Q1. Which of the following industry categories best	describes the	type of busir	ness your com	pany is enga	ged in?					
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Engineering and Construction	10%	17%	19%	20%	18%	17%	16%	16%	18%	17%
Food and Beverage	5%	3%	3%	9%	5%	4%	5%	5%	3%	3%
Financial	6%	6%	6%	3%	7%	9%	3%	5%	7%	8%
Manufacturing	22%	19%	19%	18%	18%	18%	26%	24%	20%	21%
Retail	10%	10%	10%	11%	11%	11%	15%	12%	12%	12%
Service	32%	36%	37%	28%	32%	33%	21%	25%	22%	23%
Wholesale and Distribution	15%	8%	6%	11%	10%	9%	12%	11%	18%	15%
Other	0%	0%	0%	0%	0%	0%	2%	2%	NA	NA
Refused	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%
Q2. As you think about the current business or econ	omic conditio	ns in New Yo	ork State as co	mpared to siv	c months ago	, would you sa	ay they are co	onsiderably be	etter, a little k	etter, about
the same, a little worse, or considerably worse?										
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	2014
Considerably better	3%	4%	4%	0%	1%	2%	2%	2%	1%	4%
A little better	19%	23%	25%	22%	26%	28%	24%	24%	34%	32%
About the same	47%	47%	47%	45%	48%	49%	37%	44%	46%	44%
A little worse	24%	20%	19%	29%	21%	19%	26%	22%	15%	16%
Considerably worse	7%	5%	4%	4%	4%	3%	10%	8%	3%	4%
Prefer not to answer	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%
Q3. Looking forward from today through next year,	that is, the en	tire 2018 yea	ar, how would	you describe	e your expecta	ations for the	economy in N	New York Stat	e?	
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	2014
Considerably better	3%	5%	5%	5%	5%	5%	3%	3%	1%	5%
A little better	27%	29%	30%	25%	37%	40%	25%	27%	37%	37%
About the same	39%	36%	35%	41%	37%	35%	38%	40%	44%	39%
A little worse	23%	24%	24%	26%	19%	17%	25%	24%	13%	15%
Considerably worse	8%	6%	6%	3%	3%	2%	8%	6%	4%	4%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
	0/0	0/0	0/0	070	070	070	070	0/0	1/0	

, how would yo	u describe the	e current busi	ness or econo	mic condition	ns in New Yor	k State as cor	npared with s	ix months ag	o?
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
6%	3%	3%	1%	2%	2%	3%	3%	2%	4%
16%	18%	19%	14%	18%	18%	20%	21%	29%	24%
43%	45%	45%	48%	47%	47%	35%	39%	40%	42%
26%	27%	27%	25%	27%	27%	32%	29%	24%	24%
8%	7%	6%	11%	7%	6%	11%	8%	4%	6%
1%	0%	0%	0%	0%	0%	0%	0%	1%	0%
next year, how	l would you de	escribe your ex	pectations fo	pr your indust	ry here in Ne	w York?			l
Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
6%	5%	5%	5%	5%	5%	3%	3%	5%	5%
24%	24%	24%	22%	30%	33%	23%	24%	34%	30%
36%	35%	35%	32%	35%	35%	42%	41%	35%	36%
22%	27%	28%	34%	24%	22%	24%	25%	21%	24%
12%	8%	7%	7%	6%	5%	8%	7%	5%	5%
1%	1%	1%	0%	0%	0%	0%	0%	0%	0%
y, what are you	r expectation	s for revenue	through the y	vear 2018? Do	you believe y	our revenue	will?		1
Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
4%	4%	4%	3%	3%	2%	3%	3%	2%	4%
41%	44%	45%	41%	48%	50%	40%	42%	46%	45%
38%	35%	35%	35%	33%	32%	37%	36%	33%	33%
11%	13%	14%	14%	14%	14%	18%	17%	18%	16%
6%	3%	2%	6%	2%	1%	3%	2%	1%	1%
	Rochester 2017 6% 16% 43% 26% 8% 1% mext year, how Prest year, how Rochester 2017 6% 24% 36% 22% 12% 1% what are your Rochester 2017 4% 41% 38% 11%	Rochester Upstate 2017 Total 2017 6% 3% 16% 18% 43% 45% 26% 27% 8% 7% 1% 0% enext year, how would you dee 26% 27% 8% 7% 1% 0% enext year, how would you dee 2017 Total 2017 6% 5% 24% 24% 36% 35% 22% 27% 1% 1% 1% 1% 1% 1% 1% 1% 1% 1% 1% 1% 4% 4% 41% 44% 38% 35% 11% 13%	Rochester Upstate Total 2017 Other MSAs 2017 6% 3% 3% 16% 18% 19% 43% 45% 45% 26% 27% 27% 8% 7% 6% 1% 0% 0% 1% 0% 0% 1% 0% 0% 1% 0% 0% 1% 0% 0% 1% 0% 0% 1% 0% 0% 1% 0% 0% 1% 0% 0% 1% 0% 0% 1% 1% 1% 2017 Total 2017 2017 6% 5% 5% 2017 Total 2017 2017 6% 35% 35% 22% 27% 28% 12% 8% 7% 1% 1% 1% 1% 1% 1%	Rochester Upstate Total 2017 Other MSAs 2017 Rochester 2016 6% 3% 3% 1% 16% 18% 19% 14% 43% 45% 45% 48% 26% 27% 27% 25% 8% 7% 6% 11% 1% 0% 0% 0% 1% 0% 0% 0% 1% 0% 0% 0% 1% 0% 0% 0% 1% 0% 0% 0% 1% 0% 0% 0% 1% 1% 0% 0% 1% 1% 2017 2016 6% 5% 5% 5% 24% 24% 24% 22% 36% 35% 35% 32% 22% 27% 28% 34% 12% 8% 7% 7% 1% 1% 1% 0% </td <td>Rochester Upstate Other MSAs Rochester Upstate 2017 Total 2017 2016 Total 2016 6% 3% 3% 1% 2% 16% 18% 19% 14% 18% 43% 45% 45% 48% 47% 26% 27% 27% 25% 27% 8% 7% 6% 11% 7% 1% 0% 0% 0% 0% 1% 0% 0% 0% 0% 1% 0% 0% 0% 0% 1% 0% 0% 0% 0% 1% 0% 0% 0% 0% 1% 0% 0% 0% 0% 1% 19 10% 10% 10% 1% 10% 2017 2016 Total 2016 6% 5% 5% 5% 5% 22% 27% 28%</td> <td>Rochester Upstate Other MSAs Rochester Upstate Other MSAs 2017 Total 2017 2017 2016 Total 2016 2016 6% 3% 3% 1% 2% 2% 16% 18% 19% 14% 18% 18% 43% 45% 45% 48% 47% 47% 26% 27% 27% 25% 27% 27% 26% 27% 27% 25% 27% 27% 8% 7% 6% 11% 7% 6% 1% 0% 0% 0% 0% 0% 1% 0% 0% 0% 0% 0% enext year, how would you describe your expectations for your industry here in Ne 10state Other MSAs Rochester Upstate Other MSAs 2017 Total 2017 2017 2016 Total 2016 2016 6% 5% 5% <</td> <td>Rochester Upstate Other MSAs Rochester Upstate Other MSAs Rochester Colf Total 2016 Other MSAs Rochester 2016</td> <td>Rochester 2017 Upstate Total 2017 Other MSAs 2016 Rochester Total 2016 Upstate 2016 Other MSAs 2016 Rochester 2015 Upstate Total 2015 6% 3% 3% 1% 2% 2% 3% 3% 16% 18% 19% 14% 18% 20% 2% 3% 3% 43% 45% 45% 48% 47% 47% 35% 39% 26% 27% 27% 25% 27% 27% 32% 29% 8% 7% 6% 11% 7% 6% 11% 8% 1% 0% 0% 0% 0% 0% 0% 0% next year, how would you describe your expectations for your industry here in New York? Upstate Total 2016 2015 Total 2015</td> <td>2017 Total 2017 2017 2016 Total 2016 2016 2015 Total 2015 2014 6% 3% 3% 1% 2% 2% 3% 3% 2% 16% 18% 19% 14% 18% 18% 20% 21% 29% 43% 45% 45% 48% 47% 47% 35% 39% 40% 26% 27% 27% 25% 27% 27% 32% 29% 24% 8% 7% 6% 11% 7% 6% 11% 8% 4% 1% 0% 0% 0% 0% 0% 0% 1% 1% next year, how would you describe your expectations for your industry here in New York? Total 2017 Cote Total 2017 Cote Total 2017 Cote Total 2016 Cote Total 2016 Cote Total 2015 Total 2015 Z014 6% 5% 5% 5% 5% 5% 3% 3% 23% 24%</td>	Rochester Upstate Other MSAs Rochester Upstate 2017 Total 2017 2016 Total 2016 6% 3% 3% 1% 2% 16% 18% 19% 14% 18% 43% 45% 45% 48% 47% 26% 27% 27% 25% 27% 8% 7% 6% 11% 7% 1% 0% 0% 0% 0% 1% 0% 0% 0% 0% 1% 0% 0% 0% 0% 1% 0% 0% 0% 0% 1% 0% 0% 0% 0% 1% 0% 0% 0% 0% 1% 19 10% 10% 10% 1% 10% 2017 2016 Total 2016 6% 5% 5% 5% 5% 22% 27% 28%	Rochester Upstate Other MSAs Rochester Upstate Other MSAs 2017 Total 2017 2017 2016 Total 2016 2016 6% 3% 3% 1% 2% 2% 16% 18% 19% 14% 18% 18% 43% 45% 45% 48% 47% 47% 26% 27% 27% 25% 27% 27% 26% 27% 27% 25% 27% 27% 8% 7% 6% 11% 7% 6% 1% 0% 0% 0% 0% 0% 1% 0% 0% 0% 0% 0% enext year, how would you describe your expectations for your industry here in Ne 10state Other MSAs Rochester Upstate Other MSAs 2017 Total 2017 2017 2016 Total 2016 2016 6% 5% 5% <	Rochester Upstate Other MSAs Rochester Upstate Other MSAs Rochester Colf Total 2016 Other MSAs Rochester 2016	Rochester 2017 Upstate Total 2017 Other MSAs 2016 Rochester Total 2016 Upstate 2016 Other MSAs 2016 Rochester 2015 Upstate Total 2015 6% 3% 3% 1% 2% 2% 3% 3% 16% 18% 19% 14% 18% 20% 2% 3% 3% 43% 45% 45% 48% 47% 47% 35% 39% 26% 27% 27% 25% 27% 27% 32% 29% 8% 7% 6% 11% 7% 6% 11% 8% 1% 0% 0% 0% 0% 0% 0% 0% next year, how would you describe your expectations for your industry here in New York? Upstate Total 2016 2015 Total 2015	2017 Total 2017 2017 2016 Total 2016 2016 2015 Total 2015 2014 6% 3% 3% 1% 2% 2% 3% 3% 2% 16% 18% 19% 14% 18% 18% 20% 21% 29% 43% 45% 45% 48% 47% 47% 35% 39% 40% 26% 27% 27% 25% 27% 27% 32% 29% 24% 8% 7% 6% 11% 7% 6% 11% 8% 4% 1% 0% 0% 0% 0% 0% 0% 1% 1% next year, how would you describe your expectations for your industry here in New York? Total 2017 Cote Total 2017 Cote Total 2017 Cote Total 2016 Cote Total 2016 Cote Total 2015 Total 2015 Z014 6% 5% 5% 5% 5% 5% 3% 3% 23% 24%

