

6-1-2011

Upstate New York Entrepreneurial Opportunity Survey Analysis

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Prepared for:
JUMPSTART COMMUNITY ADVISORS

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June 2011

**UPSTATE NEW YORK
ENTREPRENEURIAL
OPPORTUNITY SURVEY
ANALYSIS**

CENTER FOR
ECONOMIC
DEVELOPMENT

TABLE OF CONTENTS

Executive Summary.....	i
Major Findings	i
Responses by Group Classification	ii
Responses by Geographic Sub-region.....	iii
Concluding Comments	iii
Introduction	1
Methodology.....	2
Survey Response Analysis	3
Demographic Characteristics	3
Self-Identified Role in Entrepreneurship	7
Situation as an Entrepreneur	10
Entrepreneurs by Stage of Business	14
Entrepreneur Ability to Generate Support	15
Entrepreneurs by Ability to Generate Support.....	16
Self-Identified Industry	17
Capital	21
Network	23
Support and Mentoring	23
Business Support Organizations	27
Networking	29
Government.....	31
Workforce	33
Attitude	35
Infrastructure	37
Economy.....	41
Appendix A: Upstate New York Region Tables A.1. – A.26.....	45
Appendix B: The Buffalo Region Tables B.1. – B.15.	59
Appendix C: The Rochester Region Tables C.1. – C.15.....	68
Appendix D: The Syracuse Region Tables D.1. – D.15.....	77
Appendix E: Survey Instrument.....	86

LIST OF FIGURES

Figure 1. Respondent Count by Age	5
Figure 2. Respondent Count by Ethnicity.....	6
Figure 3. Self-Identified Role in Entrepreneurship in the Upstate New York Region	8
Figure 4. Self-Identified Role in Entrepreneurship in the Buffalo, Rochester, and Syracuse Regions.....	9
Figure 5. Written Responses from <i>Other Industry</i> Category	20

LIST OF TABLES

Table 1. Respondent Count by County	3
Table 2. Respondent Count by Gender	4
Table 3. Self-Identified Role in Entrepreneurship.....	7
Table 4. Description of Situation for Respondents Who Self-Identified as <i>Entrepreneurs</i> in the Upstate New York Region.....	10
Table 5. <i>Entrepreneurs</i> by Description of Business Stage in Upstate New York and its sub-regions	13
Table 6. <i>Entrepreneurs</i> by Time in Business and Business Stage.....	14
Table 7. <i>Entrepreneurs</i> Perceptions of Ability to Generate Support and Resources for Entrepreneurial Activity	15
Table 8. <i>Entrepreneurs</i> by Time in Business and by Ability to Generate Support	16
Table 9. Self-Identified Business Industry	18
Table 10. Self-Identified Role – <i>Other</i> as Business Industry	20
Table 11. Perceptions of Access to Capital	21
Table 12. Perceptions of Access to Support Services and Mentoring	23
Table 13. Perceptions of Resources and Information Provided by Colleges and Universities	25
Table 14. Perceptions of Business Support Organizations	27
Table 15. Perceptions of Entrepreneurial Networking Opportunities.....	29
Table 16. Perceptions of Government Responsiveness.....	31
Table 17. Perceptions of Workforce Supply	33
Table 18. Perceptions of Attitudes toward Entrepreneurs.....	35
Table 19. Perceptions of Infrastructure	37
Table 20. Perceptions of Ability to Obtain Support and Resources for Startup	39
Table 21. Perceptions of the Most Recent Recession's Impact on Startups.....	41
Table 22. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment.....	43

LIST OF APPENDICIES

APPENDIX A

A.1. Self-Identified Role in Entrepreneurship by Gender	46
A.2. Self-Identified Role in Entrepreneurship by Age	46
A.3. Top 10 Industry Self-Identified by Women.....	47
A.4. Top 10 Industry Self-Identified by Men	47
A.5. Top 10 Industry Self-Identified by Respondents \geq 45 Years Old	48
A.6. Top 10 Industry Self-Identified by Respondents $<$ 45 Years Old	48
A.7. Perceptions of Access to Capital by Gender (Women).....	49
A.8. Perceptions of Access to Capital by Gender (Men)	49
A.9. Perceptions of Access to Capital by Age (\geq 45 Years Old)	50
A.10. Perceptions of Access to Capital by Age ($<$ 45 Years Old)	50
A. 11. Perceptions of Access to Support Services and Mentoring by Age	51
A. 12. Perceptions of Access to Support Services and Mentoring by Gender	51
A.13. Perceptions of Business Support Organizations by Gender	52
A.14. Perceptions of Business Support Organizations by Age	52
A.15. Perceptions of Entrepreneurial Networking Opportunities by Gender	53
A.16. Perceptions of Entrepreneurial Networking Opportunities by Age	53
A.17. Perceptions of Attitudes toward Entrepreneurs by Gender (Women)	54
A.18. Perceptions of Attitudes toward Entrepreneurs by Gender (Men).....	54
A.19. Perceptions of Attitudes toward Entrepreneurs by Age ($<$ 45 Years)	55
A.20. Perceptions of Attitudes toward Entrepreneurs by Age (\geq 45 Years)	55
A.21. Perceptions of Ability to Obtain Support and Resources for Entrepreneurial Activity by Gender ...	56
A.22. Perceptions of Ability to Obtain Support and Resources for Entrepreneurial Activity by Age	56
A.23. Perceptions of the Most Recent Recession's Impact on Entrepreneurial Activity by Gender	57
A.24. Perceptions of the Most Recent Recession's Impact on Entrepreneurial Activity by Age	57
A.25. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment	58
A.26. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment by Age	58

APPENDIX B

- B. 1. Self-Identified Role in Entrepreneurship in the Buffalo Region..... 60
- B. 2. Description of Situation for Respondents Who Self-Identified as Entrepreneurs in the Buffalo Region 60
- B. 3. Top 10 Industry Self-Identified in the Buffalo Region..... 61
- B. 4. Perceptions of Access to Capital in the Buffalo Region 61
- B. 5. Perceptions of Access to Support Services and Mentoring in the Buffalo Region 62
- B. 6. Perceptions of Resources and Information Provided by Colleges and Universities in the Buffalo Region 62
- B. 7. Perceptions of Business Support Organizations in the Buffalo Region 63
- B. 8. Perceptions of Entrepreneurial Networking Opportunities in the Buffalo Region 63
- B. 9. Perceptions of Government Responsiveness in the Buffalo Region..... 64
- B. 10. Perceptions of Workforce Supply in the Buffalo Region 64
- B. 11. Perceptions of Attitudes toward Entrepreneurs in the Buffalo Region..... 65
- B. 12. Perceptions of Infrastructure in the Buffalo Region 65
- B. 13. Perceptions of Ability to Obtain Support and Resource for Startup 66
- B. 14. Perceptions of the Most Recent Recession’s Impact on Startups in the Buffalo Region 66
- B. 15. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment in the Buffalo Region 67

APPENDIX C

- C. 1 Self-Identified Role in Entrepreneurship in the Rochester Region..... 69
- C. 2. Description of Situation for Respondents Who Self-Identified as Entrepreneurs in the Rochester Region 69
- C. 3. Top 10 Industry Self-Identified in the Rochester Region 70
- C. 4. Perceptions of Access to Capital in the Rochester Region 70
- C. 5. Perceptions of Access to Support Services and Mentoring in the Rochester Region..... 71
- C. 6. Perceptions of Resources and Information Provided by Colleges and Universities in the Rochester Region 71
- C. 7. Perceptions of Business Support Organizations in the Rochester Region..... 72
- C. 8. Perceptions of Entrepreneurial Networking Opportunities in the Rochester Region 72
- C. 9. Perceptions of Government Responsiveness in the Rochester Region..... 73
- C. 10. Perceptions of Workforce in the Rochester Region 73
- C. 11. Perceptions of Attitudes toward Entrepreneurs in the Rochester Region 74
- C. 12. Perceptions of Infrastructure in the Rochester Region 74
- C. 13. Perceptions of Ability to Obtain Support and Resources for Startup..... 75
- C. 14. Perceptions of the Most Recent Recession’s Impact on Startups in the Rochester Region..... 75
- C. 15. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment in the Rochester Region 76

APPENDIX D

- D. 1. Self-Identified Role in Entrepreneurship in the Syracuse Region..... 78
- D. 2. Description of Situation for Respondents Who Self-Identified as Entrepreneurs in the Syracuse
Region 78
- D. 3. Top 10 Industry Self-Identified in the Syracuse Region..... 79
- D. 4. Perceptions of Access to Capital in the Syracuse Region 79
- D. 5. Perceptions of Access to Support Services and Mentoring in the Syracuse Region 80
- D. 6. Perceptions of Resources and Information Provided by Colleges and Universities in the Syracuse
Region 80
- D. 7. Perceptions of Business Support Organizations in the Syracuse Region 81
- D. 8. Perceptions of Entrepreneurial Networking Opportunities in the Syracuse Region..... 81
- D. 9. Perceptions of Government Responsiveness in the Syracuse Region..... 82
- D. 10. Perceptions of Workforce in the Syracuse Region 82
- D. 11. Perceptions of Attitudes toward Entrepreneurs in the Syracuse Region..... 83
- D. 12. Perceptions of Infrastructure in the Syracuse Region 83
- D. 13. Perceptions of Ability to Obtain Support and resources for Startup in the Syracuse Region 84
- D. 14. Perceptions of the Most Recent Recessions Impact on Startups in the Syracuse Region 84
- D. 15. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment in the Syracuse
Region 85

APPENDIX E

- E. 1. Upstate New York Entrepreneurial Opportunity Survey Instrument 87

EXECUTIVE SUMMARY

The Upstate New York Entrepreneurial Opportunity Survey was created to measure respondents' perceptions regarding access to capital, the entrepreneurial network (support and mentoring, university assistance, and networking), attitudes toward entrepreneurs, and perceptions about the impact of the current recession on entrepreneurial activity in the Upstate New York region. Upstate New York is defined for this study as a 19-county region that includes the 5-county Buffalo region¹ (Western New York region) the 9-county Rochester region² (Finger Lakes region) and the 5-county Syracuse region³ (Central New York region).

The Upstate New York Entrepreneurial Opportunity Survey is one facet of a multilayered research study analyzing entrepreneurship and investment in the Upstate New York region. This report was prepared for JumpStart Community Advisors and is sponsored by the U.S. Economic Development Administration, the John S. and James L. Knight Foundation, and the Surdna Foundation. This survey was administered by JumpStart Community Advisors in partnership with High Tech Rochester, Insyte Consulting, the New York State Science & Technology Law Center, and Syracuse University.

MAJOR FINDINGS

The Upstate New York Entrepreneurial Opportunity Survey revealed mixed perceptions toward the entrepreneurial climate in the Upstate New York region when analyzed across multiple categories. In this survey, a total of 242 respondents that lived within the Upstate New York region, as defined for this study, participated. Of these respondents, a significant portion provided demographic information; 80% of the respondents are male, and 94% are *White/Caucasian*. The majority of respondents came from three counties: Monroe County (37%) - the county in which the city of Rochester is located; Onondaga County (24%) - the county in which the city of Syracuse is located; and Erie County (23%) - the county in which the city of Buffalo is located.

More than half of the respondents (56%) identified themselves as entrepreneurs in the Upstate New York region. Forty percent (40%) of the entrepreneur group started their business more than five years ago, and a little more than a third (36%) are in the *growth* and *sustainability* phase of business. Of all entrepreneurs, 61% reported that they were *confident* or *somewhat confident* in their ability to generate support and resources for their entrepreneurial activity. The fact that the majority of the entrepreneurs surveyed have a favorable perception of their ability to garner support is a positive sign for the region. Introducing resources into the Upstate New York entrepreneurial community may increase needed support and resources.

All respondents were questioned about their perception of the availability of capital in its various forms (debt, equity, and grants) in the Upstate New York region. Overall, individuals had mixed perceptions

¹ Buffalo region: Allegany, Cattaraugus, Chautauqua, Erie, and Niagara Counties

² Rochester region: Genesee, Livingston, Monroe, Ontario, Orleans, Wayne, Wyoming, Yates, and Seneca Counties

³ Syracuse region: Cayuga, Cortland, Onondaga, Oswego, and Madison Counties

about obtaining capital; when asked if obtaining capital was easy, the highest frequency of unfavorable responses (*somewhat disagree* and *disagree*) was in the category of debt from banks, with an unfavorable percentage of 48% selecting *disagree* and 19% selecting *somewhat disagree*.

A key objective of this study was to examine the Upstate New York region's entrepreneurial ecosystem, which includes the resources of colleges and universities, business support organizations, and government, and regional networking. When surveyed about these resources, most respondents reported that colleges and universities were helpful, but a sizeable percentage of respondents (26%) reported dissatisfaction with the university resources available in regard to technology transfer and licensing. It is unclear at this time what the demand for technology transfer or licensing is in the Upstate New York region, but it is noteworthy that respondents are not content with the status quo. Respondents had a favorable perception of business support organizations and their ability to provide knowledge and information to start and grow a new business in the Upstate New York region. On the other hand, close to two thirds replied that city governments (68%), county governments (62%), and the state government (62%) do not provide relevant services to entrepreneurs.

The ability of an entrepreneur to generate leads through networking is an important factor. The majority of respondents had positive perceptions of the opportunities for entrepreneurs to meet and network with other entrepreneurs in the region (24% *agree*; 34% *somewhat agree*); only 22% of respondents selected *somewhat disagree* and *disagree*.

RESPONSES BY GROUP CLASSIFICATION

In order to examine the different characteristics of respondents, questions were asked about respondents' gender and age. This demographic information allowed us to compare respondents by gender and by age. Since a large number of respondents were over the age of 45, the cohort of respondents was broken into two age categories for the entire Upstate New York region: those under the age of 45 (62 respondents) and those 45 years old and older (174 respondents). It is interesting to note that respondents 45 years and older, regardless of gender, had somewhat similar perceptions as those under the age of 45.

There were a few discernable differences in responses among respondents by gender. For instance, men tended to be slightly more negative than women. One example of a larger gap is evident in reference to access to capital. When asked about access to capital, 72% of men *disagreed* or *somewhat disagreed* that getting access to capital from banks was easy, while 49% of women chose those same selections. For the most part there was little difference in participants' responses based on gender.

RESPONSES BY GEOGRAPHIC SUB-REGION

The Upstate New York Region is divided into three sub-regions: the Buffalo region, the Rochester region, and the Syracuse region. The Rochester region had the largest participation (114 respondents) followed by the Syracuse region (66 respondents) and the Buffalo region (62 respondents). In the Rochester region, 62% of respondents self-identified as entrepreneurs, while in the Buffalo and Syracuse regions half (50%) self-identified in this manner.

There are minor differences between the responses from the three Upstate New York sub-regions, but there are distinct variations between the regions for some questions. Overall, the Syracuse region had the most favorable/positive responses in comparison to the Buffalo and Rochester regions.

One area of difference is in regards to respondents perceptions of government responsiveness and ability to provide relevant services to meet entrepreneurial needs. For example, the Upstate New York region as a whole had a negative view of city government responsiveness (68% *disagreed* or *somewhat disagreed* that the city level of government was responsive and provided relevant services). In comparison, the Buffalo region had a larger degree of dissatisfaction (81% *disagreed* or *somewhat disagreed*), but in the Syracuse and Rochester region the level of dissatisfaction with city services was similar to that of Upstate New York (67% and 62% *disagree* or *somewhat disagree*, respectively). At the county level, there was also significant gap in how each region viewed their county governments. Respondents in the Syracuse and the Rochester regions had similar negative views of county support for entrepreneurial activity, 59% and 58% *disagreed* respectively, but in the Buffalo region, 71% *disagreed*.

There are also distinctions among sub-regions regarding access to capital. Eighty-four percent (84%) of respondents in the Buffalo region *disagreed* or *somewhat disagreed* that access to capital from banks was easy, compared to 65% in the Rochester region and 58% in the Syracuse region. In addition, the Syracuse region also had a more positive outlook in regard to access to equity from venture capital sources than the other regions; only 56% of respondents *disagreed* or *somewhat disagreed* that access to this source of funding was easy, as compared to the Rochester and Buffalo regions (64% and 76% of respondents *disagreed*, respectively). In all three regions respondents had the most favorable perceptions of capital from federal grants and equity capital from friends and families.

CONCLUDING COMMENTS

The Upstate New York Entrepreneurial Opportunity Survey reveals strengths and opportunities in the Upstate New York entrepreneurial ecosystem. Respondents had mixed views on the impact of the recession on entrepreneurial activity and do not feel supported by local governments (state, county and city). It is also striking that respondents do not feel supported by government economic development agencies. In the Buffalo region only 33% of respondents *agreed* or *somewhat agreed* that the attitudes of government economic development agencies are supportive of entrepreneurs; in the Rochester and Syracuse regions the perception is slightly more positive (47% and 56%, respectively). Targeted support by these organizations could increase perceptions on these issues. In general, entrepreneurs are generally optimistic about their abilities to continue their entrepreneurial activities, which provide a positive starting point for Jumpstart Community Advisors to begin their work in the region.

INTRODUCTION

This report was prepared for JumpStart Community Advisors by the Center for Economic Development at Cleveland State University's Maxine Goodman Levin College of Urban Affairs. The report analyzes respondent data from the Upstate New York Entrepreneurial Opportunity Survey. This survey was administered by JumpStart Community Advisors in partnership with High Tech Rochester, Insyte Consulting, the New York State Science & Technology Law Center, and Syracuse University.

The Upstate New York is defined for this study as a 19-county region that includes the 5-county Buffalo region⁴ (Western New York region) the 9-county Rochester region⁵ (Finger Lakes region) and the 5-county Syracuse region⁶ (Central New York region). In this report, regions will be identified by the primary city in the regions: Buffalo, Rochester, and Syracuse.

