



Envision 2020
Hampton Roads Resident Survey

November 8, 2019

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**I.
Report
Goals &
Methodology**

This Report is One of 10 SIR Envision 2020 Input Deliverables*

*SIR is the strategic consultancy supporting the Envision 2020 Regional Branding Initiative's Task Force (www.sirhq.com)

1. Secondary Research Report (Relevant Data and Existing Research)
2. Peer Cities/Regions Place Marketing Report
3. Hampton Roads Place Marketing Report
4. National Social Media Sentiment Naming Report
5. **Hampton Roads Resident Survey Report**
6. Hampton Roads Young Professionals and High School Students Reports**
7. Hampton Roads Business Leaders Survey Report
8. Hampton Roads Prospective Visitors Survey Report
9. Corporate Real Estate Professionals Survey Report
10. Site Selection Consultants Interview Report



This Report

Envision 2020 Project Task Force Findings and Recommendations Report

Resident Survey Report Goals

- Assess local attitudes and perceptions about the Hampton Roads region, Hampton Roads as a regional name, and the relative appeal of alternative names.
- Assess how residents rate the Hampton Roads region as a place to live, work, and play.
- Assess the current level of equity in the Hampton Roads name and the imagery associated with the name.
- Test the relative appeal of alternative names and/or taglines.

Methodology

- The Envision 2020 Taskforce worked together with SIR to develop an online survey among residents who live in the Hampton Roads region.
- Survey respondents were gathered in two ways:
 - A **Scientific Survey** with a national panel partner (**total sample n=615**)
 - A **Convenience Survey**, currently in the field, being distributed through city social media and communications channels to gather additional input from Hampton Roads citizens (**current sample n=1075**). The convenience survey was split into two parts, each approximately 10 minutes in length.

This report contains additional analysis from the **SCIENTIFIC survey, and **CONVENIENCE** data for a topline analysis.**



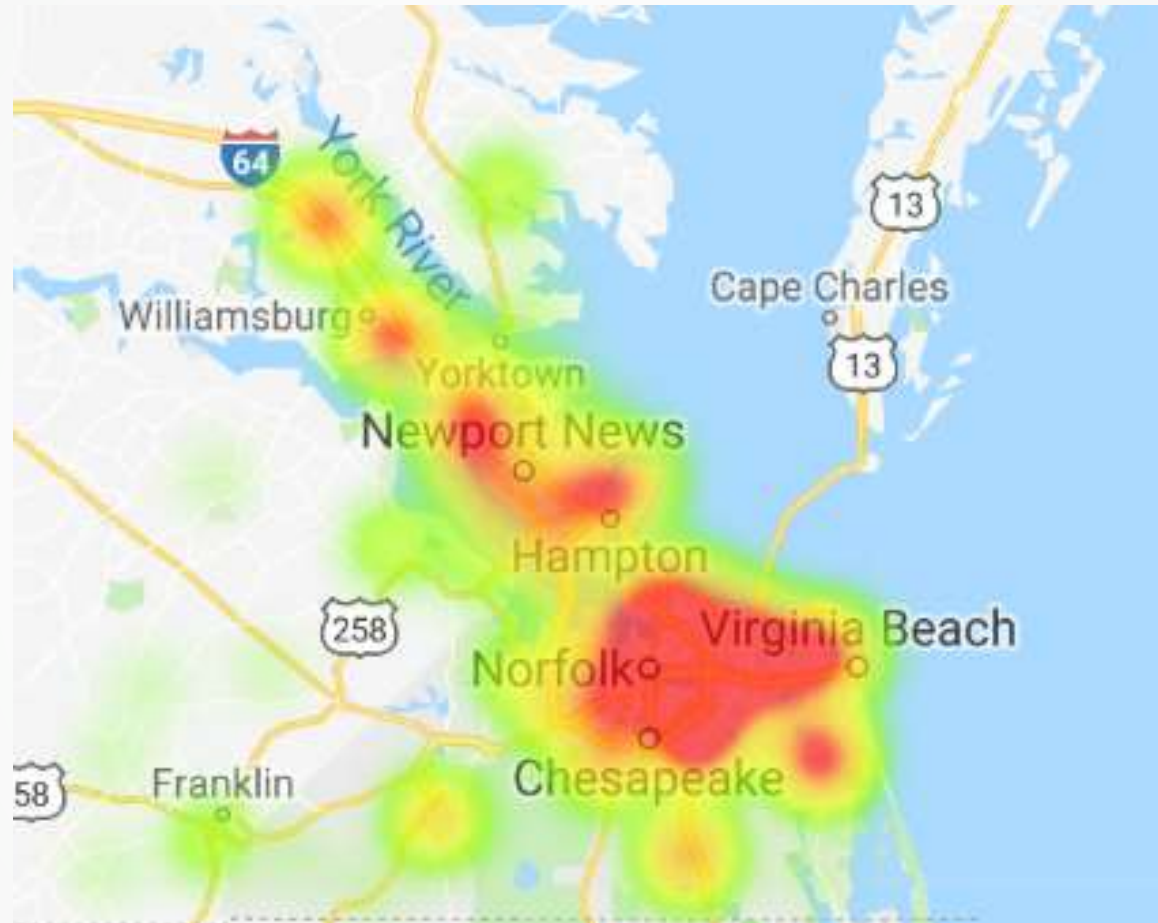
II. Respondent Profile

SCIENTIFIC STUDY DEMOGRAPHICS

Scientific study respondent demographic data was compared to 2017 ACS Census estimates for gender, age, race, ethnicity, income, and location to ensure a dataset comparable to current Hampton Roads demographics

DEMOGRAPHIC	GROUP	SAMPLE %	CENSUS PROPORTION
GENDER	Male	50%	48%
	Female	50%	52%
GENERATION	Millennials (born 1983–1999)	33%	32%
	Generation X (born 1965–1982)	27%	32%
	Boomers (born prior to 1964)	40%	36%
RACE	White	59%	59%
	Black / African American	32%	31%
	Other	9%	10%
HISPANIC ETHNICITY	Hispanic or Latino	8%	7%
	Not Hispanic or Latino	92%	93%
AREA OF HAMPTON ROADS	Peninsula	32%	31%
	Southside	68%	69%
ANNUAL HOUSEHOLD INCOME	Average total household income	\$82,000	\$82,000

Scientific study respondents live across the Hampton Roads region



Scientific study respondents come from all 17 Hampton Roads cities and counties

PENINSULA	SAMPLE %
Newport News	12%
Hampton	7%
James City	5%
Williamsburg	4%
York	2%
Gloucester	1%
Poquoson	1%

SOUTHSIDE	SAMPLE %
Virginia Beach	27%
Chesapeake	15%
Norfolk	13%
Portsmouth	6%
Suffolk	4%
Isle of Wight /Smithfield	2%
Franklin	1%
Southampton	1%
Surry	1%

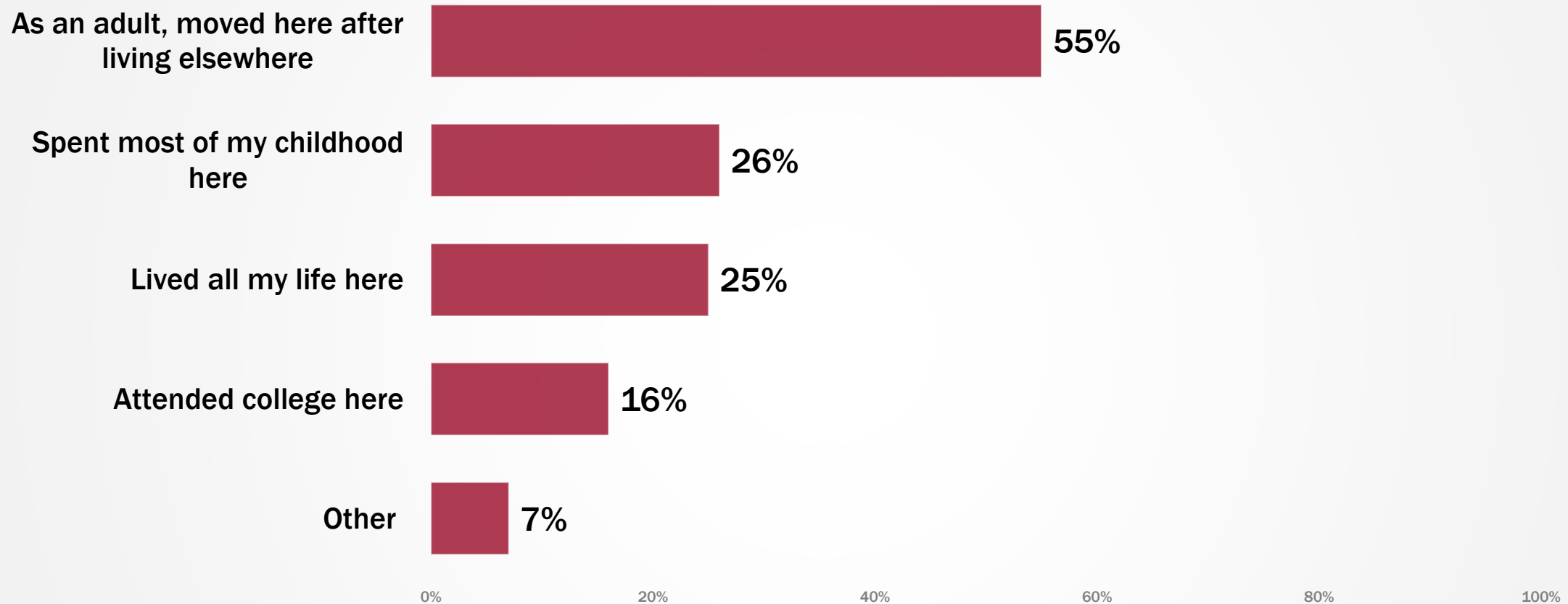
Other demographic information (cont'd)

DEMOGRAPHIC	GROUP	SAMPLE PROPORTION
MILITARY SERVICE	Currently or have served	26%
	Have not served	73%
AVERAGE NUMBER OF YEARS LIVED IN REGION	Average number of years lived in region	23 years
CHILDREN UNDER 18 IN HOUSEHOLD	Children in household	31%
	None	69%
CURRENTLY ATTENDING COLLEGE	Yes, in Hampton Roads	11%
	Yes, outside Hampton Roads	3%
	No	86%

Other demographic information (cont'd)

DEMOGRAPHIC	GROUP	SAMPLE PROPORTION (Weighted)
EMPLOYMENT STATUS	Employed full time	45%
	Retired	22%
	Employed part time	11%
	Unemployed or temporarily laid off	8%
	Self-employed/freelancer/entrepreneur	6%
	Currently a student and not working	2%
	Currently a student and working part-time or full-time	1%
	Other	5%

Most scientific study respondents moved to Hampton Roads from somewhere else, as an adult



CONVENIENCE SURVEY DEMOGRAPHICS

Convenience Survey Demographics

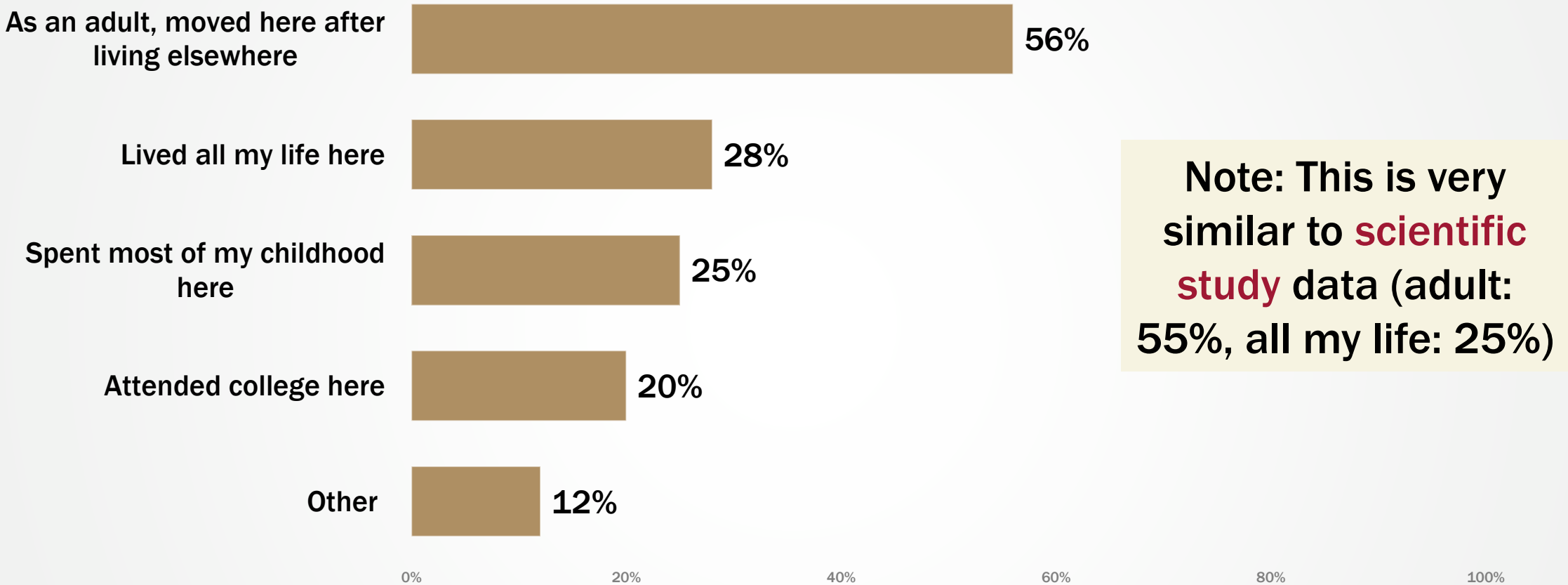
DEMOGRAPHIC	GROUP	SAMPLE %
GENDER	Male	44%
	Female	56%
GENERATION	Millennials (born 1983–1999)	31%
	Generation X (born 1965–1982)	36%
	Boomers (born prior to 1964)	34%
RACE	White	80%
	Black / African American	14%
	Other	6%
HISPANIC ETHNICITY	Hispanic or Latino	4%
	Not Hispanic or Latino	96%
AREA OF HAMPTON ROADS	Peninsula	21%
	Southside	79%
ANNUAL HOUSEHOLD INCOME	Average total household income	\$116,000

