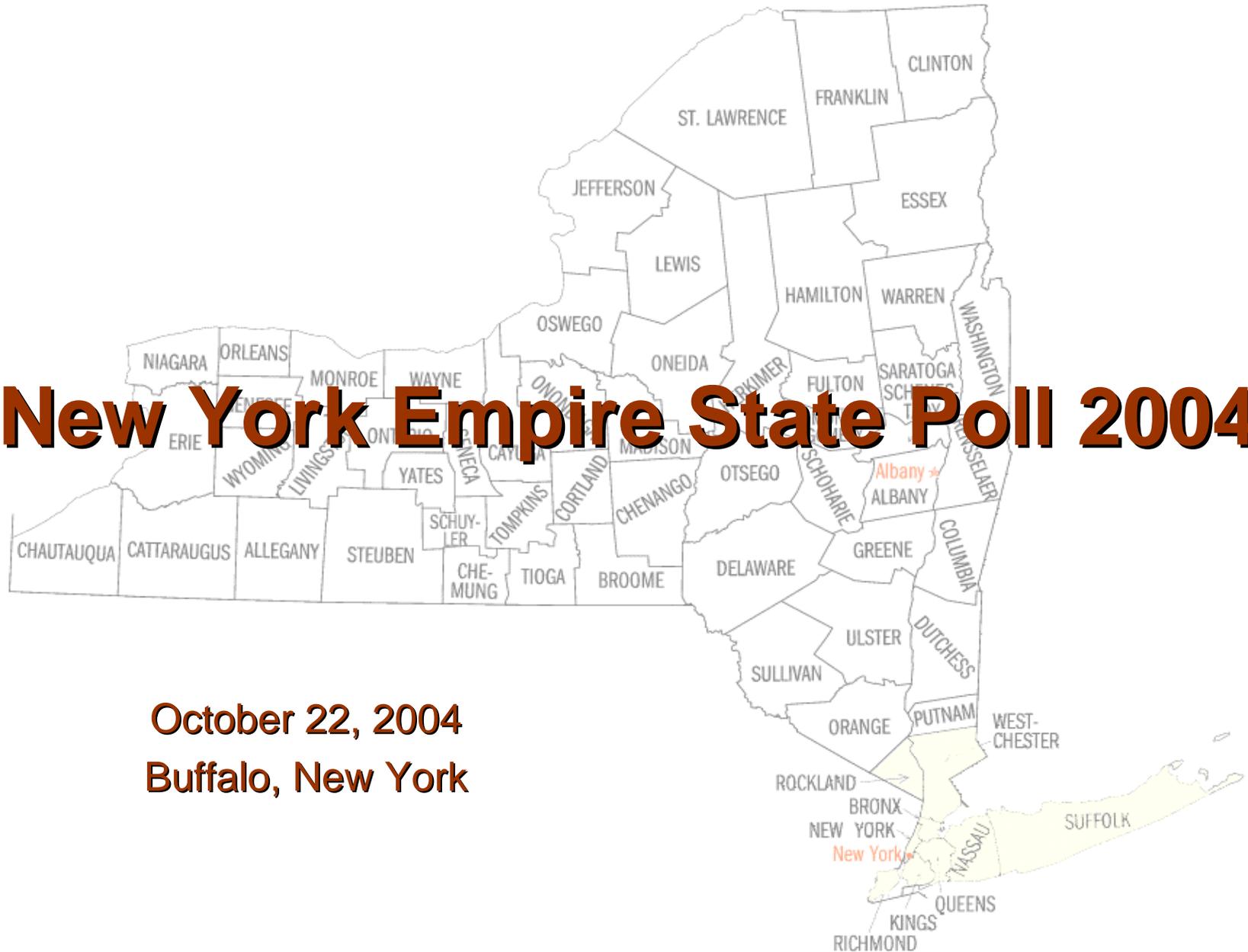


New York Empire State Poll 2004



October 22, 2004
Buffalo, New York



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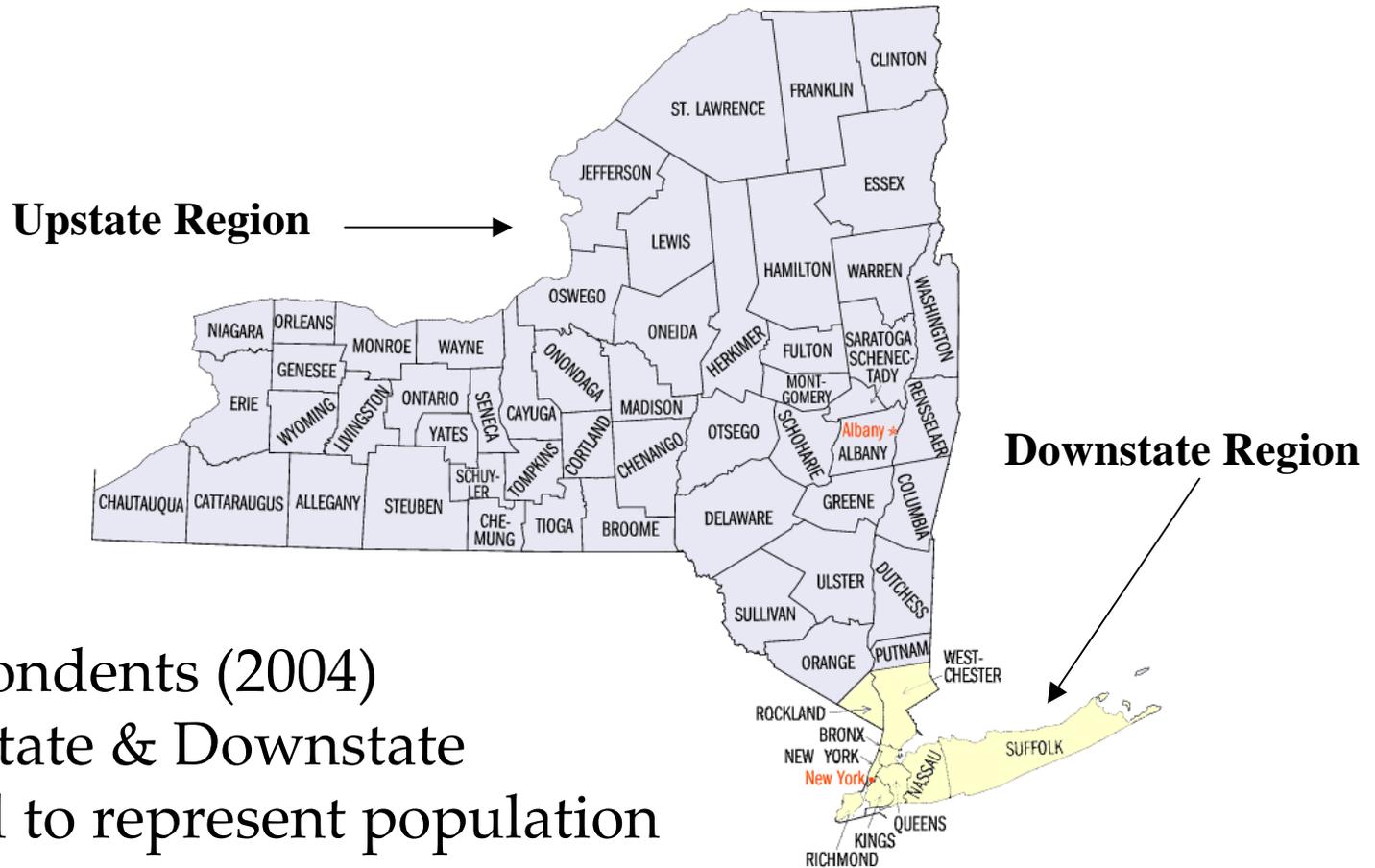
The ILR Survey Research Institute