The structure of this report is such that in most instances throughout the analysis, a graphic or table is followed by bullet points highlighting the observations of collected and studied data. In addition, boxes entitled "Q" represent the question posed to survey participants; responses are tabulated below the boxes. Overall Upstate New York respondents were calculated into demographic groups (age and gender) and tabulated into responses by sub-region. In addition, overall Upstate New York responses are calculated in the report and all sub-regions are tabulated and included in the appendix by sub-region. Non-response rates are included below the tables; non-response rates were not calculated by age and gender, or by sub-regions. Questions have been re-ordered from the original survey instrument for analysis purposes.

⁴ Buffalo region: Allegany, Cattaraugus, Chautauqua, Erie, and Niagara Counties

⁵ Rochester region: Genesee, Livingston, Monroe, Ontario, Orleans, Wayne, Wyoming, Yates, and Seneca Counties

⁶ Syracuse region: Cayuga, Cortland, Onondaga, Oswego, and Madison Counties

METHODOLOGY

The objective of the Upstate New York Entrepreneurial Opportunity Survey is to provide information about the **perceptions** of entrepreneurs and those involved in the entrepreneurial network in the Upstate New York region. This is part of a multilayered research study that includes economic research, face-to-face interviews, focus groups, and additional methods designed to create a Regional Entrepreneurial Action Plan for the region.

JumpStart Community Advisors collected the contact information of entrepreneurs and those involved in entrepreneurial networks in the Upstate New York region and disseminated the web-based survey via email. The Upstate New York Entrepreneurial Opportunity Survey was promoted by JumpStart Community Advisors, High Tech Rochester, Insyte Consulting, the New York State Science & Technology Law Center, and Syracuse University.

The Upstate New York Entrepreneurship Survey was deployed during a 4-week period between February 3, 2011, and March 4, 2011. In order to distinguish between the Upstate New York sub-regions respondents were asked in which county was their primary business located (Question 21). A total of 315 respondents participated in the Upstate New York Entrepreneurial Opportunity Survey, but of these respondents only 242 were located within the reference region and therefore included in this study (Buffalo region: 62; Rochester region: 114; and Syracuse region: 66).

It is important to address the types of bias that can be detected in survey responses for the Upstate New York Entrepreneurial Opportunity Survey. Even with significant attempts by JumpStart Community Advisors to obtain contact information for all entrepreneurs and those involved in the Upstate New York region's entrepreneurial network, selection bias has occurred because the individuals and groups that received the survey were not part of a random sample, i.e., they were selected based upon prior knowledge of the identity of the potential respondent. In addition, response bias can be detected in the method of dissemination and collection; if a respondent did not have an email address or access to a computer, they were unable to participate in the survey and were not counted. Furthermore, it is not known if one particular group was overrepresented or underrepresented because of the aforementioned unmeasured responses and non-response bias.

The overrepresentation of respondents from the Rochester region could contribute to bias in respondent data in the overall Upstate New York responses as a whole. An examination of the data does not find clear instances where this occurs, but it is important to advise the reader of this possible bias.

For more information on the Upstate New York Entrepreneurial Opportunity Survey Instrument, please see Appendix E.1.

SURVEY RESPONSE ANALYSIS

DEMOGRAPHIC CHARACTERISTICS

Table 1. Respondent Count by County

New York County	Upstate New York Region	Respondent Count	Percentage of Respondents
Allegany	Buffalo	0	0.0%
Cattaraugus	Buffalo	2	0.8%
Cayuga	Syracuse	1	0.4%
Chautauqua	Buffalo	1	0.4%
Cortland	Syracuse	2	0.8%
Erie	Buffalo	56	23.1%
Genesee	Rochester	4	1.7%
Livingston	Rochester	2	0.8%
Madison	Syracuse	1	0.4%
Monroe	Rochester	89	36.8%
Niagara	Buffalo	3	1.2%
Onondaga	Syracuse	58	24.0%
Ontario	Rochester	11	4.5%
Orleans	Rochester	1	0.4%
Oswego	Syracuse	4	1.7%
Seneca	Rochester	0	0.0%
Wayne	Rochester	6	2.5%
Wyoming	Rochester	1	0.4%
Yates	Rochester	0	0.0%

Note: Due to rounding, percentages may not be exact;

The non-response rate for this question was 0% (0 out of 242 respondents).

- The demographic characteristics of survey respondents are necessary to evaluate respondent perceptions by location, gender, and age.
- Of the 242 respondents that identified their primary business location in Upstate New York, the largest number of respondents were from Monroe County with 36.8% (the city of Rochester is located in Monroe County), followed by 24.0% in Onondaga County (the city of Syracuse is located in Onondaga County) and 23.1% in Erie County (the city of Buffalo is located in Erie County) (Table 1).

Table 2. Respondent Count by Gender

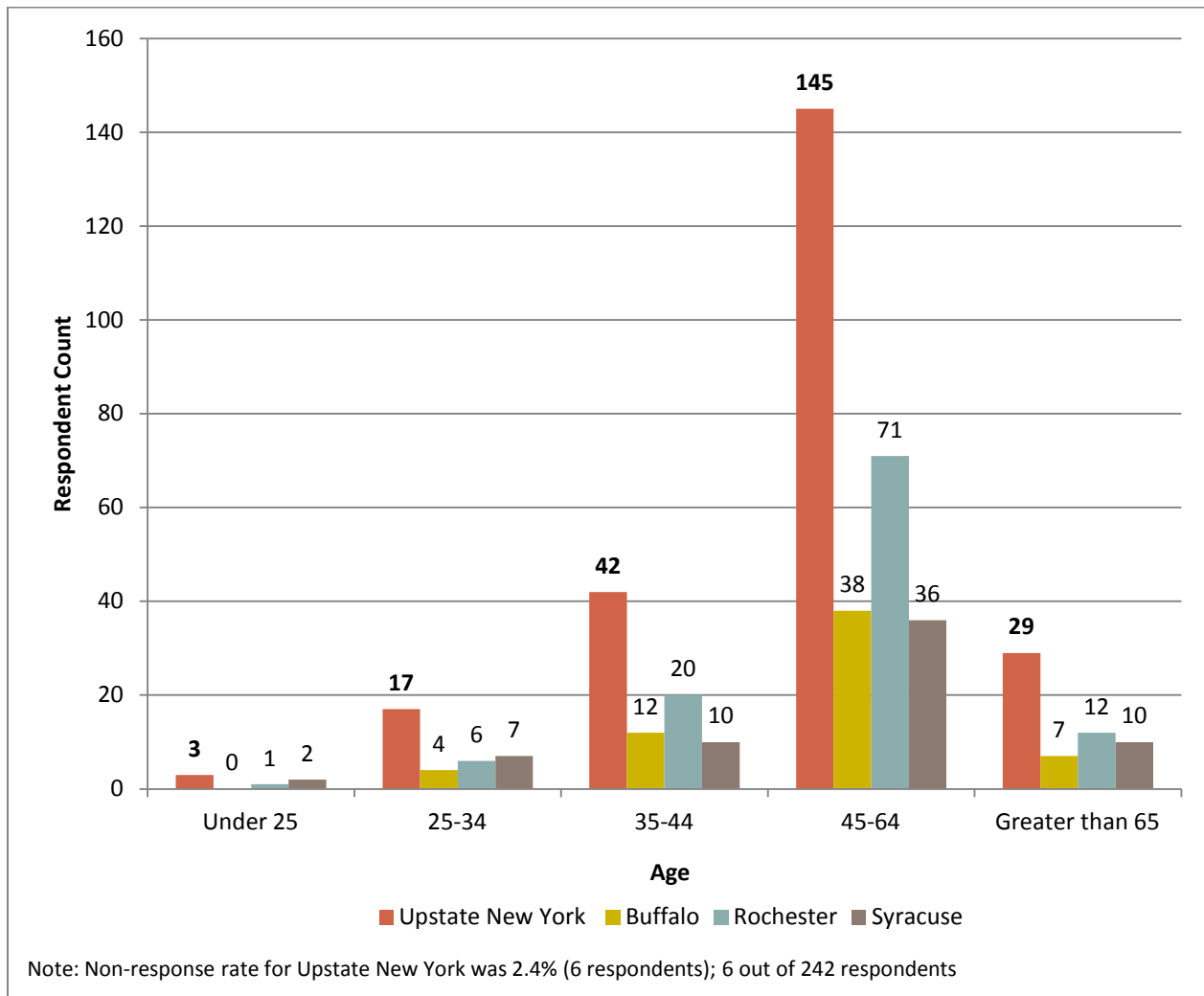
	Upstate New York		Buffalo		Rochester		Syracuse	
	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents
Female	47	20%	9	15%	17	15%	21	32%
Male	191	80%	53	85%	94	85%	44	68%
Total	238	100%	62	100%	111	100%	65	100%

Note: Due to rounding, percentages may not be exact;

The Upstate New York non-response rate for this question was 1.7% (4 out of 242 respondents).

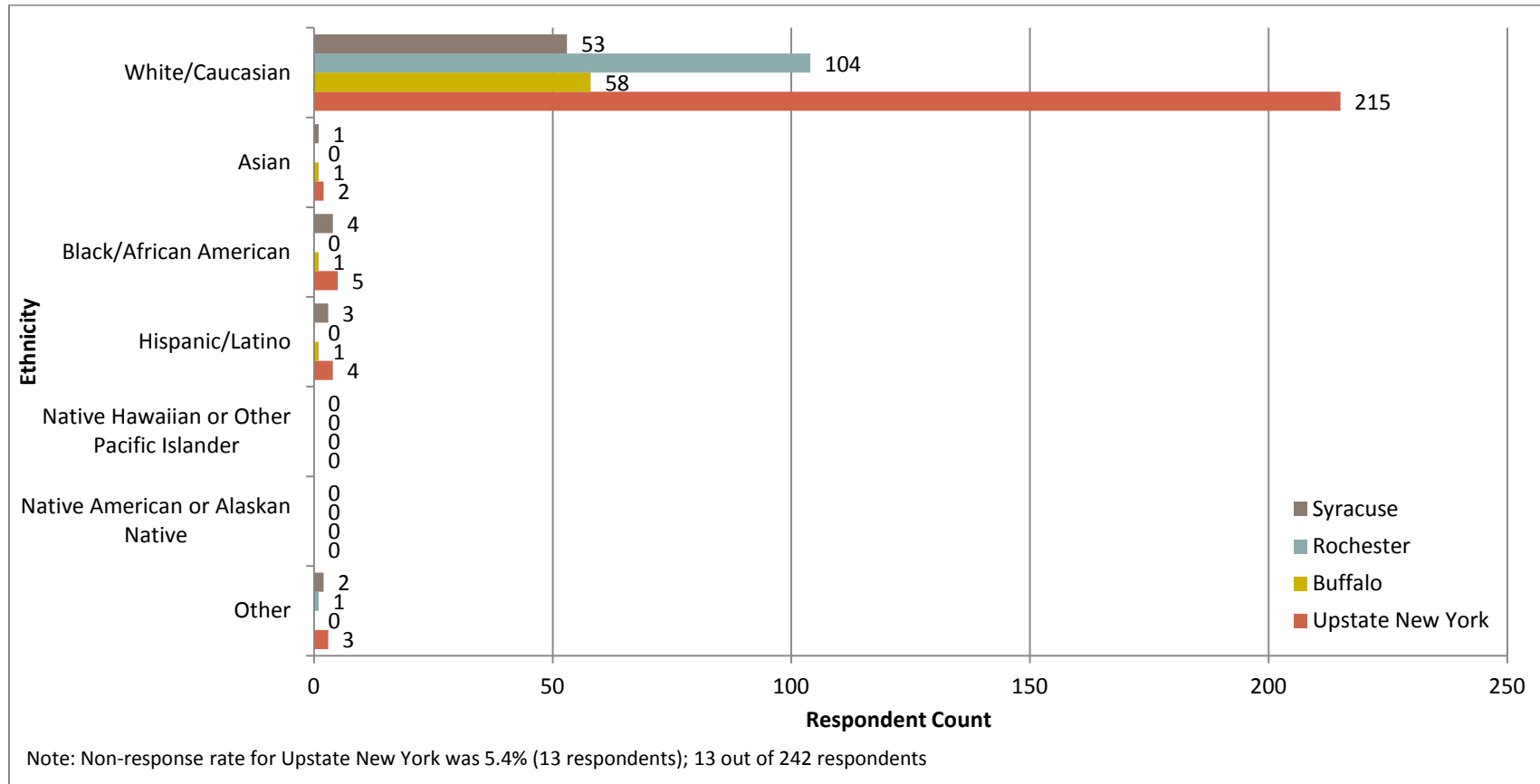
- In Upstate New York, 47 women (20% of respondents) and 191 men (80% of respondents) identified their gender (Table 2).
- The largest percentage of women respondents came from the Syracuse region (32% of respondents).

Figure 1. Respondent Count by Age



- Of the 236 respondents in Upstate New York who disclosed their age, 61% (145 respondents) were between the ages of 45 and 64. Overall, over 74% of the respondents were 45 years or older (Figure 1).
- Those under the age of 45 accounted for only 26% of the respondents who disclosed their age.

Figure 2. Respondent Count by Ethnicity



- A vast majority of respondents in Upstate New York self-identified their ethnicity as *White/Caucasian* (94%) (Figure 2). The proportion of respondents who self-identified as *White/Caucasian* reflects a previous study conducted by the Center for Economic Development that shows the largest population group in Upstate New York to be *White/Caucasian*, which accounts for almost 86% of the population.⁷

⁷ Center for Economic Development, “Upstate New York Regional Analysis: Demographics, Economy, Entrepreneurship and Innovation.” June 2011

SELF-IDENTIFIED ROLE IN ENTREPRENEURSHIP

Q: PLEASE IDENTIFY YOUR ROLE IN ENTREPRENEURSHIP. (SELECT ONLY ONE.)

1. Entrepreneur
2. Investor
3. Work for economic development organization
4. Work for or volunteer with an organization supporting entrepreneurship
5. Other _____

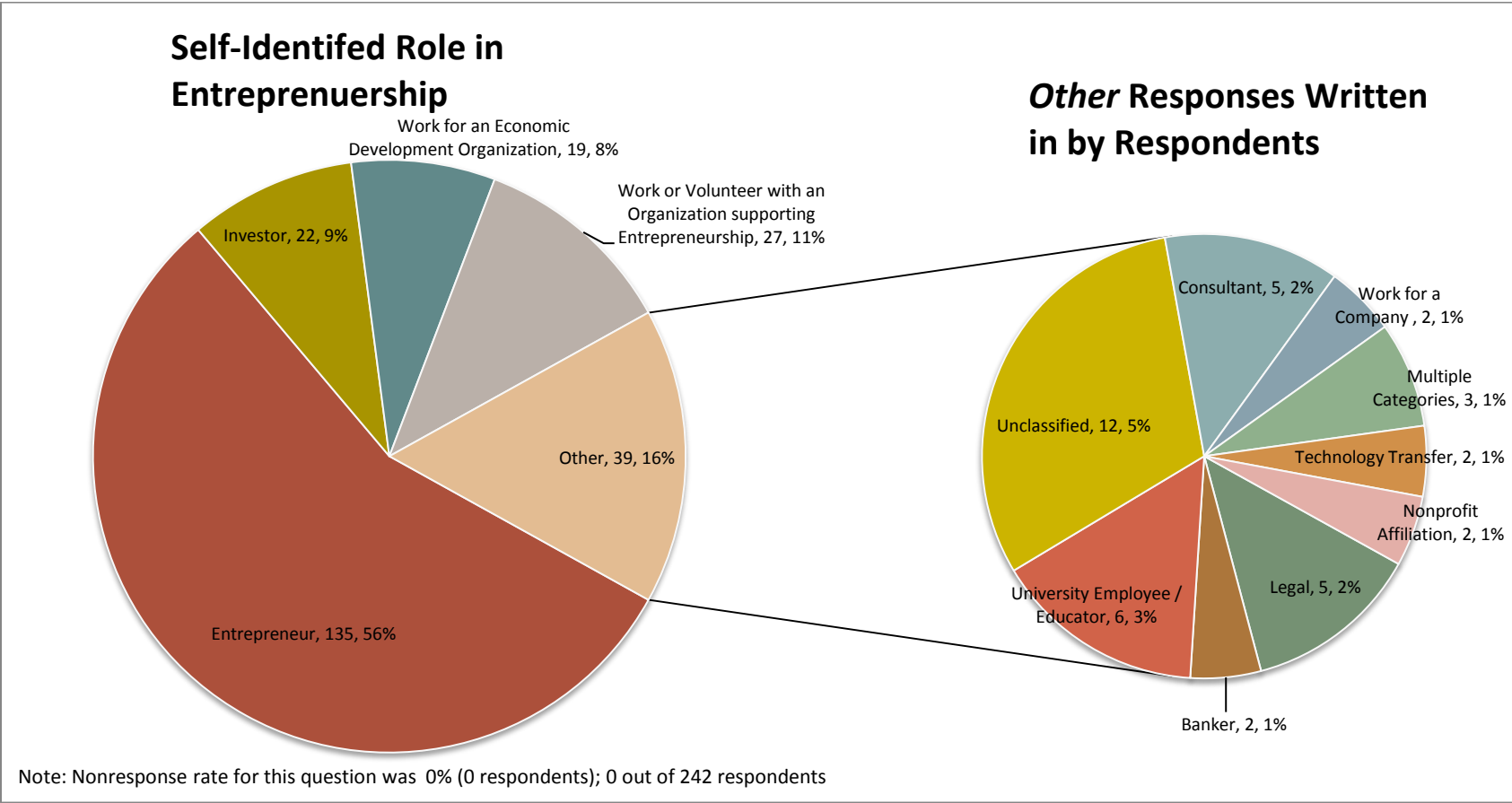
Table 3. Self-Identified Role in Entrepreneurship

	Upstate New York	
	Respondent Count	Percentage of Respondents
Entrepreneur	135	56%
Investor	22	9%
Work for an Economic Development Organization	19	8%
Work or Volunteer with an Organization Supporting Entrepreneurship	27	11%
Other	39	16%
Total	242	100%

Note: Due to rounding, percentages may not be exact;
The non-response rate for this question was 0% (0 out of 242 respondents).