Convenience respondents mostly come from Virginia Beach and Norfolk

PENINSULA	SAMPLE %
Hampton	8%
Newport News	5%
York	3%
Williamsburg	2%
James City	2%
Gloucester	<1%
Poquoson	<1%

SOUTHSIDE	SAMPLE %
Virginia Beach	35%
Norfolk	24%
Chesapeake	11%
Portsmouth	3%
Suffolk	3%
Isle of Wight /Smithfield	1%
Franklin	<1%
Southampton	<1%
Surry	<1%

Most convenience study respondents moved to Hampton Roads from somewhere else, as an adult



The Convenience sample is more white, higher income, and more likely to live on the Southside of the region

DEMOGRAPHIC	GROUP	SCIENTIFIC	CONVENIENCE
GENDER	Male	50%	44%
	Female	50%	56%
GENERATION	Millennials (born 1983–1999)	33%	31%
	Generation X (born 1965–1982)	27%	36%
	Boomers (born prior to 1964)	40%	34%
RACE	White	59%	80%
	Black / African American	32%	14%
	Other	9%	6%
HISPANIC ETHNICITY	Hispanic or Latino	8%	4%
	Not Hispanic or Latino	92%	96%
AREA OF HAMPTON ROADS	Peninsula	32%	21%
	Southside	68%	79%
ANNUAL HOUSEHOLD INCOME	Average total household income	\$82,000	\$116,000



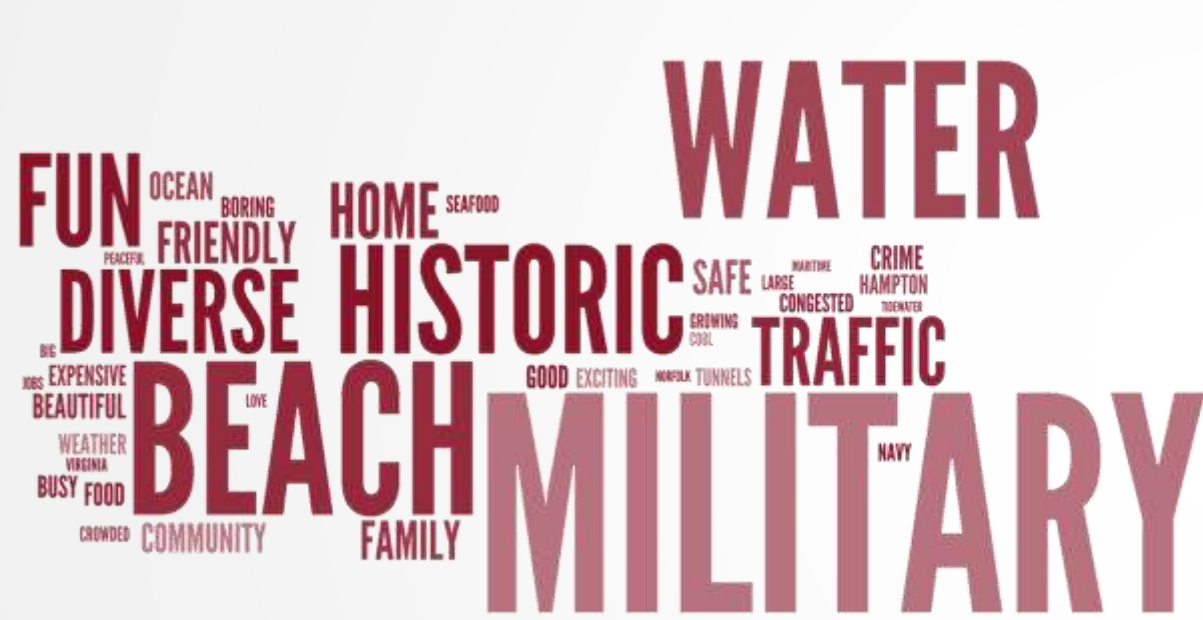
III.

Key insights

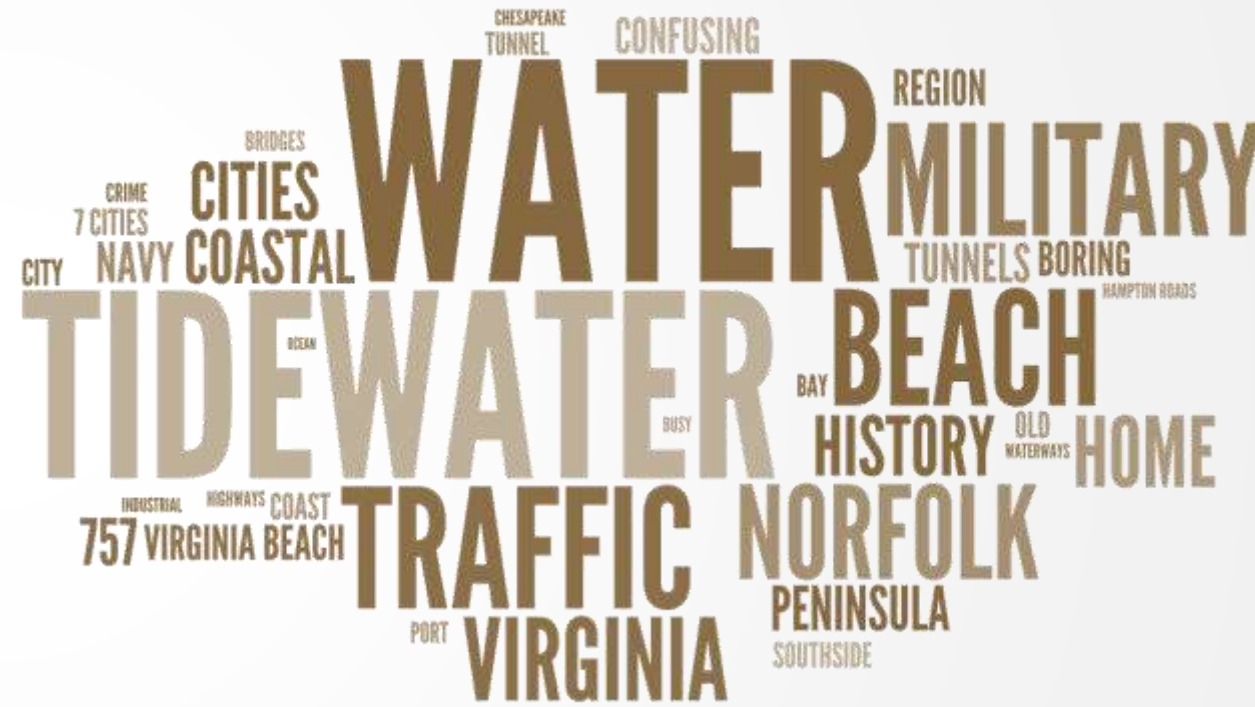
REGIONAL ATTRIBUTES

When you think about the Hampton Roads region, what three words come to mind?

SCIENTIFIC

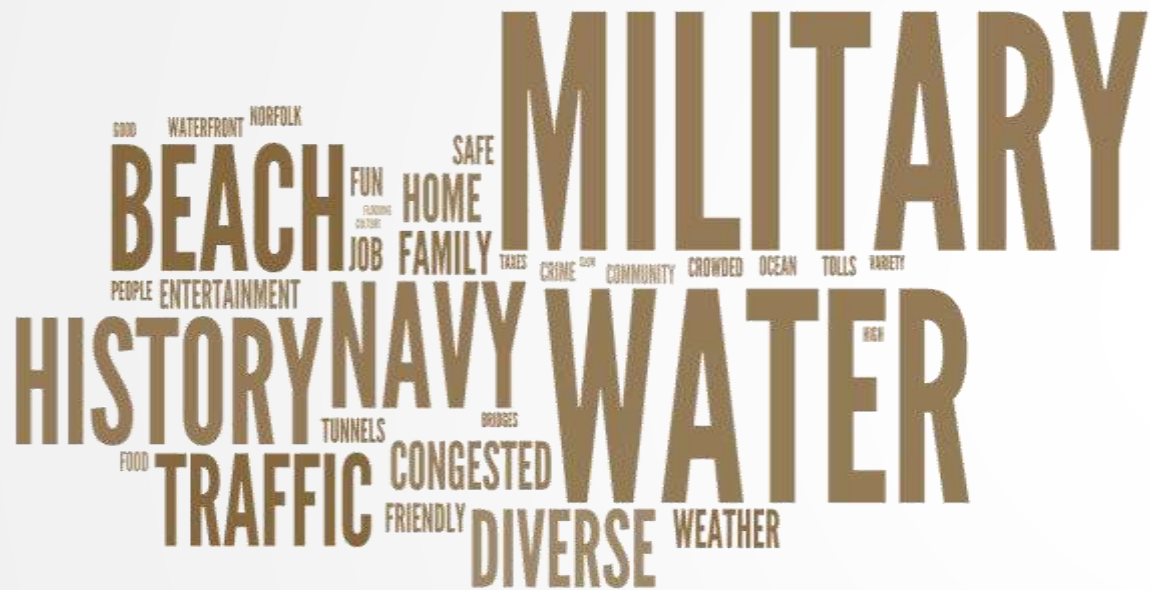


CONVENIENCE

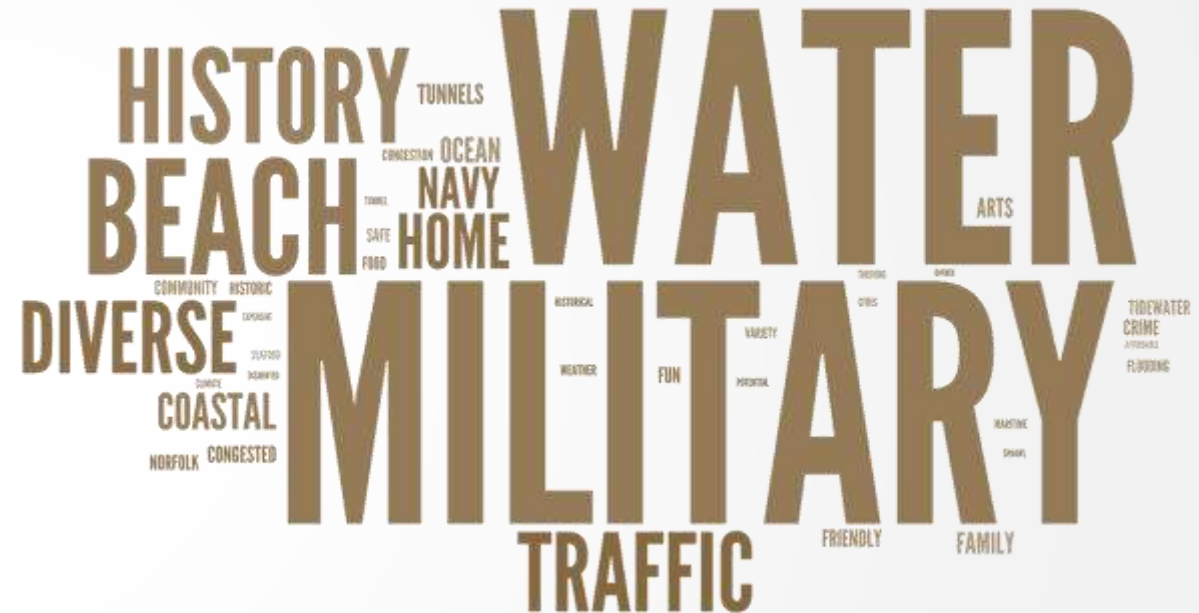


When you think about the Hampton Roads region, what three words come to mind?

