2%	1%	1%	1%	1%	2%	1%	0%
Don't know	6%	6%	7%	5%	7%	11%	4%	5%	5%	7%	6%	6%	5%	7%	8%	6%	6%	8%	2%
Q28. To what extent has your business invested in energy efficiency and/or carbon emission reduction measures over the past several years?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
A significant amount	15%	14%	14%	11%	14%	18%	17%	14%	16%	12%	18%	13%	18%	18%	7%	20%	21%	14%	17%
A modest amount	45%	46%	48%	52%	42%	34%	48%	44%	37%	48%	46%	42%	50%	50%	52%	53%	42%	42%	51%
None	36%	36%	35%	36%	35%	43%	30%	38%	38%	36%	33%	41%	28%	24%	38%	27%	29%	39%	28%
Don't know	4%	4%	3%	2%	8%	5%	5%	4%	9%	4%	3%	3%	4%	7%	2%	1%	8%	5%	4%
Q29A. Do you support or oppose the following proposals? - Instituting a State-level 'single payer' health insurance system																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Support	21%	18%	19%	17%	13%	31%	19%	22%	21%	23%	17%	22%	15%	22%	19%	16%	19%	27%	11%
Oppose	63%	67%	67%	70%	66%	49%	69%	67%	58%	57%	73%	62%	72%	61%	67%	70%	66%	54%	68%
Don't know	16%	15%	15%	13%	21%	20%	12%	11%	21%	19%	9%	16%	13%	17%	14%	14%	15%	18%	21%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%

Q29B. Do you support or oppose the following proposals? - Legalizing the recreational use of cannabis																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Support	33%	35%	41%	33%	24%	39%	25%	38%	37%	35%	30%	34%	32%	33%	31%	31%	27%	40%	34%
Oppose	55%	55%	50%	55%	67%	46%	65%	50%	51%	54%	59%	56%	54%	56%	58%	59%	63%	48%	51%
Don't know	12%	10%	9%	13%	9%	15%	10%	12%	12%	11%	12%	11%	14%	11%	11%	10%	10%	12%	15%
Q29C. Do you support or oppose the following proposals? - Expanding the definition of a public works contract and requiring payment of 'prevailing wages' on any construction work receiving any level of state or local economic development assistance.																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Support	16%	15%	16%	14%	12%	20%	12%	17%	21%	16%	13%	16%	15%	17%	26%	13%	8%	18%	13%
Oppose	67%	69%	69%	72%	69%	51%	74%	69%	56%	65%	75%	67%	71%	66%	67%	71%	69%	64%	74%
Don't know	17%	16%	15%	14%	19%	29%	14%	15%	24%	18%	12%	18%	14%	17%	7%	16%	23%	18%	13%
Q30. Do you think your company will be in business in New York ten years from today or not?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Yes	56%	59%	72%	52%	55%	61%	44%	51%	68%	62%	41%	50%	68%	68%	60%	42%	50%	62%	53%
No	17%	15%	7%	14%	22%	15%	27%	19%	6%	10%	32%	22%	10%	7%	10%	23%	27%	14%	21%
Don't know	27%	26%	21%	34%	23%	24%	28%	29%	26%	28%	27%	29%	22%	24%	31%	35%	23%	24%	26%
Q31. If you had it all to do all over again, considering all factors, would you locate your business in New York or someplace else?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
New York	32%	31%	39%	22%	27%	49%	23%	30%	45%	37%	18%	31%	27%	41%	33%	15%	35%	42%	26%
Someplace else	64%	66%	59%	75%	67%	41%	72%	70%	49%	57%	81%	65%	71%	54%	62%	81%	62%	53%	72%
Don't know	4%	3%	3%	3%	6%	10%	5%	0%	6%	6%	1%	4%	2%	6%	5%	4%	3%	4%	2%
Q32. How likely do you think it is that the U.S.economy will be in recession between now and the end of 2020?																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
Almost certain	3%	3%	1%	3%	3%	4%	1%	5%	1%	3%	4%	3%	1%	5%	2%	2%	7%	3%	2%
Very likely	10%	10%	11%	16%	9%	13%	5%	6%	7%	11%	11%	10%	17%	7%	13%	9%	7%	12%	4%
Somewhat likely	32%	34%	38%	30%	29%	33%	35%	35%	29%	34%	31%	31%	32%	38%	36%	26%	24%	36%	34%
Not very likely	40%	39%	40%	34%	40%	38%	44%	40%	42%	42%	38%	42%	34%	42%	35%	48%	45%	36%	40%
Not at all likely	13%	14%	10%	17%	17%	8%	15%	14%	20%	8%	16%	14%	16%	7%	14%	15%	16%	10%	21%
Don't know	1%	0%	0%	0%	1%	6%	0%	0%	2%	2%	0%	1%	0%	1%	0%	0%	0%	3%	0%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY

Siena College Research Institute  
 Sponsored by The Business Council of New York State  
 October 2019 - January 2020  
 667 Upstate NY CEOs, MOE +/- 3.8%

<b>Q36. Do you offer a pension or 401K to your employees?</b>																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
<b>Yes</b>	80%	84%	83%	84%	86%	56%	86%	82%	78%	81%	78%	73%	88%	93%	88%	87%	75%	78%	77%
<b>No</b>	18%	14%	14%	14%	12%	41%	11%	16%	21%	16%	19%	24%	8%	5%	10%	12%	22%	19%	23%
<b>Don't know</b>	2%	2%	3%	2%	2%	4%	2%	2%	2%	3%	3%	2%	4%	2%	2%	1%	2%	3%	0%
<b>Q37. What, if anything, do you do with regard to child care services for employees' children?</b>																			
	Region								Cluster			Company Size			Industry				
	Upstate 2019*	CR, CNY, FL, WNY*	Capital Region	Central NY	Finger Lakes	Westchester	S Tier/ Mohawk Vly	Western NY	High	Middle	Low	50 or less	51 to 100	More than 100	Eng & Constr	Manuf	Retail	Service	Wh & Dist
<b>Host/sponsor employee child care services</b>	3%	3%	6%	0%	2%	2%	0%	4%	5%	2%	2%	2%	2%	6%	3%	0%	5%	4%	2%
<b>Financially support employee child care services</b>	4%	4%	9%	0%	1%	5%	2%	5%	5%	5%	4%	3%	6%	8%	2%	2%	3%	7%	8%
<b>Help employees locate services</b>	16%	15%	18%	11%	12%	20%	17%	18%	12%	14%	20%	14%	20%	21%	15%	13%	20%	18%	15%
<b>None of the above</b>	72%	74%	70%	84%	79%	52%	77%	70%	72%	72%	71%	78%	70%	62%	73%	81%	71%	68%	75%
<b>Don't know</b>	4%	5%	4%	5%	5%	7%	2%	5%	3%	5%	4%	4%	5%	7%	5%	2%	2%	4%	2%

\* Upstate 2019: All Upstate Regions

CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY