

Siena College Research Institute  
Sponsored by The Business Council of New York State  
October 2019 - January 2020  
667 Upstate NY CEOs, MOE +/- 3.8%; 99 Finger Lakes CEOs, MOE +/- 9.8%

<b>Q1. Which of the following industry categories best describes the type of business your company is engaged in?</b>																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Engineering and Construction	13%	15%	10%	17%	14%	18%	10%	17%	19%	20%	18%	17%	16%	16%	18%	17%
Food and Beverage	7%	6%	10%	5%	8%	4%	5%	3%	3%	9%	5%	4%	5%	5%	3%	3%
Financial	6%	4%	4%	6%	5%	7%	6%	6%	6%	3%	7%	9%	3%	5%	7%	8%
Manufacturing	19%	19%	25%	20%	24%	18%	22%	19%	19%	18%	18%	18%	26%	24%	20%	21%
Retail	13%	14%	13%	13%	13%	13%	10%	10%	10%	11%	11%	11%	15%	12%	12%	12%
Service	34%	32%	29%	30%	26%	31%	32%	36%	37%	28%	32%	33%	21%	25%	22%	23%
Wholesale and Distribution	8%	9%	8%	9%	10%	9%	15%	8%	6%	11%	10%	9%	12%	11%	18%	15%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	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 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Considerably better	3%	3%	5%	4%	3%	5%	3%	4%	4%	0%	1%	2%	2%	2%	1%	4%
A little better	14%	14%	13%	23%	25%	23%	19%	23%	25%	22%	26%	28%	24%	24%	34%	32%
About the same	47%	49%	47%	46%	43%	47%	47%	47%	47%	45%	48%	49%	37%	44%	46%	44%
A little worse	26%	27%	21%	20%	23%	19%	24%	20%	19%	29%	21%	19%	26%	22%	15%	16%
Considerably worse	10%	8%	13%	6%	6%	6%	7%	5%	4%	4%	4%	3%	10%	8%	3%	4%

  

<b>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?</b>																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Considerably better	2%	1%	2%	3%	3%	3%	3%	5%	5%	5%	5%	5%	3%	3%	1%	5%
A little better	17%	18%	20%	24%	27%	23%	27%	29%	30%	25%	37%	40%	25%	27%	37%	37%
About the same	38%	39%	42%	43%	40%	44%	39%	36%	35%	41%	37%	35%	38%	40%	44%	39%
A little worse	34%	35%	25%	23%	23%	23%	23%	24%	24%	26%	19%	17%	25%	24%	13%	15%
Considerably worse	9%	6%	10%	7%	7%	6%	8%	6%	6%	3%	3%	2%	8%	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 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Considerably better	2%	2%	2%	4%	3%	5%	6%	3%	3%	1%	2%	2%	3%	3%	2%	4%
A little better	15%	15%	15%	21%	24%	20%	16%	18%	19%	14%	18%	18%	20%	21%	29%	24%
About the same	39%	42%	41%	42%	39%	43%	43%	45%	45%	48%	47%	47%	35%	39%	40%	42%
A little worse	33%	31%	32%	25%	27%	24%	26%	27%	27%	25%	27%	27%	32%	29%	24%	24%
Considerably worse	11%	10%	9%	7%	6%	8%	8%	7%	6%	11%	7%	6%	11%	8%	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%; 99 Finger Lakes CEOs, MOE +/- 9.8%

Q5. And looking forward from today through the next year, how would you describe your expectations for your industry here in New York?																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Considerably better	2%	1%	1%	5%	6%	4%	6%	5%	5%	5%	5%	5%	3%	3%	5%	5%
A little better	16%	16%	21%	22%	21%	22%	24%	24%	24%	22%	30%	33%	23%	24%	34%	30%
About the same	37%	38%	33%	41%	40%	41%	36%	35%	35%	32%	35%	35%	42%	41%	35%	36%
A little worse	33%	32%	33%	23%	24%	22%	22%	27%	28%	34%	24%	22%	24%	25%	21%	24%
Considerably worse	13%	12%	11%	10%	9%	10%	12%	8%	7%	7%	6%	5%	8%	7%	5%	5%