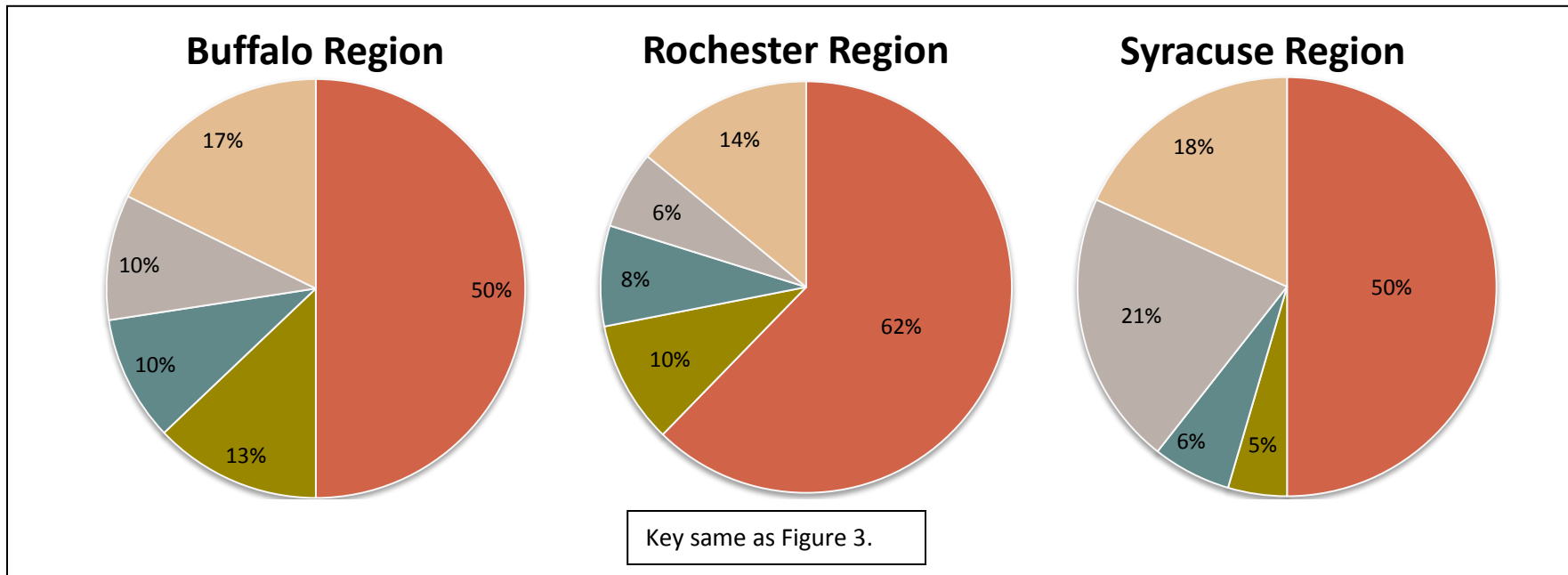
- Survey participants were asked what role they play in entrepreneurship in the Upstate New York region; all survey participants responded to this question.
- The largest respondent category was *Entrepreneur* with more than 5 out of every 10 respondents (56%) self-identifying themselves in this manner (Table 3) (Figure 3).
- The second largest respondent category was *Other* (39 respondents, 16%) (See next page).
- A larger percentage of men (59%) self-identified as entrepreneurs than women (47%). For more information on Self-Identified Role in Entrepreneurship by Gender, see Appendix A, Table A.1.
- Examining respondents by age, a slightly larger percentage of respondents under the age of 45 self-identified as entrepreneurs (61%) than those 45 years old or older (53%). For more information on Self-Identified Role in Entrepreneurship by Age, see Appendix A, Table A.2.

Figure 3. Self-Identified Role in Entrepreneurship in the Upstate New York Region



- Over 16% of respondents self-identified as *Other*; Figure 3 groups those written-in responses; these could account for a majority of *Other* responses.

Figure 4. Self-Identified Role in Entrepreneurship in the Buffalo, Rochester, and Syracuse Regions



- The composition of respondents is somewhat different between the three sub-regions in Upstate New York.
- Among respondents self-identification of their role in entrepreneurship, 62% of respondents in the Rochester region self-identified as an *entrepreneur*, compared to 50% in both the Buffalo and Syracuse region (Figure 4).
- For more information on Self-Identified Role in Entrepreneurship in the Buffalo Region, see Appendix B, Table B.1.
- For more information on Self-Identified Role in Entrepreneurship in the Rochester Region, see Appendix C, Table C.1.
- For more information on Self-Identified Role in Entrepreneurship in the Syracuse Region, see Appendix D, Table D.1.

SELF-IDENTIFIED *ENTREPRENEUR*

NOTE: IF A RESPONDENT SELECTED ENTREPRENEUR IN THE PREVIOUS QUESTION, THEY WERE GIVEN THE FOLLOWING 3 QUESTIONS.

Situation as an Entrepreneur

Q: PLEASE CHOOSE THE OPTION THAT BEST DESCRIBES YOUR SITUATION AS AN ENTREPRENEUR:

1. *I started a business more than five years ago*
2. *I started a business three to five years ago*
3. *I started a business within the past two years*
4. *I am in the planning stages for my new business*
5. *I want to start my own business within the next year*
6. *I want to start my own business within the next five years*

Table 4. Description of Situation for Respondents Who Self-Identified as *Entrepreneurs* in the Upstate New York Region

Self-Identified as <i>Entrepreneurs</i> Description	Upstate New York Region	
	Respondent Count	Percentage of Respondents
I started a business more than five years ago	54	40%
I started a business three to five years ago	34	25%
I started a business within the past two years	29	22%
I am in the planning stages for my new business	15	11%
I want to start my own business within the next year	3	2%
I want to start my own business within the next five years	0	0%
TOTAL	135	100%

Note: Due to rounding, percentages may not be exact;
 The non-response rate for this question was 0% (0 out of 135 respondents).

- Forty percent (40%; 54 respondents) of the respondents who self-identified as an *entrepreneur* reported that they started their business more than five years ago (Table 4).
- The second largest category was those respondents who started a three to five years ago (25%).
- Those self-identified entrepreneurs whose entrepreneurial activity is in the initial stages (*planning stages or want to start a business in the next year or the next five years*) accounted for only 18 respondents (13%).
- In the Buffalo region, 58% of respondents started their business three years ago or more. For more information on Description of Situation for Respondents Who Self-Identified as Entrepreneurs in the Buffalo Region, see Appendix B, Table B.2.
- In the Rochester region, 39% of the respondents who self-identified as an entrepreneur reported that they started their business more than five years ago. For more information on Description of Situation for Respondents Who Self-Identified as Entrepreneurs in the Rochester Region, see Appendix C, Table C.2.
- In the Syracuse region, 52% of the respondents who self-identified as an entrepreneur reported that they started their business more than five years ago. For more information on Description of Situation for Respondents Who Self-Identified as Entrepreneurs in the Syracuse Region, see Appendix D, Table D.2.

Stage of Business

Q: AT WHAT STAGE IS YOUR BUSINESS? (IF YOU HAVE MULTIPLE ENTREPRENEURIAL ENDEAVORS, PLEASE ANSWER FOR THE ONE FURTHEST AHEAD IN THE PROCESS.)

1. **Imagining** - Both business concept and product or service are, for the most part, still ideas. If your concept is technology-based, the technology is still in the lab stage for proof of concept testing, defining performance specifications, or development of Intellectual Property protection. There are no customers or revenue.
2. **Incubating** - Business plans are being developed based on market research, and work is focused on building a prototype or working model.
3. **Demonstrating** - A formal business plan is completed, your product or service has entered the market, and you are learning about customer receptivity to performance, quality, and pricing.
4. **Market Entry** - Your business is active in sales, marketing, operations, and beginning to grow.
5. **Growth & Sustainability** - You are engaged in improving market share, reducing costs, increasing profits, and improving your product or service.

Table 5. *Entrepreneurs by Description of Business Stage in Upstate New York and its sub-regions*

	Upstate New York		Buffalo Region		Rochester Region		Syracuse Region	
	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents
Imagining	9	7%	3	10%	3	4%	3	9%
Incubating	20	15%	7	22%	9	13%	4	12%
Demonstrating	24	18%	9	29%	13	18%	2	6%
Market Entry	34	25%	8	26%	21	30%	5	15%
Growth & Sustainability	48	35%	4	13%	25	35%	19	58%
Total	135	100%	31	100%	71	100%	33	100%

Note: Due to rounding, percentages may not be exact;
The non-response rate for this question was 0% (0 out of 135 respondents).

- Those respondents who self-identified as an *entrepreneur* were presented with a question asking what stage of the entrepreneurial process their business is in currently (Table 5).
- Forty percent (53 respondents) of the respondents in Upstate New York who self-identified as *entrepreneurs* were in the first three stages (*Imagining*, *Incubating*, and *Demonstrating*). This timeframe is referred to as the “Valley of Death”, the stage where JumpStart Ventures in Northeast Ohio focuses its funding and assistance. The majority, however, of respondent *entrepreneurs* (61%) have grown beyond this phase.
- The largest number of respondents in the Buffalo region were in the *Demonstrating* phase (9 respondents), while in both the Rochester and Syracuse regions the largest number of respondents reported that they were in the *Growth & Sustainability* phase (25 & 19 respondents, respectively).

Entrepreneurs by Stage of Business

Table 6. Entrepreneurs by Time in Business and Business Stage

Self-Identified Situation as an Entrepreneur	Upstate New York Respondent Count					Growth & Sustainability
	Total Respondent Count	At What Stage is Your Business?				
		Imagining	Incubating	Demonstrating	Market Entry	
I started a business more than five years ago	54	1	2	5	9	37
I started a business three to five years ago	34	1	3	8	12	10
I started a business within the past two years	29	1	9	7	11	1
I am in the planning stages for my new business	15	5	5	3	2	0
I want to start my own business within the next year	3	1	1	1	0	0
I want to start my own business within the next five years	0	0	0	0	0	0
Total	135	9	20	24	34	48

Note: The non-response rate for this question was 0% (0 out of 135 respondents).

- Examining respondent counts by both their self-identified situation as an entrepreneur and their business stage reflects their time in the entrepreneurial cycle.
- The most selected category in the Upstate New York region was those entrepreneurs who *started their business more than five years ago* and had a business that was in the *growth and sustainability* stage (37 respondents) (Table 6).
- It is interesting to note that 41% of those entrepreneurs who *started their business within the past two years* are in the *market entry* or *growth and sustainability* stage. We would expect that those entrepreneurs who have been in business for only two years would still be in one of the first three business stages. That would vary, however, with the type of product or service they are developing.

Entrepreneur Ability to Generate Support

Q: IF YOU STARTED A BUSINESS IN THE LAST FIVE YEARS AND THE BUSINESS IS STILL RUNNING, HOW CONFIDENT ARE YOU THAT YOU WILL BE ABLE TO GENERATE THE SUPPORT AND RESOURCES YOU NEED TO CONTINUE SUCCESSFULLY?

<i>Not Confident</i>	<i>Somewhat Not Confident</i>	<i>Neutral</i>	<i>Somewhat Confident</i>	<i>Confident</i>	<i>N/A</i>
1	2	3	4	5	

Table 7. Entrepreneurs Perceptions of Ability to Generate Support and Resources for Entrepreneurial Activity

	Upstate New York	
	Respondent Count	Percentage of Respondents
Confident	52	38%
Somewhat Confident	30	22%
Neutral	11	8%
Somewhat Not Confident	12	9%
Not Confident	5	4%
N/A	25	19%
Total	135	100%

Note: Due to rounding, percentages may not be exact;
The non-response rate for this question was 0% (0 out of 135 respondents).

- Those respondents who self-identified as *entrepreneurs* were presented with a question asking how confident they are of their ability to generate support and resources to continue being successful (Table 7).
- Sixty percent (60%) of respondents indicated that they were *confident* or *somewhat confident* that they would be able to garner support and resources for their entrepreneurial ventures.
- It is worthy of note that of respondent entrepreneurs, 19% reported *N/A* in their perception to generate support and resources for their activities; this may be related to the large quantity of respondents who were in the *Growth and Stability* phase in Table 8.

Entrepreneurs by Ability to Generate Support

Table 8. Entrepreneurs by Time in Business and by Ability to Generate Support

	Upstate New York Respondent Count					
	Confident	Somewhat Confident	Neutral	Somewhat Not Confident	Not Confident	N/A
I started a business more than five years ago	22	11	4	2	1	14
I started a business three to five years ago	13	8	4	7	2	0
I started a business within the past two years	15	10	2	1	1	0
I am in the planning stages for my new business	2	1	1	1	1	9
I want to start my own business within the next year	0	0	0	1	0	2
I want to start my own business within the next five years	0	0	0	0	0	0
Total	52	30	11	12	5	25

Note: Non-response rate for this question was 1.5% (2 respondents); 2 out of 135 respondents

- Examining respondent counts by both their self-identified situation as an *entrepreneur* and their ability to generate support and resources to continue to be successful examines the confidence level of an entrepreneur by business situation.
- The category most selected was entrepreneurs who started their business more than five years ago and were confident in their ability to garner support and resources (22 respondents) (Table 8).
- The largest response selected was *confident* which had 52 respondents (Tables 7 and 8). Within this category, almost all respondents had already started their businesses.

SELF-IDENTIFIED INDUSTRY

Q: IN WHAT INDUSTRY(S) DO YOU WORK OR INVEST? IF YOU CHOOSE *OTHER*, PLEASE SPECIFY YOUR INDUSTRY IN THE SPACE PROVIDED.

- Aerospace & Defense
- Agriculture
- Automotive & Transportation
- Banking
- Bioscience/Biotechnology
- Business Products & Services
- Chemicals
- Clinical Healthcare
- Computer Hardware
- Computer Software: Internet, SAS, Social Networking, Other
- Computer Services: Installation, Networking, Repair
- Construction
- Consumer Products & Services
- Education
- Electronics
- Energy: Advanced, Alternative Products and Services
- Environmental Services & Equipment
- Financial Services
- Food & Beverages
- Healthcare IT
- Industrial Manufacturing
- Information Technology
- Insurance
- Leisure & Travel
- Media & Entertainment
- Medical Devices
- Metals & Mining
- Pharmaceuticals
- Real Estate
- Retail
- Security Products & Services
- Telecommunications
- Transport Services
- Utilities
- Other

Table 9. Self-Identified Business Industry

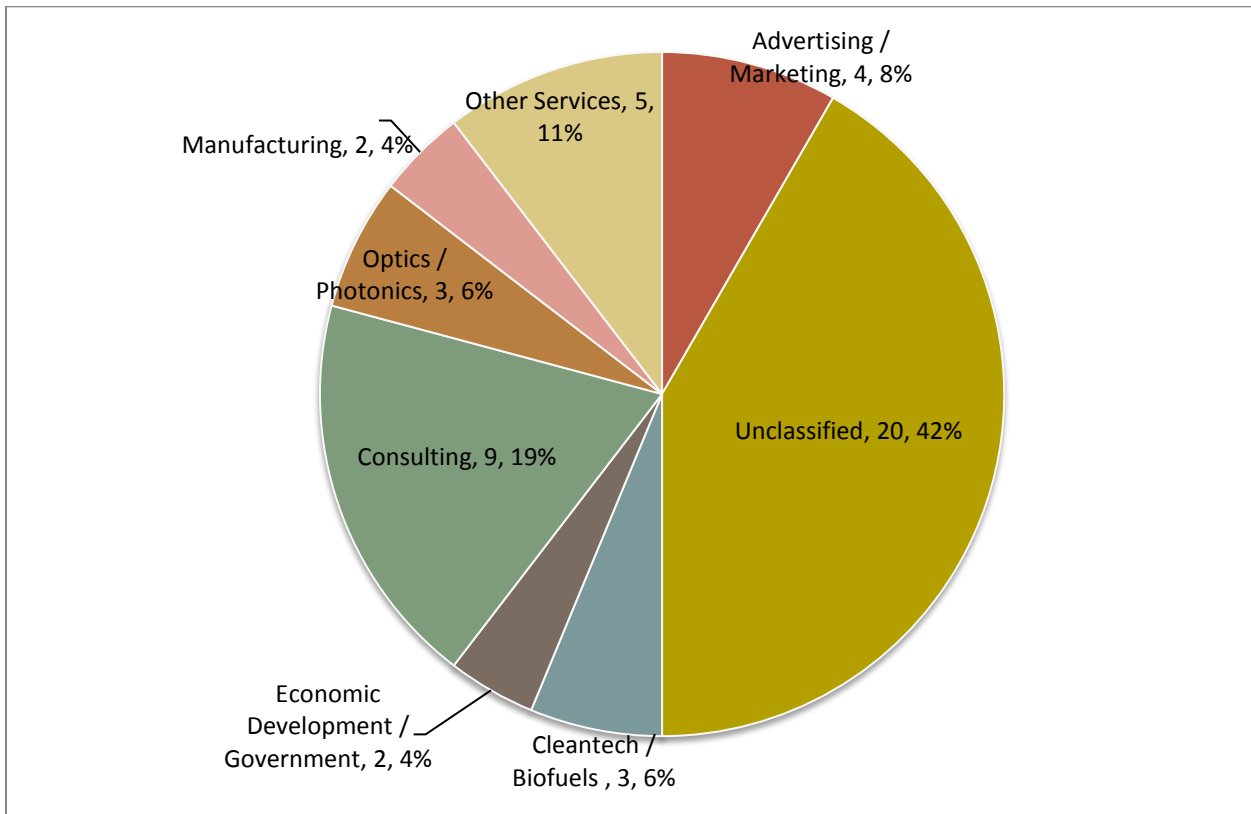
Industry	Upstate New York Respondent Count
Medical Devices	52
Bioscience/Biotechnology	51
Computer Software: Internet, SAS, Social Networking, Other	50
Energy: Advanced, Alternative Products and Services	46
Business Products & Services	42
Industrial Manufacturing	41
Information Technology	41
Education	33
Aerospace & Defense	32
Pharmaceuticals	30
Electronics	29
Telecommunications	28
Consumer Products & Services	26
Clinical Healthcare	25
Healthcare IT	23
Environmental Services & Equipment	20
Automotive & Transportation	19
Food & Beverages	17
Computer Hardware	15
Chemicals	15
Agriculture	14
Real Estate	14
Media & Entertainment	13
Security Products & Services	13
Financial Services	12
Banking	12
Metals & Mining	10
Computer Services: Installation, Networking, Repair	10
Construction	9
Retail	9
Utilities	9
Transport Services	8
Leisure & Travel	6
Insurance	2
Other Industry	48
Total	824