Q7. Continuing to focus on your company, please th	ink quickly ab	out profitabi	lity. Between	today and th	e end of the o	alendar year	2018 do you	expect your p	rofits to?	
	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%	3%	4%	0%	2%	2010	2015	2%	0%	3%
Grow moderately	35%	36%	37%	32%	41%	44%	2%	33%	36%	38%
	36%	35%	35%	32%	34%	32%	40%	36%	39%	35%
Stay about the same Decrease moderately	20%	20%	21%	23%	20%	19%	25%	25%	21%	22%
Decrease substantially	7%	4%	3%	6%	3%	2%	4%	4%	3%	3%
Prefer not to answer	1%	4%	1%	0%	5% 0%	2% 0%	4% 0%	4%	0%	5% 0%
Prefer hot to answer	1%	1%	1%	0%	0%	0%	0%	1%	0%	0%
Q8. Businesses and the executives that direct them company's profitability over the next year?	strive to enha	nce profitabi	lity in many w	ays. Through	which of the	following stra	ategies do yo	u plan to MO	ST enhance y	our
	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%	42%	43%	47%	48%	49%	36%	39%	46%	43%
Cost reduction	30%	25%	24%	23%	25%	25%	31%	31%	27%	29%
Price increase	14%	13%	13%	16%	13%	11%	11%	12%	14%	15%
New technology	13%	11%	10%	7%	9%	10%	12%	9%	4%	7%
Other	4%	8%	10%	3%	4%	4%	10%	7%	7%	6%
Prefer not to answer	1%	1%	1%	3%	1%	1%	1%	1%	2%	1%
Q9. Please indicate which of the following are majo	r areas of con	centration for	r your compar	ny now and th	nrough 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	56%	57%	58%	58%	53%	51%	50%	54%	59%	56%
Growth in existing products	63%	54%	52%	57%	58%	59%	49%	52%	51%	54%
Entry into new markets	28%	28%	28%	28%	32%	33%	31%	30%	31%	33%
New product lines	26%	24%	23%	27%	23%	23%	27%	27%	25%	25%
Acquisition of new businesses	13%	15%	15%	16%	15%	15%	13%	15%	16%	14%
Technology innovation	33%	34%	35%	29%	28%	28%	28%	27%	21%	26%
Construction of new locations	5%	8%	10%	7%	10%	10%	9%	9%	10%	10%
Internal restructuring	29%	28%	27%	28%	25%	24%	30%	28%	27%	25%
Expansion into export markets	8%	5%	4%	5%	4%	3%	NA	NA	NA	NA
Other	5%	5%	6%	2%	4%	4%	6%	0%	3%	3%
Prefer not to answer	0%	0%	0%	3%	2%	2%	1%	1%	3%	1%
	1	I	I						1	