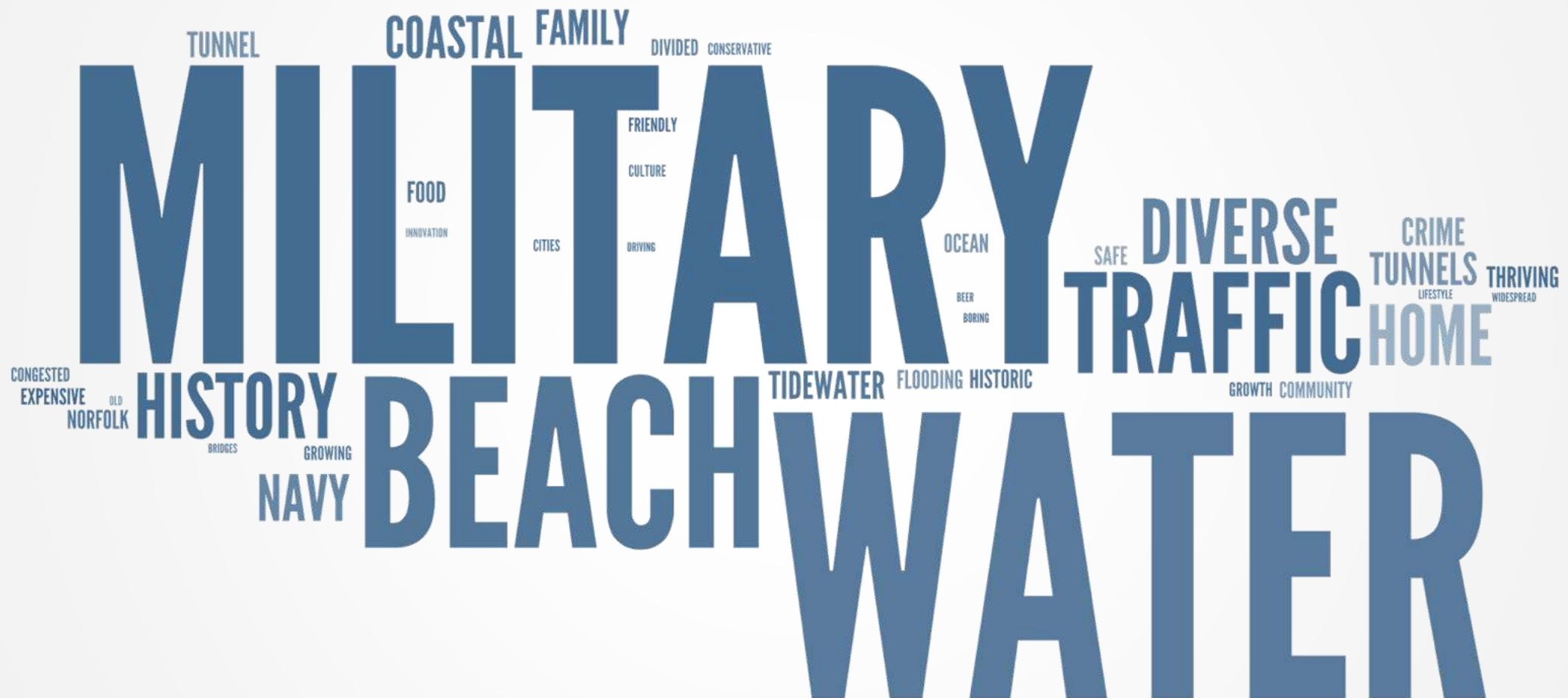
MILITARY



NON-MILITARY



When you think about the Hampton Roads region,
what three words come to mind?



What is one thing that makes the Hampton Roads region a unique place compared to other places you could live in the United States?

SCIENTIFIC



CONVENIENCE

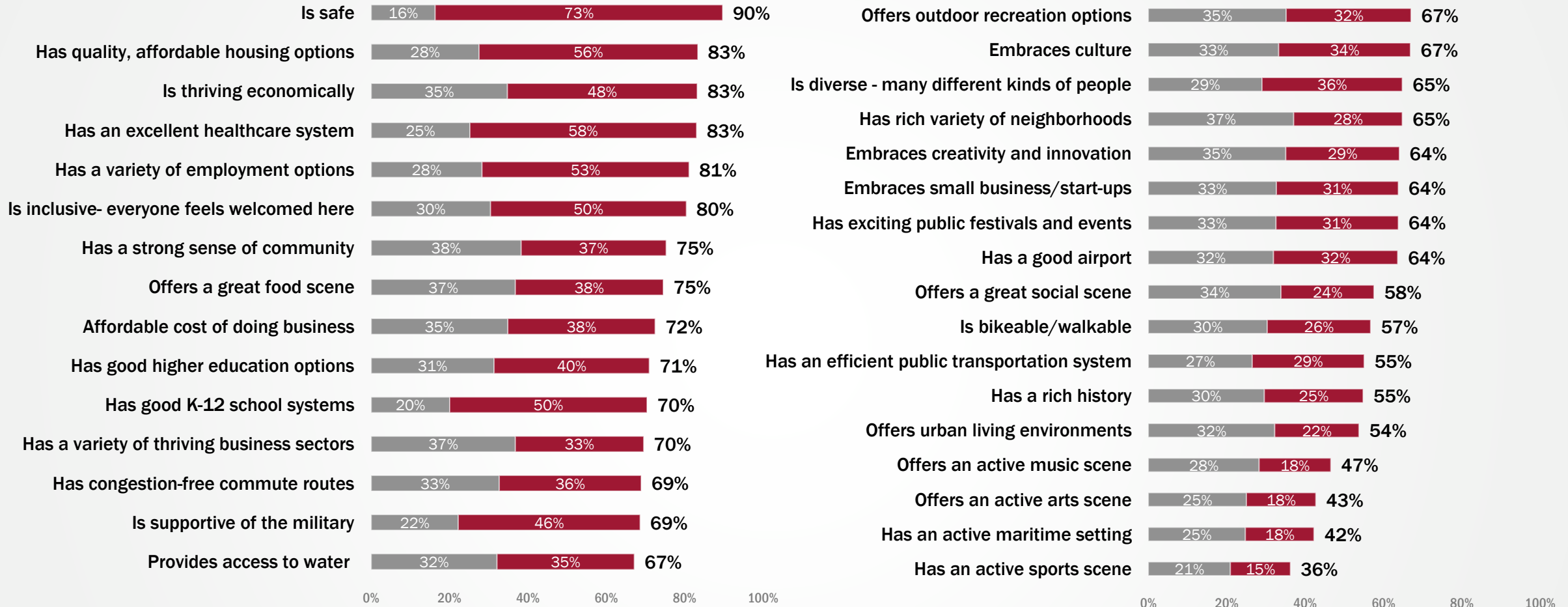


GAP ANALYSIS

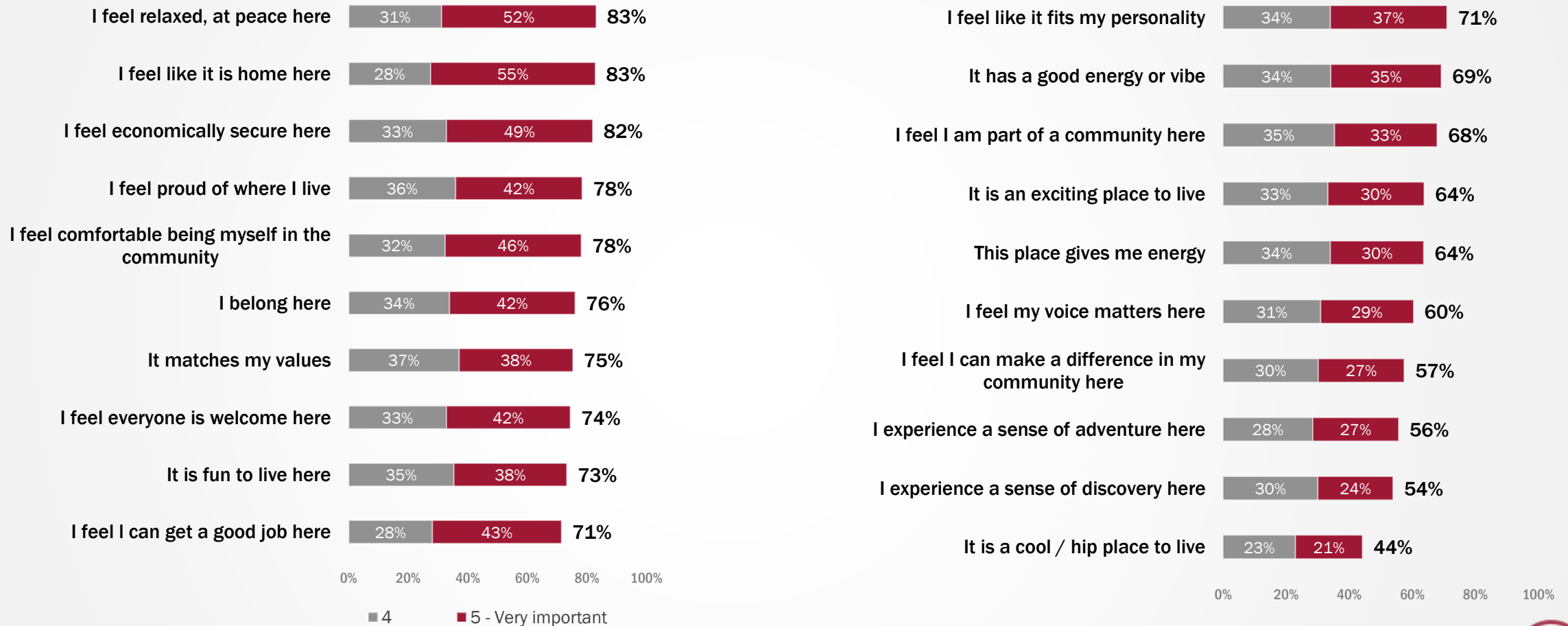
Regional attributes (both rational and emotional) were presented to scientific study respondents. Respondents rated these attributes in importance and in how well Hampton Roads performed on these attributes. Gap Analysis was performed to discover which city/regional traits were over- or underperforming in the Hampton Roads region.

IDEAL PLACE

Respondents place **IMPORTANCE** on many **RATIONAL** attributes, especially safety, housing, economics, and healthcare



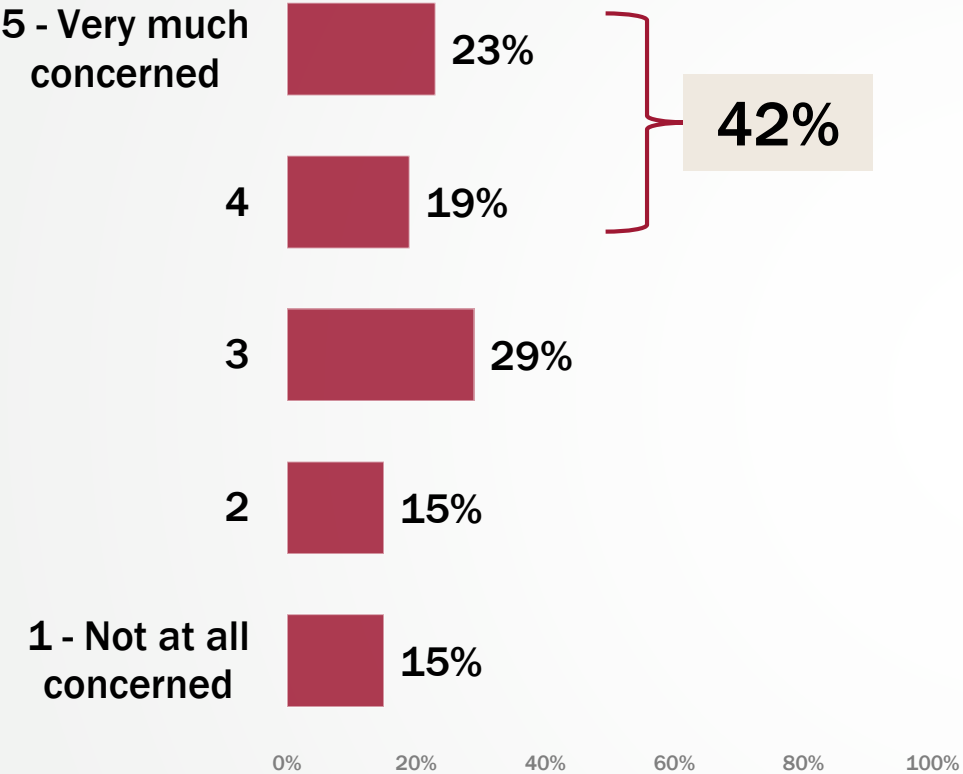
Respondents also place **IMPORTANCE** on many **EMOTIONAL** city attributes, especially feeling at peace, at home, and economically secure



