	Buffalo	Unstate	Other MSAs	Buffalo	Linetata	Other MSAs	Buffalo	Unstate	Buffalo	Linetata
		Upstate			Upstate			Upstate		Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Engineering and Construction	13%	17%	19%	12%	18%	20%	11%	16%	12%	17%
Food and Beverage	6%	3%	3%	7%	5%	4%	9%	5%	6%	3%
Financial	3%	6%	8%	4%	7%	9%	3%	5%	6%	8%
Manufacturing	21%	19%	19%	24%	18%	16%	30%	24%	24%	21%
Retail	10%	10%	10%	12%	11%	10%	9%	12%	12%	12%
Service	40%	36%	34%	33%	32%	31%	24%	25%	23%	23%
Wholesale and Distribution	8%	8%	8%	9%	10%	10%	10%	11%	16%	15%
Other	0%	0%	0%	0%	0%	0%	3%	2%	NA	NA
Refused	0%	0%	0%	0%	0%	0%	0%	0%	1%	1%
the same, a little worse, or considerably wors	se?		[]	-	-	- 		-		
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	2014
Considerably better	3%	4%	4%	3%	1%	1%	4%	2%	9%	4%
A little better	22%	23%	24%	27%	26%	26%	22%	24%	30%	32%
		23/0	/*							
About the same	46%	47%	48%	47%	48%	48%	46%	44%	36%	44%
About the same					48% 21%	48% 21%	46% 20%	44% 22%	36% 19%	44% 16%
	46%	47%	48%	47%						
About the same A little worse Considerably worse	46% 24%	47% 20%	48% 18%	47% 21%	21%	21%	20%	22%	19%	16%
About the same A little worse Considerably worse Prefer not to answer	46% 24% 4% 0%	47% 20% 5% 0%	48% 18% 5% 0%	47% 21% 3% 0%	21% 4% 0%	21% 4% 0%	20% 8% 0%	22% 8% 0%	19% 6% 0%	16% 4%
About the same A little worse Considerably worse Prefer not to answer	46% 24% 4% 0%	47% 20% 5% 0%	48% 18% 5% 0%	47% 21% 3% 0%	21% 4% 0%	21% 4% 0%	20% 8% 0%	22% 8% 0%	19% 6% 0%	16% 4%
About the same A little worse Considerably worse Prefer not to answer	46% 24% 4% 0% tt year, that is, the er	47% 20% 5% 0% htire 2018 yea	48% 18% 5% 0% ar, how would	47% 21% 3% 0% you describe	21% 4% 0% your expecta	21% 4% 0% ations for the e	20% 8% 0% economy in I	22% 8% 0% New York State	19% 6% 0% e?	16% 4% 0%
About the same A little worse	46% 24% 4% 0% tt year, that is, the er Buffalo	47% 20% 5% 0% tire 2018 yea	48% 18% 5% 0% ar, how would Other MSAs	47% 21% 3% 0% you describe Buffalo	21% 4% 0% your expecta Upstate	21% 4% 0% ations for the e Other MSAs	20% 8% 0% economy in I Buffalo	22% 8% 0% New York State Upstate	19% 6% 0% e? Buffalo	16% 4% 0% Upstate
About the same A little worse Considerably worse Prefer not to answer Q3. Looking forward from today through nex	46% 24% 4% 0% tt year, that is, the er Buffalo 2017	47% 20% 5% 0% tire 2018 yea Upstate Total 2017	48% 18% 5% 0% ar, how would Other MSAs 2017	47% 21% 3% 0% you describe Buffalo 2016	21% 4% 0% your expecta Upstate Total 2016	21% 4% 0% ations for the e Other MSAs 2016	20% 8% 0% economy in I Buffalo 2015	22% 8% 0% New York Stat Upstate Total 2015	19% 6% 0% e? Buffalo 2014	16% 4% 0% Upstate 2014
About the same A little worse Considerably worse Prefer not to answer	46% 24% 4% 0% tt year, that is, the er Buffalo 2017 3%	47% 20% 5% 0% tire 2018 yea Upstate Total 2017 5%	48% 18% 5% 0% ar, how would Other MSAs 2017 5%	47% 21% 3% 0% you describe Buffalo 2016 6%	21% 4% 0% your expecta Upstate Total 2016 5%	21% 4% 0% ations for the e Other MSAs 2016 4%	20% 8% 0% economy in I Buffalo 2015 4%	22% 8% 0% New York State Upstate Total 2015 3%	19% 6% 0% e? Buffalo 2014 9%	16% 4% 0% Upstate 2014 5%
About the same A little worse Considerably worse Prefer not to answer Q3. Looking forward from today through nex Considerably better	46% 24% 4% 0% tt year, that is, the er Buffalo 2017	47% 20% 5% 0% tire 2018 yea Upstate Total 2017	48% 18% 5% 0% ar, how would Other MSAs 2017	47% 21% 3% 0% you describe Buffalo 2016	21% 4% 0% your expecta Upstate Total 2016	21% 4% 0% ations for the e Other MSAs 2016	20% 8% 0% economy in l Buffalo 2015 4% 26%	22% 8% 0% New York Stat Upstate Total 2015	19% 6% 0% e? Buffalo 2014	16% 4% 0% Upstate 2014 5% 37%
About the same A little worse Considerably worse Prefer not to answer Q3. Looking forward from today through nex	46% 24% 4% 0% tt year, that is, the er Buffalo 2017 3%	47% 20% 5% 0% tire 2018 yea Upstate Total 2017 5%	48% 18% 5% 0% ar, how would Other MSAs 2017 5%	47% 21% 3% 0% you describe Buffalo 2016 6%	21% 4% 0% your expecta Upstate Total 2016 5%	21% 4% 0% ations for the e Other MSAs 2016 4%	20% 8% 0% economy in I Buffalo 2015 4%	22% 8% 0% New York State Upstate Total 2015 3%	19% 6% 0% e? Buffalo 2014 9%	16% 4% 0% Upstate 2014 5%
About the same A little worse Considerably worse Prefer not to answer Q3. Looking forward from today through nex Considerably better A little better	46% 24% 4% 0% tt year, that is, the er Buffalo 2017 3% 28%	47% 20% 5% 0% tire 2018 yea Upstate Total 2017 5% 29%	48% 18% 5% 0% ar, how would Other MSAs 2017 5% 30%	47% 21% 3% 0% you describe Buffalo 2016 6% 39%	21% 4% 0% your expecta Upstate Total 2016 5% 37%	21% 4% 0% ations for the e Other MSAs 2016 4% 36%	20% 8% 0% economy in l Buffalo 2015 4% 26%	22% 8% 0% Wew York State Upstate Total 2015 3% 27%	19% 6% 0% e? Buffalo 2014 9% 34%	16% 4% 0% Upstate 2014 5% 37%
About the same A little worse Considerably worse Prefer not to answer Q3. Looking forward from today through nex Considerably better A little better About the same	46% 24% 4% 0% tt year, that is, the er Buffalo 2017 3% 28% 34%	47% 20% 5% 0% tire 2018 yea Upstate Total 2017 5% 29% 36%	48% 18% 5% 0% ar, how would Other MSAs 2017 5% 30% 37%	47% 21% 3% 0% you describe Buffalo 2016 6% 39% 34%	21% 4% 0% your expecta Upstate Total 2016 5% 37% 37%	21% 4% 0% ations for the e Other MSAs 2016 4% 36% 38%	20% 8% 0% economy in I Buffalo 2015 4% 26% 39%	22% 8% 0% New York State Upstate Total 2015 3% 27% 40%	19% 6% 0% e? Buffalo 2014 9% 34% 36%	16% 4% 0% Upstate 2014 5% 37% 39%