Q10. Do you intend to invest between today thro	ugh 2018 in any	fixed assets	for your comp	any designed	to meet grow	wing demand,	reduce costs	or enhance p	productivity?	
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Yes	54%	56%	57%	48%	51%	51%	54%	55%	56%	58%
Νο	24%	28%	29%	42%	36%	35%	33%	34%	32%	31%
Not sure	23%	16%	14%	9%	13%	14%	13%	11%	12%	11%
Q11. Now thinking about the people that work fo	r your company	, between to	day and the e	nd of 2018, d	o you plan to	?		-		
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Substantially increase your workforce	0%	2%	3%	0%	2%	2%	0%	1%	0%	2%
Moderately increase your workforce	29%	35%	37%	37%	37%	37%	28%	32%	34%	30%
Remain about the same	58%	53%	52%	53%	52%	52%	64%	57%	53%	59%
Decrease your workforce	12%	9%	8%	8%	8%	8%	7%	9%	12%	9%
Prefer not to answer	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%
Q12. And thinking about other challenges that yo	ur company fac	l es, which of t	he following a	re you conce	rned with?					
Q12. And thinking about other challenges that yo	ur company fac	es, which of t	he following a	re you conce	rned with?					
Q12. And thinking about other challenges that yo	ur company fac Rochester	es, which of t Upstate	he following a Other MSAs	re you conce Rochester	rned with? Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
Q12. And thinking about other challenges that yo				-		Other MSAs 2016	Rochester 2015	Upstate Total 2015	Rochester 2014	Upstate Total 2014
Q12. And thinking about other challenges that yo Existing U.S. competition	Rochester	Upstate	Other MSAs	Rochester	Upstate					
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	2016	2015	Total 2015	2014	Total 2014
Existing U.S. competition	Rochester 2017 29%	Upstate Total 2017 24%	Other MSAs 2017 22%	Rochester 2016 26%	Upstate Total 2016 27%	2016 28%	2015 25%	Total 2015 25%	2014 31%	Total 2014 29%
Existing U.S. competition Governmental regulation	Rochester 2017 29% 62%	Upstate Total 2017 24% 61%	Other MSAs 2017 22% 61%	Rochester 2016 26% 71%	Upstate Total 2016 27% 68%	2016 28% 68%	2015 25% 65%	Total 2015 25% 68%	2014 31% 74%	Total 2014 29% 69%
Existing U.S. competition Governmental regulation Taxation	Rochester 2017 29% 62% 65%	Upstate Total 2017 24% 61% 61%	Other MSAs 2017 22% 61% 60%	Rochester 2016 26% 71% 60%	Upstate Total 2016 27% 68% 57%	2016 28% 68% 56%	2015 25% 65% 67%	Total 2015 25% 68% 65%	2014 31% 74% 70%	Total 2014 29% 69% 65%
Existing U.S. competition Governmental regulation Taxation Foreign competition	Rochester 2017 29% 62% 65% 10%	Upstate Total 2017 24% 61% 61% 10%	Other MSAs 2017 22% 61% 60% 10%	Rochester 2016 26% 71% 60% 9%	Upstate Total 2016 27% 68% 57% 9%	2016 28% 68% 56% 9%	2015 25% 65% 67% 17%	Total 2015 25% 68% 65% 11%	2014 31% 74% 70% 12%	Total 2014 29% 69% 65% 12%
Existing U.S. competition Governmental regulation Taxation Foreign competition Energy costs	Rochester 2017 29% 62% 65% 10% 19%	Upstate Total 2017 24% 61% 61% 10% 18%	Other MSAs 2017 22% 61% 60% 10% 18%	Rochester 2016 26% 71% 60% 9% 27%	Upstate Total 2016 27% 68% 57% 9% 24%	2016 28% 68% 56% 9% 23%	2015 25% 65% 67% 17% 19%	Total 2015 25% 68% 65% 11% 19%	2014 31% 74% 70% 12% 36%	Total 2014 29% 69% 65% 12% 30%
Existing U.S. competition Governmental regulation Taxation Foreign competition Energy costs Risk management	Rochester 2017 29% 62% 65% 10% 19% 25%	Upstate Total 2017 24% 61% 61% 10% 18% 26%	Other MSAs 2017 22% 61% 60% 10% 18% 26%	Rochester 2016 26% 71% 60% 9% 27% 20%	Upstate Total 2016 27% 68% 57% 9% 24% 22%	2016 28% 68% 56% 9% 23% 23%	2015 25% 65% 67% 17% 19% 24%	Total 2015 25% 68% 65% 11% 19% 26%	2014 31% 74% 70% 12% 36% 25%	Total 2014 29% 69% 65% 12% 30% 22%
Existing U.S. competition Governmental regulation Taxation Foreign competition Energy costs Risk management Adverse economic conditions Health care costs	Rochester 2017 29% 62% 65% 10% 19% 25% 47%	Upstate Total 2017 24% 61% 61% 10% 18% 26% 37%	Other MSAs 2017 22% 61% 60% 10% 18% 26% 35%	Rochester 2016 26% 71% 60% 9% 27% 20% 49%	Upstate Total 2016 27% 68% 57% 9% 24% 22% 42%	2016 28% 68% 56% 9% 23% 23% 39%	2015 25% 65% 67% 17% 19% 24% 54%	Total 2015 25% 68% 65% 11% 19% 26% 48%	2014 31% 74% 70% 12% 36% 25% 48%	Total 2014 29% 69% 65% 12% 30% 22% 46%
Existing U.S. competition Governmental regulation Taxation Foreign competition Energy costs Risk management Adverse economic conditions	Rochester 2017 29% 62% 65% 10% 19% 25% 47% 79%	Upstate Total 2017 24% 61% 61% 10% 18% 26% 37% 78%	Other MSAs 2017 22% 61% 60% 10% 18% 26% 35% 78%	Rochester 2016 26% 71% 60% 9% 27% 20% 49% 84%	Upstate Total 2016 27% 68% 57% 9% 24% 22% 42% 79%	2016 28% 68% 56% 9% 23% 23% 23% 39% 78%	2015 25% 65% 67% 17% 19% 24% 54% 83%	Total 2015 25% 68% 65% 11% 19% 26% 48% 78%	2014 31% 74% 70% 12% 36% 25% 48% 78%	Total 2014 29% 69% 65% 12% 30% 22% 46% 77%
Existing U.S. competition Governmental regulation Taxation Foreign competition Energy costs Risk management Adverse economic conditions Health care costs Global political instability	Rochester 2017 29% 62% 65% 10% 19% 25% 47% 79% 14%	Upstate Total 2017 24% 61% 61% 10% 18% 26% 37% 78% 15%	Other MSAs 2017 22% 61% 60% 10% 10% 18% 26% 35% 78% 16%	Rochester 2016 26% 71% 60% 9% 27% 20% 49% 84% 14%	Upstate Total 2016 27% 68% 57% 9% 24% 22% 42% 79% 12%	2016 28% 68% 56% 9% 23% 23% 23% 39% 78% 11%	2015 25% 65% 67% 17% 19% 24% 54% 83% 15%	Total 2015 25% 68% 65% 11% 19% 26% 48% 78% 15%	2014 31% 74% 70% 12% 36% 25% 48% 78% 16%	Total 2014 29% 69% 65% 12% 30% 22% 46% 77% 16%
Existing U.S. competition Governmental regulation Taxation Foreign competition Energy costs Risk management Adverse economic conditions Health care costs Global political instability Rising supplier costs	Rochester 2017 29% 62% 65% 10% 19% 25% 47% 79% 14% 40%	Upstate Total 2017 24% 61% 61% 10% 18% 26% 37% 78% 15% 32%	Other MSAs 2017 22% 61% 60% 10% 18% 26% 35% 78% 16% 30%	Rochester 2016 26% 71% 60% 9% 27% 20% 49% 84% 14% 34%	Upstate Total 2016 27% 68% 57% 9% 24% 22% 42% 79% 12% 27%	2016 28% 68% 56% 9% 23% 23% 23% 39% 78% 11% 25%	2015 25% 65% 67% 17% 19% 24% 54% 83% 15% 27%	Total 2015 25% 68% 65% 11% 19% 26% 48% 78% 15% 25%	2014 31% 74% 70% 12% 36% 25% 48% 78% 16% 38%	Total 2014 29% 69% 65% 12% 30% 22% 46% 77% 16% 35%
Existing U.S. competition Governmental regulation Taxation Foreign competition Energy costs Risk management Adverse economic conditions Health care costs Global political instability Rising supplier costs Human resources Cash flow	Rochester 2017 29% 62% 65% 10% 19% 25% 47% 79% 14% 40% 35% 25%	Upstate Total 2017 24% 61% 61% 10% 18% 26% 37% 26% 37% 78% 15% 32% 43% 27%	Other MSAs 2017 22% 61% 60% 10% 18% 26% 35% 78% 16% 30% 46% 28%	Rochester 2016 26% 71% 60% 9% 27% 20% 49% 84% 14% 34% 30% 24%	Upstate Total 2016 27% 68% 57% 9% 24% 22% 42% 79% 12% 27% 36% 28%	2016 28% 68% 56% 9% 23% 23% 23% 39% 78% 11% 25% 39% 29%	2015 25% 65% 67% 17% 19% 24% 54% 83% 15% 27% 31% 26%	Total 2015 25% 68% 65% 11% 19% 26% 48% 78% 15% 25% 38% 26%	2014 31% 74% 70% 12% 36% 25% 48% 78% 16% 38% 33% 31%	Total 2014 29% 69% 65% 12% 30% 22% 46% 77% 16% 35% 30% 29%
Existing U.S. competition Governmental regulation Taxation Foreign competition Energy costs Risk management Adverse economic conditions Health care costs Global political instability Rising supplier costs Human resources Cash flow Ability to obtain suitable financing	Rochester 2017 29% 62% 65% 10% 19% 25% 47% 79% 14% 40% 35% 25% 12%	Upstate Total 2017 24% 61% 61% 10% 18% 26% 37% 78% 15% 32% 43% 27% 10%	Other MSAs 2017 22% 61% 60% 10% 18% 26% 35% 78% 16% 30% 46% 28% 9%	Rochester 2016 26% 71% 60% 9% 27% 20% 49% 84% 14% 34% 30% 24% 9%	Upstate Total 2016 27% 68% 57% 9% 24% 22% 42% 79% 12% 27% 36% 28% 8%	2016 28% 68% 56% 9% 23% 23% 23% 39% 78% 11% 25% 39% 29% 8%	2015 25% 65% 67% 17% 19% 24% 54% 83% 15% 27% 31% 26% 8%	Total 2015 25% 68% 65% 11% 19% 26% 48% 78% 15% 25% 38%	2014 31% 74% 70% 12% 36% 25% 48% 78% 16% 38% 33% 31% 8%	Total 2014 29% 69% 65% 12% 30% 22% 46% 77% 16% 35% 30% 29% 8%
Existing U.S. competition Governmental regulation Taxation Foreign competition Energy costs Risk management Adverse economic conditions Health care costs Global political instability Rising supplier costs Human resources Cash flow	Rochester 2017 29% 62% 65% 10% 19% 25% 47% 79% 14% 40% 35% 25%	Upstate Total 2017 24% 61% 61% 10% 18% 26% 37% 26% 37% 78% 15% 32% 43% 27%	Other MSAs 2017 22% 61% 60% 10% 18% 26% 35% 78% 16% 30% 46% 28%	Rochester 2016 26% 71% 60% 9% 27% 20% 49% 84% 14% 34% 30% 24%	Upstate Total 2016 27% 68% 57% 9% 24% 22% 42% 79% 12% 27% 36% 28%	2016 28% 68% 56% 9% 23% 23% 23% 39% 78% 11% 25% 39% 29%	2015 25% 65% 67% 17% 19% 24% 54% 83% 15% 27% 31% 26%	Total 2015 25% 68% 65% 11% 19% 26% 48% 78% 15% 25% 38% 26%	2014 31% 74% 70% 12% 36% 25% 48% 78% 16% 38% 33% 31%	Total 2014 29% 69% 65% 12% 30% 22% 46% 77% 16% 35% 30% 29%