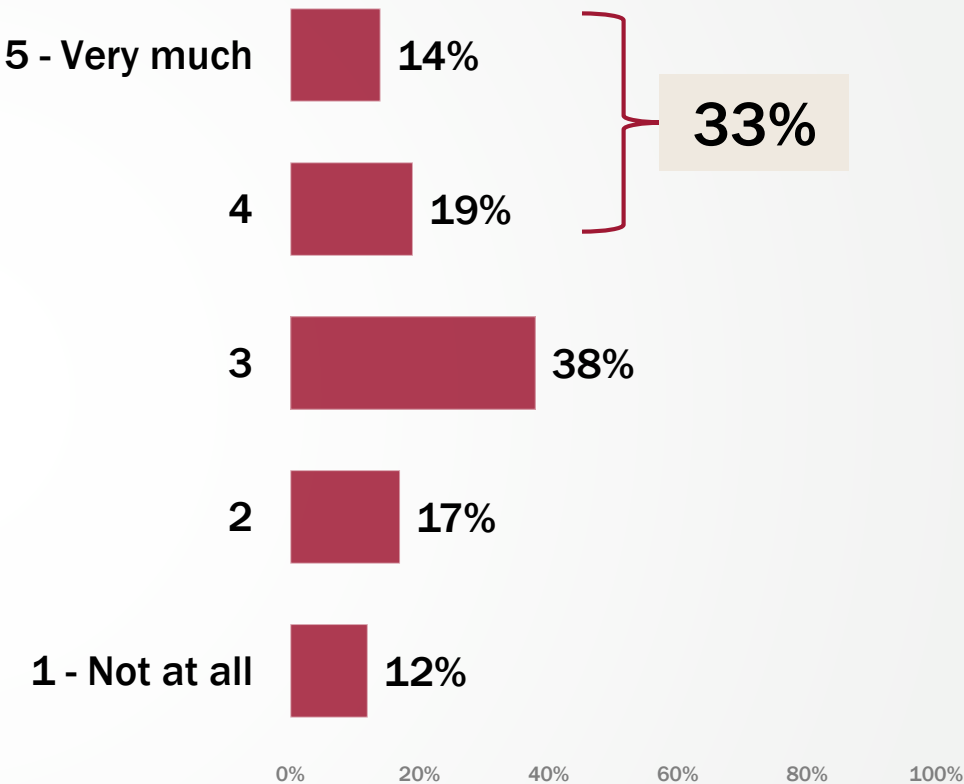
PERFORMANCE

Two in five respondents have concerns about recurrent flooding and sea level rise, but only one third feel it impacts Hampton Roads today

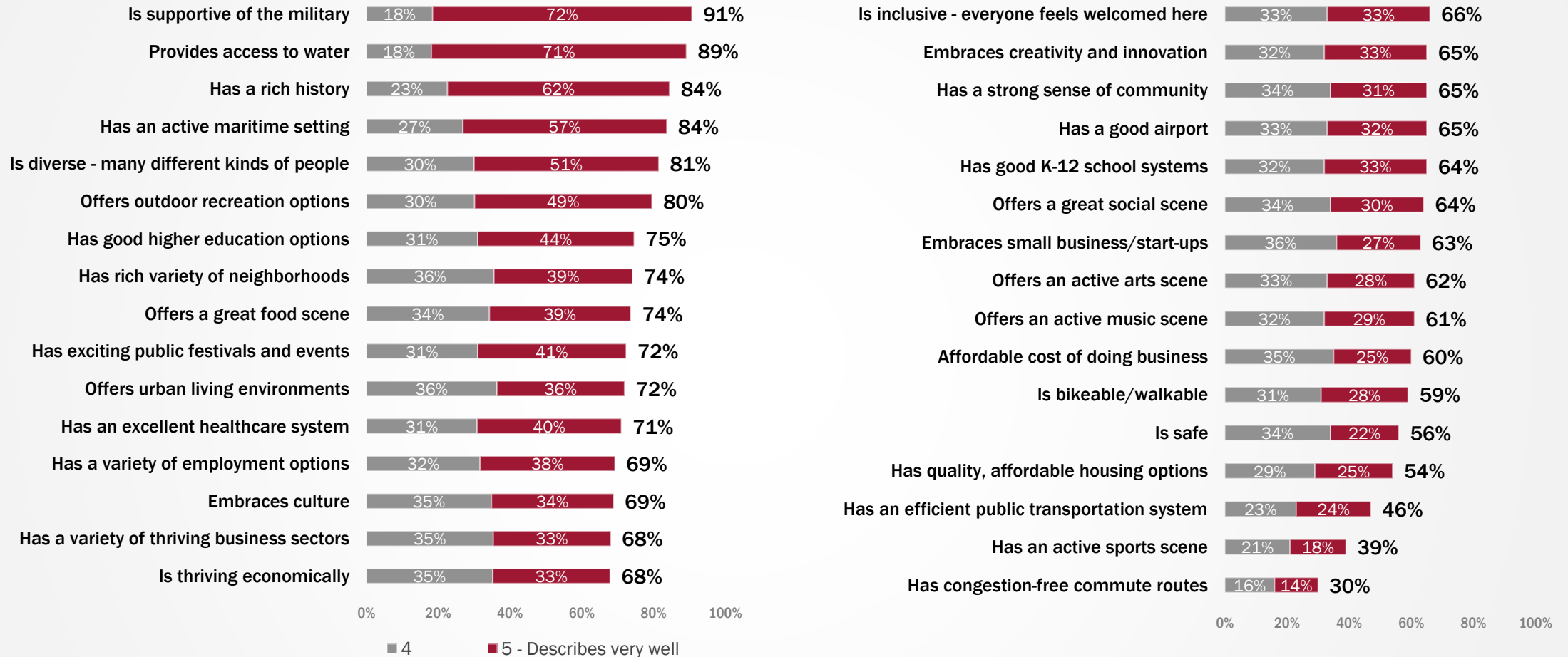
CONCERN ABOUT RECURRENT FLOODING AND SEA LEVEL RISE



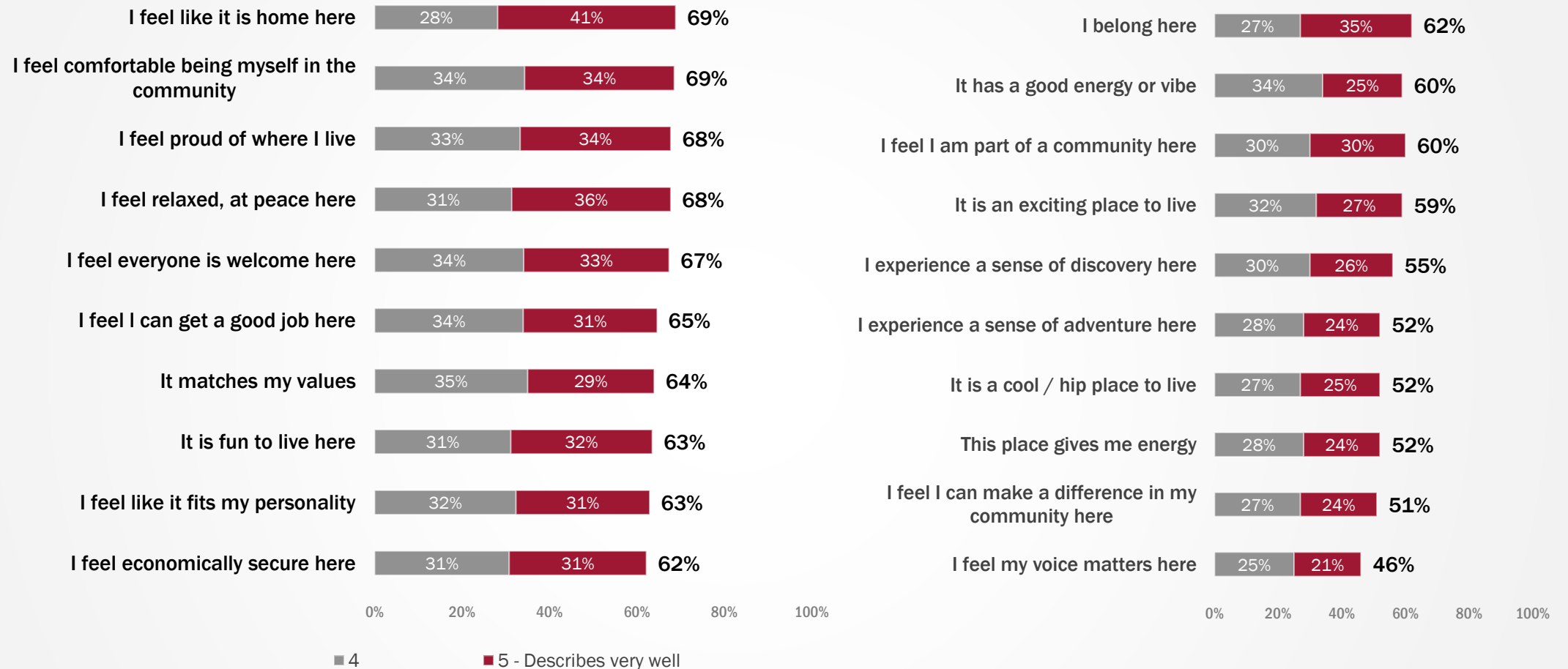
IMPACT OF RECURRENT FLOODING AND SEA LEVEL RISE ON IMAGE OR REPUTATION



Respondents believe the **RATIONAL** attributes where HR **PERFORMS** best are military support, access to water, its rich history, and maritime setting



Respondents feel the **EMOTIONAL** attributes where HR **PERFORMS** best are feeling like it is home and being comfortable in the community



GAP ANALYSIS

Understanding gap analysis

Expectation vs. performance

The first step in identifying areas of opportunity is to look at **gap analysis**. This gathers ratings of what respondents find important when it comes to the ideal place they'd want to live — their expectation.

The process then follows up by asking respondents how well those various attributes actually describe Hampton Roads — its performance.

$$\begin{array}{ccccc} \text{AVERAGE} & & \text{AVERAGE} & & \text{GAP} \\ \text{PERFORMANCE} & \div & \text{IMPORTANCE} & = & \text{SCORE} \\ \text{of attribute} & & \text{of attribute} & & \end{array}$$

GAP ANALYSIS: **RATIONAL ATTRIBUTES** (slide 1 of 3)

Among the most important areas, those performing below expectations are safety and affordable housing options

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
Is safe	4.60	3.58	78%
Has an excellent healthcare system/medical facilities	4.37	3.99	91%
Has quality, affordable housing options	4.33	3.54	82%
Is thriving economically	4.27	3.87	91%
Has a variety of employment options	4.27	3.93	92%
Is inclusive - everyone feels welcomed here	4.23	3.83	91%
Offers a great food scene	4.05	4.03	100%
Has a strong sense of community	4.05	3.82	94%
Affordable cost of doing business	4.02	3.69	92%
Is supportive of the military	4.01	4.58	114%

100%
Perfect
alignment

Below 85%
Below
expectations

Above 100%
Above
expectations

GAP ANALYSIS: RATIONAL ATTRIBUTES (slide 2 of 3)

Attributes performing below expectations are congestion-free commute routes

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
Has good K-12 school systems	3.95	3.83	97%
Has good higher education options (colleges and universities)	3.95	4.08	103%
Has congestion-free commute routes	3.94	2.74	70%
Has a variety of thriving business sectors	3.93	3.90	99%
Provides access to water (e.g., river, lakes, bay, ocean)	3.88	4.55	117%
Offers outdoor recreation options	3.87	4.22	109%
Embraces culture	3.86	3.89	101%
Is diverse - many different kinds of people live here	3.85	4.26	111%
Embraces small business/start-ups/entrepreneurship	3.82	3.78	99%
Has exciting public festivals and events	3.81	4.03	106%

100%
Perfect alignment

Below 85%
Below expectations

Above 100%
Above expectations

GAP ANALYSIS: **RATIONAL ATTRIBUTES** (slide 3 of 3)

Active maritime setting and rich history are very above expectations

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
Has rich variety of neighborhoods	3.80	4.02	106%
Embraces creativity and innovation	3.80	3.87	102%
Has a good airport	3.75	3.80	101%
Offers a great social scene	3.63	3.81	105%
Is bikeable/walkable	3.63	3.67	101%
Has an efficient public transportation system	3.57	3.31	93%
Has a rich history	3.57	4.39	123%
Offers urban living environments	3.54	3.97	112%
Offers an active music scene	3.36	3.74	111%
Has an active maritime setting	3.29	4.35	132%
Offers an active arts scene	3.24	3.76	116%

100%
Perfect
alignment

Below 80%
Below
expectations

Above 100%
Above
expectations

GAP ANALYSIS: EMOTIONAL ATTRIBUTES (slide 1 of 2)

Among the most important emotional areas, none fall below the expectation threshold

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
I feel like it is home here	4.32	3.87	90%
I feel relaxed, at peace here	4.28	3.85	90%
I feel economically secure here	4.22	3.69	87%
I feel comfortable being myself in the community	4.16	3.84	92%
I feel proud of where I live	4.11	3.82	93%
I belong here	4.08	3.73	91%
I feel everyone is welcome here	4.07	3.84	94%
It matches my values	4.03	3.71	92%
It is fun to live here	4.01	3.75	94%
I feel like it fits my personality	3.99	3.70	93%

100%
Perfect
alignment

Below 80%
Below
expectations

Above 100%
Above
expectations

GAP ANALYSIS: EMOTIONAL ATTRIBUTES (slide 2 of 2)

Among the most important emotional areas, none fall below the expectation threshold

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
I feel I can get a good job here	3.96	3.70	93%
It has a good energy or vibe	3.92	3.63	93%
I feel I am part of a community here	3.90	3.65	94%
This place gives me energy	3.80	3.46	91%
It is an exciting place to live	3.79	3.63	96%
I feel my voice matters here	3.72	3.33	90%
I feel I can make a difference in my community here	3.66	3.47	95%
I experience a sense of adventure here	3.65	3.47	95%
I experience a sense of discovery here	3.62	3.55	98%
It is a cool / hip place to live	3.37	3.49	104%