	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Considerably better	2%	3%	4%	3%	2%	2%	3%	3%	4%	4%
A little better	15%	18%	19%	20%	18%	16%	19%	21%	24%	24%
About the same	43%	45%	45%	42%	47%	49%	40%	39%	37%	42%
A little worse	32%	27%	24%	28%	27%	26%	29%	29%	25%	24%
Considerably worse	7%	7%	7%	8%	7%	7%	9%	8%	10%	6%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Q5. And looking forward from today t	hrough the next year, how	l would you de	scribe your ex	pectations for	or your indust	ry here in Nev	v York?			1
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Considerably better	2%	5%	6%	6%	5%	5%	4%	3%	6%	5%
A little better	19%	24%	26%	31%	30%	31%	22%	24%	27%	30%
About the same	37%	35%	35%	33%	35%	35%	37%	41%	31%	36%
A little worse	31%	27%	24%	23%	24%	25%	31%	25%	30%	24%
Considerably worse	10%	8%	7%	8%	6%	5%	6%	7%	5%	5%
Prefer not to answer	0%	1%	1%	0%	0%	0%	0%	0%	0%	0%
Q6. Now thinking specifically about yo	our company, what are you	r expectations	s for revenue t	hrough the y	/ear 2018? Do	you believe y	our revenue	will?		
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Grow substantially	3%	4%	5%	4%	3%	2%	3%	3%	6%	4%
Grow moderately	45%	44%	43%	43%	48%	50%	39%	42%	41%	45%
Stay about the same	28%	35%	39%	34%	33%	33%	38%	36%	32%	33%
Decrease moderately	20%	13%	10%	16%	14%	13%	18%	17%	19%	16%
Decrease substantially	3%	3%	3%	3%	2%	2%	3%	2%	1%	1%
	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%

Q7. Continuing to focus on your company, please the	nink quickly at	oout profitabi	lity. Between	today and th	e end of the o	alendar year 2	2018 do you	expect your p	rofits to?	
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
Cuesus este este este elle	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Grow substantially	5%	3%	3%	5%	2%	1%	1%	2%	5%	3%
Grow moderately	32%	36%	38%	38%	41%	43%	31%	33%	31%	38%
Stay about the same	34%	35%	36%	33%	34%	34%	34%	36%	36%	35%
Decrease moderately	24%	20%	18%	20%	20%	20%	26%	25%	25%	22%
Decrease substantially	4%	4%	4%	4%	3%	3%	5%	4%	3%	3%
Prefer not to answer	1%	1%	1%	0%	0%	0%	1%	1%	0%	0%
Q8. Businesses and the executives that direct them company's profitability over the next year?	strive to enha	ance profitabi	lity in many w	ays. Through	which of the	following stra	itegies do yo	u plan to MOS	ST enhance y	vour
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Market/demand growth	39%	42%	43%	50%	48%	48%	34%	39%	37%	43%
Cost reduction	31%	25%	22%	21%	25%	26%	33%	31%	33%	29%
Price increase	11%	13%	14%	16%	13%	11%	16%	12%	17%	15%
New technology	11%	11%	10%	8%	9%	10%	9%	9%	8%	7%
Other	7%	8%	9%	4%	4%	4%	7%	7%	4%	6%
Prefer not to answer	0%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Q9. Please indicate which of the following are majo	r areas of con	centration fo	r your compan	iy now and t	hrough 2018.					
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Expansion of existing markets	60%	57%	56%	49%	53%	54%	57%	54%	53%	56%
Growth in existing products	50%	54%	56%	56%	58%	59%	53%	52%	56%	54%
Entry into new markets	26%	28%	29%	35%	32%	31%	30%	30%	33%	33%
New product lines	24%	24%	24%	23%	23%	24%	30%	27%	24%	25%
Acquisition of new businesses	20%	15%	12%	16%	15%	15%	11%	15%	9%	14%
Technology innovation	36%	34%	34%	31%	28%	27%	25%	27%	21%	26%
Construction of new locations	9%	8%	8%	10%	10%	9%	10%	9%	7%	10%
Internal restructuring	29%	28%	27%	27%	25%	24%	24%	28%	24%	25%
Expansion into export markets	6%	5%	4%	4%	4%	4%	NA	NA	NA	NA
Other	8%	5%	4%	3%	4%	4%	5%	0%	4%	3%
Prefer not to answer	0%	0%	0%	1%	2%	3%	1%	1%	1%	1%

Q10. Do you intend to invest between today throug	gh 2018 in any	fixed assets	for your comp	any designed	to meet grov	wing demand,	reduce costs	s or enhance p	roductivity?	
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Yes	56%	56%	56%	52%	51%	50%	54%	55%	57%	58%
No	29%	28%	27%	36%	36%	37%	36%	34%	35%	31%
Not sure	15%	16%	17%	12%	13%	13%	10%	11%	8%	11%
Q11. Now thinking about the people that work for	vour company	. between to	dav and the er	nd of 2018. d	o vou plan to	?				
	<u>,</u>									
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Substantially increase your workforce	3%	2%	1%	3%	2%	1%	1%	1%	2%	2%
Moderately increase your workforce	36%	35%	34%	37%	37%	37%	32%	32%	29%	30%
Remain about the same	48%	53%	56%	50%	52%	53%	53%	57%	58%	59%
Decrease your workforce	12%	9%	8%	10%	8%	7%	14%	9%	11%	9%
Prefer not to answer	1%	1%	1%	0%	1%	2%	1%	1%	1%	1%
Q12. And thinking about other challenges that you	r company faco	es, which of t	he following a	re you conce	rned with?					
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Existing U.S. competition	22%	24%	25%	28%	27%	27%	19%	25%	28%	29%
Governmental regulation	68%	61%	58%	73%	68%	67%	72%	68%	69%	69%
Taxation	60%	61%	61%	58%	57%	57%	72%	65%	63%	65%
Foreign competition	15%	10%	8%	10%	9%	9%	12%	11%	11%	12%
Energy costs	14%	18%	20%	24%	24%	24%	18%	19%	25%	30%
Risk management	26%	26%	25%	24%	22%	22%	28%	26%	19%	22%
Adverse economic conditions	33%	37%	39%	43%	42%	41%	43%	48%	39%	46%
Health care costs	74%	78%	80%	78%	79%	80%	77%	78%	74%	77%
Global political instability	15%	15%	16%	11%	12%	12%	15%	15%	13%	16%
Rising supplier costs	31%	32%	33%	24%	27%	28%	28%	25%	36%	35%
Human resources	43%	43%	44%	41%	36%	35%	45%	38%	29%	30%
Cash flow	31%	27%	25%	24%	28%	29%	27%	26%	26%	29%
Ability to obtain suitable financing	11%	10%	9%	6%	8%	10%	7%	8%	10%	8%
U.S. trade agreements	11%	9%	8%	7%	8%	9%	NA	NA	NA	NA
Don't know/None of the Above	2%	2%	2%	0%	1%	1%	0%	0%	0%	0%