- Established in 1996
- Full-Service Survey Research Facility
- @20 CATI (telephone interviewing) Stations
- Design & Administer Web & Mail Surveys, Focus Groups
- Data Analysis & Reporting

Objectives:

- Collect current workplace data on New Yorkers
- Provide a benchmark of New York State residents' views on a wide-range of issues: labor, economic, governmental
- Support other research at Cornell University through omnibus modules
- Second ESP recently completed (May 2004)

Respondents & Geography



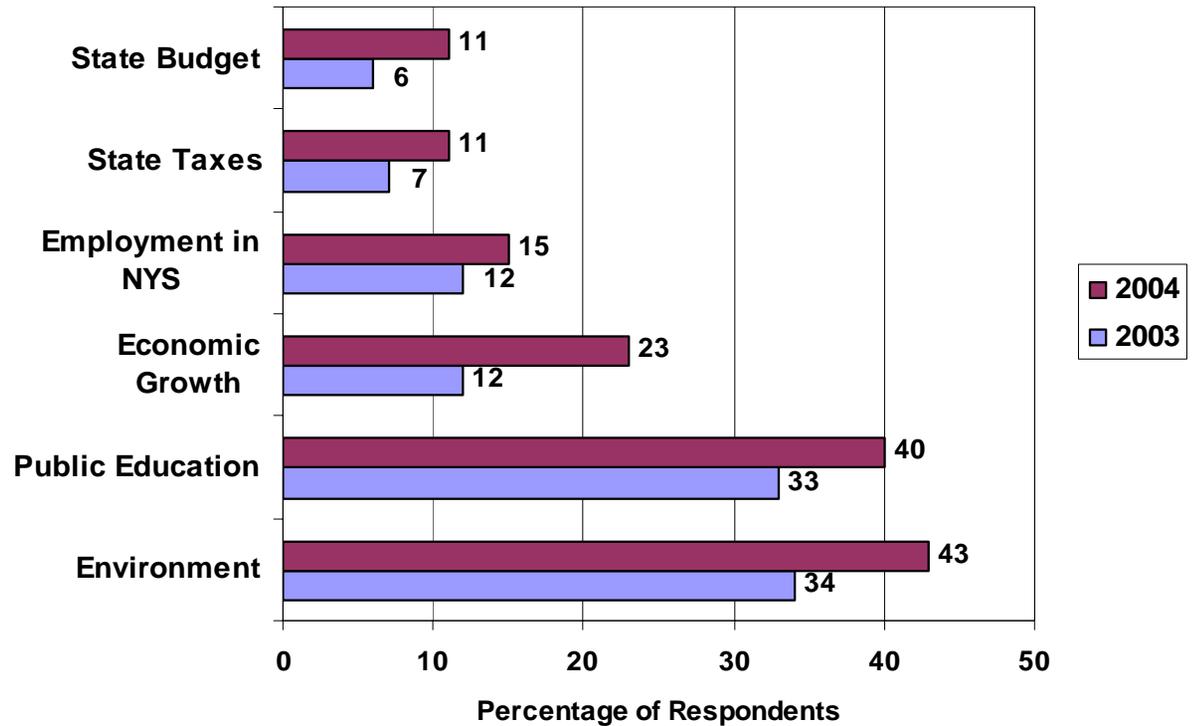
- 820 Respondents (2004)
- Both Upstate & Downstate
- Weighted to represent population distribution

Rating New York State: 2003 vs. 2004

Substantial increases in ratings of *education*, *environment*, and *economic growth*.

Ratings of *state budget*, *state taxes*, and *employment* are steady.

% of respondents who rate NYS in each category as good or excellent



Rating New York State by Region

% of respondents who rate NYS in each category as good or excellent
by region

Upstate residents rate the state much higher in terms of *public education*, the *environment*, and *health & human services*.

However, downstate residents rate NYS much higher in terms of *economic growth*.

Category	Upstate	Downstate	All NYS
Transportation Infrastructure*	50	55	53
Environment	58	34	43
Public Education	55	31	40
Health & Human Services*	41	33	36
Economic Growth	15	28	23
State Government*	16	19	18
Employment	14	15	15
State Taxes	7	13	11
State Budget	8	13	11

*New categories for 2004 ESP

Rating New York State by Annual Household Income

% of respondents who rate NYS in each category as good or excellent
by annual household income

Ratings of NYS are relatively consistent across annual household income groupings, except in the areas of *public education* and *employment*.

Category	< \$35k	\$35k-\$75k	\$75k>
Transportation Infrastructure*	51	49	58
Environment	40	47	41
Public Education	36	39	46
Health & Human Services*	38	35	38
Economic Growth	24	23	23
State Government*	22	17	16
Employment	11	12	21
State Taxes	12	11	8
State Budget	14	10	11

*New categories for 2004 ESP

Rating New York State by Party Affiliation

% of respondents who rate NYS in each category as good or excellent
by party affiliation

Republicans generally rate NYS much higher than Democrats or Independents, especially in the areas of *transportation, environment, education, and health & human services.*

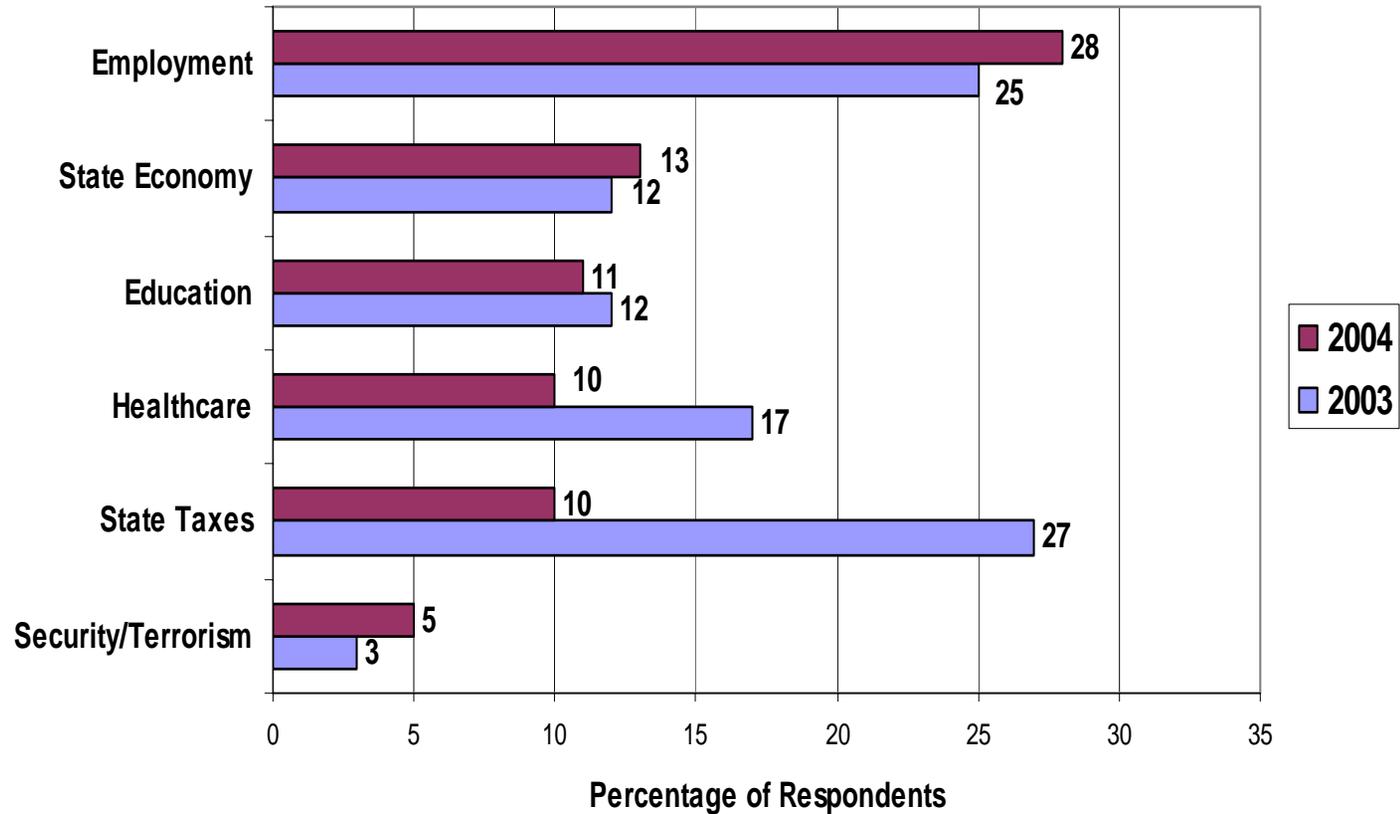
Category	Democrat	Independent	Republican
Transportation Infrastructure*	53	47	65
Environment	36	40	66
Public Education	34	38	59
Health & Human Services*	35	31	48
Economic Growth	22	21	30
State Government*	17	16	22
Employment	11	14	23
State Taxes	11	12	9
State Budget	11	12	11