- Survey participants were asked to identify the industry in which they work or invest. One hundred and thirty-nine (139) respondents selected more than one industry category, resulting in 824 total responses (Table 9).
- The largest number of responses for one category (except *Other*) was in *Medical Devices* (52 respondents (6%), followed by *Bioscience/Biotechnology* (51 respondents, 6%). *Computer Hardware* was the third largest industry (50 respondents, 6%).
- The most selected industry amongst **female** respondents was Education (7%) and Medical Devices (7%), while the most common selection from **men** was *Bioscience/Biotechnology* (6%). For more information on Industry Self-Identification by Women, see Appendix A, Table A.3., and for Industry Self-Identification by Men, see Appendix A, Table A.4.
- Of respondents in the Upstate New York region, men who self-identified as **entrepreneurs** selected *Other* and *Computer Software* as their top industries while the top industries selected by women entrepreneurs were *Other* and *Business Products and Services*.
- The most selected industry for respondents **over the age of 45** (except *Other*) was *Medical Devices* (8%). Among those respondents **under the age of 45**, the most selected industry was *Bioscience/Biotechnology* (7%). For more information on Industry Self-Identification by Age, see Appendix A, Tables A.5. and A.6.
- The most selected industry in the **Buffalo** region was *Bioscience/Biotechnology* (7%) followed by *Medical Devices* (6%). For more information on Industry Self-Identification in the Buffalo Region, see Appendix B, Table B.3.
- The most selected industry in the **Rochester** region was *Medical Devices* (7%) and *Other* (7%). For more information on Industry Self-Identification in the Rochester Region, see Appendix C, Table C.3.
- The most selected industry in the **Syracuse** region was *Other* (10%) followed by *Education* (8%). For more information on Industry Self-Identification in the Syracuse Region, see Appendix D, Table D.3.

Table 10. Self-Identified Role – *Other* as Business Industry

Written Responses from <i>Other Industry</i> Category	Respondent Count
Advertisizing/Marketing	4
Cleantech/Biofuels	3
Consulting	9
Economic Development/ Government	2
Optics/Photonics	3
Unclassified	20
Total	48

Figure 5. Written Responses from *Other Industry* Category



- Of the 48 survey participants in Upstate New York who answered *Other Industry*, 9 respondents were working in *Consulting* and 4 were working in *Advertising/Marketing* (Table 10 & Figure 4).

CAPITAL

Q: GETTING ACCESS TO CAPITAL FOR NEW BUSINESSES FROM THE FOLLOWING SOURCES IN THE UPSTATE NEW YORK REGION IS EASY. (PLEASE RATE EACH USING THE FOLLOWING SCALE.)

	<i>Disagree</i> 1	<i>Somewhat Disagree</i> 2	<i>Neutral</i> 3	<i>Somewhat Agree</i> 4	<i>Agree</i> 5	N/A
• Debt - Banks						
• Debt - Other Sources						
• Equity - Friends/Family						
• Equity – Angel Capital						
• Equity – Venture Capital						
• Grants – Local/Regional						
• Grants – State						
• Grants – Federal						

Table 11. Perceptions of Access to Capital

	Respondent Count							
	Sources of Capital in the Upstate New York Region							
	Debt - Banks	Debt - Other Sources	Equity – Friends / Family	Equity - Angel Capital	Equity – Venture Capital	Grants – Local / Regional	Grants - State	Grants - Federal
Agree	7	5	20	2	4	5	7	9
Somewhat Agree	20	14	42	25	10	27	29	37
Neutral	29	47	70	51	37	52	50	37
Somewhat Disagree	47	66	49	61	51	58	55	57
Disagree	117	74	28	70	106	79	81	84
N/A	22	36	33	33	34	21	20	18
Total	242	242	242	242	242	242	242	242

Note: The non-response rate for this question was 0% (0 out of 242 respondents).

- Respondents were asked their perceptions about the access to capital for three major categories: debt, equity, and grants. In order to gauge the levels within these categories, they were broken down into subcomponents: *Debt—Banks*, *Debt—Other Sources*, *Equity—Friends/Family*, *Equity – Angel Capital*, *Equity – Venture Capital*, *Grants –Local/Regional*, *Grants – State*, *Grants – Federal* (Table 11).
- Examining responses in the categories *somewhat disagree* and *disagree* shows that respondents had mixed perceptions of obtaining access to capital in Upstate New York. These responses ranged from 32% (*Equity – Friends/Family*) to 68% (*Debt – Banks*) of respondents who viewed access to capital unfavorably.

- Looking at responses by only those who self-identified as **entrepreneurs** shows that entrepreneurs, similar to all respondents, had mixed perceptions of obtaining access to capital. These responses ranged from 33% *somewhat disagree/disagree* for *Equity – Friend/Family* to 64% for the category *Banks - Debt*.
- When comparing the perceptions of access to capital by **gender**, men have a more negative outlook than women, especially in reference to access to *Debt – Banks* (72% of men *somewhat disagreed or disagreed* that getting access to debt from banks was easy; 49% of women chose these selections). For more information on Perceptions of Access to Capital by Gender, see Appendix A, Tables A.7. and A.8.
- There were no discernable differences by respondents of perceptions to access to capital by **age**. For more information on Perceptions of Access to Capital by Age, see Appendix A, Tables A.9. and A.10.
- Of the three Upstate New York sub-regions, the Syracuse region had the most positive perceptions on respondents' access to capital than the Buffalo and Rochester regions. Overall, all three sub-regions had the most negative perceptions of access to capital in regards to debt from banks.
 - Regionally, the perceptions of access to capital in the **Buffalo** region shows that respondents in this region had mostly negative perceptions of access to capital, especially in reference to access to *Debt – Banks* (84% *somewhat disagreed or disagreed* that gaining access to this capital was easy) and *Equity – Venture Capital* (76% *somewhat disagreed or disagreed* that gaining access to this capital was easy). For more information on Perceptions of Access to Capital in the Buffalo region, see Appendix B, Table B.4.
 - In the **Rochester** region most respondents had negative perceptions of access to capital, but slightly less than in the Buffalo region, especially in reference to access to *Debt – Banks* (65% *somewhat disagreed or disagreed* that gaining access to this capital was easy) and *Equity – Venture Capital* (64% *somewhat disagreed or disagreed* that gaining access to this capital was easy). For more information on Perceptions of Access to Capital in the Rochester region, see Appendix C, Table C.4.
 - Slightly less than in the Rochester and Buffalo regions, the **Syracuse** region most respondents had negative perceptions of access to capital, especially in reference to access to *Debt – Banks* (58% *somewhat disagreed or disagreed* that gaining access to this capital was easy) and *Equity – Venture Capital* (56% *somewhat disagreed or disagreed* that gaining access to this capital was easy). For more information on Perceptions of Access to Capital in the Syracuse region, see Appendix D, Table D.4.

NETWORK

SUPPORT AND MENTORING

Q: GETTING ACCESS TO HELPFUL SUPPORT SERVICES AND MENTORING IS EASY FOR STARTUP BUSINESSES IN THE UPSTATE NEW YORK REGION.

<i>Disagree</i> 1	<i>Somewhat Disagree</i> 2	<i>Neutral</i> 3	<i>Somewhat Agree</i> 4	<i>Agree</i> 5	N/A
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Table 12. Perceptions of Access to Support Services and Mentoring

	Upstate New York	
	Respondent Count	Percentage of Respondent Count
Agree	58	24%
Somewhat Agree	73	30%
Neutral	41	17%
Somewhat Disagree	42	17%
Disagree	25	10%
N/A	3	1%
Total	242	100%

Note: Due to rounding, percentages may not be exact;
The non-response rate for this question was 0% (0 out of 242 respondents).

- Respondents were asked about their perceptions of access to support services and mentoring for startup businesses in the Upstate New York region.
- More respondents agreed than disagreed that access to support services was easy (54% *agree or somewhat agree* versus 27% *somewhat disagree or disagree*) (Table 12).
- Upstate New York **entrepreneurs** reported similar responses to those of all categories of respondents in regard to their perceptions of access to support services with 53% in agreement (*agree or somewhat agree*) versus 28% in disagreement (*somewhat disagree or disagree*).
- In the Upstate New York region, there were no discernable differences by respondents of perceptions to access to support services and mentoring by **age**. For more information on Perceptions of Access to Support Services and Mentoring by Age, see Appendix A, Table A.11.
- Similar to the response by age, there were no discernable differences by respondents of perceptions to access to support services and mentoring by **gender**. For more information on Perceptions of Access to Support Services and Mentoring by Gender, see Appendix A, Table A.12.
- When comparing the three regions of Upstate New York, the perceptions in the Syracuse region were more positive than the Buffalo and Rochester regions concerning support services and mentoring in the region.
 - Respondents located in the **Buffalo** region displayed tepid responses in regards to access to support services and mentoring, with 50% of respondents in the Buffalo region responding *agree/somewhat agree* that access to support and mentoring was easy. For more information on Perceptions of Support Services and Mentoring in the Buffalo region, see Appendix B, Table B.5.
 - The **Rochester** region, similar to the Buffalo region, exhibited a lukewarm response to the statement that obtaining support services and mentoring in the region was easy, with 53% of respondents stating *agree/somewhat agree*. For more information on Perceptions of Support Services and Mentoring in the Rochester region, see Appendix C, Table C.5.
 - Survey participants in the **Syracuse** region responded more positively to the access to support services and mentoring than other Upstate New York regions with 61% of respondents in the region responding *agree/somewhat agree* that it was easy to obtain these services. For more information on Perceptions of Support Services and Mentoring in the Syracuse region, see Appendix D, Table D.5.

Q: COLLEGES AND UNIVERSITIES IN THE UPSTATE NEW YORK REGION PROVIDE KNOWLEDGE, INFORMATION, AND RESOURCES THAT MEET THE NEEDS OF SMALL BUSINESSES. (PLEASE RATE EACH USING THE FOLLOWING SCALE.)

	<i>Disagree</i> 1	<i>Somewhat Disagree</i> 2	<i>Neutral</i> 3	<i>Somewhat Agree</i> 4	<i>Agree</i> 5	N/A
<ul style="list-style-type: none"> • <i>Facilities/Labs</i> • <i>Training</i> • <i>Faculty Consulting</i> • <i>Students</i> • <i>Research/Information</i> • <i>Technology Transfer or Licensing</i> 						

Table 13. Perceptions of Resources and Information Provided by Colleges and Universities

	Upstate New York Respondent Count					
	Facilities / Labs	Training	Faculty Consulting	Students	Research / Information	Technology Transfer or Licensing
Agree	61	48	51	83	68	34
Somewhat Agree	70	86	77	90	76	70
Neutral	44	43	47	32	49	48
Somewhat Disagree	33	32	36	17	27	34
Disagree	19	19	15	10	10	30
N/A	15	14	16	10	12	26
Total	242	242	242	242	242	242

Note: The non-response rate for this question was 0% (0 out of 242 respondents).

- Respondents were asked about their perceptions of the resources and information provided by colleges and universities in the Upstate New York region.
- Overall, respondents had a favorable perception of the resources and information provided by colleges and universities. Respondents were most favorable pertaining to the category of *Students* and the category of *Research/Information* (Table 13).
- However, of those who responded to this question, 26% *somewhat disagreed/disagreed* that *Technology Transfer or Licensing* assistance from colleges and universities was sufficient, while 11% responded *N/A*. **It is unclear what the demand is for technology transfer and licensing assistance in the Upstate New York region, but a sizeable number of respondents are unsatisfied with the status quo.**
- All three sub-regions valued the access to students as the most favorable university resource, although the Syracuse region had the most favorable responses with over three quarters of respondents replying in this manner.
 - Overall, respondents in the **Buffalo** region had moderately favorable perceptions of the resources and information provided by colleges and universities. Respondents were most favorable pertaining to the category of *Students* (65% *somewhat agree/agree*). For more information on Perceptions of Resources and Information Provided by Colleges and Universities in the Buffalo region, see Appendix B, Table B.6.
 - In the **Rochester** region, moderately favorable perceptions of the resources and information provided by colleges and universities, except for the category of *Students* which revealed extremely favorable responses (73% *somewhat agree/agree*). For more information on Perceptions of Resources and Information Provided by Colleges and Universities in the Rochester region, see Appendix C, Table C.6.
 - Similar to the Rochester region, the **Syracuse** region showed moderately favorable perceptions of the resources and information provided by colleges and universities, except for the category of *Students* which revealed extremely favorable responses (76% *somewhat agree/agree*). For more information on Perceptions of Resources and Information Provided by Colleges and Universities in the Syracuse region, see Appendix D, Table D.6.

BUSINESS SUPPORT ORGANIZATIONS

Q: BUSINESS SUPPORT ORGANIZATIONS IN THE UPSTATE NEW YORK REGION PROVIDE THE KNOWLEDGE AND INFORMATION NEEDED TO START AND GROW A NEW BUSINESS.

<i>Disagree</i> 1	<i>Somewhat Disagree</i> 2	<i>Neutral</i> 3	<i>Somewhat Agree</i> 4	<i>Agree</i> 5	<i>N/A</i>
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Table 14. Perceptions of Business Support Organizations

	Respondent Count	Percentage of Respondents
Agree	55	23%
Somewhat Agree	81	33%
Neutral	39	16%
Somewhat Disagree	42	17%
Disagree	22	9%
N/A	3	1%
Total	242	100%

Note: Due to rounding, percentages may not be exact;
The non-response rate for this question was 0% (0 out of 242 respondents).

- Survey participants were asked about their perceptions of business support organizations and their ability to provide knowledge and information to entrepreneurs to grow a new business.
- Overall, respondents in Upstate New York showed favorable perceptions of business support organizations in the region with 56% of survey participants selecting *agree* or *somewhat agree* (Table 14).
- When comparing the perceptions of business support organizations by **gender**, women are slightly more positive in their perceptions of businesses support organization in the Upstate New York region compared to men (59% of women *agree/somewhat agree* versus 56% of men). For more information on Perceptions of Business Support Organizations by Age, see Appendix A, Table A.13.
- The perceptions of business support organizations by **age** show that people under 45 years old have a slightly more negative outlook than those 45 years and older (29% *somewhat disagreed* or *disagreed* under the age of 45 versus 25% of those 45 years and older). For more information on Perceptions of Business Support Organizations, see Appendix A, Table A.14.
- Regionally, the perceptions of business support organizations were the most positive in the Syracuse region as compared to the responses from the Buffalo and Rochester regions.
 - The perceptions of business support organizations in the **Buffalo** region are mostly positive, 53% of respondents agree (19% *agree* and 34% *somewhat agree*) that that existing organizations provide the necessary support to start and grow a new business. For more information on Perceptions of Business Support Organizations in the Buffalo region, see Appendix B, Table B.7.
 - The perceptions of business support organizations in the **Rochester** region are similar to Buffalo region, 53% of respondents view the support organization positively (23% *agree* and 30% *somewhat agree*). For more information on Perceptions of Business Support Organizations in the Rochester region, see Appendix C, Table C.7.
 - The perceptions of business support organizations were the most positive in the **Syracuse** region compared to the other two sub-regions with 65% of participants responding favorably (26% *agree* and 39% *somewhat agree*). For more information on Perceptions of Business Support Organizations in the Syracuse region, see Appendix D, Table D.7.

NETWORKING

Q: OPPORTUNITIES FOR ENTREPRENEURS TO MEET AND NETWORK WITH OTHERS ARE SUFFICIENT IN THE UPSTATE NEW YORK REGION.

<i>Disagree</i> 1	<i>Somewhat Disagree</i> 2	<i>Neutral</i> 3	<i>Somewhat Agree</i> 4	<i>Agree</i> 5	N/A
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Table 15. Perceptions of Entrepreneurial Networking Opportunities

	Respondent Count	Percentage of Respondents
Agree	57	24%
Somewhat Agree	82	34%
Neutral	48	20%
Somewhat Disagree	38	16%
Disagree	16	7%
N/A	1	0%
Total	242	100%

Note: Due to rounding, percentages may not be exact;
The non-response rate for this question was 0% (0 out of 242 respondents).