Q13. Thinking specifically about New York and	the relationship b	etween the st	tate governme	nt and busin	esses like you	urs, overall wo	uld you say	the governme	nt of the Stat	te of New
York is doing an excellent, good, fair or poor jo	-		-		-			0		
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Excellent	1%	1%	1%	2%	1%	1%	2%	1%	2%	1%
Good	6%	7%	8%	10%	8%	6%	6%	4%	6%	4%
Fair	22%	25%	27%	30%	29%	29%	26%	29%	26%	30%
Poor	67%	64%	62%	56%	61%	64%	62%	64%	63%	63%
Don't know	3%	3%	3%	2%	1%	1%	3%	2%	3%	2%
Q14. Of the following, what would you like to s	ee the Governor a	Ind Legislatur	e of New York	focus on?	I T					I T
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Personal Income Tax Reform	61%	58%	57%	55%	55%	54%	58%	54%	NA	NA
Business Income Tax Reform	65%	63%	62%	66%	62%	60%	68%	63%	NA	NA
Estate Tax Reform	34%	29%	28%	34%	31%	30%	34%	34%	NA	NA
Sales Tax Reform	30%	24%	22%	24%	22%	22%	32%	25%	NA	NA
Infrastructure Development	49%	52%	54%	45%	43%	43%	35%	42%	37%	42%
Energy Infrastructure	24%	24%	24%	NA	NA	NA	NA	NA	NA	NA
Business Development Incentives	28%	31%	32%	39%	36%	35%	32%	36%	34%	38%
Ethics Reform	39%	43%	45%	58%	52%	50%	41%	42%	42%	40%
Spending Cuts	58%	53%	51%	50%	51%	52%	65%	58%	72%	64%
Other	18%	16%	15%	14%	13%	13%	16%	14%	16%	16%
Prefer not to answer	0%	0%	0%	1%	1%	1%	0%	0%	0%	0%
Q15. How confident are you in the ability of the Are you?	e government of t	he State of Ne	ew York to imp	rove the bus	l siness climate	for businesse	s like yours	here in New Yo	ork over the	next year?
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Very confident	0%	1%	1%	2%	1%	1%	1%	1%	3%	1%
Somewhat confident	10%	15%	17%	16%	14%	13%	14%	12%	13%	12%
Not very confident	51%	48%	47%	44%	48%	51%	50%	50%	38%	47%
Not at all confident	38%	35%	33%	39%	36%	35%	33%	37%	44%	38%
Prefer not to answer	1%	2%	2%	0%	1%	0%	1%	1%	1%	1%

in which companies like yours will succ										
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Excellent	5%	6%	6%	1%	1%	1%	0%	0%	1%	0%
Good	24%	22%	20%	3%	6%	7%	0%	2%	3%	4%
Fair	34%	35%	35%	31%	29%	28%	17%	22%	21%	21%
Poor	31%	33%	34%	61%	59%	60%	78%	73%	74%	72%
Don't know	6%	5%	5%	5%	5%	4%	5%	2%	3%	2%
Q17. How confident are you in the abili	ty of the federal governm	ent to improv	e the business	climate for	businesses lik	e yours here i	n New York	over the next	year? Are yo	ju:
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Very confident	4%	3%	3%	4%	5%	5%	0%	0%	1%	1%
Somewhat confident	36%	36%	36%	34%	27%	25%	5%	7%	8%	8%
Not very confident	42%	42%	42%	35%	44%	47%	47%	50%	37%	45%
Not at all confident	17%	18%	18%	24%	22%	22%	47%	41%	51%	44%
Prefer not to answer	1%	1%	1%	2%	2%	1%	1%	1%	4%	2%
Consider each of the following national right track nor moving in the wrong dire Q18A. The cost of health care		l over the last y	/ear you think	the country	has been on t	he right track,	moved in th	he wrong direc	tion or is ne	ither on the
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
	16%	16%	16%							
Right track		1	64.04					1		1
Right track Wrong direction	60%	61%	61%			1				
	60% 16%	61% 18%	61% 18%							

Q18B. Our immigration system							
	Buffalo	Upstate	Other MSAs				
	2017	Total 2017	2017				
Right track	41%	38%	37%				
Wrong direction	45%	46%	46%				
Neither	9%	12%	13%				
Don't know	4%	4%	4%				
Q18C. The federal budget deficit			1				
	Buffalo	Upstate	Other MSAs				
	2017	Total 2017	2017				
Right track	13%	15%	16%				
Wrong direction	57%	59%	59%				
Neither	18%	18%	17%				
Don't know	11%	8%	7%				
Q18D. The taxes businesses pay							
	Buffalo	Upstate	Other MSAs				
	2017	Total 2017	2017				
Right track	43%	43%	43%				
Wrong direction	32%	32%	31%				
Neither	17%	18%	19%				
Don't know	7%	7%	7%				
Q18E. The health of our economy				•		-	•
	Buffalo	Upstate	Other MSAs				
	2017	Total 2017	2017				
Right track	53%	48%	46%				
Wrong direction	24%	27%	28%				
Neither	14%	18%	20%				
Don't know	9%	7%	6%				

Q18F. Safeguarding the environment										
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	25%	23%	21%							
Wrong direction	38%	39%	40%							
Neither	27%	28%	29%							
Don't know	10%	10%	10%							
And consider each of the following New York State i	ssues. Indicat	e whether ov	ver the last yea	ar you think t	he state has	been on the r	ight track, mo	oved in the w	rong direction	or is neithe
on the right track nor moving in the wrong direction										
Q19A. Infrastructure development										
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	24%	25%	26%							
Wrong direction	39%	37%	37%							
Neither	22%	24%	25%							
Don't know	15%	13%	12%							
Q19B. Ethics reform										
	r	T				Τ	1	Τ	T	
	Buffalo	Upstate	Other MSAs			1		1		
	2017	Total 2017	2017							
Right track	7%	9%	10%							
Wrong direction	61%	61%	62%							
Neither	20%	19%	18%							
Don't know	12%	10%	10%							
Q19C. State spending		1	1						1	
· · ·										
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	5%	9%	11%							
Wrong direction	77%	70%	67%							
Neither	13%	15%	15%							
Don't know	5%	6%	7%							