*New categories for 2004 ESP

Most Important Problem in NYS: 2003 vs. 2004

Compared to 2003, *state taxes* and *healthcare* have become less salient.

Employment and the *state economy* continue to preoccupy New Yorkers' concerns.



Most Important Problem in NYS by Region

% Respondents by Region

Issue	Upstate	Downstate	All NYS
Employment	27	29	28
State Economy	14	13	13
Education	7	15	11
State Taxes	17	6	10
Healthcare	10	9	10
Security/Terrorism	2	8	5

Employment and the *state economy* are consistently strong concerns across regions. Largest regional differences are in terms of *state taxes* and *education*.

Most Important Problem in NYS by Party Affiliation

% Respondents by Party Affiliation

Issue	Democrat	Independent	Republican
Employment	31	26	20
State Economy	15	15	7
Education	13	13	7
State Taxes	5	12	21
Healthcare	9	10	10
Security/Terrorism	7	4	6

Besides *employment*, substantial disagreement exists between Democrats and Republicans on priorities. In general, Independents are closer to Democrats than Republicans regarding priorities.

Most Important Problem by Annual Household Income

% Respondents by Household Income Range

Issue	< \$35k	\$35k-\$75k	\$75k>
Employment	32	30	21
State Economy	8	13	17
Education	15	13	7
State Taxes	9	9	14
Healthcare	11	8	12
Security/Terrorism	6	4	8

Employment is the biggest concern of low and middle income respondents. Upper income households are less concerned about *employment* and more concerned about the *state economy*.

Personal Economic Perceptions: 2003 vs. 2004

% of all respondents who said...

Fewer New Yorkers report doing financially worse over the past year. There is also a small increase in the number who reported doing better.

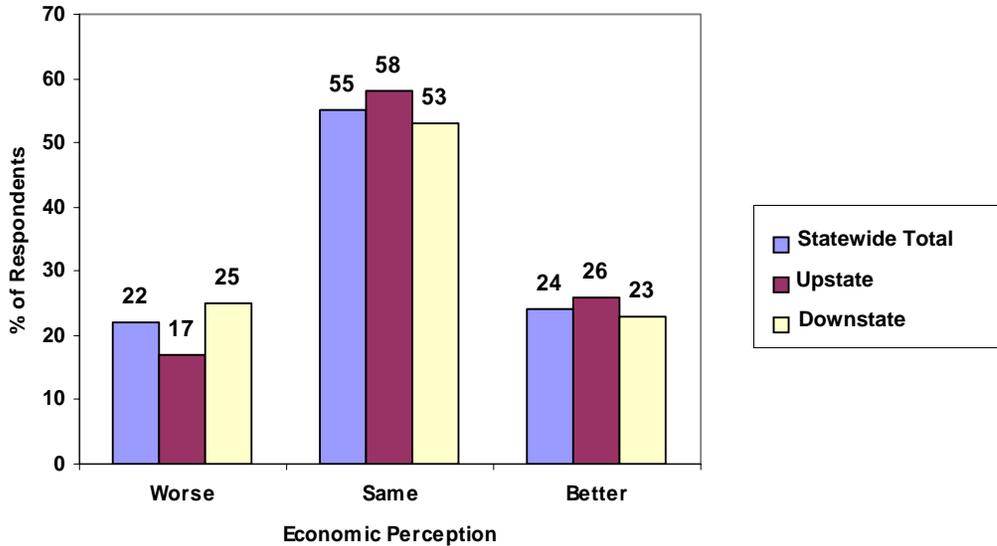
Economic Condition	Worse	Same	Better
Per Finance - Past Yr (2003)	32	50	18
Per Finance - Past Yr (2004)	22	55	24
Pers Finance - Forthcoming Yr (2003)	15	53	32
Pers Finance - Forthcoming Yr (2004)	9	48	43

However, nearly a quarter of respondents still report they were financially worse off over the past year.

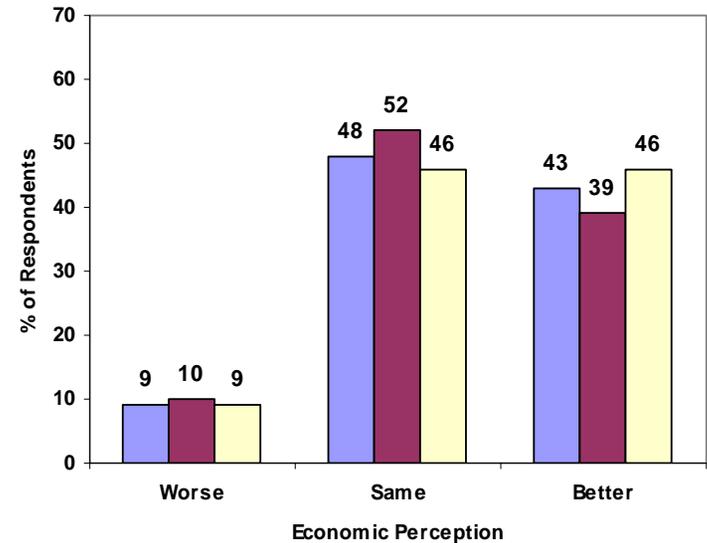
Overall, New Yorkers are more optimistic than last year, with an 11 point increase in the number of residents who believe that they will be financially better off in the forthcoming year.