Q13. Thinking specifically about New York and the	relationshin h	atween the st	ate governme	nt and husin	esses like voi	urs overall wo	uld vou sav t	he governme	nt of the Stat	e of New
York is doing an excellent, good, fair or poor job of	-		-		-	-	ulu you say t	ane governine	int of the Stat	eonwew
				,						
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Excellent	2%	1%	1%	1%	1%	1%	0%	1%	1%	1%
Good	7%	7%	8%	7%	8%	8%	4%	4%	5%	4%
Fair	25%	25%	26%	21%	29%	32%	24%	29%	31%	30%
Poor	64%	64%	63%	70%	61%	59%	70%	64%	63%	63%
Don't know	3%	3%	3%	1%	1%	1%	3%	2%	0%	2%
Q14. Of the following, what would you like to see t	he Governor a	nd Legislatur	e of New York	focus on?						
Q14. Of the following, what would you like to see t										
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Personal Income Tax Reform	60%	58%	58%	53%	55%	55%	57%	54%	NA	NA
Business Income Tax Reform	64%	63%	62%	60%	62%	62%	63%	63%	NA	NA
Estate Tax Reform	29%	29%	29%	30%	31%	32%	33%	34%	NA	NA
Sales Tax Reform	19%	24%	26%	23%	22%	22%	25%	25%	NA	NA
Infrastructure Development	48%	52%	53%	41%	43%	44%	40%	42%	44%	42%
Energy Infrastructure	21%	24%	26%	NA	NA	NA	NA	NA	NA	NA
Business Development Incentives	27%	31%	31%	39%	36%	35%	38%	36%	39%	38%
Ethics Reform	45%	43%	42%	53%	52%	52%	40%	42%	33%	40%
Spending Cuts	62%	53%	51%	61%	51%	49%	62%	58%	63%	64%
Other	13%	16%	17%	8%	13%	15%	13%	14%	18%	16%
Prefer not to answer	0%	0%	0%	0%	1%	1%	1%	0%	0%	0%
Q15. How confident are you in the ability of the go Are you?	vernment of th	ne State of Ne	ew York to imp	prove the bus	siness climate	for businesse	es like yours h	nere in New Y	ork over the I	next year?
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Very confident	2%	1%	0%	1%	1%	1%	1%	1%	0%	1%
Somewhat confident	15%	15%	15%	13%	14%	14%	8%	12%	12%	12%
Not very confident	42%	48%	50%	46%	48%	50%	46%	50%	52%	47%
Not at all confident	40%	35%	33%	39%	36%	35%	46%	37%	35%	38%
Prefer not to answer	1%	2%	2%	0%	1%	0%	0%	1%	1%	1%

	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Excellent	7%	6%	5%	1%	1%	1%	0%	0%	0%	0%
Good	23%	22%	21%	7%	6%	6%	4%	2%	3%	4%
air	35%	35%	35%	22%	29%	31%	22%	22%	22%	21%
Poor	31%	33%	33%	64%	59%	59%	74%	73%	70%	72%
Don't know	5%	5%	5%	6%	5%	3%	0%	2%	4%	2%
Q17. How confident are you in the ability of t	the federal governme	ent to improv	e the busines	s climate for	businesses lik	e yours here i	in New York (over the next	year? Are yo	u:
	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
/ery confident	3%	3%	4%	6%	5%	5%	0%	0%	0%	1%
Somewhat confident	36%	36%	36%	18%	27%	30%	10%	7%	6%	8%
Not very confident	39%	42%	43%	55%	44%	41%	47%	50%	53%	45%
Not at all confident	22%	18%	17%	20%	22%	23%	43%	41%	39%	44%
Prefer not to answer	1%	1%	1%	2%	2%	1%	1%	1%	2%	2%
Consider each of the following national issue ight track nor moving in the wrong direction		over the last y	year you think	the country	has been on t	he right track	, moved in th	e wrong dire	ction or is nei	ther on the
Q18A. The cost of health care										
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	24%	16%	14%							
Wrong direction	56%	61%	62%							
Neither	17%	18%	18%							