Q19D. The regulatory environment										
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	3%	8%	10%							
Wrong direction	72%	66%	63%							
Neither	15%	17%	18%							
Don't know	9%	8%	8%							
Q19E. Workers Compensation reform	-	-								
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	10%	13%	14%							
Wrong direction	60%	56%	54%							
Neither	15%	16%	17%							
Don't know	15%	15%	15%							
Q19F. Energy costs										
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	10%	14%	16%							
Wrong direction	38%	36%	35%							
Neither	34%	32%	32%							
Don't know	17%	18%	18%							
Q20A. How would you rate your local area on each	of the followi	ng - Suitable	workforce							
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Excellent	10%	9%	8%	13%	9%	7%	12%	12%	11%	12%
Good	35%	37%	38%	39%	39%	38%	38%	42%	53%	50%
Fair	37%	37%	37%	34%	40%	42%	33%	34%	23%	29%
Poor	17%	15%	14%	12%	11%	12%	16%	12%	11%	7%
Refused	1%	2%	3%	2%	2%	1%	1%	1%	2%	2%
Refused	170	270	570	2/0	270	1/0	<u>±/0</u>	1/0		

	al area on each of the followi	ng - Consume	r confidence		-					-
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Excellent	3%	4%	4%	2010	2%	2%	3%	2%	3%	2%
Good	49%	50%	50%	37%	41%	42%	42%	38%	26%	32%
Fair	43%	39%	38%	53%	41%	42%	42%	49%	55%	54%
Poor	6%	5%	5%	7%	9%	10%	9%	4 <i>9</i> %	14%	11%
Refused	1%	2%	2%	2%	3%	3%	1%	2%	3%	2%
Kelused	170	Ζ70	270	Ζ70	570	570	170	270	570	Ζ70
Q20C. How would you rate your loca	al area on each of the followi	ng - Transpor	tation infrastru	ucture	1					1
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Excellent	4%	4%	4%	4%	3%	2%	5%	4%	3%	4%
Good	41%	38%	37%	43%	39%	38%	47%	40%	39%	44%
Fair	43%	45%	45%	31%	37%	40%	35%	40%	42%	38%
Poor	10%	11%	12%	18%	19%	19%	11%	15%	13%	12%
Refused	1%	2%	2%	3%	3%	2%	2%	2%	3%	2%
Q20D. How would you rate your loc	al area on each of the followi	ng - Airline se	ervice					· · · · ·		
1										
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate		
	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015		
Excellent		-			-			-		
Excellent Good	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015		
Excellent Good Fair	2017 13%	Total 2017 8%	2017 5%	2016 16%	Total 2016 7%	2016 3%	2015 16%	Total 2015 8%		
Good	2017 13% 58%	Total 2017 8% 45%	2017 5% 39%	2016 16% 60%	Total 2016 7% 42%	2016 3% 36%	2015 16% 66%	Total 2015 8% 47%		
Good Fair	2017 13% 58% 22%	Total 2017 8% 45% 34%	2017 5% 39% 39%	2016 16% 60% 21%	Total 2016 7% 42% 35%	2016 3% 36% 42%	2015 16% 66% 16%	Total 2015 8% 47% 31%		
Good Fair Poor	2017 13% 58% 22% 4%	Total 2017 8% 45% 34% 11%	2017 5% 39% 39% 14%	2016 16% 60% 21% 2%	Total 2016 7% 42% 35% 13%	2016 3% 36% 42% 17%	2015 16% 66% 16% 2%	Total 2015 8% 47% 31% 14%		
Good Fair Poor	2017 13% 58% 22% 4% 3%	Total 2017 8% 45% 34% 11% 3%	2017 5% 39% 39% 14% 3%	2016 16% 60% 21% 2%	Total 2016 7% 42% 35% 13%	2016 3% 36% 42% 17%	2015 16% 66% 16% 2%	Total 2015 8% 47% 31% 14%		
Good Fair Poor Refused	2017 13% 58% 22% 4% 3%	Total 2017 8% 45% 34% 11% 3%	2017 5% 39% 39% 14% 3% service	2016 16% 60% 21% 2%	Total 2016 7% 42% 35% 13%	2016 3% 36% 42% 17% 3%	2015 16% 66% 16% 2%	Total 2015 8% 47% 31% 14%		
Good Fair Poor Refused	2017 13% 58% 22% 4% 3% al area on each of the followin Buffalo	Total 2017 8% 45% 34% 11% 3%	2017 5% 39% 39% 14% 3% service Other MSAs	2016 16% 60% 21% 2% 2% 2% Buffalo	Total 2016 7% 42% 35% 13%	2016 3% 36% 42% 17%	2015 16% 66% 16% 2%	Total 2015 8% 47% 31% 14%		
Good Fair Poor Refused	2017 13% 58% 22% 4% 3% al area on each of the followin	Total 2017 8% 45% 34% 11% 3% pg - Taxi/car s	2017 5% 39% 39% 14% 3% service	2016 16% 60% 21% 2% 2%	Total 2016 7% 42% 35% 13% 3%	2016 3% 36% 42% 17% 3%	2015 16% 66% 16% 2% 1%	Total 2015 8% 47% 31% 14% 1%		
Good Fair Poor Refused	2017 13% 58% 22% 4% 3% al area on each of the followin Buffalo	Total 2017 8% 45% 34% 11% 3% upstate	2017 5% 39% 39% 14% 3% service Other MSAs	2016 16% 60% 21% 2% 2% 2% Buffalo	Total 2016 7% 42% 35% 13% 3% Upstate	2016 3% 36% 42% 17% 3% 0ther MSAs	2015 16% 66% 16% 2% 1% Buffalo	Total 2015 8% 47% 31% 14% 1% Upstate		
Good Fair Poor Refused Q20E. How would you rate your loca	2017 13% 58% 22% 4% 3% al area on each of the followin Buffalo 2017	Total 2017 8% 45% 34% 11% 3% ng - Taxi/car s Upstate Total 2017	2017 5% 39% 39% 14% 3% service Other MSAs 2017	2016 16% 60% 21% 2% 2% Buffalo 2016	Total 2016 7% 42% 35% 13% 3% Upstate Total 2016	2016 3% 42% 17% 3% Other MSAs 2016	2015 16% 66% 16% 2% 1% Buffalo 2015	Total 2015 8% 47% 31% 14% 1% Upstate Total 2015		
Good Fair Poor Refused Q20E. How would you rate your loca Excellent	2017 13% 58% 22% 4% 3% al area on each of the followin Buffalo 2017 5%	Total 2017 8% 45% 34% 11% 3% Description Upstate Total 2017 3% 34% 38%	2017 5% 39% 14% 3% service Other MSAs 2017 3%	2016 16% 60% 21% 2% 2% Buffalo 2016 0%	Total 2016 7% 42% 35% 13% 3% Upstate Total 2016 1%	2016 3% 42% 17% 3% Other MSAs 2016 1%	2015 16% 66% 16% 2% 1% Buffalo 2015 5%	Total 2015 8% 47% 31% 14% 1% Upstate Total 2015 3%		
Good Fair Poor Refused Q20E. How would you rate your loca Excellent Good	2017 13% 58% 22% 4% 3% al area on each of the followin Buffalo 2017 5% 38%	Total 2017 8% 45% 34% 11% 3% bg - Taxi/car s Upstate Total 2017 3% 34%	2017 5% 39% 14% 3% service Other MSAs 2017 3% 33%	2016 16% 60% 21% 2% 2% Buffalo 2016 0% 20%	Total 2016 7% 42% 35% 13% 3% Upstate Total 2016 1% 15%	2016 3% 42% 17% 3% Other MSAs 2016 1% 14%	2015 16% 66% 16% 2% 1% Buffalo 2015 5% 39%	Total 2015 8% 47% 31% 14% 1% Upstate Total 2015 3% 27%		