Personal Financial Situation by Region

Past Year



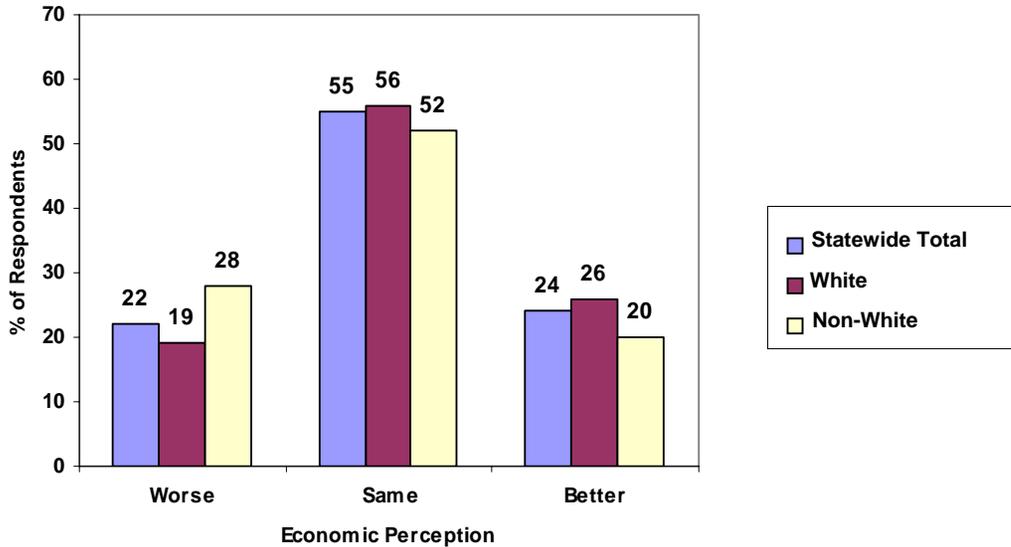
Forthcoming Year



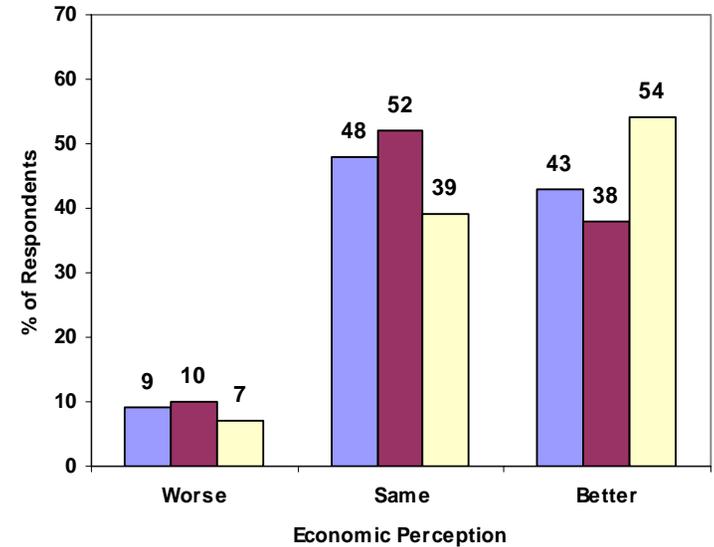
Fewer upstate residents (17%) than downstate residents (25%) were financially worse off over the past year, yet downstate residents (46%) are more optimistic than upstate residents (39%).

Personal Financial Situation by Race

Past Year



Forthcoming Year



Over the past year, substantially more non-white residents (28%) than white residents (19%) reported a worsening in their personal financial situation. However, non-white residents (54%) are substantially more optimistic regarding the forthcoming year than white residents (38%).

State Economic Perceptions: 2003 vs. 2004

% of all respondents who said...

There is a substantial increase in the number of New Yorkers that perceive the NYS economy as doing the same or better in the past year.

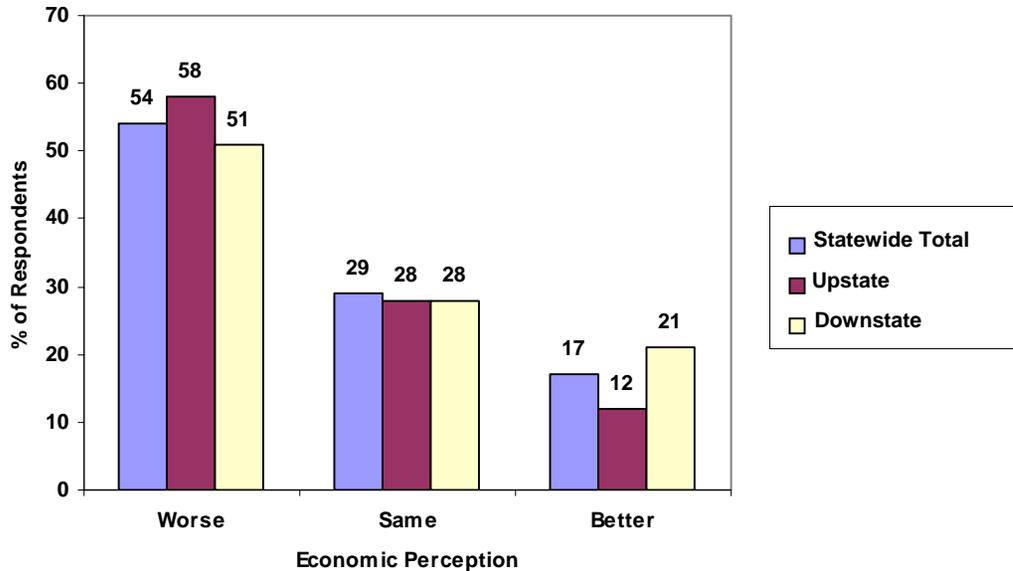
Economic Condition	Worse	Same	Better
NYS Economy - Past Yr (2003)	79	17	3
NYS Economy - Past Yr (2004)	54	29	17
NYS Economy - Forthcoming Yr (2003)	34	35	24
NYS Economy - Forthcoming Yr (2004)	27	39	34

Yet, a majority still perceive the economy as worsening rather than improving.

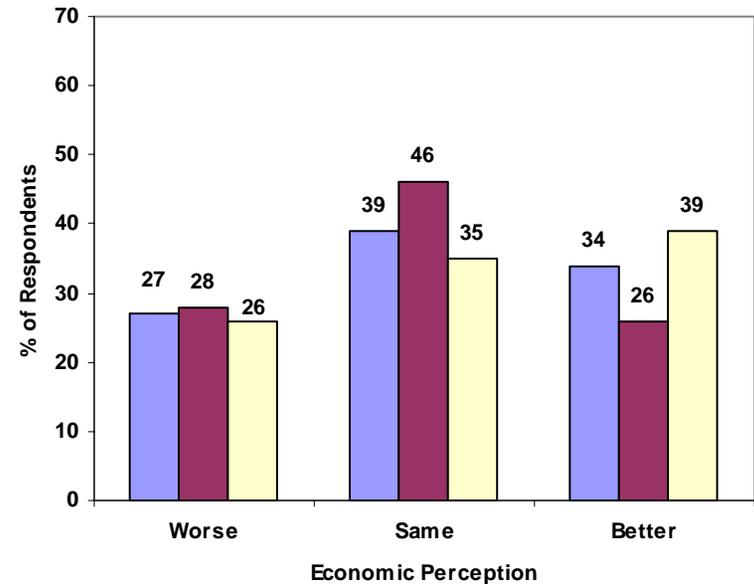
Mirroring personal optimism, the number of New Yorkers who believe that the state economy will improve in the forthcoming year has improved by ten percent.