Q6. Now thinking specifically about your company, what are your expectations for revenue through the year 2020? Do you believe your revenue will...?																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Grow substantially	3%	2%	3%	4%	1%	5%	4%	4%	4%	3%	3%	2%	3%	3%	2%	4%
Grow moderately	38%	40%	35%	46%	42%	47%	41%	44%	45%	41%	48%	50%	40%	42%	46%	45%
Stay about the same	36%	37%	45%	35%	42%	32%	38%	35%	35%	35%	33%	32%	37%	36%	33%	33%
Decrease moderately	19%	16%	10%	13%	12%	14%	11%	13%	14%	14%	14%	14%	18%	17%	18%	16%
Decrease substantially	5%	5%	6%	3%	3%	2%	6%	3%	2%	6%	2%	1%	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 2020 do you expect your profits to...?																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Grow substantially	2%	1%	2%	2%	2%	2%	2%	3%	4%	0%	2%	2%	2%	2%	0%	3%
Grow moderately	32%	32%	35%	35%	30%	37%	35%	36%	37%	32%	41%	44%	29%	33%	36%	38%
Stay about the same	34%	36%	33%	37%	40%	36%	36%	35%	35%	39%	34%	32%	40%	36%	39%	35%
Decrease moderately	26%	24%	23%	20%	23%	18%	20%	20%	21%	23%	20%	19%	25%	25%	21%	22%
Decrease substantially	6%	6%	6%	5%	4%	6%	7%	4%	3%	6%	3%	2%	4%	4%	3%	3%
Don't know	0%	0%	0%	0%	0%	0%	1%	1%	1%	0%	0%	0%	0%	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 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Market/demand growth	38%	37%	39%	40%	39%	40%	38%	42%	43%	47%	48%	49%	36%	39%	46%	43%
Cost reduction	23%	26%	28%	21%	25%	20%	30%	25%	24%	23%	25%	25%	31%	31%	27%	29%
Price increase	17%	16%	11%	21%	20%	22%	14%	13%	13%	16%	13%	11%	11%	12%	14%	15%
New technology	8%	8%	9%	10%	11%	10%	13%	11%	10%	7%	9%	10%	12%	9%	4%	7%
Other	13%	12%	12%	7%	5%	8%	4%	8%	10%	3%	4%	4%	10%	7%	7%	6%
Don't know	2%	1%	0%	1%	0%	1%	1%	1%	1%	3%	1%	1%	1%	1%	2%	1%

\* 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%; 99 Finger Lakes CEOs, MOE +/- 9.8%

<b>Q9. Please indicate which of the following are major areas of concentration for your company now and through 2020.</b>																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Expansion of existing markets	55%	52%	52%	54%	52%	54%	56%	57%	58%	58%	53%	51%	50%	54%	59%	56%
Growth in existing products	50%	52%	48%	51%	48%	52%	63%	54%	52%	57%	58%	59%	49%	52%	51%	54%
Entry into new markets	26%	25%	27%	29%	27%	29%	28%	28%	28%	28%	32%	33%	31%	30%	31%	33%
New product lines	22%	23%	30%	25%	20%	27%	26%	24%	23%	27%	23%	23%	27%	27%	25%	25%
Acquisition of new businesses	12%	13%	9%	13%	11%	14%	13%	15%	15%	16%	15%	15%	13%	15%	16%	14%
Technology innovation	29%	31%	28%	31%	33%	30%	33%	34%	35%	29%	28%	28%	28%	27%	21%	26%
Construction of new locations	8%	8%	8%	10%	7%	11%	5%	8%	10%	7%	10%	10%	9%	9%	10%	10%
Internal restructuring	27%	28%	25%	28%	26%	28%	29%	28%	27%	28%	25%	24%	30%	28%	27%	25%
Expansion into export markets	3%	3%	2%	4%	3%	4%	8%	5%	4%	5%	4%	3%	NA	NA	NA	NA
Other	6%	5%	9%	6%	7%	5%	5%	5%	6%	2%	4%	4%	6%	0%	3%	3%
Don't know	3%	2%	1%	3%	4%	3%	0%	0%	0%	3%	2%	2%	1%	1%	3%	1%
<b>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?</b>																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Yes	51%	55%	52%	57%	58%	57%	54%	56%	57%	48%	51%	51%	54%	55%	56%	58%
No	30%	27%	27%	28%	25%	29%	24%	28%	29%	42%	36%	35%	33%	34%	32%	31%
Not sure	19%	18%	21%	15%	17%	14%	23%	16%	14%	9%	13%	14%	13%	11%	12%	11%
<b>Q11. Now thinking about the people that work for your company, between today and the end of 2020, do you plan to...?</b>																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Substantially increase your workforce	1%	1%	3%	1%	2%	1%	0%	2%	3%	0%	2%	2%	0%	1%	0%	2%
Moderately increase your workforce	29%	31%	27%	37%	27%	42%	29%	35%	37%	37%	37%	37%	28%	32%	34%	30%
Remain about the same	57%	57%	58%	53%	60%	50%	58%	53%	52%	53%	52%	52%	64%	57%	53%	59%
Decrease your workforce	12%	11%	12%	8%	10%	7%	12%	9%	8%	8%	8%	8%	7%	9%	12%	9%
Don't know	1%	0%	0%	0%	0%	0%	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%