	area on each of the following	ng - Ride shar	ing services							
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Excellent	8%	8%	8%							
Good	47%	48%	48%							
Fair	26%	29%	30%							
Poor	11%	10%	10%							
Refused	8%	5%	3%							
Q20G. How would you rate your local	l area on each of the followi	ng - Local gov	ernmental sup	pport for bus	iness					
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate		
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015		
Excellent	3%	3%	4%	2%	2%	2%	3%	2%		
Good	23%	26%	27%	23%	17%	16%	18%	17%		
Fair	50%	47%	45%	50%	48%	47%	48%	48%		
Poor	23%	22%	22%	24%	30%	34%	30%	31%		
	10/	20/	20/	3%	3%	2%	1%	2%		
Refused	1%	2%	3%	3%	3%	2%	170	270		
Refused	1%	2%	3%	3%	3%	2%	170	270		
Refused Q20H. How would you rate your local						2%	170	270		
			a where busin			2%	170	270		
						2% Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	area on each of the followi	ng - As an are	a where busin	nesses can su	cceed				Buffalo 2014	Upstate Total 2014
	area on each of the followi Buffalo	ng - As an are Upstate	a where busin Other MSAs	nesses can su Buffalo	cceed Upstate	Other MSAs	Buffalo	Upstate		-
Q20H. How would you rate your local	area on each of the followi Buffalo 2017	ng - As an are Upstate Total 2017	a where busin Other MSAs 2017	nesses can su Buffalo 2016	cceed Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	2014	Total 2014
Q20H. How would you rate your local	area on each of the followi Buffalo 2017 3%	ng - As an are Upstate Total 2017 3%	a where busin Other MSAs 2017 3%	Buffalo 2016 3%	cceed Upstate Total 2016 3%	Other MSAs 2016 2%	Buffalo 2015 3%	Upstate Total 2015 3%	2014 3%	Total 2014 2%
Q20H. How would you rate your local Excellent Good	l area on each of the followi Buffalo 2017 3% 23%	ng - As an are Upstate Total 2017 3% 29%	a where busin Other MSAs 2017 3% 32%	Buffalo 2016 3% 25%	cceed Upstate Total 2016 3% 25%	Other MSAs 2016 2% 26%	Buffalo 2015 3% 24%	Upstate Total 2015 3% 27%	2014 3% 21%	Total 2014 2% 25%
Q20H. How would you rate your local Excellent Good Fair	area on each of the followi Buffalo 2017 3% 23% 55%	ng - As an are Upstate Total 2017 3% 29% 48%	a where busin Other MSAs 2017 3% 32% 45%	nesses can su Buffalo 2016 3% 25% 52%	cceed Upstate Total 2016 3% 25% 51%	Other MSAs 2016 2% 26% 50%	Buffalo 2015 3% 24% 47%	Upstate Total 2015 3% 27% 49%	2014 3% 21% 45%	Total 2014 2% 25% 49%
Q20H. How would you rate your local Excellent Good Fair Poor	l area on each of the followi Buffalo 2017 3% 23% 55% 16%	ng - As an are Upstate Total 2017 3% 29% 48% 16%	a where busin Other MSAs 2017 3% 32% 45% 16%	Buffalo 2016 3% 25% 52% 16%	cceed Upstate Total 2016 3% 25% 51% 18%	Other MSAs 2016 2% 26% 50% 19%	Buffalo 2015 3% 24% 47% 23%	Upstate Total 2015 3% 27% 49% 19%	2014 3% 21% 45% 28%	Total 2014 2% 25% 49% 21%
Q20H. How would you rate your local Excellent Good Fair Poor	l area on each of the followi Buffalo 2017 3% 23% 55% 16% 2%	ng - As an are Upstate Total 2017 3% 29% 48% 16% 2%	a where busin Other MSAs 2017 3% 32% 45% 16% 3%	Buffalo 2016 3% 25% 52% 16% 4%	cceed Upstate Total 2016 3% 25% 51% 18% 3%	Other MSAs 2016 2% 26% 50% 19%	Buffalo 2015 3% 24% 47% 23%	Upstate Total 2015 3% 27% 49% 19%	2014 3% 21% 45% 28%	Total 2014 2% 25% 49% 21%
Q20H. How would you rate your local Excellent Good Fair Poor Refused	l area on each of the followi Buffalo 2017 3% 23% 55% 16% 2%	ng - As an are Upstate Total 2017 3% 29% 48% 16% 2%	a where busin Other MSAs 2017 3% 32% 45% 16% 3%	Buffalo 2016 3% 25% 52% 16% 4%	cceed Upstate Total 2016 3% 25% 51% 18% 3%	Other MSAs 2016 2% 26% 50% 19%	Buffalo 2015 3% 24% 47% 23%	Upstate Total 2015 3% 27% 49% 19%	2014 3% 21% 45% 28%	Total 2014 2% 25% 49% 21%
Q20H. How would you rate your local Excellent Good Fair Poor Refused	l area on each of the followi Buffalo 2017 3% 23% 55% 16% 2%	ng - As an are Upstate Total 2017 3% 29% 48% 16% 2%	a where busin Other MSAs 2017 3% 32% 45% 16% 3%	Buffalo 2016 3% 25% 52% 16% 4%	cceed Upstate Total 2016 3% 25% 51% 18% 3%	Other MSAs 2016 2% 26% 50% 19%	Buffalo 2015 3% 24% 47% 23%	Upstate Total 2015 3% 27% 49% 19%	2014 3% 21% 45% 28%	Total 2014 2% 25% 49% 21%
Q20H. How would you rate your local Excellent Good Fair Poor Refused	area on each of the followi Buffalo 2017 3% 23% 55% 16% 2% area on each of the followin	ng - As an are Upstate Total 2017 3% 29% 48% 16% 2% g - As a place	a where busin Other MSAs 2017 3% 32% 45% 16% 3% where consur	Buffalo 2016 3% 25% 52% 16% 4% mers want to	cceed Upstate Total 2016 3% 25% 51% 18% 3%	Other MSAs 2016 2% 26% 50% 19% 2%	Buffalo 2015 3% 24% 47% 23% 3%	Upstate Total 2015 3% 27% 49% 19% 3%	2014 3% 21% 45% 28% 3%	Total 2014 2% 25% 49% 21% 3%
Q20H. How would you rate your local Excellent Good Fair Poor Refused	l area on each of the followi Buffalo 2017 3% 23% 55% 16% 2% area on each of the followin Buffalo	ng - As an are Upstate Total 2017 3% 29% 48% 16% 2% g - As a place Upstate	a where busin Other MSAs 2017 3% 32% 45% 16% 3% where consur Other MSAs	Buffalo 2016 3% 25% 52% 16% 4% mers want to Buffalo	cceed Upstate Total 2016 3% 25% 51% 18% 3% 3% live Upstate	Other MSAs 2016 2% 26% 50% 19% 2% 2% Other MSAs	Buffalo 2015 3% 24% 47% 23% 3% Buffalo	Upstate Total 2015 3% 27% 49% 19% 3% 3% Upstate	2014 3% 21% 45% 28% 3% Buffalo	Total 2014 2% 25% 49% 21% 3% Upstate
Q20H. How would you rate your local Excellent Good Fair Poor Refused Q20I. How would you rate your local	l area on each of the followi Buffalo 2017 3% 23% 23% 55% 16% 2% area on each of the followin Buffalo 2017	ng - As an are Upstate Total 2017 3% 29% 48% 16% 2% g - As a place Upstate Total 2017	a where busin Other MSAs 2017 3% 32% 45% 16% 3% Where consur Other MSAs 2017	Buffalo 2016 3% 25% 52% 16% 4% mers want to Buffalo 2016	cceed Upstate Total 2016 3% 25% 51% 18% 3% Ilve Upstate Total 2016	Other MSAs 2016 2% 26% 50% 19% 2% 2% Other MSAs 2016	Buffalo 2015 3% 24% 47% 23% 3% Buffalo 2015	Upstate Total 2015 3% 27% 49% 19% 3% 3% Upstate Total 2015	2014 3% 21% 45% 28% 3% Buffalo 2014	Total 2014 2% 25% 49% 21% 3% Upstate Total 2014
Q20H. How would you rate your local Excellent Good Fair Poor Refused Q20I. How would you rate your local Excellent	l area on each of the followi Buffalo 2017 3% 23% 23% 55% 16% 2% area on each of the followin Buffalo 2017 area on each of the followin 10%	ng - As an are Upstate Total 2017 3% 29% 48% 16% 2% g - As a place Upstate Total 2017 14%	a where busin Other MSAs 2017 3% 32% 45% 16% 3% where consur Other MSAs 2017 15%	Buffalo 2016 3% 25% 52% 16% 4% mers want to Buffalo 2016 7%	Cceed Upstate Total 2016 3% 25% 51% 18% 3% 3% Ive Upstate Total 2016 10%	Other MSAs 2016 2% 26% 50% 19% 2% 2% 0ther MSAs 2016 11%	Buffalo 2015 3% 24% 47% 23% 3% 3% Buffalo 2015 11%	Upstate Total 2015 3% 27% 49% 19% 3% 3% Upstate Total 2015 10%	2014 3% 21% 45% 28% 3% Buffalo 2014 14%	Upstate Total 2014 2% 25% 49% 21% 3% Upstate Total 2014 12%
Q20H. How would you rate your local Excellent Good Fair Poor Refused Q20I. How would you rate your local Excellent Good	area on each of the followi Buffalo 2017 3% 23% 55% 16% 2% area on each of the followin Buffalo 2017 10% 44%	ng - As an are Upstate Total 2017 3% 29% 48% 16% 2% g - As a place Upstate Total 2017 14% 44%	a where busin Other MSAs 2017 3% 32% 45% 16% 3% where consur Other MSAs 2017 15% 44%	Buffalo 2016 3% 25% 52% 16% 4% mers want to Buffalo 2016 7% 49%	Cceed Upstate Total 2016 3% 25% 51% 18% 3% ive Upstate Total 2016 10% 45%	Other MSAs 2016 2% 26% 50% 19% 2% 2% 0ther MSAs 2016 11% 44%	Buffalo 2015 3% 24% 47% 23% 3% 3% Buffalo 2015 11% 47%	Upstate Total 2015 3% 27% 49% 19% 3% 3% Upstate Total 2015 10% 43%	2014 3% 21% 45% 28% 3% Buffalo 2014 14% 45%	Total 2014 2% 25% 49% 21% 3% Upstate Total 2014 12% 45%