100%
Perfect
alignment

Below 80%
Below
expectations

Above 100%
Above
expectations

MILLENNIAL MAP

YOUNG PROFESSIONALS / NEXT GEN

- Under 40
- Working
- Convenience Study data (n=157)

MILLENNIAL MAP: RATIONAL ATTRIBUTES (slide 1 of 3)

Among the most important areas, those performing especially below expectations are affordable housing, safety, economics, and inclusiveness

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
Is safe	4.68	3.24	69%
Is inclusive - everyone feels welcomed here	4.64	3.39	73%
Is thriving economically	4.60	3.32	72%
Has a variety of employment options	4.59	3.42	75%
Has quality, affordable housing options	4.47	2.96	66%
Has an excellent healthcare system/medical facilities	4.44	3.69	83%
Offers a great food scene	4.44	3.69	83%
Has a variety of thriving business sectors	4.37	3.25	74%
Embraces culture	4.37	3.42	78%
Has good K-12 school systems	4.33	3.24	75%

100%
Perfect
alignment

Below 80%
Below
expectations

Above 100%
Above
expectations

MILLENNIAL MAP: **RATIONAL ATTRIBUTES** (slide 2 of 3)

Attributes performing **below** expectations are congestion-free commute routes, good airport, embracing creativity, and sense of community

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
Offers outdoor recreation options	4.32	3.99	92%
Embraces creativity and innovation	4.30	3.26	76%
Has a strong sense of community	4.27	3.27	77%
Embraces small business/start-ups/entrepreneurship	4.23	3.47	82%
Provides access to water (e.g., river, lakes, bay, ocean)	4.20	4.65	111%
Affordable cost of doing business	4.20	3.38	80%
Is diverse - many different kinds of people live here	4.19	4.03	96%
Has exciting public festivals and events	4.18	3.92	94%
Has a good airport	4.17	3.07	74%
Has congestion-free commute routes	4.14	1.89	46%

100%
Perfect
alignment

Below 80%
Below
expectations

Above 100%
Above
expectations

MILLENNIAL MAP: RATIONAL ATTRIBUTES (slide 3 of 3)

Young professionals also find public transportation, walkability and sports to be under expectations in Hampton Roads

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
Offers a great social scene	4.09	3.43	84%
Is bikeable/walkable	4.06	2.46	61%
Has rich variety of neighborhoods	4.03	3.75	93%
Has good higher education options (colleges and universities)	3.94	3.71	94%
Has an efficient public transportation system	3.88	1.91	49%
Offers urban living environments	3.70	3.54	96%
Offers an active music scene	3.61	3.36	93%
Offers an active arts scene	3.59	3.47	97%
Has a rich history	3.59	4.37	122%
Is supportive of the military	3.36	4.73	141%
Has an active maritime setting	3.17	4.53	143%
Has an active sports scene/professional sports teams	2.88	2.05	71%

100%
Perfect alignment

Below 80%
Below expectations

Above 100%
Above expectations

MILLENNIAL MAP: EMOTIONAL ATTRIBUTES (slide 1 of 2)

Among the most important areas, emotional attributes that fall below the expectation threshold are regarding jobs, economics, inclusion, and good energy/vibe

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
I feel I can get a good job here	4.68	3.50	75%
I feel like it is home here	4.61	3.92	85%
I feel economically secure here	4.61	3.44	75%
I feel comfortable being myself in the community	4.46	3.84	86%
I feel relaxed, at peace here	4.46	3.61	81%
I feel everyone is welcome here	4.42	3.44	78%
I feel proud of where I live	4.41	3.57	81%
It is fun to live here	4.37	3.60	82%
It has a good energy or vibe	4.34	3.38	78%
I belong here	4.33	3.61	83%

100%
Perfect
alignment

Below 80%
Below
expectations

Above 100%
Above
expectations

MILLENNIAL MAP: EMOTIONAL ATTRIBUTES (slide 2 of 2)

Other emotional attributes that fall below the expectation threshold are regarding values, energy, and feeling heard

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
I feel like it fits my personality	4.27	3.54	83%
It matches my values	4.18	3.28	78%
I feel I am part of a community here	4.16	3.43	82%
This place gives me energy	4.06	3.13	77%
I feel I can make a difference in my community here	4.03	3.41	85%
I feel my voice matters here	4.01	2.96	74%
It is an exciting place to live	3.94	3.19	81%
I experience a sense of adventure here	3.81	3.05	80%
I experience a sense of discovery here	3.75	3.13	83%
It is a cool / hip place to live	3.68	3.00	82%

100%
Perfect alignment

Below 80%
Below expectations

Above 100%
Above expectations

OPPORTUNITY MAPPING

Understanding Opportunity Mapping

- Similar to Gap Analysis, **OPPORTUNITY MAPPING** is another way to look at importance and performance attributes.
- Using a four-quadrant map, average Top 2 Box ratings for importance and performance for each attribute are mapped based off their relationship to overall question averages.



Attributes with:

1. Higher than average importance
2. Lower than average performance

=

your best
GROWTH OPPORTUNITIES

RATIONAL OPPORTUNITY MAP

Safety, affordable housing, inclusivity, sense of community, affordable business costs, good K-12 schools, and congestion-free commutes are rational city attributes that are highly important to residents but are under-performing by the Hampton Roads region.

IMPORTANCE

BEST GROWTH OPPORTUNITY

- Is safe
- Has quality, affordable housing options
- Is inclusive - everyone feels welcomed here
- Has a strong sense of community
- Affordable cost of doing business
- Has good K-12 school systems
- Has congestion-free commute routes

REINFORCE

- Is thriving economically
- Has an excellent healthcare system/medical facilities
- Has a variety of employment options
- Offers a great food scene
- Has good higher education options
- Has a variety of thriving business sectors
- Is supportive of the military
- Provides access to water (e.g., river, lakes, bay, ocean)
- Offers outdoor recreation options
- Embraces culture

VALUE-ADD SATISFIERS

- Is diverse - many different kinds of people live here
- Has rich variety of neighborhoods
- Has exciting public festivals and events
- Has a rich history
- Offers urban living environments
- Has an active maritime setting

ALREADY WORKING

- Embraces creativity and innovation
- Embraces small business/start-ups/entrepreneurship
- Has a good airport
- Offers a great social scene
- Is bikeable/walkable
- Has efficient public transportation
- Offers an active music scene
- Offers an active arts scene
- Has an active sports scene/professional sports teams

PERFORMANCE

EMOTIONAL OPPORTUNITY MAP

Having a good energy/vibe is an emotional city attribute that is highly important to residents but is under-performing by the Hampton Roads region.

IMPORTANCE

BEST GROWTH OPPORTUNITY

- It has a good energy or vibe

REINFORCE

- I feel relaxed, at peace here
- I feel like it is home here
- I feel economically secure here
- I feel proud of where I live
- I feel comfortable being myself
- I belong here
- It matches my values
- I feel everyone is welcome here
- It is fun to live here
- I feel I can get a good job here
- I feel like it fits my personality

VALUE-ADD SATISFIERS

- I feel I am part of a community here
- It is an exciting place to live
- This place gives me energy
- I feel my voice matters here
- I feel I can make a difference in my community here
- I experience a sense of adventure here
- I experience a sense of discovery here
- It is a cool / hip place to live

ALREADY WORKING

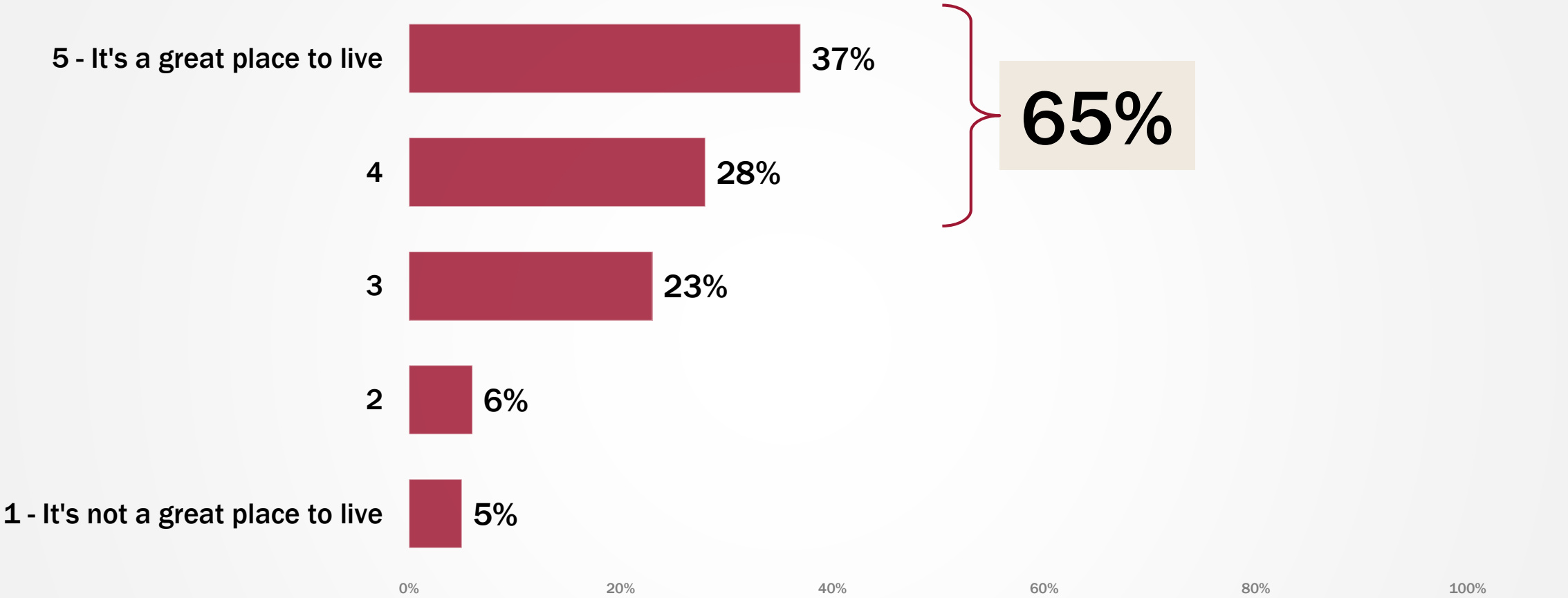
- None

PERFORMANCE

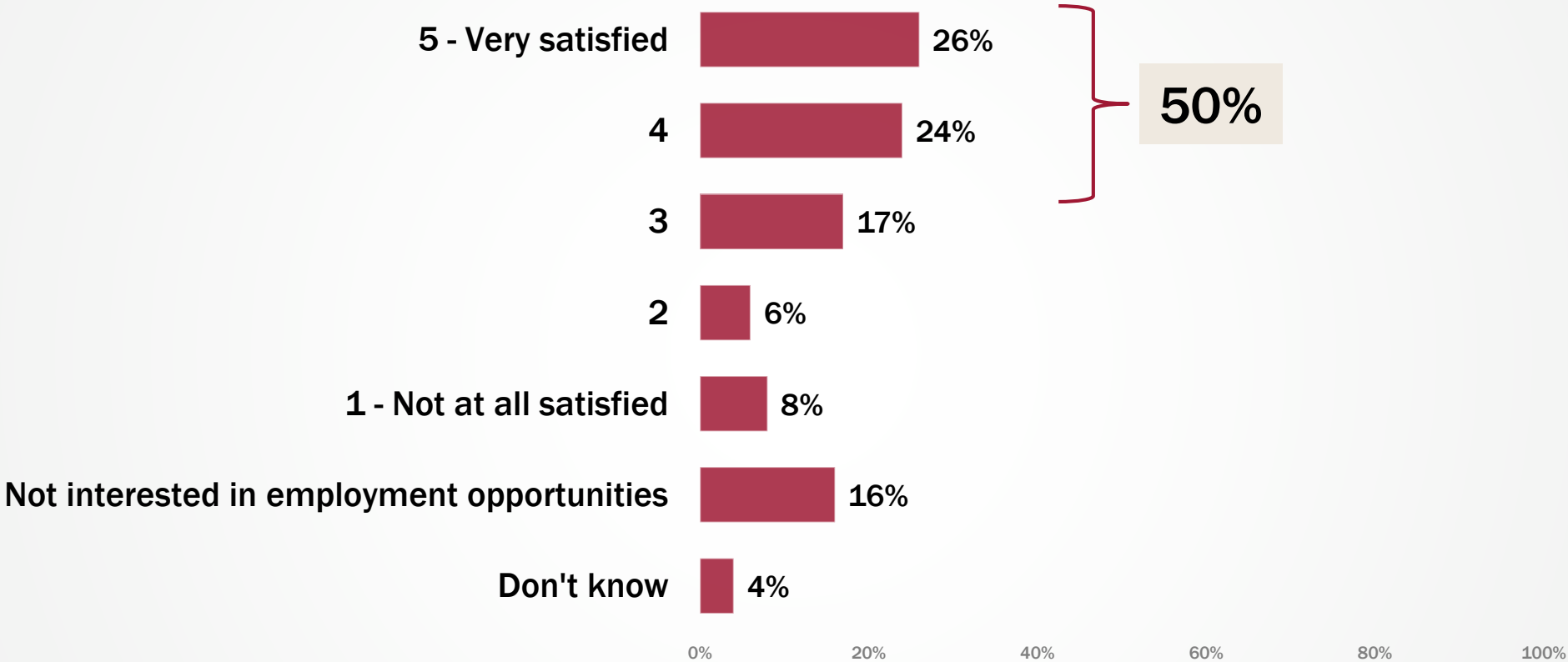
HAMPTON ROADS' PLACE SCORE

SIR's proprietary PLACE score represents the five elements of a quality place — what it's like to live, play, visit, work, and learn in a region. Scientific study respondents' data was analyzed to determine Hampton Roads' PLACE score.