Perceptions of State Economy by Region

Past Year



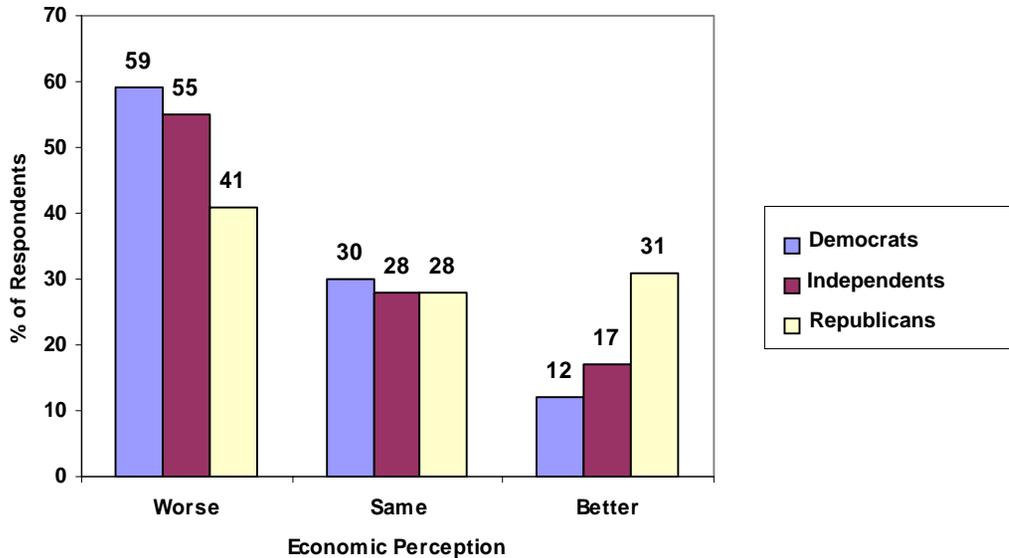
Forthcoming Year



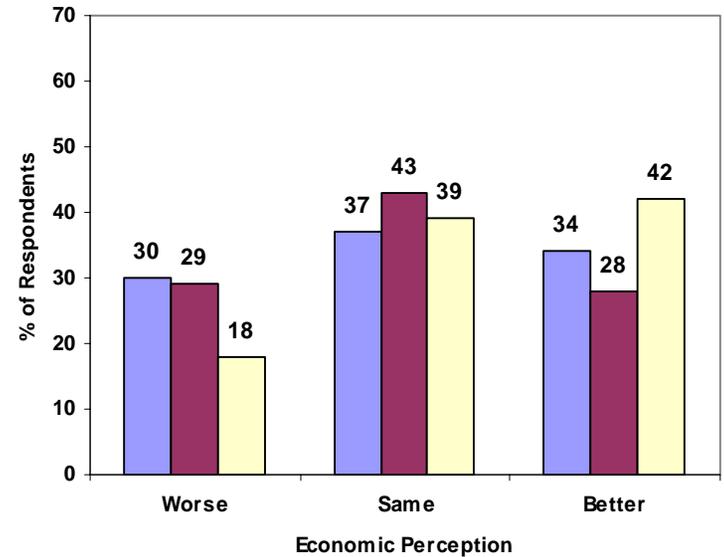
More downstate residents than upstate residents perceive the economy as improving over the last year, and downstate residents are more optimistic regarding the forthcoming year.

Perceptions of State Economy by Party Affiliation

Past Year



Forthcoming Year



Nearly 60% of Democrats believe the economy has worsened compared to 40% of Republicans. Republicans are much more optimistic than Democrats regarding the forthcoming year as well. Overall, Independents mirror Democrats much more than Republicans.

Most Important Issue of 2004 Presidential Election by Party Affiliation

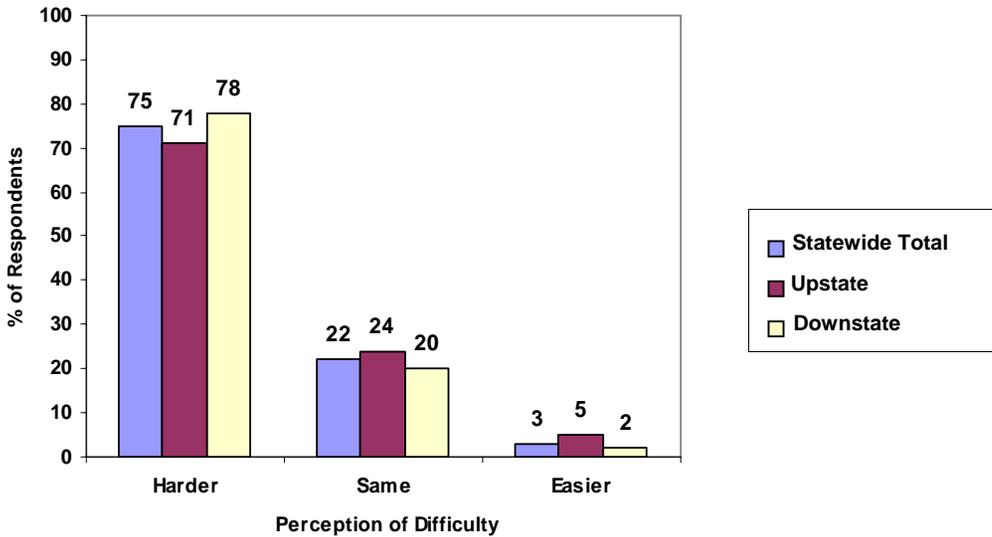
% of respondents who selected issues by party affiliation

Issue	Democrat	Independent	Republican	All NYS
Honesty/Integrity of Candidate	19	25	33	25
State of the U.S. Economy	21	18	16	18
National Security/Iraq	11	14	19	13
Employment & Jobs	10	9	6	9
Education	11	8	2	8
Foreign Policy*	6	7	8	7
Healthcare & Insurance	9	7	5	6
Anti-Bush	4	3	2	3
Other Issues Not Listed	9	9	10	10

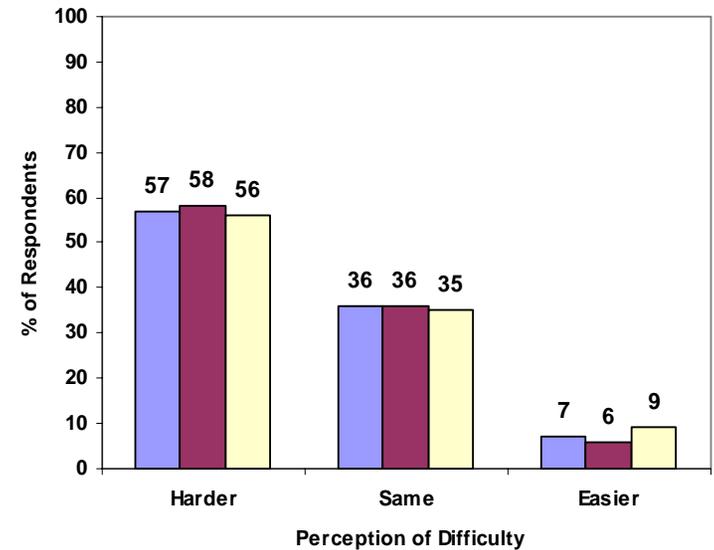
The foremost issue mentioned by one-in-four ESP 2004 respondents was the *honesty and integrity* of the candidate, especially for Republicans (33%), but less so for Democrats (19%).