	Buffalo 2017	Upstate Total 2017	Other MSAs 2017	Buffalo 2016	Upstate Total 2016	Other MSAs 2016	Buffalo 2015	Upstate Total 2015	Buffalo 2014	Upstate Total 2014
Education	8%	13%	15%	5%	9%	11%	8%	10%	11%	14%
Tourism	6%	8%	9%	8%	8%	8%	10%	8%	8%	6%
Technology	10%	25%	32%	4%	27%	36%	10%	31%	10%	30%
Transportation	2%	3%	3%	3%	3%	2%	1%	3%	1%	2%
Medical	47%	27%	18%	48%	28%	21%	44%	24%	48%	26%
Green and sustainable energy	3%	3%	3%	10%	5%	3%	13%	7%	5%	4%
Manufacturing	13%	11%	10%	14%	12%	11%	13%	15%	14%	16%
Other	5%	3%	2%	1%	1%	1%	0%	1%	2%	2%
None of the above	6%	7%	8%	6%	7%	7%	0%	0%	1%	1%
Thinking specifically about the workforce h Q22A. How technically skilled they are	nere in New York State,	, how significa	ant a problem	would you s	ay each of the	e following is v	vhen you thi	nk about our v	workforce:	
	Buffalo	Upstate	Other MSAs							1
	2017	Total 2017	2017							
	2017	10tal 2017	2017							
Very significant	41%	32%	2017							
Somewhat significant	41%	32%	29%							
Somewhat significant Not too significant	41% 34%	32% 40%	29% 43%							
Very significant Somewhat significant Not too significant Not at all significant Don't know/Refused	41% 34% 22%	32% 40% 22%	29% 43% 23%							
Somewhat significant Not too significant Not at all significant Don't know/Refused	41% 34% 22% 2%	32% 40% 22% 3%	29% 43% 23% 3%							
Somewhat significant Not too significant Not at all significant Don't know/Refused	41% 34% 22% 2% 1% Buffalo	32% 40% 22% 3% 2% Upstate	29% 43% 23% 3% 3% Other MSAs							
Somewhat significant Not too significant Not at all significant Don't know/Refused Q22B. Their work ethic	41% 34% 22% 2% 1% Buffalo 2017	32% 40% 22% 3% 2% Upstate Total 2017	29% 43% 23% 3% 3% Other MSAs 2017							
Somewhat significant Not too significant Not at all significant Don't know/Refused Q22B. Their work ethic Very significant	41% 34% 22% 2% 1% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5%	32% 40% 22% 3% 2% Upstate Total 2017 42%	29% 43% 23% 3% 3% Other MSAs 2017 41%							
Somewhat significant Not too significant Not at all significant Don't know/Refused Q22B. Their work ethic Very significant Somewhat significant	41% 34% 22% 2% 1% Buffalo 2017 44% 28%	32% 40% 22% 3% 2% Upstate Total 2017 42% 32%	29% 43% 23% 3% 3% 0ther MSAs 2017 41% 34%							
Somewhat significant Not too significant Not at all significant	41% 34% 22% 2% 1% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5%	32% 40% 22% 3% 2% Upstate Total 2017 42%	29% 43% 23% 3% 3% Other MSAs 2017 41%							

Q22C. Having realistic salary and benefit expectation	c									
Q220. Having realistic salary and benefit expectation	5									
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Very significant	19%	23%	2017							
Somewhat significant	50%	48%	47%							
Not too significant	28%	25%	24%							
	3%	23%	24%							
Not at all significant	3% 1%	2%	3%							
Don't know/Refused	1%	2%	3%							
022D Use an abuse of drugs on clock of										
Q22D. Use or abuse of drugs or alcohol						1	Г	1	1	
	Buffalo	Unctate	Other MSAs							
	2017	Upstate Total 2017	2017							
Venueignificent										
Very significant	39% 38%	29% 37%	25% 36%							
Somewhat significant						1		1		
Not too significant	17%	27%	31%							
Not at all significant	3%	4%	5%							
Don't know/Refused	2%	3%	3%							
Q22E. Their ability to express themselves both verba	lly and in wr	iting				1	1	1	1	
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Very significant	32%	29%	28%							
Somewhat significant	49%	46%	44%							
Not too significant	15%	20%	23%							
Not at all significant	3%	3%	3%				ļ			
Don't know/Refused	1%	2%	2%							
Q23. How prepared is your company for the Paid Far	nily Leave Ac	t that takes e	effect January	2018? Are yo	u:	•	-	•	•	
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Very prepared	24%	28%	29%							
Not very prepared	11%	10%	10%							
Somewhat prepared	46%	47%	47%							
Not at all prepared	17%	14%	13%							
Don't know/Refused	1%	1%	1%			I	I	I	I	