- Survey participants were asked if there were sufficient opportunities for entrepreneurs to meet and network with each other in the Upstate New York region.
- Respondents mostly agreed that networking opportunities are sufficient (58% *somewhat agree and agree*). (Table 15).
- Analysis by **gender** shows that women answered more positively than men; 56% of men chose *agree or somewhat agree* while 66% of women selected the same answers. For more information on Perceptions of Entrepreneurial Networking Opportunities by Gender, see Appendix A, Table A.15.
- Analysis by **age** suggests that respondents over the age of 45 were more positive than those under 45 years old; 62% of respondents 45 years and older *agreed or somewhat agreed* with this statement while 45% of respondents under the age of 45 selected these responses. For more information on Perceptions of Entrepreneurial Networking Opportunities by Age, see Appendix A, Table A.16.
- Perception about entrepreneurial networking opportunities differ by region, only half of the responses in the Buffalo region were in favorable, while the Rochester and Syracuse regions were significantly more positive.
 - Half of the respondents (50%) in the in the **Buffalo** region had favorable perceptions of entrepreneurial networking opportunities (21% *agree*, 29% *somewhat agree*). For more information on Perceptions of Entrepreneurial Networking Opportunities in the Buffalo region, see Appendix B, Table B.8.
 - The perceptions of entrepreneurial networking opportunities in the **Rochester** region are mostly positive (58%) compared to only 35% who replied with a negative perception. For more information on perceptions of Entrepreneurial Networking Opportunities in the Rochester region, see Appendix C, Table C.8.
 - The majority of perceptions of entrepreneurial networking opportunities in the **Syracuse** region are positive (63% *agree and somewhat agree*). For more information on Perceptions of Entrepreneurial Networking Opportunities in the Syracuse region, see Appendix D, Table D.8.

GOVERNMENT

Q: GOVERNMENT RESPONSIVENESS AND ABILITY TO PROVIDE RELEVANT SERVICES TO MEET ENTREPRENEURIAL NEEDS IS SUFFICIENT. (PLEASE RATE EACH USING THE FOLLOWING SCALE.)

	<i>Disagree</i>	<i>Somewhat Disagree</i>	<i>Neutral</i>	<i>Somewhat Agree</i>	<i>Agree</i>	<i>N/A</i>
	1	2	3	4	5	

- City Governments
- County Governments
- State Government

Table 16. Perceptions of Government Responsiveness

	Upstate New York Respondent Count					
	City		County		State	
	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents
Agree	6	2%	12	5%	5	2%
Somewhat Agree	18	7%	33	14%	32	13%
Neutral	32	13%	33	14%	41	17%
Somewhat Disagree	58	24%	57	24%	50	21%
Disagree	107	44%	92	38%	99	41%
N/A	21	9%	15	6%	15	6%
Total	242	100%	242	100%	242	100%

Note: The non-response rate for this question was 0% (0 out of 242 respondents).

- Survey participants were asked about their perceptions of government responsiveness to entrepreneurial needs at the city, county, and state levels.
- More than 6 out of 10 respondents in Upstate New York *somewhat disagreed or disagreed* that city (68%), county (62%), and state (62%) governments provide sufficient, relevant services to entrepreneurs (Table 16).
- Examining responses for the perception of government responsiveness by those who self-identify as **entrepreneurs** shows a similar dissatisfaction as the general cohort: city (64%), county (61%) and state (62%).
- All sub-regions in the Upstate New York region were not satisfied with government responsiveness to entrepreneurial needs: this was emphasized by over 8 out of 10 respondents in the Buffalo region stating that they were dissatisfied with this from city government.
 - The respondents' perceptions of government responsiveness in the **Buffalo** region were overwhelmingly negative. Sixty-eight percent (68%) of respondents were dissatisfied with state government responsiveness (*disagree* and *somewhat disagree*), while 71% were dissatisfied with county government, and 81% with the city government. For more information on Perceptions of Government Responsiveness in the Buffalo region, see Appendix B, Table B.9.
 - Similar to the Buffalo region, participants' perceptions of government responsiveness in the **Rochester** region were negative for each level of government. Respondents were least dissatisfied with the county government (58% *disagreed or somewhat disagreed*), followed by state government (61% *disagreed or somewhat disagreed*) and most dissatisfied with the city government (62% *disagreed or somewhat disagreed*). For more information on Perceptions of Government Responsiveness in the Rochester region, see Appendix C, Table C.9.
 - In the **Syracuse** region, respondents' perceptions of government responsiveness were negative in all three categories. Respondents' views were the most negative regarding the city government responsiveness (66% *disagree* and *somewhat disagree*), followed by the state government (62% *disagree* and *somewhat disagree*) and lastly the county government (59% *disagree* and *somewhat disagree*). For more information on Perceptions of Government Responsiveness in the Syracuse region, see Appendix D, Table D.9.

WORKFORCE

Q: WELL-TRAINED WORKERS IN THE FOLLOWING OCCUPATIONAL CATEGORIES ARE IN SUFFICIENT SUPPLY IN THE UPSTATE NEW YORK REGION. (PLEASE RATE EACH USING THE FOLLOWING SCALE.)

	<i>Disagree</i> 1	<i>Somewhat Disagree</i> 2	<i>Neutral</i> 3	<i>Somewhat Agree</i> 4	<i>Agree</i> 5	N/A
<ul style="list-style-type: none"> • <i>Management Personnel</i> • <i>Scientists & Engineers</i> • <i>IT Specialists</i> • <i>Skilled/Specialized Workers</i> • <i>Manufacturing & Assembly</i> 						

Table 17. Perceptions of Workforce Supply

	Respondent Count				
	Management Personnel	Scientists & Engineers	IT Specialists	Skilled/Specialized Workers	Manufacturing & Assembly
Agree	82	80	90	67	96
Somewhat Agree	57	63	61	67	56
Neutral	36	37	35	42	37
Somewhat Disagree	35	31	30	32	12
Disagree	18	8	6	14	7
N/A	14	23	20	20	34
Total	242	242	242	242	242

Note: The non-response rate for this question was 0% (0 out of 242 respondents).

- Respondents were asked their perceptions of the supply of workers in several occupations: *Management Personnel, Scientist & Engineers, IT Specialists, Skilled/Specialized Workers, and Manufacturing & Assembly*.
- Overall, most respondents had extremely favorable perceptions of the workforce supply in the Upstate New York region. All categories reported a majority of favorable responses (*agree, somewhat agree*) (Table 17).
- Respondents in the three sub-regions agreed that there was a sufficient supply of *Manufacturing and Assembly* workers, there was some difference of opinion among the regions about the supply of *Scientists and Engineers*; the Buffalo and Rochester regions found the supply of *Scientists and Engineers* adequate (60% and 72% *agree or somewhat agree*, respectively), while only one third of Syracuse respondents stated that there was an adequate supply.
 - The perceptions of workforce supply in the **Buffalo** region show that respondents in this region view the supply of workers favorably in all categories. Respondents agreed that there was sufficient supply of *Manufacturing and Assembly workers* (68% *agree*) followed by *Scientists and Engineers* (60% *agree*), while the perceptions of the supply of *Management Personnel* was the lowest (52% *agree or somewhat agree*). For more information on Perceptions of Workforce Supply in the Buffalo region, see Appendix B, Table B.10.
 - The perceptions of workforce supply in the **Rochester** region show that respondents in this region view the workforce positively. The supply of *Scientists and Engineers* was viewed the most favorably with 71% responding *agree or somewhat agree*, followed by *IT specialists* (67% *agree or somewhat agree*). For more information Perceptions of Workforce Supply in the Rochester region, see Appendix C, Table C.10.
 - The perceptions of workforce supply in the **Syracuse** region were the least positive of the three Upstate New York Regions. The supply of *Manufacturing and Assembly* workers were viewed the most favorably with 62% of participants responding *agree or somewhat agree* while, only 36% of respondents *agree or somewhat agree* that the supply *Scientists and Engineers* was in adequate supply. For more information on Perceptions of Workforce Supply in the Syracuse region, see Appendix D, Table D.10.

ATTITUDE

Q: ATTITUDES TOWARD ENTREPRENEURS AMONG THE FOLLOWING GROUPS IN THE UPSTATE NEW YORK REGION ARE SUPPORTIVE. (PLEASE RATE EACH USING THE FOLLOWING SCALE.)

	<i>Disagree</i> 1	<i>Somewhat Disagree</i> 2	<i>Neutral</i> 3	<i>Somewhat Agree</i> 4	<i>Agree</i> 5	N/A
• <i>Friends/Family</i>						
• <i>Business Community</i>						
• <i>Government Economic Development Agencies</i>						
• <i>Local Non-Profit Organizations Supporting Entrepreneurs</i>						
• <i>Other Entrepreneurs</i>						

Table 18. Perceptions of Attitudes toward Entrepreneurs

	Respondent Count				
	Friends / Family	Business Community	Government Economic Development Agencies	Local NPOs that Support Entrepreneurs	Other Entrepreneurs
Agree	102	82	38	61	132
Somewhat Agree	81	92	74	78	69
Neutral	36	32	47	45	23
Somewhat Disagree	10	25	46	23	11
Disagree	5	8	29	17	1
N/A	8	3	8	18	6
Total	242	242	242	242	242

Note: The non-response rate for this question was 0% (0 out of 242 respondents).

- Survey participants were asked whether they felt the attitudes toward entrepreneurs were supportive in the Upstate New York region.
- Examining responses in the categories *agree* and *somewhat agree* shows that most respondents had a positive overall perception of attitudes toward entrepreneurs; these ranged from 83% agreement (*Other Entrepreneurs*) to 46% agreement (*Government Economic Development Agencies*) (Table 18).
- When comparing the perceptions of attitudes toward entrepreneurs by **gender**, women had slightly more positive perceptions than men, especially in regards to *Business Community* (81% of women *agree/somewhat agree* versus 71% of men). For more information on Perceptions of Attitudes toward Entrepreneurs by Gender, see Appendix A, Tables A.17. and A.18.
- When comparing the perceptions of attitudes toward entrepreneurs by **age**, those respondents 45 years and older had somewhat more positive perceptions than those under the age of 45; this can be seen in respondent choices for attitudes toward entrepreneurs by *Friends/Family* (78% of those 45 years and older *agree/somewhat agree* versus 68% of those under the age of 45). For more information on Perceptions of Attitudes toward Entrepreneurs by Age, see Appendix A, Tables A.19. and A.20.
- It is noteworthy that in all sub-regions, respondents had the least positive view of the attitudes of *Government Economic Development Agencies*. The Buffalo region displayed the largest dissatisfaction in services from *Government Economic Development Agencies* with only one third responding in the affirmative (*agree/somewhat agree*).
 - Respondents in the **Buffalo** region had positive perceptions of attitudes toward entrepreneurs by all groups with the exception of *Government Economic Development Agencies* where only 33% of respondents *agreed* or *somewhat agreed*. This is in strong contrast to *Other Entrepreneurs* (79%) and *Friends/ Family* (69%). For more information on Perceptions of Attitudes toward Entrepreneurs in the Buffalo region, see Appendix B, Table B.11.
 - Similar to the Buffalo region, participants in the **Rochester** region had favorable perceptions of the attitudes toward entrepreneurs from multiple categories except for *Government Economic Development Agencies*, where less than half of respondents (47% *agreed* or *somewhat agreed*). Conversely, 86% had favorable views (*agree and somewhat agree*) from *Other Entrepreneurs*; 81% from *Friends/Family*; and 76% from the *Business Community*. For more information Perceptions of Attitudes toward Entrepreneurs in the Rochester region, see Appendix C, Table C.11.
 - Reviewing the results of the attitudes of the **Syracuse** respondents, this region had positive perceptions of the attitudes toward entrepreneurs in all categories. The categories ranged from 80% *agree* or *somewhat agree* for other entrepreneurs to 56% for *Government Economic Development Agencies*. For more information on Perceptions of Attitudes toward Entrepreneurs in the Syracuse region, see Appendix D, Table D.11

INFRASTRUCTURE

Q: THE FOLLOWING INFRASTRUCTURE ELEMENTS IN THE UPSTATE NEW YORK REGION ARE SUFFICIENT FOR DEVELOPING NEW BUSINESSES. (PLEASE RATE EACH USING THE FOLLOWING SCALE.)

	<i>Disagree</i> 1	<i>Somewhat Disagree</i> 2	<i>Neutral</i> 3	<i>Somewhat Agree</i> 4	<i>Agree</i> 5	N/A
<ul style="list-style-type: none"> • Available Real Estate • Information Technology • Air Transportation • Ground Transportation • Foreign Trade Zones 						

Table 19. Perceptions of Infrastructure

	Respondent Count				
	Available Real Estate	Information Technology	Air Transportation	Ground Transportation	Foreign Trade Zones
Agree	131	106	89	103	42
Somewhat Agree	65	83	58	64	30
Neutral	20	32	39	29	59
Somewhat Disagree	10	10	28	26	24
Disagree	5	1	17	8	16
N/A	11	10	11	12	71
Total	242	242	242	242	242

Note: The non-response rate for this question was 0% (0 out of 242 respondents).

- Respondents were asked about their perceptions of whether infrastructure elements such as real estate, information technology, air transportation, and foreign trade zones were sufficient to develop a business in the Upstate New York region.
- For the most part, people responded in agreement that the infrastructure in Upstate New York was sufficient (Table 19).
- It is interesting to note that only 29% of those surveyed *agreed* or *somewhat agreed* that foreign trade zones were sufficient, but 54% of respondents replied that they were *neutral* or *N/A* to this question, suggesting that this is not a key issue for entrepreneurs in the Upstate New York region.
- While the perceptions of infrastructure were generally favorable in both the Buffalo and Rochester regions, perceptions in Syracuse were mixed especially in regards to air transportation.
 - The perceptions of infrastructure in the **Buffalo** region were very favorable in all categories with the exception of *Foreign Trade Zones* where only 40% of respondents *agreed* or *somewhat agreed*. For more information on Perceptions of Infrastructure in the Buffalo region, see Appendix B, Table B.12.
 - The perceptions of infrastructure in the **Rochester** region were also strongly positive with the noticeable exception of *Foreign Trade Zones* where only 32% *agreed* or *somewhat agreed* and 32% of participants responded *N/A* to *Foreign Trade Zones*. For more information Perceptions of Infrastructure in the Rochester region, see Appendix C, Table C.12.
 - In the **Syracuse** region respondents perceptions of available infrastructure were mixed. *Available Real Estate* and *Information Technology* were viewed favorably (77% and 74% *agree* or *somewhat agree*, respectively), while *Air Transportation* had weak support with only 39% of respondents either *agreeing* or *somewhat agreeing*. Respondents had the worst perceptions of *Foreign Trade Zones* (15% *agree* or *somewhat agree*). For more information on Perceptions of Infrastructure in the Syracuse region, see Appendix D, Table D.12.

Q: IF YOU WERE TO START A BUSINESS WITHIN THE NEXT TWO YEARS, HOW CONFIDENT ARE YOU THAT YOU WILL FIND THE SUPPORT AND RESOURCES YOU NEED TO DO SO SUCCESSFULLY?

<i>Not Confident</i>	<i>Somewhat Confident</i>	<i>Neutral</i>	<i>Somewhat Confident</i>	<i>Confident</i>	<i>N/A</i>
<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>	

Table 20. Perceptions of Ability to Obtain Support and Resources for Startup

	Respondent Count	Percentage of Respondents
Confident	39	16%
Somewhat Confident	85	35%
Neutral	33	14%
Somewhat Not Confident	55	23%
Not Confident	28	11%
N/A	2	1%
Total	242	100%

Note: Due to rounding, percentages may not be exact;
The non-response rate for this question was 0% (0 out of 242 respondents).

- Respondents were asked about their ability to obtain support and resources to start a business within the next two years.
- In general, only about half (51%) of respondents were *confident* or *somewhat confident* that they would find the support and resources they need to start a business in the next two years (Table 20).
- Analysis by **gender** shows that both men and women reported similar perceptions of their ability to garner support in the next two years. Fifty one percent (51%) of women and 52% of men are *confident* or *somewhat confident* that they will be able to obtain support and resources in the next two years. For more information on Perceptions of Ability to Obtain Support and Resources for Entrepreneurial Activity by Gender, see Appendix A, Table A.21.
- Analysis by **age** indicates that those under the age of 45 were slightly more positive about their ability to obtain support and resources for their entrepreneurial ventures over the next two years than those 45 years and older (57% of those under the age of 45 selected *agree/somewhat agree* versus 50% of those 45 years and older). For more information on Perceptions of Ability to Obtain Support and Resources for Entrepreneurial Activity by Age, see Appendix A, Table A.22.
- Perceptions of respondents' abilities to start up a business in the next two years were somewhat cool in all regions, with the Buffalo region reporting a low percentage of positive responses in comparison to the Rochester and Syracuse regions.
 - The perceptions of the ability to garner support for startup in the **Buffalo** region shows that respondents in this region are the least positive of the three Upstate New York regions. Forty percent of respondents (40%) are *confident* or *somewhat confident*, compared to 44% who are *somewhat not confident* or *not confident*. For more information on Perceptions of Ability to Obtain Support and Resources for Startup in the Buffalo region, see Appendix B, Table B.13.
 - The perceptions of the ability to garner support for startup in the **Rochester** region reveal that the majority of respondents (54%) in this region are *confident* that they can find support and resources for a startup. Only 32% of respondents are *not confident* or *somewhat not confident*. For more information Perceptions of Ability to Obtain Support and Resources for Startup in the Rochester region, see Appendix C, Table C.13.
 - The perceptions of respondents' ability to garner support for startup in the **Syracuse** region displays that the most respondents (55%) in this region are *confident* that they can find support and resources for a startup. Only 35% of respondents are *not confident* or *somewhat not confident*. For more information on Perceptions of Ability to Obtain Support and Resources for Startup in the Syracuse region, see Appendix D, Table D.13.

ECONOMY

Q: THE MOST RECENT RECESSION IS ADVERSELY AFFECTING PEOPLE’S ABILITY TO START AND/OR SUSTAIN A NEW BUSINESS.