Difficulty of Finding Jobs in Community: 2003 vs. 2004

2003

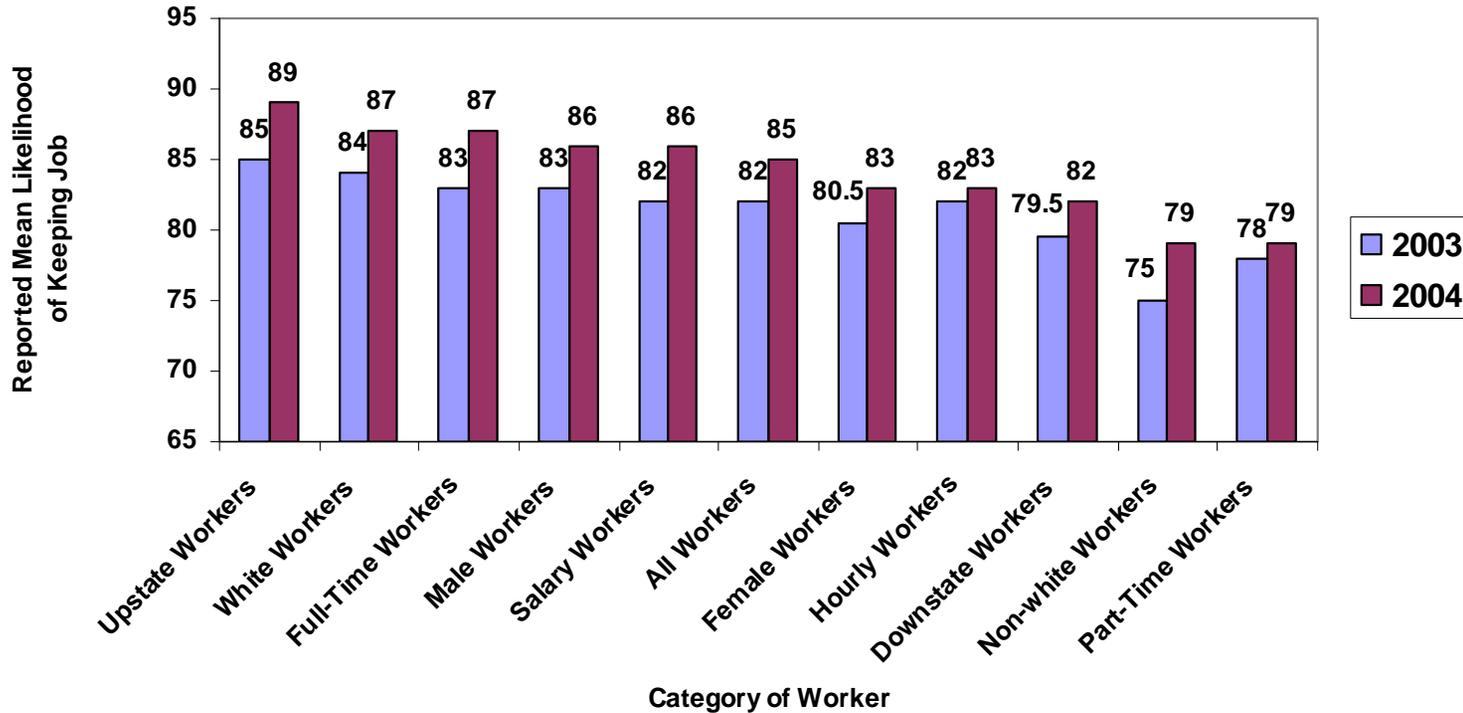


2004



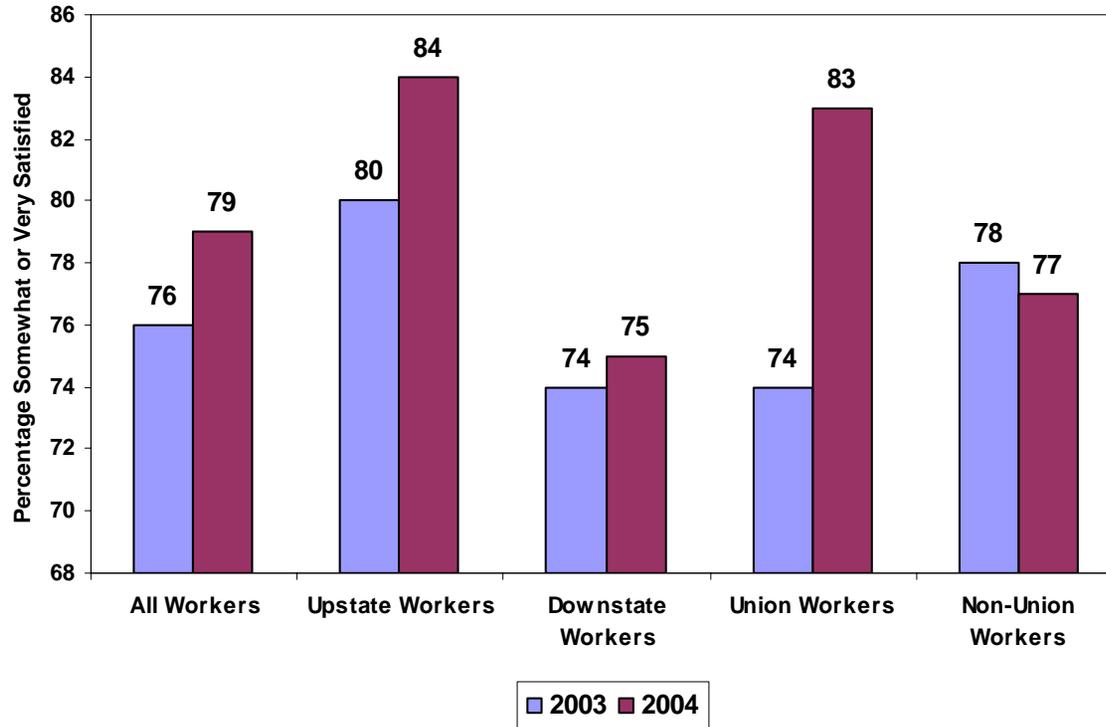
Across NYS, the number of respondents reporting that finding jobs was harder over the past year substantially decreased in 2004. However, there was only a marginal increase in the number of New Yorkers that reported finding jobs was easier.

Job Security by Category of Worker: 2003 vs. 2004



2004 found a marginal increase in overall level of job security among NYS workers. Downstate, hourly, non-white, and/or part-time workers have considerably less perceived job security than other categories of workers.