Q18B. Our immigration system		1				1	1	•	1
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Right track	42%	38%	37%						
Wrong direction	44%	46%	46%						
Neither	10%	12%	12%						
Don't know	3%	4%	5%						
Q18C. The federal budget deficit									
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Right track	17%	15%	15%						
Wrong direction	62%	59%	58%						
Neither	15%	18%	18%						
Don't know	6%	8%	9%						
Q18D. The taxes businesses pay						•	•		•
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Right track	44%	43%	43%						
Wrong direction	29%	32%	32%						
Neither	21%	18%	18%						
Don't know	6%	7%	7%						
Q18E. The health of our economy	-	•	-		-	•	•		
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Right track	50%	48%	48%						
Wrong direction	24%	27%	28%						
Neither	22%	18%	17%						
Don't know	5%	7%	7%						
		1							
		1	1					1	1

Q18F. Safeguarding the environment										
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	23%	23%	22%							
Wrong direction	40%	39%	39%							
Neither	28%	28%	28%							
Don't know	9%	10%	10%							
	0,0	2070	2070							
And consider each of the following New York State	issues. Indicat	e whether o	ver the last vea	ar vou think t	he state has	been on the r	ight track. mo	ved in the w	rong direction	or is neither
on the right track nor moving in the wrong directio			· · · · · · · · · · · · · · · · · · ·	,			0		0	
Q19A. Infrastructure development										
	Rochester	Upstate	Other MSAs			1				
	2017	Total 2017	2017							
Right track	24%	25%	26%							
Wrong direction	42%	37%	36%							
Neither	21%	24%	26%							
Don't know	14%	13%	13%							
Q19B. Ethics reform										
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	9%	9%	9%							
Wrong direction	66%	61%	60%							
Neither	15%	19%	20%							
Don't know	9%	10%	11%							
Q19C. State spending										
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	7%	9%	10%							
Wrong direction	75%	70%	68%							
Neither	12%	15%	15%							
Don't know	6%	6%	6%							

Q19D. The regulatory environment										
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	8%	8%	8%							
Wrong direction	71%	66%	65%							
Neither	15%	17%	18%							
Don't know	6%	8%	9%							
Q19E. Workers Compensation reform		1				1				
	Rochester	Unstato	Other MSAs							
		Upstate								
Dielettus al	2017	Total 2017	2017							
Right track	13%	13%	13%							
Wrong direction	62%	56%	54%							
Neither	14%	16%	17%							
Don't know	10%	15%	16%							
Q19F. Energy costs										
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Right track	17%	14%	13%							
Wrong direction	38%	36%	36%							
Neither	27%	32%	34%							
Don't know	18%	18%	17%							
Q20A. How would you rate your local area on each o	of the followi	ng - Suitable	workforce		1					
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Excellent	8%	9%	10%	12%	9%	8%	15%	12%	16%	12%
Good	38%	37%	37%	27%	39%	41%	44%	42%	45%	50%
Fair	37%	37%	37%	44%	40%	39%	35%	34%	31%	29%
Poor	16%	15%	14%	14%	11%	11%	6%	12%	6%	7%
Refused	2%	2%	2%	2%	2%	1%	1%	1%	2%	2%

Q20B. How would you rate your lo	cal area on each of the followir	ng - Consume	r confidence							
	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	2%	4%	4%	1%	2%	2%	3%	2%	1%	2%
Good	47%	50%	51%	43%	41%	40%	35%	38%	37%	32%
Fair	43%	39%	38%	45%	45%	46%	51%	49%	52%	54%
Poor	7%	5%	5%	7%	9%	10%	10%	9%	8%	11%
Refused	1%	2%	2%	3%	3%	2%	1%	2%	2%	2%
Q20C. How would you rate your loo	cal area on each of the followir	ng - Transpor	tation infrastr	ucture						
	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	4%	4%	4%	3%	3%	2%	4%	4%	7%	4%
Good	38%	38%	38%	39%	39%	39%	44%	40%	56%	44%
Fair	47%	45%	44%	35%	37%	38%	37%	40%	29%	38%
Poor	10%	11%	12%	20%	19%	19%	12%	15%	7%	12%
Refused	1%	2%	2%	3%	3%	2%	3%	2%	1%	2%
Q20D. How would you rate your lo										
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015		
Excellent	5%	8%	8%	2%	7%	8%	4%	8%		
Good	41%	45%	46%	36%	42%	44%	46%	47%		
Fair	41%	34%	32%	37%	35%	36%	35%	31%		
Poor	13%	11%	10%	19%	13%	11%	15%	14%		
Refused	1%	3%	4%	6%	3%	1%	1%	1%		
Q20E. How would you rate your loo	cal area on each of the followir	ng - Taxi/car s	service							
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015		
Excellent	2%	3%	4%	1%	1%	1%	3%	3%		
Good	41%	34%	32%	12%	15%	16%	27%	27%		
Fair	36%	38%	38%	39%	35%	35%	44%	38%		
Poor	21%	21%	21%	38%	43%	44%	22%	26%		
Refused	1%	4%	5%	9%	6%					