<i>Disagree</i> 1	<i>Somewhat Disagree</i> 2	<i>Neutral</i> 3	<i>Somewhat Agree</i> 4	<i>Agree</i> 5	<i>N/A</i>
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Table 21. Perceptions of the Most Recent Recession's Impact on Startups

	Respondent Count	Percentage of Respondents
Agree	100	41%
Somewhat Agree	79	33%
Neutral	27	11%
Somewhat Disagree	26	11%
Disagree	10	4%
N/A	0	0%
Total	242	100%

Note: Due to rounding, percentages may not be exact;
The non-response rate for this question was 0% (0 out of 242 respondents).

- Survey participants were asked if they believe that the most recent recession is affecting the ability of people to start/sustain a new business. **Please note that this question does not ask about the respondent's ability to start a business, but his/her perception about overall conditions.**
- Over 41% of respondents *agree* that the most recent recession has been adversely impacting entrepreneurial activity; this number climbs to 74% when *agree* and *somewhat agree* are aggregated (Table 21).
- Analysis by **gender** shows differences between men and women. Forty-three percent (43%) of men *agree* to this question compared to 36% of women. For more information on Perceptions of the Most Recent Recession's Impact on Entrepreneurial Activity by Gender, see Appendix A, Table A.23.
- Examining this question by **age** shows that a greater percentage of individuals age 45 and over responded that they *agree* (43%) on this question, somewhat more than those under 45 years old (37%). For more information on Perceptions of the Most Recent Recession's Impact on Entrepreneurial Activity by Age, see Appendix A, Table A.24.
- The three sub-regions of Upstate New York all overwhelmingly agreed that the most recent recession has impacted people's ability to start up or sustain a business, with the Buffalo region most in agreement with this statement.
 - An overwhelming majority of respondents in the **Buffalo** region (79%) *agree* or *somewhat agree* that the most recent recession has impacted people's ability to start up or sustain a business. For more information Perceptions of the Most Recent Recession's Impact on Startups in the Buffalo region, see Appendix B, Table B.14.
 - Similarly to the Buffalo region, over three quarters of respondents (76%) in the **Rochester** region *agreed* or *somewhat agreed* that the most recent recession adversely affected startups. For more information on the Perceptions of the Most Recent Recession's Impact on Startups in the Rochester region, see Appendix C, Table C.14.
 - The **Syracuse** region had the most positive outlook of the three sub-region, 6 out of 10 respondents (66%) in the Syracuse region *agree* or *somewhat agree* that the most recent recession has impacted people's ability to start up or sustain a business. For more information on Perceptions of the Most Recent Recession's Impact on Startups in the Syracuse region, see Appendix D, Table D.14.

Q: MORE PEOPLE ARE PURSUING ENTREPRENEURIAL OPPORTUNITIES DUE TO LAYOFFS AND HIGH UNEMPLOYMENT.

<i>Disagree</i> 1	<i>Somewhat Disagree</i> 2	<i>Neutral</i> 3	<i>Somewhat Agree</i> 4	<i>Agree</i> 5	<i>N/A</i>
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Table 22. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment

	Respondent Count	Percentage of Respondents
Agree	73	30%
Somewhat Agree	104	43%
Neutral	37	15%
Somewhat Disagree	20	8%
Disagree	2	1%
N/A	6	2%
Total	242	100%

Notes: Due to rounding, percentages are not exact;
The non-response rate for this question was 0% (0 out of 242 respondents).

- In general, 73% of Upstate New York respondents *agree* or *somewhat agree* that individuals were pursuing entrepreneurial activities due to layoffs or unemployment (Table 22).
- Analysis by **gender** indicates that 70% of women and 74% of men *agree* or *somewhat agree* that individuals were pursuing entrepreneurial activities because of high unemployment or layoffs. For more information on Perceptions on Entrepreneurial Activities because of a Layoffs and High Unemployment by Gender, see Appendix A, Table A.25.
- Analysis by **age** shows 68% of respondents under 45 years old *agree* or *somewhat agree* that more people are pursuing entrepreneurial activities as a result of layoffs or unemployment, compared to 75% of those 45 years old or older. For more information on Perceptions on Entrepreneurial Activities because of a Layoffs and High Unemployment by Age, see Appendix A, Table A.26.
- Of the three Upstate New York regions, a higher percentage of respondents in the Rochester region think that more entrepreneurial activities are being pursued due to layoffs in comparison to the other two regions.
 - Most respondents in the **Buffalo** region agree (62%) *agree* or *somewhat agree* that more people are pursuing entrepreneurial activity due to layoffs and high unemployment. Only 13% of respondents *disagreed* or *somewhat disagreed* to this question. For more information on Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment in the Buffalo region, see Appendix B, Table B.15.
 - Eight out of 10 respondents (83%) of respondents in the **Rochester** region *agreed* or *somewhat agreed* that more people are pursuing entrepreneurial activity due to layoffs and high unemployment. Only 7% of respondents *disagreed* or *somewhat disagreed* to this question. For more information on Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment in the Rochester Region, see Appendix C, Table C.15.
 - Sixty five percent (65%) of respondents from the **Syracuse** region *agreed* or *somewhat agreed* that more people are pursuing entrepreneurial activity due to layoffs and high unemployment, and only 9% somewhat disagree. For more information on Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment in the Syracuse region, see Appendix D, Table D.15.

APPENDIX A: UPSTATE NEW YORK REGION TABLES A.1. – A.26.

A.1. Self-Identified Role in Entrepreneurship by Gender

	Respondent Count (Male)	Percentage of Respondent Count (Male)	Respondent Count (Women)	Percentage of Respondent Count (Women)
Entrepreneur	112	59%	22	47%
Investor	17	9%	4	9%
Work for economic development organization	12	6%	7	15%
Work for or volunteer with an organization supporting entrepreneurship	18	9%	8	17%
Other	32	17%	6	13%
Total	191	100%	47	100%

Note: Percentages are not exact due to rounding.

A.2. Self-Identified Role in Entrepreneurship by Age

	Respondent Count (<45 Years)	Percentage of Respondent Count (<45 Years)	Respondent Count (≥45 Years)	Percentage of Respondent Count (≥45 Years)
Entrepreneur	38	61%	93	53%
Investor	2	3%	19	11%
Work for economic development organization	7	11%	12	7%
Work for or volunteer with an organization supporting entrepreneurship	6	10%	21	12%
Other	9	15%	29	17%
Total	62	100%	174	100%

Note: Percentages are not exact due to rounding.

A.3. Top 10 Industry Self-Identified by Women

Rank	Industry	Respondent Count (Women)	Percentage of Respondent Count (Women)
1	Education	12	7%
2	Medical Devices	12	7%
3	Business Products & Services	10	6%
4	Computer Software	10	6%
5	Bioscience/Biotechnology	8	5%
6	Energy	8	5%
7	Industrial Manufacturing	7	4%
8	Pharmaceuticals	7	4%
9	Other Industry	7	4%
10	Agriculture	6	4%
	Total	87	54%

A.4. Top 10 Industry Self-Identified by Men

Rank	Industry	Respondent Count (Male)	Percentage of Respondent Count (Male)
1	Bioscience/Biotechnology	41	6%
2	Computer Software	40	6%
3	Other Industry	40	6%
4	Energy	37	6%
5	Medical Devices	37	6%
6	Information Technology	34	5%
7	Industrial Manufacturing	33	5%
8	Business Products & Services	32	5%
9	Aerospace & Defense	29	4%
10	Electronics	25	4%
	Total	348	54%

A.5. Top 10 Industry Self-Identified by Respondents ≥ 45 Years Old

Rank	Industry	Respondent Count (≥45 Years)	Percentage of Respondent Count (≥45 Years)
1	Other Industry	40	8%
2	Medical Devices	37	6%
3	Computer Software	34	6%
4	Bioscience/Biotechnology	7	6%
5	Industrial Manufacturing	33	6%
6	Energy	32	5%
7	Business Products and Services	31	5%
8	Information Technology	27	5%
9	Education	26	4%
10	Aerospace and Defense	4	4%
	Total	318	53%

A.6. Top 10 Industry Self-Identified by Respondents < 45 Years Old

Rank	Industry	Respondent Count (<45 Years)	Percentage of Respondent Count (<45 Years)
1	Bioscience/Biotechnology	16	7%
2	Computer Software	16	7%
3	Medical Devices	14	6%
4	Energy	13	6%
5	Information Technology	13	6%
6	Pharmaceuticals	12	6%
7	Business Products & Services	11	5%
8	Aerospace & Defense	8	4%
9	Consumer Products and Services	8	4%
10	Industrial Manufacturing	8	4%
	Total	119	55%

A.7. Perceptions of Access to Capital by Gender (Women)

	Debt - Banks	% Debt - Banks	Debt - Other Sources	% Debt - Other Sources	Equity - Friends/Family	% Equity - Friends/Family	Equity - Angel Capital	% Equity - Angel Capital	Equity - VC	% Equity - VC	Grants - Local/Regional	% Grants - Local/Regional	Grants - State	% Grants - State	Grants - Federal	% Grants - Federal
Agree	2	4%	2	4%	5	11%	0	0%	2	4%	3	6%	2	4%	2	4%
Somewhat Agree	7	15%	2	4%	8	17%	5	11%	1	2%	5	11%	6	13%	8	17%
Neutral	7	15%	14	30%	13	28%	12	26%	10	21%	9	19%	8	17%	5	11%
Somewhat Disagree	7	15%	8	17%	8	17%	8	17%	9	19%	11	23%	8	17%	11	23%
Disagree	16	34%	11	23%	6	13%	11	23%	13	28%	14	30%	16	34%	15	32%
N/A	8	17%	10	21%	7	15%	11	23%	12	26%	5	11%	7	15%	6	13%
Total	47		47		47		47		47		47		47		47	

Note: Percentages may be slightly above or below 100% due to rounding.

A.8. Perceptions of Access to Capital by Gender (Men)

	Debt - Banks	% Debt - Banks	Debt - Other Sources	% Debt - Other Sources	Equity - Friends/Family	% Equity - Friends/Family	Equity - Angel Capital	% Equity - Angel Capital	Equity - VC	% Equity - VC	Grants - Local/Regional	% Grants - Local/Regional	Grants - State	% Grants - State	Grants - Federal	% Grants - Federal
Agree	5	3%	3	2%	15	8%	2	1%	2	1%	2	1%	5	3%	7	4%
Somewhat Agree	13	7%	12	6%	34	18%	20	10%	9	5%	22	12%	23	12%	29	15%
Neutral	21	11%	32	17%	54	28%	38	20%	26	14%	41	21%	41	21%	29	15%
Somewhat Disagree	40	21%	57	30%	40	21%	50	26%	41	21%	45	24%	46	24%	46	24%
Disagree	98	51%	61	32%	22	12%	59	31%	91	48%	65	34%	63	33%	68	36%
N/A	14	7%	26	14%	26	14%	22	12%	22	12%	16	8%	13	7%	12	6%
Total	191		191		191		191		191		191		191		191	

Note: Percentages may be slightly above or below 100% due to rounding.

A.9. Perceptions of Access to Capital by Age (≥ 45 Years Old)

	Debt - Banks	% Debt - Banks	Debt - Other Sources	% Debt - Other Sources	Equity - Friends/Family	% Equity - Friends/Family	Equity - Angel Capital	% Equity - Angel Capital	Equity - VC	% Equity - VC	Grants - Local/Regional	% Grants - Local/Regional	Grants - State	% Grants - State	Grants - Federal	% Grants - Federal
Agree	6	3%	4	2%	14	8%	2	1%	3	2%	3	2%	6	3%	9	5%
Somewhat Agree	14	8%	10	6%	31	18%	23	13%	10	6%	20	11%	23	13%	28	16%
Neutral	22	13%	32	18%	51	29%	34	20%	27	16%	40	23%	38	22%	31	18%
Somewhat Disagree	34	20%	49	28%	35	20%	45	26%	36	21%	43	25%	40	23%	40	23%
Disagree	84	48%	53	30%	20	11%	49	28%	75	43%	55	32%	55	32%	56	32%
N/A	14	8%	26	15%	23	13%	21	12%	23	13%	13	7%	12	7%	10	6%
Total	174		174		174		174		174		174		174		174	

Note: Percentages may be slightly above or below 100% due to rounding.

A.10. Perceptions of Access to Capital by Age (< 45 Years Old)

	Debt - Banks	% Debt - Banks	Debt - Other Sources	% Debt - Other Sources	Equity - Friends/Family	% Equity - Friends/Family	Equity - Angel Capital	% Equity - Angel Capital	Equity - VC	% Equity - VC	Grants - Local/Regional	% Grants - Local/Regional	Grants - State	% Grants - State	Grants - Federal	% Grants - Federal
Agree	1	2%	1	2%	5	8%	0	0%	1	2%	2	3%	1	2%	0	0%
Somewhat Agree	5	8%	3	5%	10	16%	2	3%	0	0%	6	10%	5	8%	8	13%
Neutral	6	10%	15	24%	19	31%	16	26%	10	16%	12	19%	12	19%	6	10%
Somewhat Disagree	13	21%	16	26%	12	19%	15	24%	14	23%	14	23%	15	24%	17	27%
Disagree	29	47%	18	29%	6	10%	18	29%	27	44%	20	32%	21	34%	23	37%
N/A	8	13%	9	15%	10	16%	11	18%	10	16%	8	13%	8	13%	8	13%
Total	62		62		62		62		62		62		62		62	

Note: Percentages may be slightly above or below 100% due to rounding.

A. 11. Perceptions of Access to Support Services and Mentoring by Age

	Respondent Count (<45 Years)	Percentage of Respondent Count (<45 Years)	Respondent Count (≥45 Years)	Percentage of Respondent Count (≥45 Years)
Agree	12	19%	43	25%
Somewhat Agree	21	34%	52	30%
Neutral	9	15%	32	18%
Somewhat Disagree	12	19%	29	17%
Disagree	8	13%	15	8%
N/A	0	0%	3	2%
Total	62	100%	174	100%

Note: Percentages are not exact due to rounding.

A. 12. Perceptions of Access to Support Services and Mentoring by Gender

	Respondent Count (Male)	Percentage of Respondent Count (Male)	Respondent Count (Female)	Percentage of Respondent Count (Female)
Agree	44	23%	14	30%
Somewhat Agree	59	31%	13	28%
Neutral	35	18%	5	10%
Somewhat Disagree	35	18%	7	15%
Disagree	17	9%	6	13%
N/A	1	1%	2	4%
Total	191	100%	47	100%

Note: Percentages are not exact due to rounding.

A.13. Perceptions of Business Support Organizations by Gender

	Respondent Count (Male)	Percentage of Respondent Count (Male)	Respondent Count (Female)	Percentage of Respondent Count (Female)
Agree	43	23%	11	23%
Somewhat Agree	63	33%	17	36%
Neutral	32	17%	7	15%
Somewhat Disagree	34	18%	7	15%
Disagree	16	8%	5	11%
N/A	3	1%	0	0%
Total	191	100%	47	100%

Note: Percentages are not exact due to rounding.

A.14. Perceptions of Business Support Organizations by Age

	Respondent Count (<45 Years)	Percentage of Respondent Count (<45 Years)	Respondent Count (≥45 Years)	Percentage of Respondent Count (≥45 Years)
Agree	10	16%	43	25%
Somewhat Agree	19	31%	61	35%
Neutral	14	22%	24	14%
Somewhat Disagree	10	16%	32	18%
Disagree	8	13%	12	7%
N/A	1	2%	2	1%
Total	62	100%	174	100%

Note: Percentages are not exact due to rounding.

A.15. Perceptions of Entrepreneurial Networking Opportunities by Gender

	Respondent Count (Male)	Percentage of Respondent Count (Male)	Respondent Count (Female)	Percentage of Respondent Count (Female)
Agree	43	23%	13	28%
Somewhat Agree	63	33%	18	38%
Neutral	41	21%	7	15%
Somewhat Disagree	31	16%	6	13%
Disagree	12	6%	3	6%
N/A	1	1%	0	0%
Total	191	100%	47	100%

Note: Percentages are not exact due to rounding.

A.16. Perceptions of Entrepreneurial Networking Opportunities by Age

	Respondent Count (<45 Years)	Percentage of Respondent Count (<45 Years)	Respondent Count (≥45 Years)	Percentage of Respondent Count (≥45 Years)
Agree	13	21%	44	25%
Somewhat Agree	15	24%	64	37%
Neutral	18	29%	29	17%
Somewhat Disagree	10	16%	27	15%
Disagree	6	10%	9	5%
N/A	0	0%	1	1%
Total	62	100%	174	100%

Note: Percentages are not exact due to rounding.

A.17. Perceptions of Attitudes toward Entrepreneurs by Gender (Women)

	Friends/ Family	% Friends/ Family	Business Community	% Business Community	Government Economic Development Agencies	% Government Economic Development Agencies	Local NPOs that Support Entrepreneurs	% Local NPOs that Support Entrepreneurs	Other Entrepreneurs	% Other Entrepreneurs
Agree	19	40%	16	34%	5	11%	7	15%	26	55%
Somewhat Agree	17	36%	22	47%	16	34%	16	34%	14	30%
Neutral	6	13%	7	15%	6	13%	9	19%	4	9%
Somewhat Disagree	2	4%	1	2%	9	19%	6	13%	2	4%
Disagree	0	0%	0	0%	7	15%	3	6%	0	0%
N/A	3	6%	1	2%	4	9%	6	13%	1	2%
Total	47		47		47		47		47	

Note: Percentages may be slightly above or below 100% because of rounding.