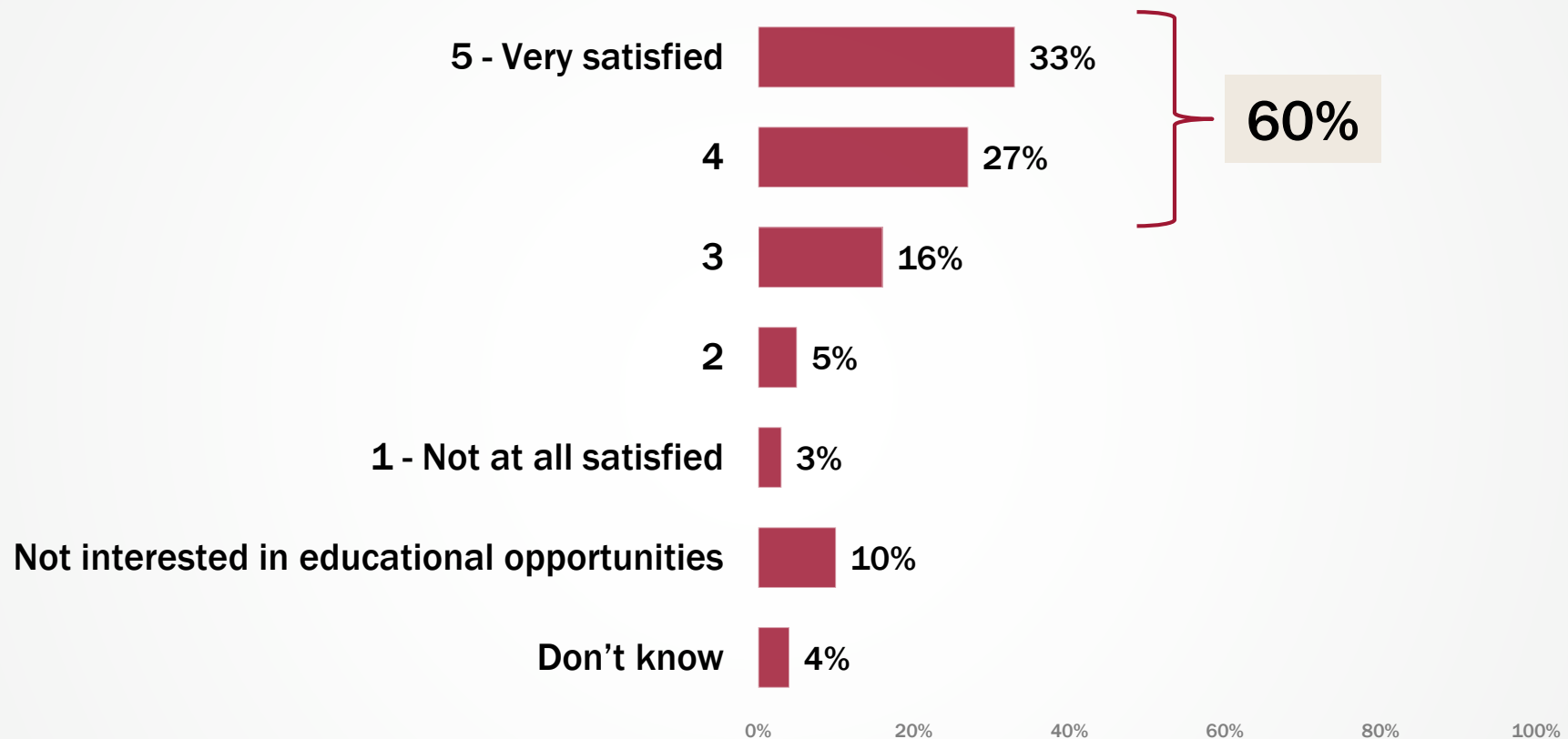
About two thirds of respondents feel Hampton Roads is a good/great place to live



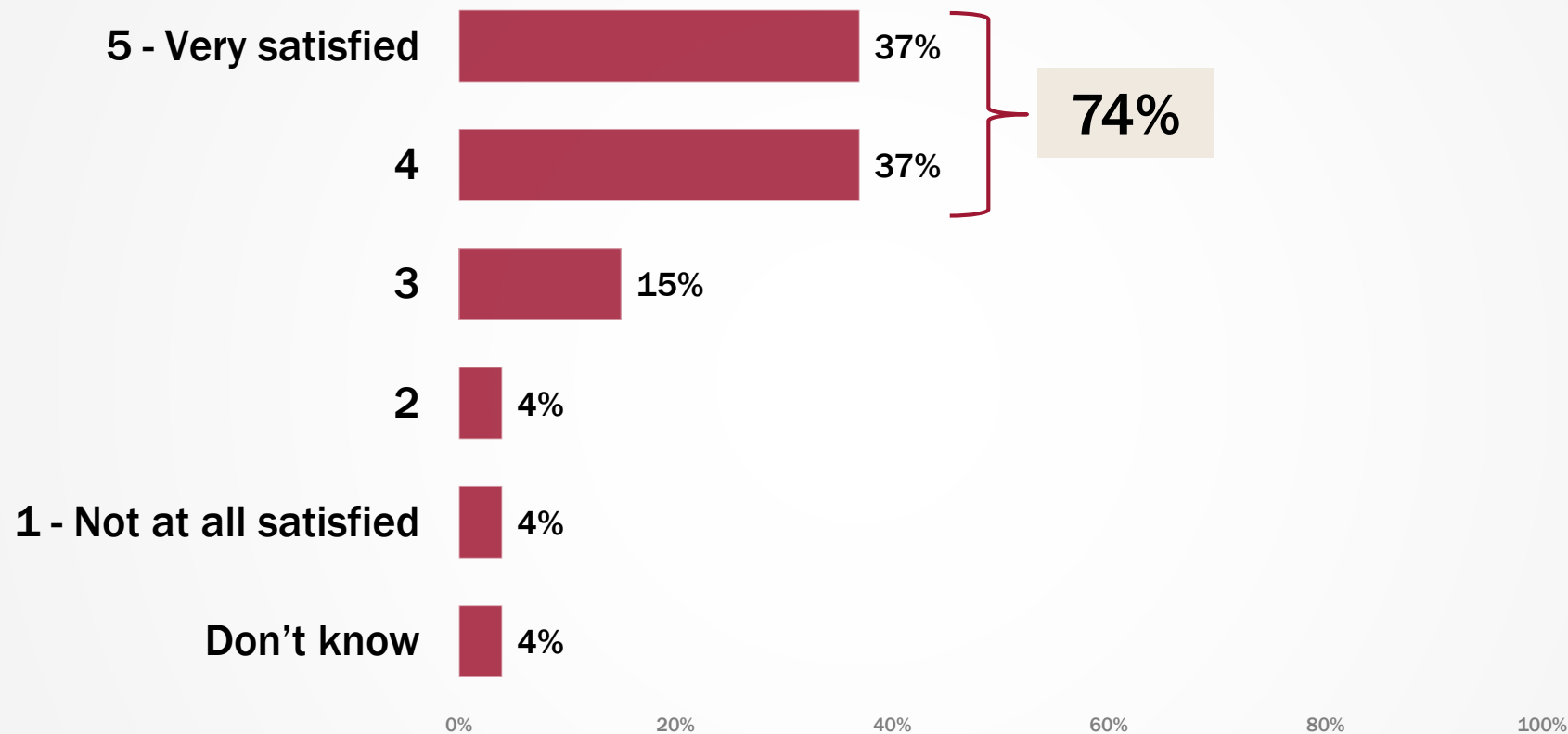
Half of respondents are satisfied with Hampton Roads as a place for **employment** opportunities



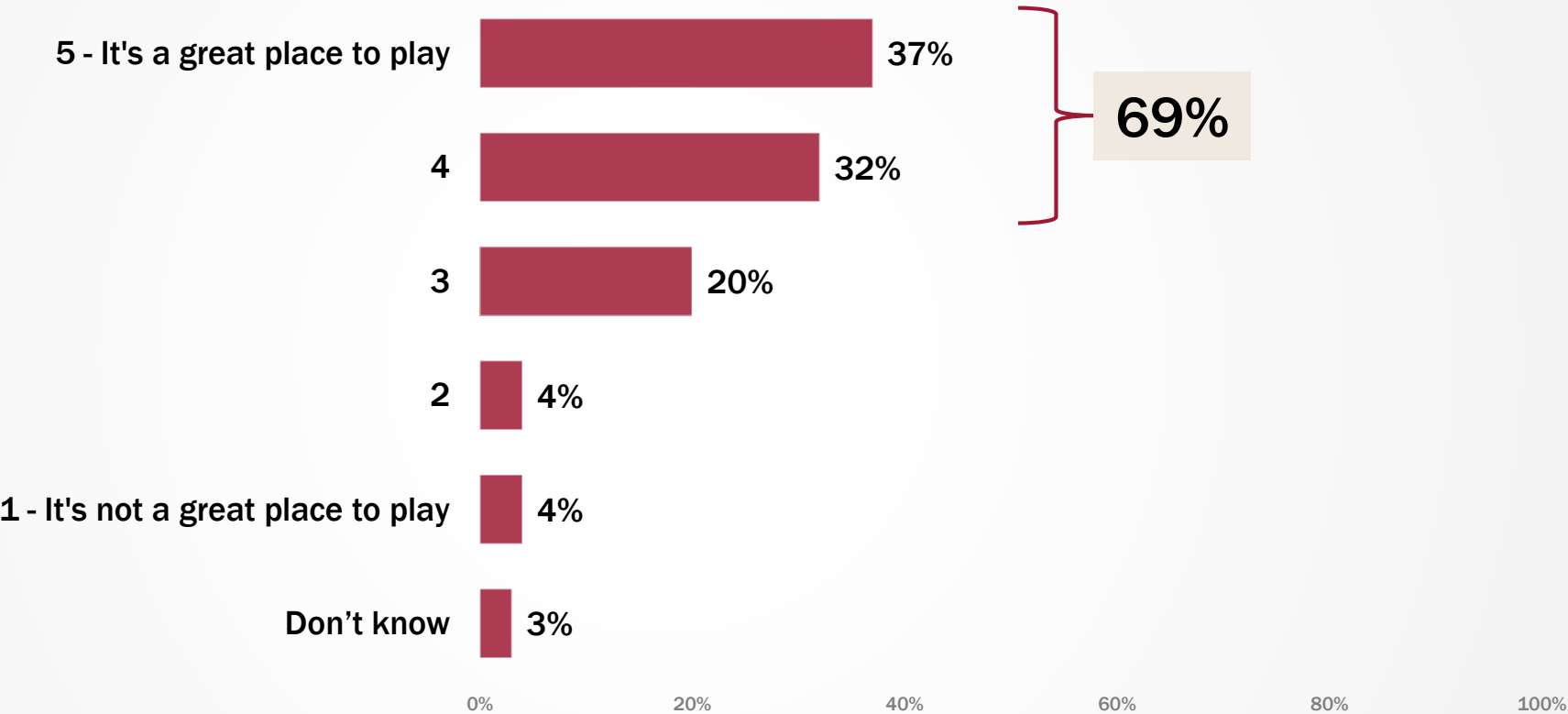
Three in five respondents are satisfied with Hampton Roads as a place for **educational** opportunities



Three quarters of respondents are satisfied with Hampton Roads as a **destination** for tourists and visitors



Seven in ten respondents feel Hampton Roads is a good or great place to play



Comparison to SIR's Placemaking "PLACE" Scores:

A new measure of a "quality place"