IQZUE. HOW WOULD YOU FALL YOU' 10	cal area on each of the followir	ng - Ride shar	ing services							
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Excellent	9%	8%	8%							
Good	48%	48%	48%							
Fair	28%	29%	29%							
Poor	13%	10%	10%							
Refused	1%	5%	6%							
Q20G. How would you rate your lo	cal area on each of the followi	ng - Local gov	ernmental su	pport for bus	iness					
	Dechaster	11		Dealerstein	11		Deshartan	11		
	Rochester 2017	Upstate Total 2017	Other MSAs 2017	Rochester 2016	Upstate Total 2016	Other MSAs	Rochester 2015	Upstate		
- - - - - - - - - -						2016		Total 2015		
Excellent	1%	3%	4%	3%	2%	2%	3%	2%		
Good	26%	26%	26%	16%	17%	18%	18%	17%		
Fair	43%	47%	47%	46%	48%	48%	47%	48%		
	28%	22%	21%	30%	30%	31%	28%	31%		
Poor										
Refused	1%	2%	2%	4%	3%	1%	4%	2%		
Refused	1%	2%				1%	4%	2%		
	1%	2%				1%	4%	2%		
Refused	1%	2%				1% Other MSAs	4% Rochester	2% Upstate	Rochester	Upstate
Refused	cal area on each of the followi	2% ng - As an are	a where busir	nesses can su	cceed				Rochester 2014	Upstate Total 2014
Refused	cal area on each of the followi Rochester	2% ng - As an are Upstate	a where busir Other MSAs	nesses can su Rochester	cceed Upstate	Other MSAs	Rochester	Upstate		-
Refused Q20H. How would you rate your lo	cal area on each of the followi Rochester 2017	2% ng - As an are Upstate Total 2017	a where busir Other MSAs 2017	nesses can su Rochester 2016	cceed Upstate Total 2016	Other MSAs 2016	Rochester 2015	Upstate Total 2015	2014	Total 2014
Refused Q20H. How would you rate your lo Excellent	1% cal area on each of the following Rochester 2017 2%	2% ng - As an are Upstate Total 2017 3%	a where busir Other MSAs 2017 4%	Rochester 2016 5%	CCEED Upstate Total 2016 3%	Other MSAs 2016 2%	Rochester 2015 4%	Upstate Total 2015 3%	2014 3%	Total 2014 2%
Refused Q20H. How would you rate your lo Excellent Good	1% cal area on each of the following Rochester 2017 2% 27%	2% ng - As an are Upstate Total 2017 3% 29%	a where busir Other MSAs 2017 4% 30%	Rochester 2016 5% 16%	CCCEED Upstate Total 2016 3% 25%	Other MSAs 2016 2% 29%	Rochester 2015 4% 27%	Upstate Total 2015 3% 27%	2014 3% 24%	Total 2014 2% 25%
Refused Q20H. How would you rate your lo Excellent Good Fair	1% cal area on each of the following Rochester 2017 2% 27% 43%	2% ng - As an are Upstate Total 2017 3% 29% 48%	a where busir Other MSAs 2017 4% 30% 50%	nesses can su Rochester 2016 5% 16% 56%	cceed Upstate Total 2016 3% 25% 51%	Other MSAs 2016 2% 29% 50%	Rochester 2015 4% 27% 50%	Upstate Total 2015 3% 27% 49%	2014 3% 24% 52%	Total 2014 2% 25% 49%
Refused Q20H. How would you rate your lo Excellent Good Fair Poor	1% cal area on each of the followin Rochester 2017 2% 27% 43% 25%	2% ng - As an are Upstate Total 2017 3% 29% 48% 16%	a where busir Other MSAs 2017 4% 30% 50% 14%	Rochester 2016 5% 16% 56% 21%	cceed Upstate Total 2016 3% 25% 51% 18%	Other MSAs 2016 2% 29% 50% 18%	Rochester 2015 4% 27% 50% 14%	Upstate Total 2015 3% 27% 49% 19%	2014 3% 24% 52% 18%	Total 2014 2% 25% 49% 21%
Refused Q20H. How would you rate your lo Excellent Good Fair Poor	1% cal area on each of the following Rochester 2017 2% 27% 43% 25% 3%	2% ng - As an are Upstate Total 2017 3% 29% 48% 16% 2%	a where busir Other MSAs 2017 4% 30% 50% 14% 2%	Rochester 2016 5% 16% 56% 21% 2%	Cceed Upstate Total 2016 3% 25% 51% 18% 3%	Other MSAs 2016 2% 29% 50% 18%	Rochester 2015 4% 27% 50% 14%	Upstate Total 2015 3% 27% 49% 19%	2014 3% 24% 52% 18%	Total 2014 2% 25% 49% 21%
Refused Q20H. How would you rate your lo Excellent Good Fair Poor Refused	1% cal area on each of the following Rochester 2017 2% 27% 43% 25% 3%	2% ng - As an are Upstate Total 2017 3% 29% 48% 16% 2% g - As a place	a where busir Other MSAs 2017 4% 30% 50% 14% 2% where consu	Rochester 2016 5% 16% 56% 21% 2% mers want to	cceed Upstate Total 2016 3% 25% 51% 18% 3% Iive	Other MSAs 2016 2% 29% 50% 18% 3%	Rochester 2015 4% 27% 50% 14% 4%	Upstate Total 2015 3% 27% 49% 19% 3%	2014 3% 24% 52% 18%	Total 2014 2% 25% 49% 21% 3%
Refused Q20H. How would you rate your lo Excellent Good Fair Poor Refused	1% cal area on each of the followin Rochester 2017 2% 27% 43% 25% 3% cal area on each of the followin Rochester Rochester	2% ng - As an are Upstate Total 2017 3% 29% 48% 16% 2%	a where busir Other MSAs 2017 4% 30% 50% 14% 2%	Rochester 2016 5% 16% 56% 21% 2%	Cceed Upstate Total 2016 3% 25% 51% 18% 3%	Other MSAs 2016 2% 29% 50% 18% 3% 3% Other MSAs	Rochester 2015 4% 27% 50% 14%	Upstate Total 2015 3% 27% 49% 19%	2014 3% 24% 52% 18%	Total 2014 2% 25% 49% 21%
Refused Q20H. How would you rate your lo Excellent Good Fair Poor Refused	1% cal area on each of the followin Rochester 2017 2% 27% 43% 25% 3% cal area on each of the followin Rochester 2017 2% 27% 43% 25% 3% Contract Cont	2% ng - As an are Upstate Total 2017 3% 29% 48% 16% 2% g - As a place Upstate Total 2017	a where busir Other MSAs 2017 4% 30% 50% 14% 2% where consu	Rochester 2016 5% 16% 56% 21% 2% mers want to Rochester 2016	Ccceed Upstate Total 2016 3% 25% 51% 18% 3% Iive Upstate Total 2016	Other MSAs 2016 2% 29% 50% 18% 3% 3% Other MSAs 2016	Rochester 2015 4% 27% 50% 14% 4% 27% 50% 14% 4%	Upstate Total 2015 3% 27% 49% 19% 3% Upstate Total 2015	2014 3% 24% 52% 18% 3%	Total 2014 2% 25% 49% 21% 3% Upstate Total 2014
Refused Q20H. How would you rate your lo Excellent Good Fair Poor Refused	1% cal area on each of the followin Rochester 2017 2% 27% 43% 25% 3% cal area on each of the followin Rochester Rochester	2% ng - As an are Upstate Total 2017 3% 29% 48% 16% 2% g - As a place Upstate	a where busir Other MSAs 2017 4% 30% 50% 14% 2% where consur Other MSAs	Rochester 2016 5% 16% 56% 21% 2% mers want to Rochester	Cceed Upstate Total 2016 3% 25% 51% 18% 3% Iive Upstate Total 2016 10%	Other MSAs 2016 2% 29% 50% 18% 3% 3% Other MSAs	Rochester 2015 4% 27% 50% 14% 4% Rochester	Upstate Total 2015 3% 27% 49% 19% 3% 3%	2014 3% 24% 52% 18% 3% 8%	Total 2014 2% 25% 49% 21% 3% Upstate Total 2014 12%
Refused Q20H. How would you rate your lo Excellent Good Fair Poor Refused Q20I. How would you rate your loc	1% cal area on each of the followin Rochester 2017 2% 27% 43% 25% 3% cal area on each of the followin Rochester 2017 2% 27% 43% 25% 3% Contract Cont	2% ng - As an are Upstate Total 2017 3% 29% 48% 16% 2% g - As a place Upstate Total 2017	a where busir Other MSAs 2017 4% 30% 50% 14% 2% Where consul Other MSAs 2017	Rochester 2016 5% 16% 56% 21% 2% mers want to Rochester 2016	Ccceed Upstate Total 2016 3% 25% 51% 18% 3% Iive Upstate Total 2016	Other MSAs 2016 2% 29% 50% 18% 3% 3% Other MSAs 2016	Rochester 2015 4% 27% 50% 14% 4% 27% 50% 14% 4%	Upstate Total 2015 3% 27% 49% 19% 3% Upstate Total 2015	2014 3% 24% 52% 18% 3% 3% Rochester 2014	Total 2014 2% 25% 49% 21% 3% Upstate Total 2014
Refused Q20H. How would you rate your lo Excellent Good Fair Poor Refused Q20I. How would you rate your loo Excellent	1% cal area on each of the followin Rochester 2017 2% 27% 43% 25% 3% cal area on each of the followin Rochester 2017 14% 45% 34%	2% ng - As an are Upstate Total 2017 3% 29% 48% 16% 2% g - As a place Upstate Total 2017 14% 44% 35%	a where busir Other MSAs 2017 4% 30% 50% 14% 2% Where consur Other MSAs 2017 14% 43% 35%	Rochester 2016 5% 16% 56% 21% 2% 2% mers want to Rochester 2016 11% 38% 36%	Cceed Upstate Total 2016 3% 25% 51% 18% 3% 3% live Upstate Total 2016 10% 45% 34%	Other MSAs 2016 2% 29% 50% 18% 3% 3% Other MSAs 2016 10% 47% 34%	Rochester 2015 4% 27% 50% 14% 4% 4% 4% Rochester 2015 12% 38% 36%	Upstate Total 2015 3% 27% 49% 19% 3% 3% Upstate Total 2015 10% 43% 33%	2014 3% 24% 52% 18% 3% Rochester 2014 16% 46% 22%	Total 2014 2% 25% 49% 21% 3% Upstate Total 2014 12% 45% 30%
Refused Q20H. How would you rate your lo Excellent Good Fair Poor Refused Q20I. How would you rate your loc Excellent Good	1% cal area on each of the followin Rochester 2017 2% 27% 43% 25% 3% Colspan="2">Colspan="2" Colspan="2">Colspan="2">Colspan="2" Colspan="2">Colspan="2" Colspan="2" Colspan="2"	2% ng - As an are Upstate Total 2017 3% 29% 48% 16% 2% 2% g - As a place Upstate Total 2017 14% 44%	a where busir Other MSAs 2017 4% 30% 50% 14% 2% where consur 0ther MSAs 2017 14% 43%	Rochester 2016 5% 16% 56% 21% 2% 2% mers want to Rochester 2016 11% 38%	Cceed Upstate Total 2016 3% 25% 51% 18% 3% Iive Upstate Total 2016 10% 45%	Other MSAs 2016 2% 29% 50% 18% 3% 3% Other MSAs 2016 10% 47%	Rochester 2015 4% 27% 50% 14% 4% 4% Rochester 2015 12% 38%	Upstate Total 2015 3% 27% 49% 19% 3% 3% Upstate Total 2015 10% 43%	2014 3% 24% 52% 18% 3% Rochester 2014 16% 46%	Upstate Total 2014 2% 25% 49% 21% 3% Upstate Total 2014 12% 45%