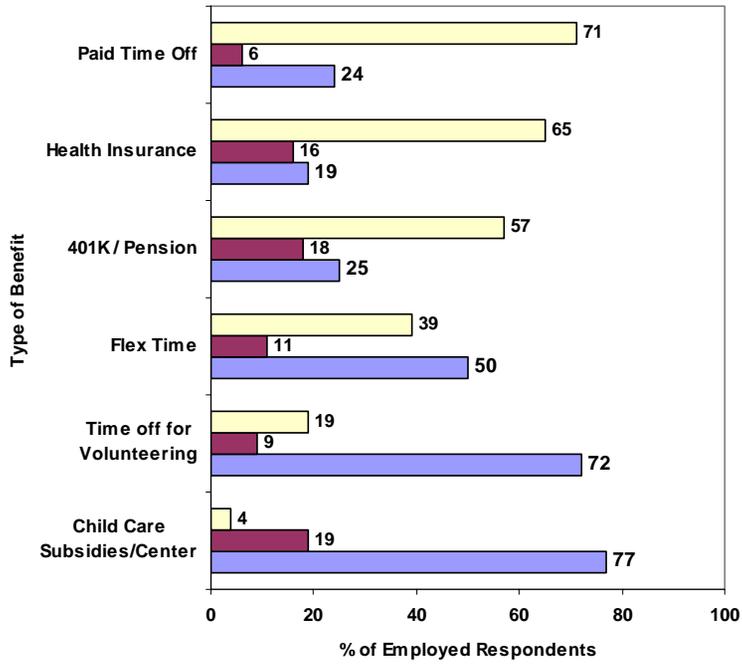
Job Satisfaction in NYS: 2003 vs. 2004



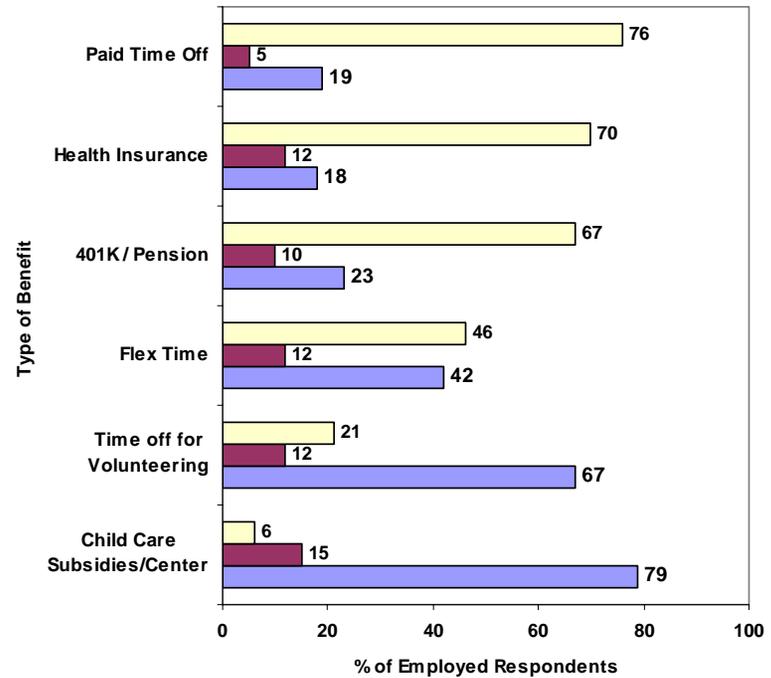
Job Satisfaction has also increased, especially for upstate and union workers.

NYS Workers' Benefits: 2003 vs. 2004

2003

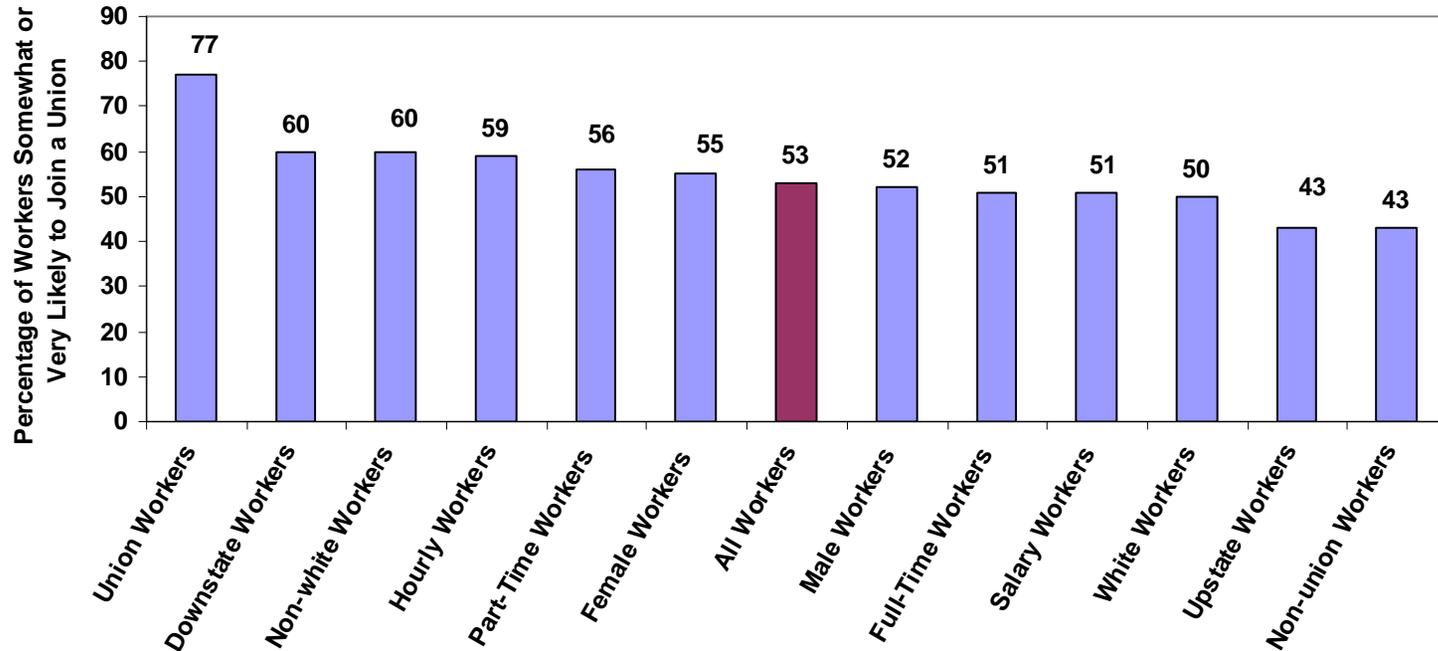


2004



Child care subsidies or onsite care centers remain the least available benefit to New York State workers.

Likelihood of Joining a Union in 2004



53% of all workers in NYS would be somewhat or very likely to join a union if given a choice – over double the percentage of currently unionized workers.

One-stop Employment Centers in NYS

% of employed and unemployed respondents reporting awareness and use

Response	Upstate	Downstate	All NYS
<i>Awareness of Center</i>			
Employed	44	24	32
Unemployed	47	30	33
<i>Likely to Use Center</i>			
Employed	37	42	40
Unemployed	67	64	64

The awareness of one-stop employment centers within NYS varies regionally, with almost twice as many employed upstate respondents (44%) aware of this employment resource as compared to only 24% of downstate respondents.