A.18. Perceptions of Attitudes toward Entrepreneurs by Gender (Men)

	Friends/ Family	% Friends/ Family	Business Community	% Business Community	Government Economic Development Agencies	% Government Economic Development Agencies	Local NPOs that Support Entrepreneurs	% Local NPOs that Support Entrepreneurs	Other Entrepreneurs	% Other Entrepreneurs
Agree	83	43%	65	34%	32	17%	54	28%	104	54%
Somewhat Agree	61	32%	70	37%	58	30%	60	31%	54	28%
Neutral	29	15%	23	12%	40	21%	36	19%	18	9%
Somewhat Disagree	8	4%	23	12%	36	19%	16	8%	9	5%
Disagree	5	3%	8	4%	21	11%	13	7%	1	1%
N/A	5	3%	2	1%	4	2%	12	6%	5	3%
Total	191		191		191		191		191	

Note: Percentages may be slightly above or below 100% because of rounding.

A.19. Perceptions of Attitudes toward Entrepreneurs by Age (<45 Years)

	Friends/ Family	% Friends/ Family	Business Community	% Business Community	Government Economic Development Agencies	% Government Economic Development Agencies	Local NPOs that Support Entrepreneurs	% Local NPOs that Support Entrepreneurs	Other Entrepreneurs	% Other Entrepreneurs
Agree	24	39%	21	34%	5	8%	17	27%	35	56%
Somewhat Agree	18	29%	22	35%	22	35%	20	32%	14	23%
Neutral	9	15%	9	15%	12	19%	8	13%	7	11%
Somewhat Disagree	4	6%	4	6%	10	16%	6	10%	4	6%
Disagree	4	6%	5	8%	8	13%	7	11%	0	0%
N/A	3	5%	1	2%	5	8%	4	6%	2	3%
Total	62		62		62		62		62	

Note: Percentages may be slightly above or below 100% because of rounding.

A.20. Perceptions of Attitudes toward Entrepreneurs by Age (≥45 Years)

	Friends/ Family	% Friends/ Family	Business Community	% Business Community	Government Economic Development Agencies	% Government Economic Development Agencies	Local NPOs that Support Entrepreneurs	% Local NPOs that Support Entrepreneurs	Other Entrepreneurs	% Other Entrepreneurs
Agree	75	43%	59	34%	32	18%	42	24%	94	54%
Somewhat Agree	61	35%	69	40%	51	29%	58	33%	53	30%
Neutral	27	16%	21	12%	35	20%	37	21%	16	9%
Somewhat Disagree	5	3%	20	11%	35	20%	15	9%	6	3%
Disagree	1	1%	3	2%	18	10%	9	5%	1	1%
N/A	5	3%	2	1%	3	2%	13	7%	4	2%
Total	174		174		174		174		174	

Note: Percentages may be slightly above or below 100% because of rounding.

A.21. Perceptions of Ability to Obtain Support and Resources for Entrepreneurial Activity by Gender

	Respondent Count (Male)	Percentage of Respondent Count (Male)	Respondent Count (Female)	Percentage of Respondent Count (Female)
Confident	30	16%	8	17%
Somewhat Confident	69	36%	16	34%
Neutral	28	15%	5	11%
Somewhat Not Confident	41	21%	13	28%
Not Confident	21	11%	5	10%
N/A	2	1%	0	0%
Total	191	100.0%	47	100%

Note: Percentages are not exact due to rounding.

A.22. Perceptions of Ability to Obtain Support and Resources for Entrepreneurial Activity by Age

	Respondent Count (<45 Years)	Percentage of Respondent Count (<45 Years)	Respondent Count (≥45 Years)	Percentage of Respondent Count (≥45 Years)
Confident	9	15%	30	17%
Somewhat Confident	26	42%	58	33%
Neutral	8	13%	24	14%
Somewhat Not Confident	12	19%	40	23%
Not Confident	7	11%	20	12%
N/A	0	0%	2	1%
Total	62	100%	174	100%

Note: Percentages are not exact due to rounding.

A.23. Perceptions of the Most Recent Recession's Impact on Entrepreneurial Activity by Gender

	Respondent Count (Male)	Percentage of Respondent Count (Male)	Respondent Count (Female)	Percentage of Respondent Count (Female)
Agree	82	43%	17	36%
Somewhat Agree	63	33%	15	32%
Neutral	22	12%	5	11%
Somewhat Disagree	18	9%	7	15%
Disagree	6	3%	3	6%
N/A	0	0%	0	0%
Total	191	100%	47	100%

Note: Percentages are not exact due to rounding.

A.24. Perceptions of the Most Recent Recession's Impact on Entrepreneurial Activity by Age

	Respondent Count (<45 Years)	Percentage of Respondent Count (<45 Years)	Respondent Count (≥45 Years)	Percentage of Respondent Count (≥45 Years)
Agree	23	37%	74	42%
Somewhat Agree	18	29%	59	34%
Neutral	12	20%	15	9%
Somewhat Disagree	7	11%	18	10%
Disagree	2	3%	8	5%
N/A	0	0%	0	0%
Total	62	100%	174	100%

Note: Percentages are not exact due to rounding.

A.25. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment by Gender

	Respondent Count (Male)	Percentage of Respondent Count (Male)	Respondent Count (Female)	Percentage of Respondent Count (Female)
Agree	56	29%	17	36%
Somewhat Agree	85	45%	16	34%
Neutral	29	15%	7	15%
Somewhat Disagree	14	7%	6	13%
Disagree	2	1%	0	0%
N/A	5	3%	1	2%
Total	191	100%	47	100%

Note: Percentages are not exact due to rounding.

A.26. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment by Age

	Respondent Count (<45 Years)	Percentage of Respondent Count (<45 Years)	Respondent Count (≥45 Years)	Percentage of Respondent Count (≥45 Years)
Agree	16	26%	56	32%
Somewhat Agree	26	42%	74	42%
Neutral	9	15%	27	16%
Somewhat Disagree	8	13%	12	7%
Disagree	1	1%	1	1%
N/A	2	3%	4	2%
Total	62	100%	174	100%

Note: Percentages are not exact due to rounding.

APPENDIX B: THE BUFFALO REGION TABLES B.1. – B.15.

B. 1. Self-Identified Role in Entrepreneurship in the Buffalo Region

	Buffalo Region	
	Respondent Count	Percentage of Respondents
Entrepreneur	31	50%
Investor	8	13%
Work for an Economic Development Organization	6	10%
Work or Volunteer with an Organization Supporting Entrepreneurship	6	10%
Other	11	17%
Total	62	100%

Note: Percentages are not exact due to rounding.

B. 2. Description of Situation for Respondents Who Self-Identified as Entrepreneurs in the Buffalo Region

	Buffalo Region	
	Respondent Count	Percentage of Respondents
I started a business more than five years ago	9	29%
I started a business three to five years ago	9	29%
I started a business within the past two years	5	16%
I am in the planning stages for my new business	7	23%
I want to start my own business within the next year	1	3%
I want to start my own business within the next five years	0	0%
TOTAL	31	100%

Note: Percentages are not exact due to rounding.

B. 3. Top 10 Industry Self-Identified in the Buffalo Region

Rank	Industry	Respondent Count	Percentage of Respondent Count
1	Bioscience/Biotechnology	17	7%
2	Medical Devices	16	6%
3	Energy	15	6%
4	Industrial Manufacturing	15	6%
5	Pharmaceuticals	15	6%
6	Business Products & Services	14	5%
7	Computer Software	13	5%
8	Consumer Products and Services	11	4%
9	Information Technology	11	4%
10	Aerospace & Defense	8	3%
	Total	135	52%

B. 4. Perceptions of Access to Capital in the Buffalo Region

	Respondent Count							
	Sources of Capital in the Buffalo Region							
	Debt - Banks	Debt - Other Sources	Equity - Friends/Family	Equity - Angel Capital	Equity - Venture Capital	Grants - Local / Regional	Grants - State	Grants - Federal
All Respondents								
Agree	1	0	5	1	0	0	1	3
Somewhat Agree	3	1	7	7	1	10	9	9
Neutral	0	6	15	13	6	8	11	6
Somewhat Disagree	13	14	17	15	21	17	10	15
Disagree	39	31	9	18	26	21	26	24
N/A	6	10	9	8	8	6	5	5
TOTAL	62	62	62	62	62	62	62	62

B. 5. Perceptions of Access to Support Services and Mentoring in the Buffalo Region

	Buffalo Region	
	Respondent Count	Percentage of Respondent Count
Agree	11	18%
Somewhat Agree	20	32%
Neutral	7	11%
Somewhat Disagree	12	19%
Disagree	10	17%
N/A	2	3%
Total	62	100%

Note: Percentages are not exact due to rounding.

B. 6. Perceptions of Resources and Information Provided by Colleges and Universities in the Buffalo Region

	Buffalo Region Respondent Count					
	Facilities / Labs	Training	Faculty Consulting	Students	Research / Information	Technology Transfer or Licensing
Agree	11	11	13	19	17	8
Somewhat Agree	22	24	19	21	14	19
Neutral	9	12	14	10	18	12
Somewhat Disagree	9	8	9	6	7	6
Disagree	6	3	3	2	2	9
N/A	5	4	4	4	4	8
TOTAL	62	62	62	62	62	62

B. 7. Perceptions of Business Support Organizations in the Buffalo Region

	Buffalo Region	
	Respondent Count	Percentage of Respondent Count
Agree	12	19%
Somewhat Agree	21	34%
Neutral	10	16%
Somewhat Disagree	10	16%
Disagree	7	12%
N/A	2	3%
Total	62	100%

Note: Percentages are not exact due to rounding.

B. 8. Perceptions of Entrepreneurial Networking Opportunities in the Buffalo Region

	Buffalo Region	
	Respondent Count	Percentage of Respondent Count
Agree	13	21%
Somewhat Agree	18	29%
Neutral	13	21%
Somewhat Disagree	13	21%
Disagree	4	6%
N/A	1	2%
Total	62	100%

Note: Percentages are not exact due to rounding.

B. 9. Perceptions of Government Responsiveness in the Buffalo Region

	Buffalo Region Respondent Count					
	City		County		State	
	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents
Agree	0	0%	1	2%	0	0%
Somewhat Agree	1	2%	4	6%	10	16%
Neutral	5	8%	9	15%	10	16%
Somewhat Disagree	11	18%	13	21%	9	15%
Disagree	39	63%	31	50%	30	48%
N/A	6	10%	4	6%	3	5%
TOTAL	62	100%	62	100%	62	100%

Note: Percentages are not exact due to rounding.

B. 10. Perceptions of Workforce Supply in the Buffalo Region

	Buffalo Region Respondent Count				
	Management Personnel	Scientists & Engineers	IT Specialists	Skilled/ Specialized Workers	Manufacturing & Assembly
Agree	18	19	24	18	25
Somewhat Agree	14	18	12	15	17
Neutral	6	8	9	5	6
Somewhat Disagree	14	9	10	14	3
Disagree	3	0	1	3	0
N/A	7	8	6	7	11
TOTAL	62	62	62	62	62

B. 11. Perceptions of Attitudes toward Entrepreneurs in the Buffalo Region

Buffalo Region Respondent Count					
	Friends / Family	Business Community	Government Economic Development Agencies	Local NPOs that Support Entrepreneurs	Other Entrepreneurs
Agree	24	18	6	14	29
Somewhat Agree	19	20	15	20	20
Neutral	12	9	11	10	5
Somewhat Disagree	3	12	18	9	5
Disagree	3	2	11	6	1
N/A	1	1	1	3	2
Total	62	62	62	62	62

B. 12. Perceptions of Infrastructure in the Buffalo Region

Buffalo Region Respondent Count					
	Available Real Estate	Information Technology	Air Transportation	Ground Transportation	Foreign Trade Zones
Agree	39	24	42	40	20
Somewhat Agree	15	23	10	8	5
Neutral	2	12	6	5	12
Somewhat Disagree	3	1	2	7	7
Disagree	1	0	1	1	3
N/A	2	2	1	1	15
TOTAL	62	62	62	62	62

B. 13. Perceptions of Ability to Obtain Support and Resource for Startup

	Buffalo Region	
	Respondent Count	Percentage of Respondent Count
Confident	7	11%
Somewhat Confident	18	29%
Neutral	9	15%
Somewhat Not Confident	23	37%
Not Confident	4	6%
N/A	1	2%
Total	62	100%

Note: Percentages are not exact due to rounding.

B. 14. Perceptions of the Most Recent Recession’s Impact on Startups in the Buffalo Region

	Buffalo Region	
	Respondent Count	Percentage of Respondent Count
Agree	26	42%
Somewhat Agree	23	37%
Neutral	5	8%
Somewhat Disagree	6	10%
Disagree	2	3%
N/A	0	0%
Total	62	100%

Note: Percentages are not exact due to rounding.

B. 15. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment in the Buffalo Region

	Buffalo Region	
	Respondent Count	Percentage of Respondent Count
Agree	12	19%
Somewhat Agree	27	43%
Neutral	14	23%
Somewhat Disagree	7	11%
Disagree	1	2%
N/A	1	2%
Total	62	100%

Note: Percentages are not exact due to rounding.

APPENDIX C: THE ROCHESTER REGION TABLES C.1. – C.15.

C. 1 Self-Identified Role in Entrepreneurship in the Rochester Region

	Rochester Region	
	Respondent Count	Percentage of Respondents
Entrepreneur	71	62%
Investor	11	10%
Work for an Economic Development Organization	9	8%
Work or Volunteer with an Organization Supporting Entrepreneurship	7	6%
Other	16	14%
Total	114	100%

Note: Percentages are not exact due to rounding.

C. 2. Description of Situation for Respondents Who Self-Identified as Entrepreneurs in the Rochester Region

	Rochester Region	
	Respondent Count	Percentage of Respondents
I started a business more than five years ago	28	39%
I started a business three to five years ago	16	23%
I started a business within the past two years	20	28%
I am in the planning stages for my new business	6	8%
I want to start my own business within the next year	1	2%
I want to start my own business within the next five years	0	0%
TOTAL	71	100%

Note: Percentages are not exact due to rounding.

C. 3. Top 10 Industry Self-Identified in the Rochester Region

Rank	Industry	Respondent Count	Percentage of Respondent Count
1	Medical Devices	27	7%
2	Other Industry	27	7%
3	Bioscience/Biotechnology	26	6%
4	Computer Software	26	6%
5	Energy	24	6%
6	Industrial Manufacturing	22	5%
7	Aerospace & Defense	21	5%
8	Business Products & Services	21	5%
9	Information Technology	20	5%
10	Electronics	18	4%
	Total	248	56%

C. 4. Perceptions of Access to Capital in the Rochester Region

	Respondent Count							
	Sources of Capital in the Rochester Region							
	Debt - Banks	Debt - Other Sources	Equity - Friends/Family	Equity - Angel Capital	Equity - Venture Capital	Grants - Local / Regional	Grants - State	Grants - Federal
All Respondents								
Agree	4	3	9	1	4	2	4	3
Somewhat Agree	9	6	24	13	5	13	13	17
Neutral	19	24	36	21	18	24	27	22
Somewhat Disagree	16	37	21	32	21	27	28	27
Disagree	58	30	11	33	52	41	36	38
N/A	8	14	13	14	14	7	6	7
TOTAL	114	114	114	114	114	114	114	114

C. 5. Perceptions of Access to Support Services and Mentoring in the Rochester Region

	Rochester Region	
	Respondent Count	Percentage of Respondent Count
Agree	27	24%
Somewhat Agree	33	29%
Neutral	22	19%
Somewhat Disagree	21	18%
Disagree	10	9%
N/A	1	1%
Total	114	100%

Note: Percentages are not exact due to rounding.

C. 6. Perceptions of Resources and Information Provided by Colleges and Universities in the Rochester Region

	Rochester Region Respondent Count					
	Facilities / Labs	Training	Faculty Consulting	Students	Research / Information	Technology Transfer or Licensing
Agree	33	24	24	42	28	16
Somewhat Agree	30	40	38	41	40	32
Neutral	21	19	19	14	22	20
Somewhat Disagree	18	13	19	7	14	20
Disagree	8	12	7	6	6	16
N/A	4	6	7	4	4	10
TOTAL	114	114	114	114	114	114

C. 7. Perceptions of Business Support Organizations in the Rochester Region

	Rochester Region	
	Respondent Count	Percentage of Respondent Count
Agree	26	23%
Somewhat Agree	34	30%
Neutral	20	17%
Somewhat Disagree	22	19%
Disagree	12	11%
N/A	0	0%
Total	114	100%

Note: Percentages are not exact due to rounding.

C. 8. Perceptions of Entrepreneurial Networking Opportunities in the Rochester Region

	Rochester Region	
	Respondent Count	Percentage of Respondent Count
Agree	26	23%
Somewhat Agree	40	35%
Neutral	24	21%
Somewhat Disagree	16	14%
Disagree	8	7%
N/A	0	0%
Total	114	100%

Note: Percentages are not exact due to rounding.

C. 9. Perceptions of Government Responsiveness in the Rochester Region

	Rochester Region Respondent Count					
	City		County		State	
	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents
Agree	4	4%	8	7%	5	4%
Somewhat Agree	13	11%	21	18%	12	11%
Neutral	16	14%	14	12%	22	19%
Somewhat Disagree	29	25%	30	26%	28	25%
Disagree	42	37%	36	32%	41	36%
N/A	10	9%	5	4%	6	5%
TOTAL	114	100%	114	100%	114	100%

Note: Percentages are not exact due to rounding.