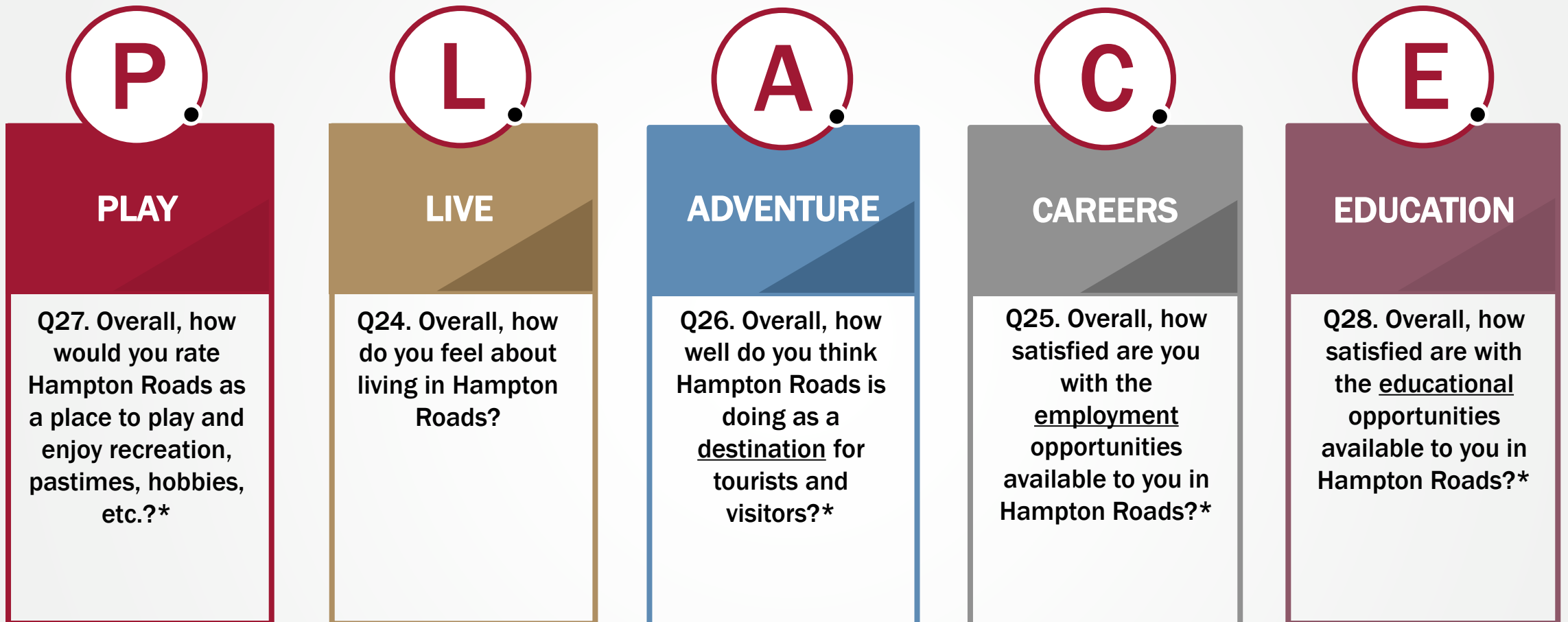
SIR has developed a proprietary **PLACE score**, which incorporates ratings of five elements of a quality place — what it's like to live, play, visit, work, and learn there — into one measure.

"PLACE" is an acronym that stands for:



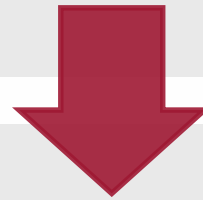
PLACE score input questions

All questions are on a 1 to 5 scale, with 5 being the highest

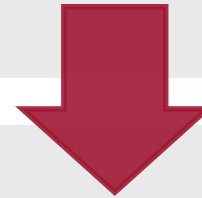


How to calculate a **PLACE** score

1. Remove “don’t know” responses from the input questions.



2. Add up the percentages of the “4” and “5” ratings for each input question.

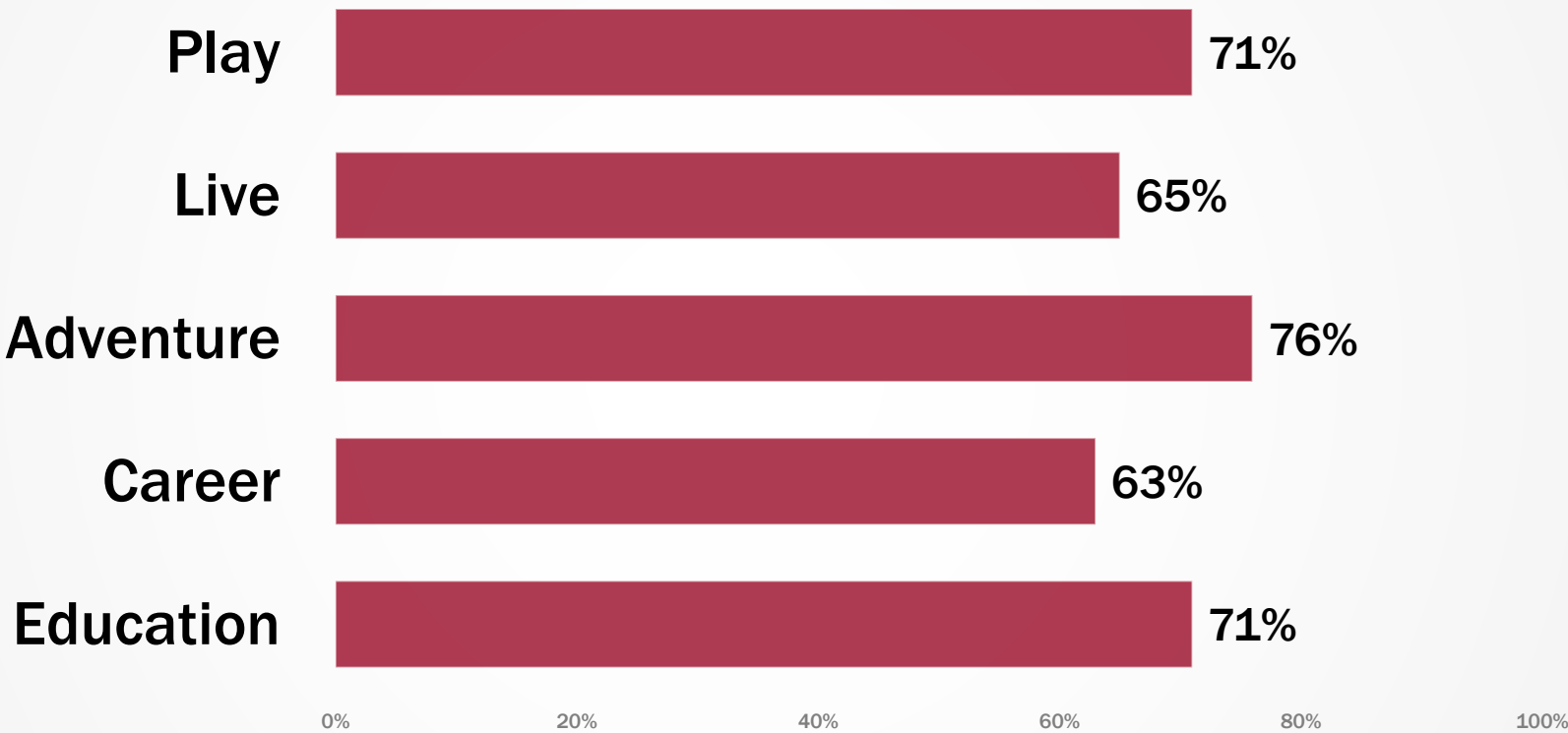


3. Find the average (arithmetic mean) of these topline percentages.

Using this method, each input question receives equal weight in the overall score calculation.

The input question results below were used to calculate Hampton Roads' PLACE score

Percentages giving “4” or “5” ratings



Hampton
Roads'
PLACE
score

69%

SIR tracks PLACE
scores for
different cities

Out of a potential
score of 100%

50% ← ● — ● — ● — ● — ● — ● → 80%



HAMPTON ROADS

PLACE Score by Location, Generation, and Race

MEASURE	AREA OF HAMPTON ROADS		GENERATION			RACE		
	Peninsula	Southside	Millennials	Gen X	Boomers+	White	Black	Other
PLAY	70%	71%	64%	74%	75%	72%	71%	68%
LIVE	63%	66%	66%	65%	74%	69%	62%	61%
ADVENTURE	79%	75%	69%	79%	81%	78%	75%	74%
CAREERS	61%	64%	61%	59%	69%	67%	61%	66%
EDUCATION	75%	69%	60%	70%	82%	72%	70%	71%
PLACE SCORE	70%	69%	64%	69%	76%	72%	68%	68%

PLACE Score by Length of Residency

MEASURE	LENGTH OF RESIDENCY		
	New resident (5 years and under)	Established resident (6-10 years)	Long-term resident (Over 10 years)
PLAY	65%	67%	67%
LIVE	55%	58%	70%
ADVENTURE	66%	76%	79%
CAREERS	53%	64%	65%
EDUCATION	65%	67%	73%
PLACE SCORE	61%	66%	71%

Military, Employment, and Young Professional / Next Gen segmentation for PLACE score was determined using the Convenience Study data, to obtain a large enough sample size.

PLACE Score by Military Status and Employment

MEASURE	MILITARY SERVICE		EMPLOYMENT STATUS	
	Currently or have served	Have not served	Employed	Not Employed / Retired
PLAY	69%	69%	69%	64%
LIVE	77%	71%	72%	64%
ADVENTURE	53%	57%	57%	48%
CAREERS	56%	53%	54%	43%
EDUCATION	67%	67%	65%	74%
PLACE SCORE	64%	63%	63%	59%

PLACE Score for Young Professionals / Next Gen (Under 40, working)

MEASURE	YOUNG PROFESSIONAL
PLAY	58%
LIVE	65%
ADVENTURE	47%
CAREERS	44%
EDUCATION	54%
PLACE SCORE	54%

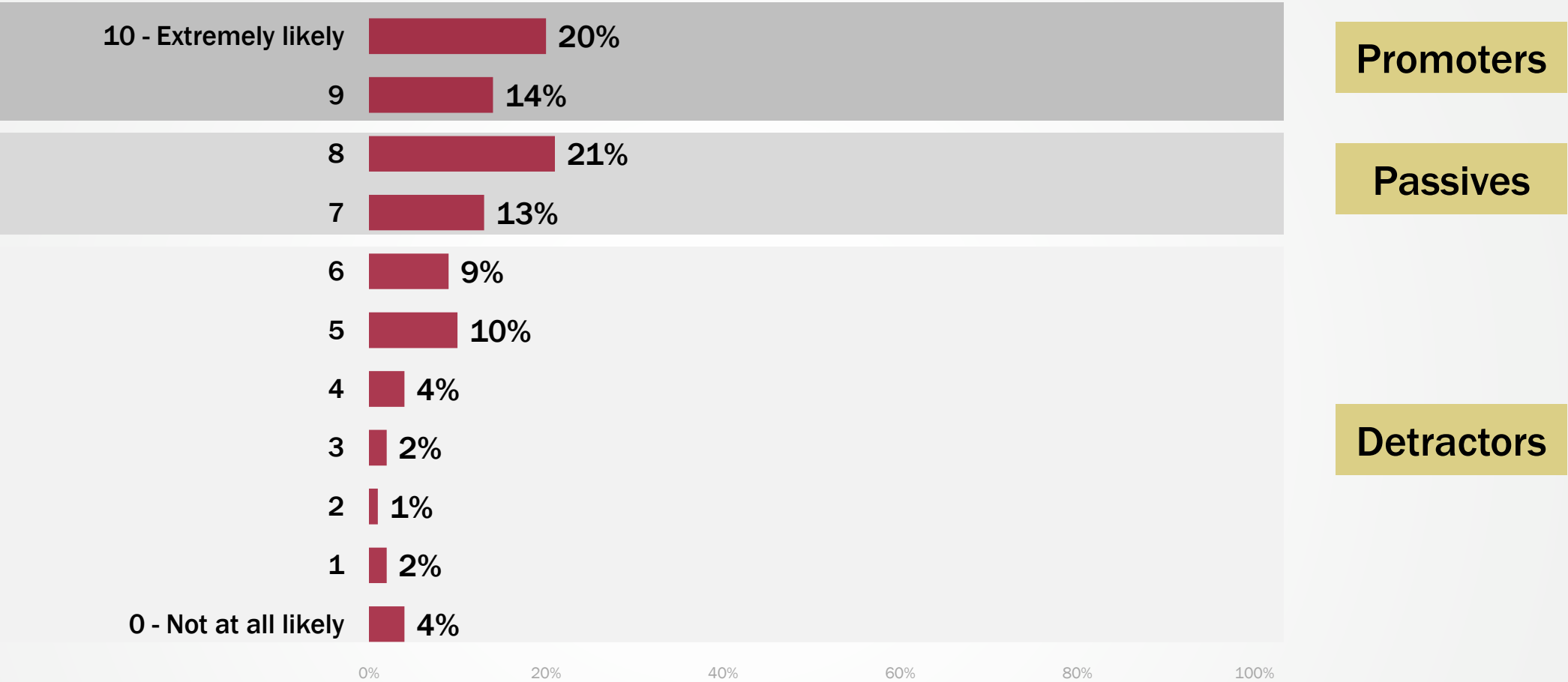
SIR's PLACE Comparative Database

MEASURE	HAMPTON ROADS (region)	CHARLOTTE (city)	MINNEAPOLIS (region)	NASHVILLE (region)	COLUMBUS (region)	FT. WORTH (city)	RICHMOND (region)
PLAY	71%	73%	86%	80%	71%	76%	70%
LIVE	65%	72%	82%	73%	77%	85%	72%
ADVENTURE (destination for tourists and visitors)	76%	64%	74%	80%	58%	71%	70%
CAREERS	63%	69%	78%	75%	81%	75%	64%
EDUCATION	71%	72%	81%	73%	77%	79%	57%
PLACE SCORE	69%	70%	80%	76%	73%	77%	68%

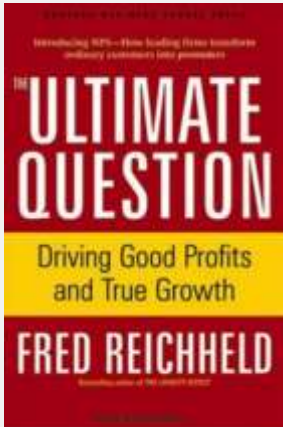
HAMPTON ROADS' NET PROMOTER SCORE

Scientific study respondents' data was analyzed to determine Hampton Roads' Net Promoter Score™, the likelihood of recommending the region as a place to live to friends or family members.