\* 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%; 99 Finger Lakes CEOs, MOE +/- 9.8%

Q12. And thinking about other challenges that your company faces, which of the following are you concerned with?																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Existing U.S. competition	24%	23%	24%	25%	27%	24%	29%	24%	22%	26%	27%	28%	25%	25%	31%	29%
Governmental regulation	65%	64%	71%	64%	62%	65%	62%	61%	61%	71%	68%	68%	65%	68%	74%	69%
Taxation	58%	59%	61%	58%	60%	57%	65%	61%	60%	60%	57%	56%	67%	65%	70%	65%
Foreign competition	9%	8%	9%	9%	10%	8%	10%	10%	10%	9%	9%	9%	17%	11%	12%	12%
Energy costs	22%	20%	19%	24%	22%	24%	19%	18%	18%	27%	24%	23%	19%	19%	36%	30%
Risk management	22%	24%	17%	22%	23%	21%	25%	26%	26%	20%	22%	23%	24%	26%	25%	22%
Adverse economic conditions	44%	45%	44%	39%	38%	40%	47%	37%	35%	49%	42%	39%	54%	48%	48%	46%
Health care costs	66%	71%	71%	73%	71%	74%	79%	78%	78%	84%	79%	78%	83%	78%	78%	77%
Global political instability	12%	12%	13%	12%	9%	14%	14%	15%	16%	14%	12%	11%	15%	15%	16%	16%
Rising supplier costs	34%	34%	35%	40%	37%	41%	40%	32%	30%	34%	27%	25%	27%	25%	38%	35%
Human resources	45%	47%	39%	48%	47%	49%	35%	43%	46%	30%	36%	39%	31%	38%	33%	30%
Cash flow	29%	28%	27%	28%	27%	28%	25%	27%	28%	24%	28%	29%	26%	26%	31%	29%
Ability to obtain suitable financing	8%	8%	6%	7%	6%	7%	12%	10%	9%	9%	8%	8%	8%	8%	8%	8%
U.S. trade agreements	16%	17%	18%	19%	19%	18%	8%	9%	9%	14%	8%	6%	NA	NA	NA	NA
None of the above	1%	1%	1%	0%	0%	1%	2%	2%	2%	1%	1%	1%	1%	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 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*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Excellent	1%	1%	1%	1%	2%	1%	2%	1%	1%	1%	1%	1%	0%	1%	1%	1%
Good	5%	4%	3%	6%	2%	8%	7%	7%	8%	7%	8%	8%	4%	4%	5%	4%
Fair	25%	25%	21%	24%	27%	23%	25%	25%	26%	21%	29%	32%	24%	29%	31%	30%
Poor	66%	67%	71%	67%	68%	67%	64%	64%	63%	70%	61%	59%	70%	64%	63%	63%
Don't know	3%	3%	4%	1%	2%	1%	3%	3%	3%	1%	1%	1%	3%	2%	0%	2%

Q14. Of the following, what would you like to see the Governor and Legislature of New York focus on?																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Personal Income Tax Reform	50%	50%	48%	57%	56%	57%	60%	58%	58%	53%	55%	55%	57%	54%	NA	NA
Business Income Tax Reform	52%	52%	58%	57%	56%	57%	64%	63%	62%	60%	62%	62%	63%	63%	NA	NA
Estate Tax Reform	24%	23%	26%	30%	27%	30%	29%	29%	29%	30%	31%	32%	33%	34%	NA	NA
Sales Tax Reform	25%	25%	25%	29%	20%	32%	19%	24%	26%	23%	22%	22%	25%	25%	NA	NA
Infrastructure Development (roads, bridges, water, sewer)	42%	40%	34%	44%	40%	46%	48%	52%	53%	41%	43%	44%	40%	42%	44%	42%
Energy Infrastructure (power generation and transmission, natural gas)	24%	20%	17%	19%	16%	19%	21%	24%	26%	NA	NA	NA	NA	NA	NA	NA
Business Development Incentives	36%	33%	33%	27%	22%	30%	27%	31%	31%	39%	36%	35%	38%	36%	39%	38%
Ethics Reform	28%	31%	30%	46%	38%	50%	45%	43%	42%	53%	52%	52%	40%	42%	33%	40%
Spending Cuts	53%	57%	66%	59%	61%	58%	62%	53%	51%	61%	51%	49%	62%	58%	63%	64%
Other	17%	16%	15%	20%	21%	20%	13%	16%	17%	8%	13%	15%	13%	14%	18%	16%
Don't know	2%	2%	2%	1%	1%	1%	0%	0%	0%	0%	1%	1%	1%	0%	0%	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%; 99 Finger Lakes CEOs, MOE +/- 9.8%