C. 10. Perceptions of Workforce in the Rochester Region

	Rochester Region Respondent Count				
	Management Personnel	Scientists & Engineers	IT Specialists	Skilled/ Specialized Workers	Manufacturing & Assembly
Agree	46	53	53	37	43
Somewhat Agree	26	29	24	33	26
Neutral	17	12	18	20	17
Somewhat Disagree	13	11	8	9	7
Disagree	8	3	1	7	6
N/A	4	6	10	8	15
TOTAL	114	114	114	114	114

C. 11. Perceptions of Attitudes toward Entrepreneurs in the Rochester Region

Rochester Region Respondent Count					
	Friends / Family	Business Community	Government Economic Development Agencies	Local NPOs that Support Entrepreneurs	Other Entrepreneurs
Agree	59	42	21	34	68
Somewhat Agree	34	45	33	32	31
Neutral	15	16	25	23	12
Somewhat Disagree	3	5	19	7	2
Disagree	1	4	12	9	0
N/A	2	2	4	9	1
Total	114	114	114	114	114

C. 12. Perceptions of Infrastructure in the Rochester Region

Rochester Region Respondent Count					
	Available Real Estate	Information Technology	Air Transportation	Ground Transportation	Foreign Trade Zones
Agree	61	58	39	47	21
Somewhat Agree	30	35	30	33	16
Neutral	10	10	21	16	29
Somewhat Disagree	6	3	11	8	7
Disagree	2	1	5	3	5
N/A	5	7	8	7	36
TOTAL	114	114	114	114	114

C. 13. Perceptions of Ability to Obtain Support and Resources for Startup

	Rochester Region	
	Respondent Count	Percentage of Respondent Count
Confident	18	16%
Somewhat Confident	45	40%
Neutral	16	14%
Somewhat Not Confident	21	18%
Not Confident	14	12%
N/A	0	0%
Total	114	100%

Note: Percentages are not exact due to rounding.

C. 14. Perceptions of the Most Recent Recession’s Impact on Startups in the Rochester Region

	Rochester Region	
	Respondent Count	Percentage of Respondent Count
Agree	50	44%
Somewhat Agree	36	32%
Neutral	13	11%
Somewhat Disagree	11	9%
Disagree	4	4%
N/A	0	0%
Total	114	100%

Note: Percentages are not exact due to rounding.

C. 15. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment in the Rochester Region

	Rochester Region	
	Respondent Count	Percentage of Respondent Count
Agree	44	38%
Somewhat Agree	51	45%
Neutral	10	9%
Somewhat Disagree	7	6%
Disagree	1	1%
N/A	1	1%
Total	114	100%

Note: Percentages are not exact due to rounding.

APPENDIX D: THE SYRACUSE REGION TABLES D.1. – D.15.

D. 1. Self-Identified Role in Entrepreneurship in the Syracuse Region

	Syracuse Region	
	Respondent Count	Percentage of Respondents
Entrepreneur	33	50%
Investor	3	5%
Work for an Economic Development Organization	4	6%
Work or Volunteer with an Organization Supporting Entrepreneurship	14	21%
Other	12	18%
Total	66	100%

Note: Percentages are not exact due to rounding.

D. 2. Description of Situation for Respondents Who Self-Identified as Entrepreneurs in the Syracuse Region

	Syracuse Region	
	Respondent Count	Percentage of Respondents
I started a business more than five years ago	17	52%
I started a business three to five years ago	9	27%
I started a business within the past two years	4	12%
I am in the planning stages for my new business	2	6%
I want to start my own business within the next year	1	3%
I want to start my own business within the next five years	0	0%
TOTAL	33	100%

Note: Percentages are not exact due to rounding.

D. 3. Top 10 Industry Self-Identified in the Syracuse Region

Rank	Industry	Respondent Count	Percentage of Respondent Count
1	Other Industry	15	10%
2	Education	12	8%
3	Computer Software	11	7%
4	Information Technology	10	7%
5	Medical Devices	9	6%
6	Bioscience/Biotechnology	8	5%
7	Business Products & Services	7	5%
8	Energy	7	5%
9	Telecommunications	7	5%
10	Electronics	5	3%
	Total	96	64%

D. 4. Perceptions of Access to Capital in the Syracuse Region

	Respondent Count							
	Sources of Capital in the Syracuse Region							
	Debt - Banks	Debt - Other Sources	Equity - Friends/Family	Equity - Angel Capital	Equity - Venture Capital	Grants - Local / Regional	Grants - State	Grants - Federal
All Respondents								
Agree	2	2	6	0	0	3	2	3
Somewhat Agree	8	7	11	5	4	4	7	11
Neutral	10	17	19	17	13	20	12	9
Somewhat Disagree	18	15	11	14	9	14	17	15
Disagree	20	13	8	19	28	17	19	22
N/A	8	12	11	11	12	8	9	6
TOTAL	66	66	66	66	66	66	66	66

D. 5. Perceptions of Access to Support Services and Mentoring in the Syracuse Region

	Syracuse Region	
	Respondent Count	Percentage of Respondent Count
Agree	20	30%
Somewhat Agree	20	30%
Neutral	12	18%
Somewhat Disagree	9	14%
Disagree	5	8%
N/A	0	0%
Total	66	100%

Note: Percentages are not exact due to rounding.

D. 6. Perceptions of Resources and Information Provided by Colleges and Universities in the Syracuse Region

	Syracuse Region Respondent Count					
	Facilities / Labs	Training	Faculty Consulting	Students	Research / Information	Technology Transfer or Licensing
Agree	17	13	14	22	23	10
Somewhat Agree	18	22	20	28	22	19
Neutral	14	12	14	8	9	16
Somewhat Disagree	6	11	8	4	6	8
Disagree	5	4	5	2	2	5
N/A	6	4	5	2	4	8
TOTAL	66	66	66	66	66	66

D. 7. Perceptions of Business Support Organizations in the Syracuse Region

	Syracuse Region	
	Respondent Count	Percentage of Respondent Count
Agree	17	26%
Somewhat Agree	26	39%
Neutral	9	13%
Somewhat Disagree	10	15%
Disagree	3	5%
N/A	1	2%
Total	66	100%

Note: Percentages are not exact due to rounding.

D. 8. Perceptions of Entrepreneurial Networking Opportunities in the Syracuse Region

	Syracuse Region	
	Respondent Count	Percentage of Respondent Count
Agree	18	27%
Somewhat Agree	24	36%
Neutral	11	17%
Somewhat Disagree	9	14%
Disagree	4	6%
N/A	0	0%
Total	66	100%

Note: Percentages are not exact due to rounding.

D. 9. Perceptions of Government Responsiveness in the Syracuse Region

	Syracuse Region Respondent Count					
	City		County		State	
	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents	Respondent Count	Percentage of Respondents
Agree	2	3%	3	5%	0	0%
Somewhat Agree	4	6%	8	12%	10	15%
Neutral	11	17%	10	15%	9	14%
Somewhat Disagree	18	27%	14	21%	13	20%
Disagree	26	39%	25	38%	28	42%
N/A	5	8%	6	9%	6	9%
TOTAL	66	100%	66	100%	66	100%

Note: Percentages are not exact due to rounding.

D. 10. Perceptions of Workforce in the Syracuse Region

	Syracuse Region Respondent Count				
	Management Personnel	Scientists & Engineers	IT Specialists	Skilled/ Specialized Workers	Manufacturing & Assembly
Agree	18	8	13	12	28
Somewhat Agree	17	16	25	19	13
Neutral	13	17	8	17	14
Somewhat Disagree	8	11	12	9	2
Disagree	7	5	4	4	1
N/A	3	9	4	5	8
TOTAL	66	66	66	66	66

D. 11. Perceptions of Attitudes toward Entrepreneurs in the Syracuse Region

	Syracuse Region Respondent Count				
	Friends / Family	Business Community	Government Economic Development Agencies	Local NPOs that Support Entrepreneurs	Other Entrepreneurs
Agree	19	22	11	13	35
Somewhat Agree	28	27	26	26	18
Neutral	9	7	11	12	6
Somewhat Disagree	4	8	9	7	4
Disagree	1	2	6	2	0
N/A	5	0	3	6	3
Total	66	66	66	66	66

D. 12. Perceptions of Infrastructure in the Syracuse Region

	Syracuse Region Respondent Count				
	Available Real Estate	Information Technology	Air Transportation	Ground Transportation	Foreign Trade Zones
Agree	31	24	8	16	1
Somewhat Agree	20	25	18	23	9
Neutral	8	10	12	8	18
Somewhat Disagree	1	6	15	11	10
Disagree	2	0	11	4	8
N/A	4	1	2	4	20
TOTAL	66	66	66	66	66

D. 13. Perceptions of Ability to Obtain Support and resources for Startup in the Syracuse Region

	Syracuse Region	
	Respondent Count	Percentage of Respondent Count
Confident	14	21%
Somewhat Confident	22	33%
Neutral	8	12%
Somewhat Not Confident	11	17%
Not Confident	10	15%
N/A	1	2%
Total	66	100%

Note: Percentages are not exact due to rounding.

D. 14. Perceptions of the Most Recent Recessions Impact on Startups in the Syracuse Region

	Syracuse Region	
	Respondent Count	Percentage of Respondent Count
Agree	24	36%
Somewhat Agree	20	30%
Neutral	9	14%
Somewhat Disagree	9	14%
Disagree	4	6%
N/A	0	0%
Total	66	100%

Note: Percentages are not exact due to rounding.

D. 15. Perceptions of Entrepreneurial Activity due to Layoffs and High Unemployment in the Syracuse Region

	Syracuse Region	
	Respondent Count	Percentage of Respondent Count
Agree	17	26%
Somewhat Agree	26	39%
Neutral	13	20%
Somewhat Disagree	6	9%
Disagree	0	0%
N/A	4	6%
Total	66	100%

Note: Percentages are not exact due to rounding.

APPENDIX E: SURVEY INSTRUMENT

E. 1. Upstate New York Entrepreneurial Opportunity Survey Instrument

2011 ENTREPRENEURIAL OPPORTUNITY SURVEY

The purpose of this confidential survey is to **assess the entrepreneurial climate for starting and sustaining a business in the Upstate New York Region**. We appreciate your participation in this survey if you are an entrepreneur, an investor in early-stage businesses, or a member of an organization that supports entrepreneurs and startup businesses.

This survey is part of a project sponsored by the U.S. Economic Development Administration, the John S. and James L. Knight Foundation, and the Surdna Foundation to develop, fund, and execute a Regional Entrepreneurship Action Plan (REAP). The programs and projects recommended in the REAP will help provide regional entrepreneurs with the expertise and capital they need to attract investors and services that help them toward successful commercialization and growth.

The survey will take approximately **10 minutes of your time** to complete. All responses are strictly **confidential** and the data will be aggregated across the entire spectrum of respondents, so that no information can be attributed to any one individual or organization.

Your participation is valuable and greatly appreciated. Whether you are an entrepreneur or not, your input will help guide the development of our efforts and support entrepreneurial opportunities within your Region.

If a question is not applicable to you or you don't know the answer, please select N/A.

1. Please identify your role in entrepreneurship. *(Select only one.)*

- Entrepreneur
- Investor
- Work for economic development organization
- Work for or volunteer with an organization supporting entrepreneurship
- Other _____

If answer Yes to Entrepreneur Q1 – they go to questions 2 through 4; if No they go to question 5)

2. Please choose the option that best describes your situation as an entrepreneur:

- I started a business more than five years ago
- I started a business three to five years ago
- I started a business within the past two years
- I am in the planning stages for my new business
- I want to start my own business within the next year
- I want to start my own business within the next five years

B.1. Upstate New York Entrepreneurial Opportunity Survey Instrument (Continued)

3. At what stage is your business? (If you have multiple entrepreneurial endeavors, please answer for the one farthest ahead in the process.) (Restrict to one choice)

- a. Imagining (Both business concept and product or service are, for the most part, still ideas. If your concept is technology-based, the technology is still in the lab stage for proof of concept testing, defining performance specifications, or development of Intellectual Property protection. There are no customers or revenue.)
- b. Incubating (Business plans are being developed based on market research, and work is focused on building a prototype or working model.)
- c. Demonstrating (A formal business plan is completed, your product or service has entered the market, and you are learning about customer receptivity to performance, quality, and pricing.)
- d. Market Entry (Your business is active in sales, marketing, operations, and beginning to grow.)
- e. Growth & Sustainability (You are engaged in improving market share, reducing costs, increasing profits, and improving your product or service.)

4. If you started a business in the last five years and the business is still running, how confident are you that you will be able to generate the support and resources you need to continue successfully?

Not Confident					Confident	
1	2	3	4	5		N/A

(The following questions are to be answered by all respondents.)

5. In what industry(s) do you work or invest? If you choose “Other,” please specify your industry in the space provided.

- 1. Aerospace & Defense
- 2. Agriculture
- 3. Automotive & Transportation
- 4. Banking
- 5. Bioscience/Biotechnology
- 6. Business Products & Services
- 7. Chemicals
- 8. Clinical Healthcare
- 9. Computer Hardware
- 10. Computer Software: Internet, SAS, Social Networking, Other
- 11. Computer Services: Installation, Networking, Repair
- 12. Construction
- 13. Consumer Products & Services
- 14. Education

B.1. Upstate New York Entrepreneurial Opportunity Survey Instrument (Continued)

- 15. Electronics
- 16. Energy: Advanced, Alternative Products and Services
- 17. Environmental Services & Equipment
- 18. Financial Services
- 19. Food & Beverages
- 20. Healthcare IT
- 21. Industrial Manufacturing
- 22. Information Technology
- 23. Insurance
- 24. Leisure & Travel
- 25. Media & Entertainment
- 26. Medical Devices
- 27. Metals & Mining
- 28. Pharmaceuticals
- 29. Real Estate
- 30. Retail
- 31. Security Products & Services
- 32. Telecommunications
- 33. Transport Services
- 34. Utilities
- 35. Other Industry _____

6. Getting access to capital for new businesses from the following sources in the Upstate New York Region is easy. (Please rate each using the following scale.)

	Disagree				Agree	
Debt - Banks	1	2	3	4	5	N/A
Debt - Other Sources	1	2	3	4	5	N/A
Equity - Friends/Family 1	2	3	4	5	N/A	
Equity – Angel Capital 1	2	3	4	5	N/A	
Equity – Venture Capital	1	2	3	4	5	N/A
Grants – Local/Regional 1	2	3	4	5	N/A	
Grants – State	1	2	3	4	5	N/A
Grants – Federal	1	2	3	4	5	N/A

7. Getting access to helpful support services and mentoring is easy for startup businesses in the Upstate New York Region.

Disagree				Agree	
1	2	3	4	5	N/A

B.1. Upstate New York Entrepreneurial Opportunity Survey Instrument (Continued)

8. Well-trained workers in the following occupational categories are in sufficient supply in the Upstate New York Region. (Please rate each using the following scale.)

	Disagree				Agree	
Management Personnel	1	2	3	4	5	N/A
Scientists & Engineers	1	2	3	4	5	N/A
IT Specialists	1	2	3	4	5	N/A
Skilled/Specialized Workers	1	2	3	4	5	N/A
Manufacturing & Assembly	1	2	3	4	5	N/A

9. Colleges and universities in the Upstate New York Region provide knowledge, information, and resources that meet the needs of small businesses. (Please rate each using the following scale.)

	Disagree				Agree	
Facilities/Labs	1	2	3	4	5	N/A
Training	1	2	3	4	5	N/A
Faculty Consulting	1	2	3	4	5	N/A
Students	1	2	3	4	5	N/A
Research/Information	1	2	3	4	5	N/A
Technology Transfer or Licensing	1	2	3	4	5	N/A

10. Business support organizations in the Upstate New York Region provide the knowledge and information needed to start and grow a new business.

Disagree				Agree	
1	2	3	4	5	N/A

11. Opportunities for entrepreneurs to meet and network with others are sufficient in the Upstate New York Region.

Disagree				Agree	
1	2	3	4	5	N/A

B.1. Upstate New York Entrepreneurial Opportunity Survey Instrument (Continued)

12. Government responsiveness and ability to provide relevant services to meet entrepreneurial needs is sufficient. (Please rate each using the following scale.)

	Disagree			Agree		
City Governments	1	2	3	4	5	N/A
County Governments	1	2	3	4	5	N/A
State Government	1	2	3	4	5	N/A

13. Attitudes toward entrepreneurs among the following groups in the Upstate New York Region are supportive. (Please rate each using the following scale.)

	Disagree			Agree		
Friends/Family	1	2	3	4	5	N/A
Business Community	1	2	3	4	5	N/A
Government Economic Development Agencies	1	2	3	4	5	N/A
Local Non-Profit Organizations Supporting Entrepreneurs	1	2	3	4	5	N/A
Other Entrepreneurs	1	2	3	4	5	N/A

14. The following infrastructure elements in the Upstate New York Region are sufficient for developing new businesses. (Please rate each using the following scale.)

	Disagree			Agree		
Available Real Estate	1	2	3	4	5	N/A
Information Technology	1	2	3	4	5	N/A
Air Transportation	1	2	3	4	5	N/A
Ground Transportation	1	2	3	4	5	N/A
Foreign Trade Zones	1	2	3	4	5	N/A

15. If you were to start a business within the next two years, how confident are you that you will find the support and resources you need to do so successfully?

	Not Confident				Confident	
	1	2	3	4	5	N/A

B.1. Upstate New York Entrepreneurial Opportunity Survey Instrument (Continued)

16. The most recent recession is adversely affecting people’s ability to start and/or sustain a new business.

Disagree					Agree	
1	2	3	4	5	N/A	

17. More people are pursuing entrepreneurial opportunities due to layoffs and high unemployment.

Disagree					Agree	
1	2	3	4	5	N/A	

DEMOGRAPHICS

18. Please identify your age group: (drop down menu)

- 24 years or younger
- 25-34
- 35-44
- 45-64
- 65 years or older

19. What is your gender? (Radio buttons)

- Female
- Male

20. What is your ethnicity? (Radio buttons)

- White/Caucasian
- Black/African American
- Hispanic/Latino
- Asian
- Native American or Alaskan Native
- Native Hawaiian or Other Pacific Islander
- Other (please specify) _____

21. What is the county of your primary location or place of business?

22. What is the zip code of your primary location or place of business?