Q24. Which of the following, if any, have you done t	o prepare for	the Paid Fan	nily Leave Act'	s effect?				
	Albany	Upstate	Other MSAs					
	2017	Total 2017	2017					
Hired outside legal or consulting help	17%	19%	20%					
Modified your existing company leave policy	42%	44%	45%					
Updated or purchased a new compliance solution	8%	10%	10%					
Modified your existing workforce	6%	4%	3%					
Hired or set a plan to hire temporary employees	6%	6%	5%					
Nothing	40%	39%	39%					
Q25. How would you describe your company's empl	oyee schedul	ing practices	?					
	Buffalo	Upstate	Other MSAs					
	2017	Total 2017	2017					
Primarily pre-determined fixed schedules/fixed	63%	62%	62%					
shifts	05%	02%	0276					
Schedules vary, but are provided to employees in	16%	23%	26%					
advance	10%	2370	2076					
Employees make their own schedules based on	12%	10%	9%					
business need	1270	10%	970					
Employees are often called in with little or no	6%	2%	0%					
notice to cover unexpected business variations	078	278	078					
Other	3%	2%	1%					
Don't know/Refused	1%	1%	1%					
Q26. What does your company do to maintain 'equa	l pay' by race	e/ethnicity an	d gender with	in the organi	zation?			
	Buffalo	Upstate	Other MSAs					
	2017	Total 2017	2017					
Adhere to a formal 'equal pay' policy	37%	39%	39%					
Conduct 'equal pay' assessments	15%	13%	12%					
Hire outside consultants to assess 'equal pay'	3%	2%	2%					
Nothing in particular	43%	44%	45%					
Don't know/Refused	3%	2%	1%					

Q27. Of late, there has been a lot of discussion a	bout whatare ca	lled 'Disruptiv	ve Technologie	s', how fam	iliar are you	u with this conv	versation abou	It Disruptive T	echnologies?	
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Very familiar	15%	18%	19%							
Somewhat familiar	31%	31%	31%							
Not very familiar	27%	24%	23%							
Not at all familiar	25%	24%	24%							
Don't know/Refused	1%	2%	3%							
How innovative would you say your company is	in each of the fo	lowing areas	?							
Q28A. Use of the mobile Internet		<u> </u>								
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Very innovative	24%	25%	25%							
Somewhat innovative	46%	48%	49%							
Not very innovative	17%	18%	18%							
Not at all innovative	11%	6%	4%							
Don't know/Refused	1%	2%	3%							
Q28B. Production										
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017				_			
Very innovative	16%	16%	17%							
Somewhat innovative	50%	49%	49%				_			
Not very innovative	23%	23%	23%		ļ		_		ļ	
Not at all innovative	8%	6%	5%					4		
Don't know/Refused	3%	6%	7%							

Q28C. Marketing									
	Buffalo	Upstate	Other MSAs						
	2017	Total 2017	2017						
Very innovative	16%	18%	19%						
Somewhat innovative	46%	44%	43%						
Not very innovative	29%	31%	32%						
Not at all innovative	7%	5%	4%						
Don't know/Refused	1%	2%	2%						
	1/0	270	270						
Q28D. Client services									
	-								
	Buffalo	Upstate	Other MSAs						
	2017	Total 2017	2017						
Very innovative	27%	28%	29%	+ +					
Somewhat innovative	45%	45%	45%	+					
Not very innovative	21%	21%	21%						
Not at all innovative	5%	3%	2%						
Don't know/Refused	2%	2%	2%						
	270	270	270						
Q28E. Information processing			1						
	Buffalo	Upstate	Other MSAs						
	2017	Total 2017	2017						
Very innovative	20%	21%	22%						
Somewhat innovative	52%	51%	50%						
Not very innovative	25%	24%	24%						
Not at all innovative	2%	2%	2%						
Don't know/Refused	0%	2%	3%						
Q28F. Physical space utilization		•	<u>. </u>	L					1
	Buffalo	Upstate	Other MSAs						
	2017	Total 2017	2017						
Very innovative	27%	23%	21%						
Somewhat innovative	42%	45%	46%						
Not very innovative	26%	27%	28%						
Not at all innovative	4%	3%	3%						
Don't know/Refused	1%	2%	3%					1	

burfalo Duptate Other MSAs Total 2017 Other MSAs 2017 Other MSAs 2017 Very innovative 21% 22%	Q28G. Employee benefits									
very innovative 2017 Total 2017 2017			1	r – – – – – – – – – – – – – – – – – – –					1	
very innovative 2017 Total 2017 2017		Buffala	Unstato	Other MSAc						
Very innovative 21% 22% 22% Image: Constraint of the second secon			-							
Somewhat innovative 48% 50% 51% Image: Control of the second seco	Vensinnessetise	-		-						
Not very innovative 24% 23% 22% Image: Constraint of the constrai										
Not at all innovative 4% 3% 3% 1 1 1 Don't know/Refused 2% 3% 3% 1 <td></td>										
Don't know/Refused 2% 3% 3% Image: Control of the state o										
Q28H. Employment arrangements Image: Constraint of the second secon										
Buffalo 2017 Upstate Total 2017 Other MSAs 2017 Image: Constraint of the mission o	Don't know/Refused	2%	3%	3%						
Buffalo 2017 Upstate Total 2017 Other MSAs 2017 Image: Constraint of the mission o										
2017 Total 2017 2017	Q28H. Employment arrangements		1	1			1	1	1	
2017 Total 2017 2017		Duff 1	llast t							
Very innovative 15% 16% 17% Image: Constraint of the second of th										
Somewhat innovative 52% 50% 50% Image: Constraint of the second s										
Not very innovative 28% 27% 27% Image: Constraint of the second s										
Not at all innovative 3% 3% 3% 3% 3% 3% 3% 1										
Don't know/Refused 2% 3% 3% 1 1 1 Which of the following disruptive technologies do you currently use or do you see your company using in the near future? Upsate Image: Company using in the near future? Q29A. The Internet Buffalo Upsate Other MSAs Image: Company using in the near future? Currently use Buffalo 2017 Cotter MSAs Image: Company using in the near future? Currently use 87% 89% 90% Image: Company using in the near future? Future use 87% 89% 90% Image: Company using in the near future? Currently use 87% 89% 90% Image: Company using in the near future? No plans to use 4% 3% 3% Image: Company using in the near future? Q29B. Automation of knowledge (including artificial intelligence) Image: Company using in the near future? Image: Company using in the near future? Q29B. Automation of knowledge (including artificial intelligence) Image: Company using in the near future? Image: Company using in the near future? Q29B. Automation of knowledge (including artificial intelligence) Image: Company using in the near future? Image: Company using in the near future? Image: Company using in the near future? Currently use 107% 10% 10% Image: Company us										
Which of the following disruptive technologies do you currently use or do you see your company using in the near future? Q29A. The Internet Q29A. The Internet Buffalo Upstate Other MSAs 2017 Total 2017 2017 Image: Company using in the near future? Currently use 87% 89% 90% Image: Company using in the near future? Currently use 87% 89% 90% Image: Company using in the near future? Currently use 87% 89% 90% Image: Company using in the near future? Currently use 87% 89% 90% Image: Company using in the near future? No plans to use 3% 2% 2% Image: Company using in the near future? Q29B. Automation of knowledge (including artificial intelligence) Image: Company using in the near future? Image: Company using in the near future? Q29B. Automation of knowledge (including artificial intelligence) Image: Company using in the near future? Image: Company using in the near future? Q29B. Automation of knowledge (including artificial intelligence) Image: Company using in the near future? Image: Company using in the near future? Currently use 17% 14% 13% Image: Company using in the near f										
Q29A. The Internet Image: Constraint of the Internet o	Don't know/Refused	2%	3%	3%						
Q29A. The Internet Image: Constraint of the Internet o										
Buffalo Upstate Other MSAs Image: Constraint of the state of		ou currently u	ise or do you	see your com	pany using in	the near futu	ure?			
2017Total 2017201700000Currently use87%89%90%000000Future use3%2%2%00000000No plans to use4%3%3%000	Q29A. The Internet	-	T			-		T	T	
2017Total 2017201700000Currently use87%89%90%000000Future use3%2%2%00000000No plans to use4%3%3%000										
Currently use 87% 89% 90% Image: Constraint of the sector of the										
Future use 3% 2% 2% Image: Constraint of the state of the										
No plans to use4%3%3%IIIIIIDon't know/Refused5%5%5%5%II </td <td>Currently use</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Currently use									
Don't know/Refused5%5%5%5%666777777777777777 <th< td=""><td>Future use</td><td>3%</td><td>2%</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></th<>	Future use	3%	2%							
Q29B. Automation of knowledge (including artificial intelligence)Image: Constraint of knowledge (including artificial intelligence)Q29B. Automation of knowledge (including artificial intelligence)Image: Constraint of knowledge (including artificial intelligence)Buffalo 2017Upstate Total 2017Other MSAs 2017Image: Constraint of knowledge (including artificial intelligence)Currently use Future use17%14%13%Image: Constraint of knowledge (including artificial intelligence)Future use No plans to use50%54%56%Image: Constraint of knowledge (including artificial intelligence)	No plans to use									
BuffaloUpstateOther MSAsOther MSAsImage: Constraint of the stateImage: Con	Don't know/Refused	5%	5%	5%						
BuffaloUpstateOther MSAsOther MSAsImage: Constraint of the stateImage: Con										
2017 Total 2017 2017 2017 Image: Constant of the state of	Q29B. Automation of knowledge (including artificial	intelligence)								
2017 Total 2017 2017 2017 Image: Constant of the state of										
Currently use 17% 14% 13% Image: Constraint of the state		Buffalo	Upstate	Other MSAs						
Future use 29% 27% 25% Image: Constraint of the state of		2017	Total 2017	2017						
Future use 29% 27% 25% Image: Constraint of the state of	Currently use	17%	14%	13%						
	Future use	29%	27%	25%						
	No plans to use	50%	54%	56%						
	Don't know/Refused									
	-		1					1	1	