	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
Education	12%	13%	13%	8%	9%	10%	10%	10%	15%	14%
Tourism	13%	8%	6%	10%	9% 8%	8%	9%	8%	8%	6%
Technology	20%	25%	27%	26%	27%	28%	31%	31%	21%	30%
Transportation	0%	3%	4%	0%	3%	3%	1%	3%	1%	2%
Medical	34%	27%	25%	31%	28%	27%	25%	24%	25%	26%
Green and sustainable energy	4%	3%	3%	2%	5%	5%	6%	7%	5%	4%
••	8%	11%	12%	14%	12%	11%	17%	15%	19%	4%
Manufacturing Other	1%	3%	3%	0%	12%	11%	2%	15%	4%	2%
None of the above	8%	3% 7%	3% 7%	8%	1% 7%	1% 6%	2% 0%	0%	4%	2% 1%
	8%	770	7%	8%	770	0%	0%	0%	1%	1%
Thinking specifically about the workforce	have in New York State	hour signifier	ant a nuchlaus			fallowing is a				
<u> </u>	nere in New York State,	now significa	ant a problem	would you sa	ay each of the	e tollowing is v	when you thi	nk about our	worktorce:	
Q22A. How technically skilled they are					1				1	
	Desheeter	llustata								
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
	220/	32%	32%							
	33%									
Somewhat significant	39%	40%	41%							
Somewhat significant Not too significant	39% 23%	40% 22%	41% 22%							
Very significant Somewhat significant Not too significant Not at all significant	39% 23% 3%	40% 22% 3%	41% 22% 3%							
Somewhat significant Not too significant	39% 23%	40% 22%	41% 22%							
Somewhat significant Not too significant Not at all significant Don't know/Refused	39% 23% 3%	40% 22% 3%	41% 22% 3%							
Somewhat significant Not too significant Not at all significant	39% 23% 3%	40% 22% 3%	41% 22% 3%							
Somewhat significant Not too significant Not at all significant Don't know/Refused	39% 23% 3%	40% 22% 3% 2%	41% 22% 3% 2%							
Somewhat significant Not too significant Not at all significant Don't know/Refused	39% 23% 3%	40% 22% 3%	41% 22% 3%							
Somewhat significant Not too significant Not at all significant Don't know/Refused	39% 23% 3% 3%	40% 22% 3% 2%	41% 22% 3% 2%							
Somewhat significant Not too significant Not at all significant Don't know/Refused Q22B. Their work ethic	39% 23% 3% 3% 	40% 22% 3% 2% Upstate	41% 22% 3% 2% Other MSAs							
Somewhat significant Not too significant Not at all significant Don't know/Refused Q22B. Their work ethic Very significant	39% 23% 3% 3% 	40% 22% 3% 2% Upstate Total 2017	41% 22% 3% 2% Other MSAs 2017							
Somewhat significant Not too significant Not at all significant Don't know/Refused Q22B. Their work ethic Very significant Somewhat significant	39% 23% 3% 3% 8% 8% 8% 8% 8% 8% 8% 8% 8% 8% 8% 8% 8%	40% 22% 3% 2% Upstate Total 2017 42%	41% 22% 3% 2% Other MSAs 2017 42%							
Somewhat significant Not too significant Not at all significant Don't know/Refused	39% 23% 3% 3% Rochester 2017 42% 35%	40% 22% 3% 2% Upstate Total 2017 42% 32%	41% 22% 3% 2% Other MSAs 2017 42% 32%							

O220 Having realistic colony and han of the surgestation									
Q22C. Having realistic salary and benefit expectatio	ns	1						1	
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017			 -			
Very significant	27%	23%	21%						
Somewhat significant	49%	48%	48%						
Not too significant	22%	25%	26%						
Not at all significant	0%	2%	3%						
Don't know/Refused	2%	2%	2%						
Q22D. Use or abuse of drugs or alcohol	•					•	•		-
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Very significant	29%	29%	29%						
Somewhat significant	35%	37%	37%						
Not too significant	29%	27%	26%						
Not at all significant	4%	4%	4%						
Don't know/Refused	3%	3%	3%						
Q22E. Their ability to express themselves both verb	ally and in wr	iting							
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Very significant	32%	29%	29%						
Somewhat significant	41%	46%	47%						
Not too significant	23%	20%	19%						
Not at all significant	3%	3%	3%						
Don't know/Refused	2%	2%	2%						
Q23. How prepared is your company for the Paid Fa	mily Leave Ac	t that takes e	effect January	2018? Are yo	u:				
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Very prepared	28%	28%	28%						
Not very prepared	10%	10%	10%			1			
Somewhat prepared	49%	47%	46%						
Not at all prepared	11%	14%	15%						

024 Which of the following if any have you done t	o proporo for	the Daid Far		c offoct2						
Q24. Which of the following, if any, have you done t	o prepare for	the Pald Fair	illy Leave Act	s effect?		1		1	1	
						+				
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017			-				
Hired outside legal or consulting help	25%	19%	17%							
Modified your existing company leave policy	41%	44%	45%							
Updated or purchased a new compliance solution	9%	10%	10%							
Modified your existing workforce	8%	4%	3%							
Hired or set a plan to hire temporary employees	8%	6%	5%							
Nothing	39%	39%	40%							
Q25. How would you describe your company's empl	oyee schedul	ing practices?	<u> </u>							
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Primarily pre-determined fixed schedules/fixed	F 90/	6.20/	64%							
shifts	58%	62%	04%							
Schedules vary, but are provided to employees in	220/	220/	20%							
advance	32%	23%	20%							
Employees make their own schedules based on	00/	1.00/	110/							
business need	8%	10%	11%							
Employees are often called in with little or no	10/	20/	20/							
notice to cover unexpected business variations	1%	2%	2%							
Other	1%	2%	2%							
Don't know/Refused	1%	1%	1%							
Q26. What does your company do to maintain 'equa	l pay' by race	/ethnicity an	d gender with	in the organi	zation?		•		•	
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Adhere to a formal 'equal pay' policy	37%	39%	39%							
Conduct 'equal pay' assessments	8%	13%	14%			1		1		
Hire outside consultants to assess 'equal pay'	2%	2%	2%			1				
Nothing in particular	52%	44%	42%			1				
Don't know/Refused	1%	2%	2%			1				
	-/-	_/-	_/~			1		1		
								I		