Education & Training Enrollment in NY

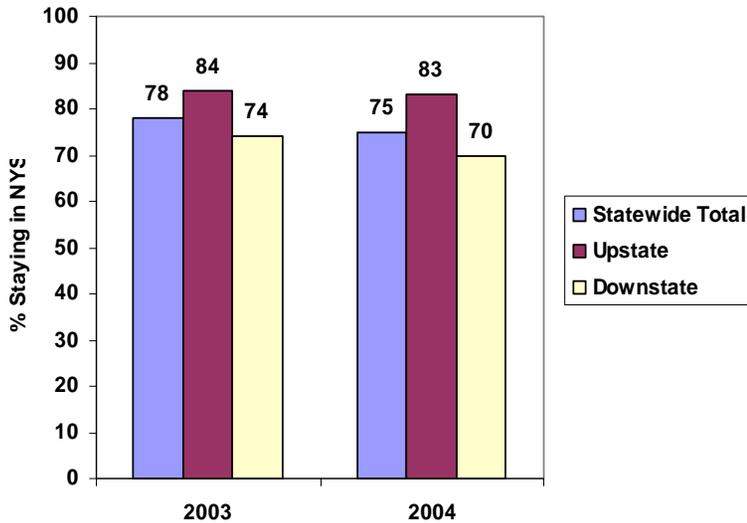
% of respondents enrolled in educational activities in the last 12 months

Type of Education/Training	%	Avg Wkly Hours
Workshops, seminars	7	10
On-the-job training / Apprenticeship	7	15
Professional/skill-based certificate program	5	15
Four Year College/University	4	14
Junior/Community College	3	13
Graduate School	3	12
Vocational/Trade School	2	18
Other	1	14
High School Diploma/ GED Program	1	25
Total / Mean	33	14

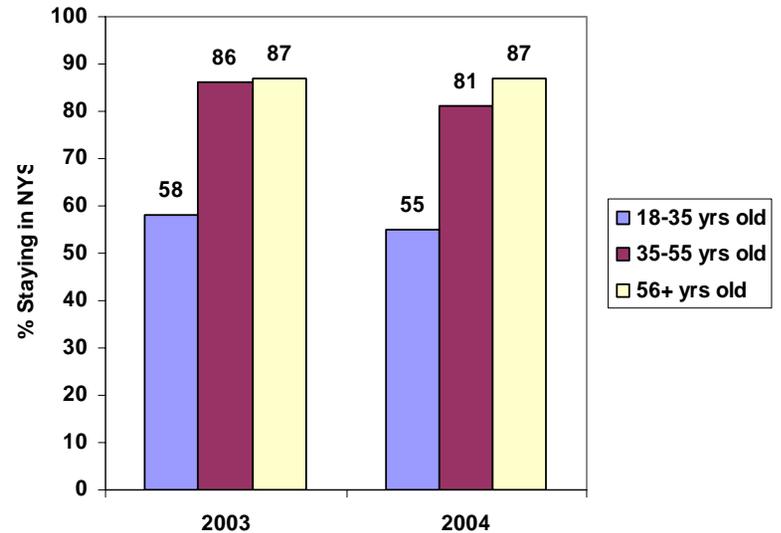
One third of ESP respondents reported being enrolled in some type of educational or training program within the last year with a weekly average of 14 hours of instruction.

Living in the Same Community in 5 Years?

Region



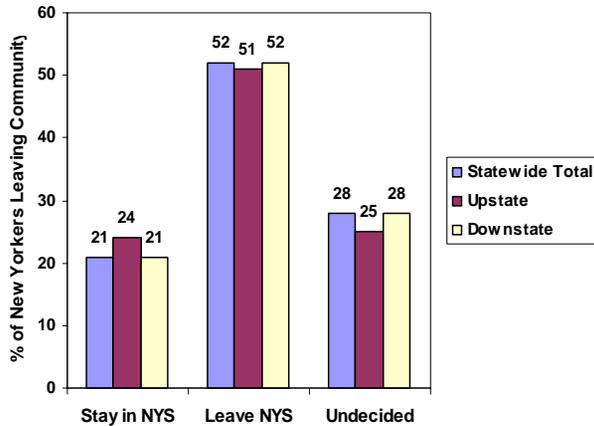
Age Group



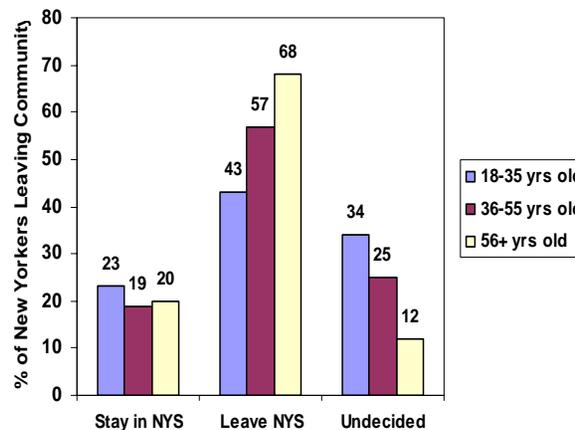
Approximately 75% of New Yorkers believe they will be living in their community in five years, though there are substantial differences between upstate and downstate residents. Younger residents are much more likely to move from their community.

Where are New Yorkers Going?

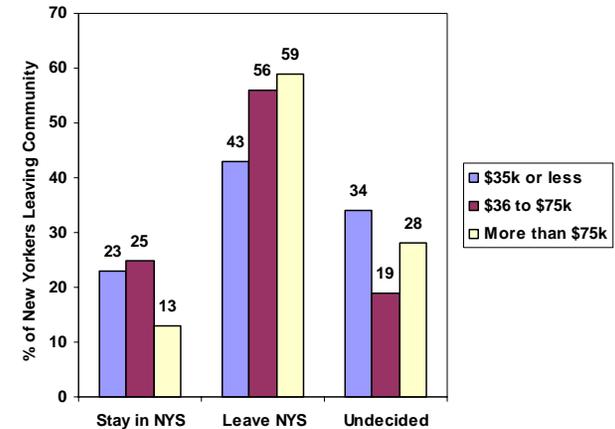
Region



Age Group



Household Income



About half of the New Yorkers that are leaving their communities are leaving New York State, though a sizable portion of New Yorkers are still undecided. Older New Yorkers and members of middle or higher income households are more likely to leave NYS altogether compared to younger or lower income residents.

Local Community Satisfaction

% of respondents who were satisfied with local community regarding...

Aspect of Community	Upstate	Downstate	All NYS
Safety & Crime	72	60	64
Cultural Activities	59	64	62
Public Education	73	48	57
Social & Human Services	55	49	52
City or Town Govt	50	43	46
Economic Growth	34	46	42
Land Dev & Planning	37	37	37
Employment	27	33	31
Local Taxes	29	33	30

Upstate respondents had higher levels of satisfaction on *safety/crime, public education, social and human services, and local government*. Conversely, downstate respondents were more satisfied than upstate respondents in the areas of *economic growth, employment, and cultural activities*.

Indicators of Social Capital – Trust in NYS

% of respondents who express trust in...

Social Institution	Upstate	Downstate	All NYS
Local Businesses	73	57	63
Local Government	50	38	43
State Government	29	30	29
Large Corporations	25	20	22
Labor Unions	33	41	38
News Media	35	31	33
Other People	66	54	59

Overall, upstate residents have much higher levels of trust than downstate residents, especially in *local businesses*, *local government*, and *other people*. Downstate residents are only more trusting when it comes to *labor unions*. Less than a third of New Yorkers trust *state government*.

Indicators of Social Capital – Civic Volunteerism in NYS

% of respondents who volunteered their time in the past year to...

Volunteer Activity	Upstate	Downstate	All NYS	National Average*
Church or Religious Group	36	34	35	39
Child or Youth Development	37	28	31	31
Arts or Cultural Association	14	14	14	10
Neighborhood or Civic Group	24	24	24	18
Help Poor, Sick, Elderly	39	32	35	32

* Based on data from Pew Public Life Survey conducted in March 2001.

NYS has comparable levels of civic volunteerism to the national average. Though a higher percentage of upstate respondents than downstate respondents reported volunteering with *child/youth development* organizations or organizations to help the *poor, sick, or elderly*.