<b>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:</b>																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Very confident	1%	1%	1%	1%	0%	1%	2%	1%	0%	1%	1%	1%	1%	1%	0%	1%
Somewhat confident	12%	11%	8%	11%	12%	11%	15%	15%	15%	13%	14%	14%	8%	12%	12%	12%
Not very confident	40%	39%	40%	42%	42%	42%	42%	48%	50%	46%	48%	50%	46%	50%	52%	47%
Not at all confident	45%	48%	51%	46%	46%	46%	40%	35%	33%	39%	36%	35%	46%	37%	35%	38%
Don't know	2%	1%	0%	1%	0%	1%	1%	2%	2%	0%	1%	0%	0%	1%	1%	1%
<b>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?</b>																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Excellent	12%	13%	16%	18%	25%	15%	7%	6%	5%	1%	1%	1%	0%	0%	0%	0%
Good	27%	29%	26%	33%	31%	34%	23%	22%	21%	7%	6%	6%	4%	2%	3%	4%
Fair	32%	30%	25%	25%	25%	25%	35%	35%	35%	22%	29%	31%	22%	22%	22%	21%
Poor	25%	25%	30%	22%	18%	24%	31%	33%	33%	64%	59%	59%	74%	73%	70%	72%
Don't know	4%	3%	2%	2%	2%	2%	5%	5%	5%	6%	5%	3%	0%	2%	4%	2%
<b>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:</b>																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Very confident	7%	7%	9%	8%	14%	6%	3%	3%	4%	6%	5%	5%	0%	0%	0%	1%
Somewhat confident	30%	30%	24%	38%	38%	38%	36%	36%	36%	18%	27%	30%	10%	7%	6%	8%
Not very confident	42%	43%	46%	38%	35%	39%	39%	42%	43%	55%	44%	41%	47%	50%	53%	45%
Not at all confident	19%	19%	20%	15%	13%	16%	22%	18%	17%	20%	22%	23%	43%	41%	39%	44%
Don't know	1%	1%	0%	0%	0%	0%	1%	1%	1%	2%	2%	1%	1%	1%	2%	2%
<b>Q30. Do you think your company will be in business in New York ten years from today or not?</b>																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016				
Yes	56%	59%	55%	66%	65%	67%	61%	65%	67%	63%	64%	66%				
No	17%	15%	22%	13%	14%	13%	16%	12%	11%	18%	10%	8%				
Don't know	27%	26%	23%	21%	21%	21%	23%	23%	22%	20%	25%	26%				
<b>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?</b>																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
New York	32%	31%	27%	33%	32%	34%	30%	41%	44%	34%	39%	41%	26%	29%	27%	28%
Someplace else	64%	66%	67%	64%	66%	64%	68%	56%	52%	61%	56%	56%	72%	67%	70%	69%
Don't know	4%	3%	6%	2%	2%	3%	2%	4%	4%	5%	5%	3%	3%	3%	3%	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%; 99 Finger Lakes CEOs, MOE +/- 9.8%

Q36. Do you offer a pension or 401K to your employees?																
	Upstate 2019*	CR, CNY, FL, WNY*	Finger Lakes	Upstate Total 2018	Rochester 2018	Other MSAs 2018	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016				
Yes	80%	84%	86%	85%	84%	86%	82%	83%	83%	83%	82%	84%				
No	18%	14%	12%	13%	16%	13%	16%	14%	13%	17%	15%	14%				
Don't know	2%	2%	2%	1%	0%	2%	2%	3%	4%	0%	3%	2%				

\* Upstate 2019: All Upstate Regions  
 CR, CNY, FL, WNY: Capital Region, Central NY, Finger Lakes, Western NY