Q27. Of late, there has been a lot of discussi	on about whatare cal	led 'Disruptiv	e Technologie	s', how fam	iliar are yo	u with this co	nversation abo	ut Disruptive 1	Fechnologies?	
		•	J	,				· ·	Ŭ	
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Very familiar	23%	18%	17%							
Somewhat familiar	38%	31%	29%							
Not very familiar	17%	24%	26%							
Not at all familiar	22%	24%	25%							
Don't know/Refused	1%	2%	3%							
How innovative would you say your compan	v is in each of the fol	lowing areas	?							
Q28A. Use of the mobile Internet			-							
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Very innovative	24%	25%	25%							
Somewhat innovative	44%	48%	49%							
Not very innovative	25%	18%	16%							
Not at all innovative	6%	6%	7%							
Don't know/Refused	2%	2%	2%							
Q28B. Production										
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Very innovative	22%	16%	15%							
Somewhat innovative	42%	49%	52%							
Not very innovative	28%	23%	21%							
Not at all innovative	5%	6%	6%							
Don't know/Refused	4%	6%	6%							

O20C Marketing									
Q28C. Marketing			1	1	-	Т		Т	r
					_				
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Very innovative	24%	18%	17%						
Somewhat innovative	40%	44%	46%						
Not very innovative	35%	31%	30%						
Not at all innovative	1%	5%	6%						
Don't know/Refused	1%	2%	2%						
Q28D. Client services		-		-	•	-	1	-	•
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017			4			
Very innovative	33%	28%	27%						
Somewhat innovative	42%	45%	46%						
Not very innovative	24%	21%	21%						
Not at all innovative	0%	3%	4%						
Don't know/Refused	1%	2%	2%						
Q28E. Information processing			1	T		T	1	1	1
					_				
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017		_	-	-	-	
Very innovative	25%	21%	20%						
Somewhat innovative	45%	51%	52%						
Not very innovative	25%	24%	24%						
Not at all innovative	3%	2%	2%						
Don't know/Refused	2%	2%	2%						
Q28F. Physical space utilization									
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Very innovative	2017	23%	23%						
Somewhat innovative	42%	45%	46%	1		1			1
Not very innovative	31%	27%	26%			+			
Not at all innovative	2%	3%	4%			+			
Don't know/Refused	2%	2%	2%			+			}
Don't know/ketusea	۷%	۷%	۷%						

Q28G. Employee benefits			1			1			1	
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Very innovative	23%	22%	21%							
Somewhat innovative	48%	50%	51%							
Not very innovative	22%	23%	23%							
Not at all innovative	5%	3%	3%							
Don't know/Refused	3%	3%	3%							
Q28H. Employment arrangements									-	
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Very innovative	17%	16%	16%							
Somewhat innovative	51%	50%	50%							
Not very innovative	24%	27%	29%							
Not at all innovative	5%	3%	3%							
Don't know/Refused	4%	3%	3%							
Which of the following disruptive technologies do ye	ou currently u	se or do you	see your com	pany using in	the near fut	ure?				
Q29A. The Internet										
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Currently use	89%	89%	89%							
Future use	3%	2%	2%							
No plans to use	3%	3%	4%							
Don't know/Refused	6%	5%	5%							
Q29B. Automation of knowledge (including artificial	intelligence)	•	-		•	•	•	•	•	•
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Currently use	14%	14%	14%							
Future use	28%	27%	26%						1	
No plans to use	56%	54%	54%							
Don't know/Refused	2%	5%	6%							
· · ·						1			1	
		1			1	1			1	1

O200 The Internet of things (computing devices and			ha)					
Q29C. The Internet of things (computing devices em	ibeaaea in ev	eryday object						
	Rochester	Upstate	Other MSAs					
	2017	Total 2017	2017					
Currently use	25%	25%	25%					
Future use	36%	32%	30%					
No plans to use	37%	39%	40%					
Don't know/Refused	2%	4%	5%					
Q29D. The cloud								
	Rochester	Upstate	Other MSAs					
	2017	Total 2017	2017					
Currently use	71%	66%	65%					
Future use	18%	16%	16%					
No plans to use	10%	15%	16%					
Don't know/Refused	1%	3%	3%					
Q29E. Advanced robotics	-		-	-		-	-	-
	Rochester	Upstate	Other MSAs					
	2017	Total 2017	2017					
Currently use	6%	6%	6%					
Future use	21%	16%	15%					
No plans to use	71%	74%	75%					
Don't know/Refused	3%	5%	5%					
· ·								
Q29F. Autonomous or near autonomous vehicles								
	Rochester	Upstate	Other MSAs					
	2017	Total 2017	2017					
Currently use	3%	2%	1%					
Future use	8%	11%	12%					
No plans to use	88%	83%	82%		1			
Don't know/Refused	1%	4%	5%					
	170	470	570					

0206 2 D Drinting									
Q29G. 3-D Printing	1		1		1			1	
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Currently use	8%	8%	9%						
Future use	21%	19%	18%						
No plans to use	71%	69%	69%						
Don't know/Refused	1%	4%	5%						
Q29H. Renewable energy				 					
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Currently use	14%	15%	15%						
Future use	37%	36%	36%						
No plans to use	48%	45%	44%						
Don't know/Refused	1%	4%	5%						
Q29I. Cyber security									
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Currently use	64%	61%	60%						
Future use	18%	22%	23%						
No plans to use	16%	15%	14%						
Don't know/Refused	2%	3%	3%						
Q29J. Digital analytics					•	•		•	•
	Rochester	Upstate	Other MSAs						
	2017	Total 2017	2017						
Currently use	33%	32%	32%						
Future use	31%	31%	31%						
No plans to use	35%	33%	33%						
Don't know/Refused	1%	4%	5%						
· · · ·	-								
	1		1		1	1	1	1	

Q30. Do you tend to see these disruptive technolog	ies more as ar	onnortunity	for your busi	ness or as a t	breat to your	husiness?				
Q30. Do you tend to see these disruptive technolog						business:				
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Opportunity	78%	73%	72%							
Threat	17%	19%	20%							
Don't know/Refused	5%	7%	8%							
	570	770	0/0							
Q31. Which of the following state funded ideas do y	ı ou support in	order to reci	ruit and retain	businesses t	hat use disru	ptive technolo	ogies in Upsta	te New York?)	
							0			
	Rochester	Upstate	Other MSAs							
	2017	Total 2017	2017							
Tax incentives	46%	45%	44%							
Funding Industry/University Partnerships	31%	31%	31%							
Offering operational support and training for	<i>i</i>									
entrepreneurs	34%	36%	37%							
Providing financial support including loans and	220/	2004	44.04							
grants	32%	39%	41%							
None of the above	28%	24%	23%							
Q32. Do you think your company will be in business	in New York	ten years fro	m today or no	t?						
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs				
	2017	Total 2017	2017	2016	Total 2016	2016				
Yes	61%	65%	67%	63%	64%	66%				
Νο	16%	12%	11%	18%	10%	8%				
Don't know	23%	23%	22%	20%	25%	26%				
Q33. If you had it all to do all over again, considerin	g all factors, w	vould you loc	ate your busin	ness in New Y	ork or somep	lace else?				
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs	Rochester	Upstate	Rochester	Upstate
	2017	Total 2017	2017	2016	Total 2016	2016	2015	Total 2015	2014	Total 2014
New York	30%	41%	44%	34%	39%	41%	26%	29%	27%	28%
Someplace else	68%	56%	52%	61%	56%	56%	72%	67%	70%	69%
Prefer not to answer	2%	4%	4%	5%	5%	3%	3%	3%	3%	4%

Q34. Do you offer a pension or 401K to your employees?											
	Rochester	Upstate	Other MSAs	Rochester	Upstate	Other MSAs					
	2017	Total 2017	2017	2016	Total 2016	2016					
Yes	82%	83%	83%	83%	82%	84%					
No	16%	14%	13%	17%	15%	14%					
Don't know	2%	3%	4%	0%	3%	2%					