Q29C. The Internet of things (computing devices em	bedded in ev	ervday object	ts)						
	Buffalo	Upstate	Other MSAs						
	2017	Total 2017	2017						
Currently use	23%	25%	26%						
Future use	30%	32%	32%						
No plans to use	44%	39%	37%						
Don't know/Refused	3%	4%	5%						
Q29D. The cloud						•	•	•	
	Buffalo	Upstate	Other MSAs						
	2017	Total 2017	2017						
Currently use	61%	66%	69%						
Future use	18%	16%	15%						
No plans to use	17%	15%	13%						
Don't know/Refused	3%	3%	3%						
Q29E. Advanced robotics									
	Buffalo	Upstate	Other MSAs						
	2017	Total 2017	2017						
Currently use	3%	6%	7%						
Future use	19%	16%	15%						
No plans to use	73%	74%	74%						
Don't know/Refused	4%	5%	5%						
Q29F. Autonomous or near autonomous vehicles		-			-				
	Buffalo	Upstate	Other MSAs						
	2017	Total 2017	2017						
Currently use	1%	2%	2%						
Future use	13%	11%	10%						
No plans to use	81%	83%	84%						
Don't know/Refused	4%	4%	4%						

Q29G. 3-D Printing									
	Buffalo	Upstate	Other MSAs						
	2017	Total 2017	2017						
Currently use	7%	8%	9%						
Future use	20%	19%	18%		-				
	69%	69%	69%						
No plans to use									
Don't know/Refused	5%	4%	3%				1		
Q29H. Renewable energy		1					1	1	1
	Buffalo	11					1		
		Upstate	Other MSAs						
	2017	Total 2017	2017		-	-			
Currently use	13%	15%	15%			 			
Future use	36%	36%	36%						
No plans to use	45%	45%	45%						
Don't know/Refused	5%	4%	4%						
Q29I. Cyber security									
	Buffalo	Upstate	Other MSAs						
	2017	Total 2017	2017						
Currently use	57%	61%	62%						
Future use	25%	22%	20%						
No plans to use	15%	15%	14%						
Don't know/Refused	2%	3%	3%						
Q29J. Digital analytics									
	Buffalo	Upstate	Other MSAs						
	2017	Total 2017	2017						
Currently use	32%	32%	32%						
Future use	31%	31%	30%						
No plans to use	32%	33%	34%						
Don't know/Refused	4%	4%	4%						
						1			
									•

Q30. Do you tend to see these disruptive technolog	ies more as ar	n opportunity	for vour busi	ness or as a t	hreat to vour	business?				
					/					
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Opportunity	66%	73%	76%							
Threat	24%	19%	17%							
Don't know/Refused	10%	7%	6%							
Q31. Which of the following state funded ideas do y	/ ou support in	order to reci	ruit and retain	businesses t	hat use disru	ptive technolo	gies in Upsta	te New York?		
	Buffalo	Upstate	Other MSAs							
	2017	Total 2017	2017							
Tax incentives	43%	45%	46%							
Funding Industry/University Partnerships	32%	31%	30%							
Offering operational support and training for	259/	26%	270/							
entrepreneurs	35%	36%	37%							
Providing financial support including loans and	2.49/	20%	410/							
grants	34%	39%	41%							
None of the above	24%	24%	24%							
Q32. Do you think your company will be in business	s in New York	ten years froi	m today or no	t?						
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs				
	2017	Total 2017	2017	2016	Total 2016	2016				
Yes	56%	65%	70%	63%	64%	66%				
No	13%	12%	12%	8%	10%	11%				
Don't know	31%	23%	18%	29%	25%	23%				
Q33. If you had it all to do all over again, considerin	g all factors, v	vould you loc	ate your busir	ess in New Y	ork or somep	lace else?				
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Buffalo	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
New York	38%	41%	42%	41%	39%	39%	31%	29%	29%	28%
Someplace else	57%	56%	55%	55%	56%	58%	67%	67%	65%	69%
Prefer not to answer	5%	4%	3%	4%	5%	3%	2%	3%	6%	4%

Q34. Do you offer a pension or 401K to your employed	ees?							
	Buffalo	Upstate	Other MSAs	Buffalo	Upstate	Other MSAs		
	2017	Total 2017	2017	2016	Total 2016	2016		
Yes	79%	83%	85%	84%	82%	84%		
No	16%	14%	13%	14%	15%	15%		
Don't know	5%	3%	3%	2%	3%	1%		