The **NET PROMOTER SCORE™** subtracts detractors from promoters



NET PROMOTER SCORE™ calculation



The percentage of
visitors, customers, respondents
who are “**promoters**”
(highly likely to recommend you)

minus the percentage
who are “**detractors**”
(less likely to recommend you)

% of Promoters
(Rating 9 or 10)

% of Detractors
(Rating 0 to 6)

NET PROMOTER SCORE™

Residents give the likelihood of recommending the Hampton Roads region as a place to live to friends or family members an overall **NET PROMOTER SCORE™** of **2**

Percentage of Promoters
(Rating 9 or 10)

34%

Percentage of Detractors
(Rating 0 to 6)

32%

- Average NPS™ across all industries is only 10 to 15.
- Anything above 50 is considered to be world-class.

**Convenience
Survey NPS
-4**

NET PROMOTER SCORE™

2

NPS by segment

DEMOGRAPHIC	GROUP	NPS
AREA OF HAMPTON ROADS	Peninsula	4
	Southside	0
GENERATION	Millennials	-15
	Generation X	1
	Boomers and older	17
RACE	White	5
	Black / African American	0
	Other	-15
MILITARY SERVICE	Currently or have served	-16
	Have not served	-5
EMPLOYMENT STATUS	Employed	-4
	Not Employed or Retired	-18
LENGTH OF RESIDENCY	New resident (5 years and under)	-13
	Established resident (6-10 years)	-3
	Long-term resident (Over 10 years)	6
YOUNG PROFESSIONALS	Under 40, working	-24

SIR's BELONG Score

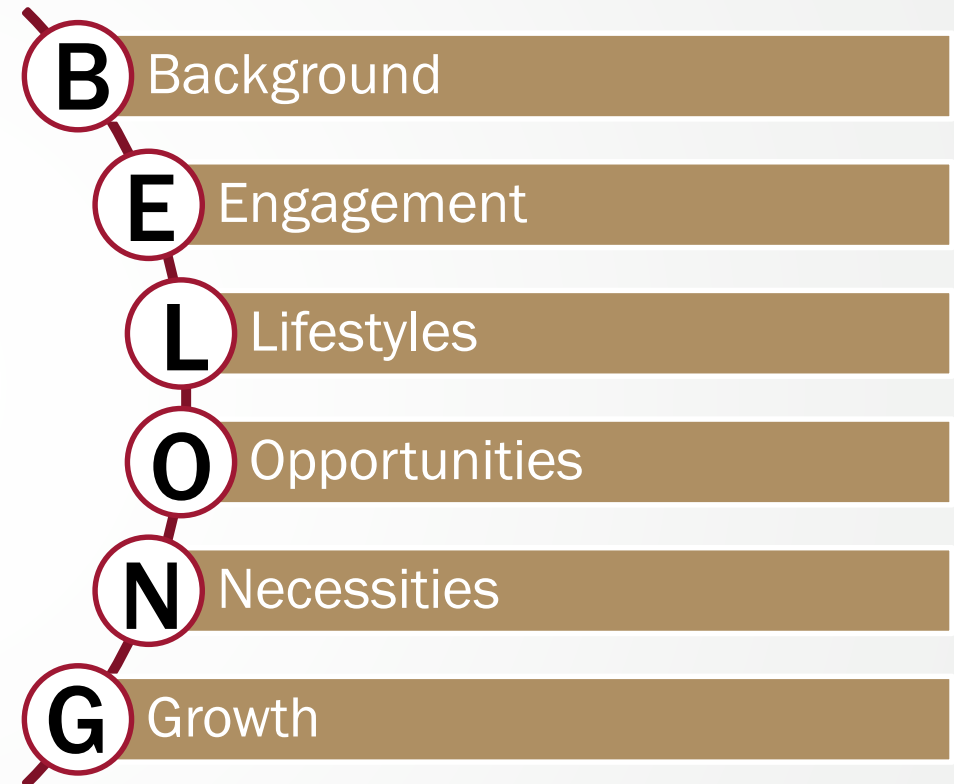
SIR's BELONG score, a measure of diverse, equitable, and inclusive communities and organizations, was determined using Convenience Study data.

SIR's "BELONG" Score:

A new measure of diverse, equitable, and inclusive communities and organizations

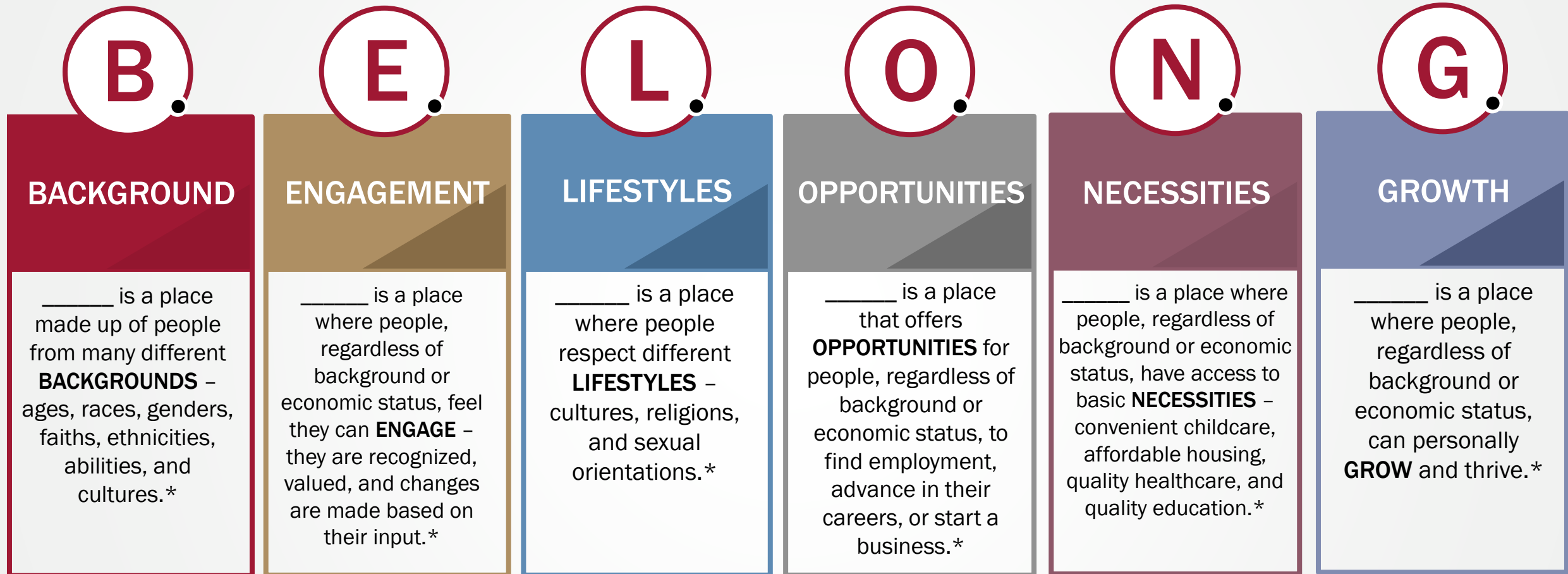
SIR has developed a proprietary **BELONG score**, which incorporates ratings of six elements of a diverse, equitable, and inclusive community into one measure.

"BELONG" is an acronym that stands for:



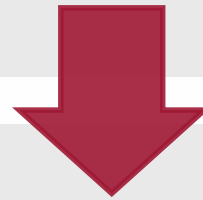
BELONG Score input questions

All questions are on a 1 to 5 scale, with 5 being the highest

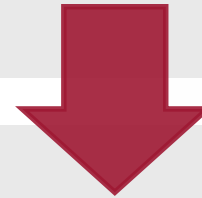


How to calculate a **BELONG** score

1. Remove “don’t know” responses from the input questions.



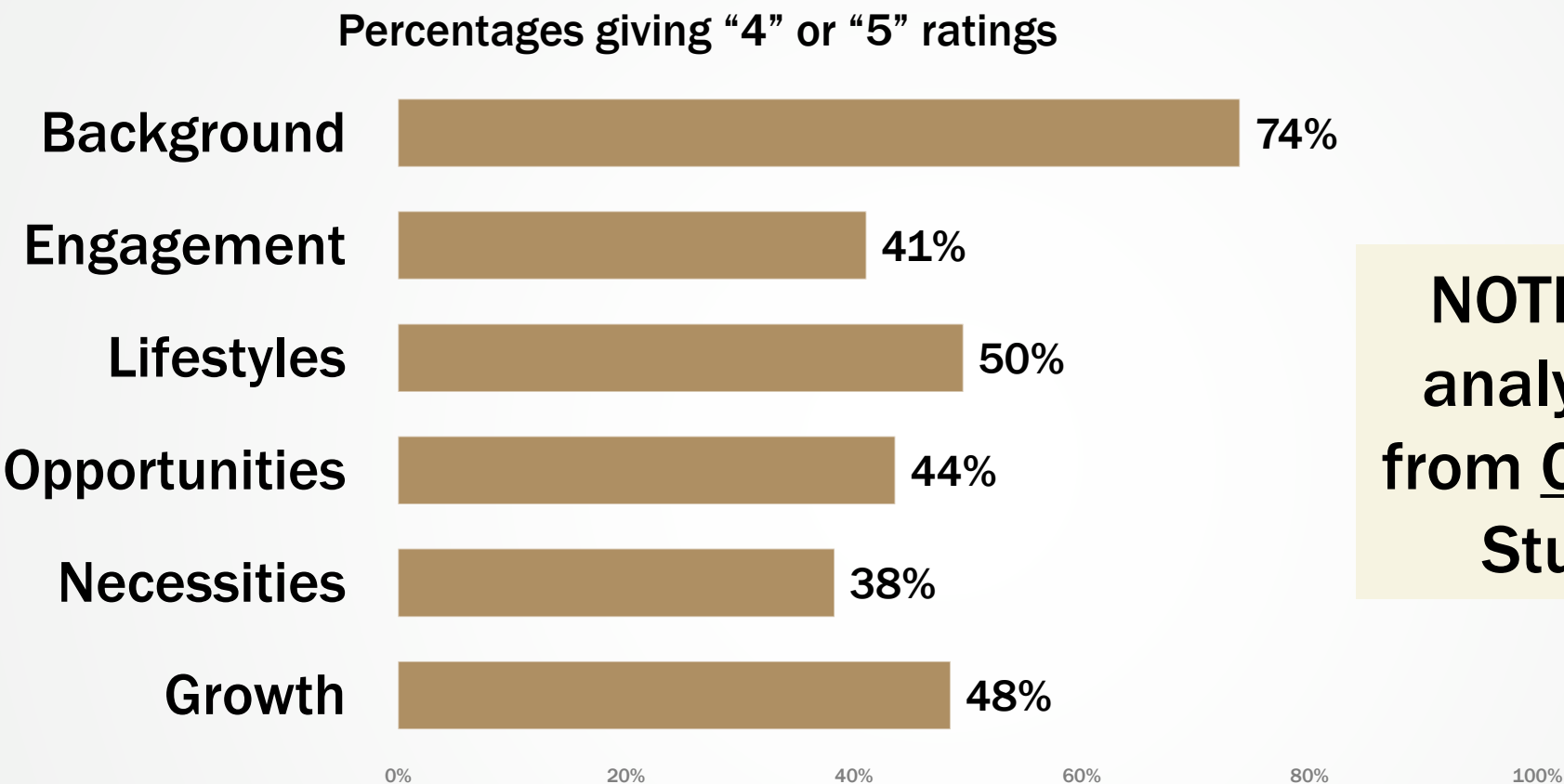
2. Add up the percentages of the “4” and “5” ratings for each input question.



3. Find the average (arithmetic mean) of these topline percentages.

Using this method, each input question receives equal weight in the overall score calculation.

The input question results below are used to calculate
Hampton Road’s BELONG score



NOTE: BELONG analysis comes from Convenience Study data.



BELONG Score

49%

SIR is tracking
BELONG Scores for
different cities, regions,
and organizations.

Out of a potential
score of 100%



BELONG score by segment

DEMOGRAPHIC	GROUP	BELONG
AREA OF HAMPTON ROADS	Peninsula	43%
	Southside	50%
GENERATION	Millennials	43%
	Generation X	47%
	Boomers and older	56%
RACE	White	51%
	Black / African American	36%
	Other	48%
MILITARY SERVICE	Currently or have served	53%
	Have not served	49%
YOUNG PROFESSIONAL	Under 40, working	44%

Convenience survey comments regarding Hampton Roads' diversity, equity, and inclusion

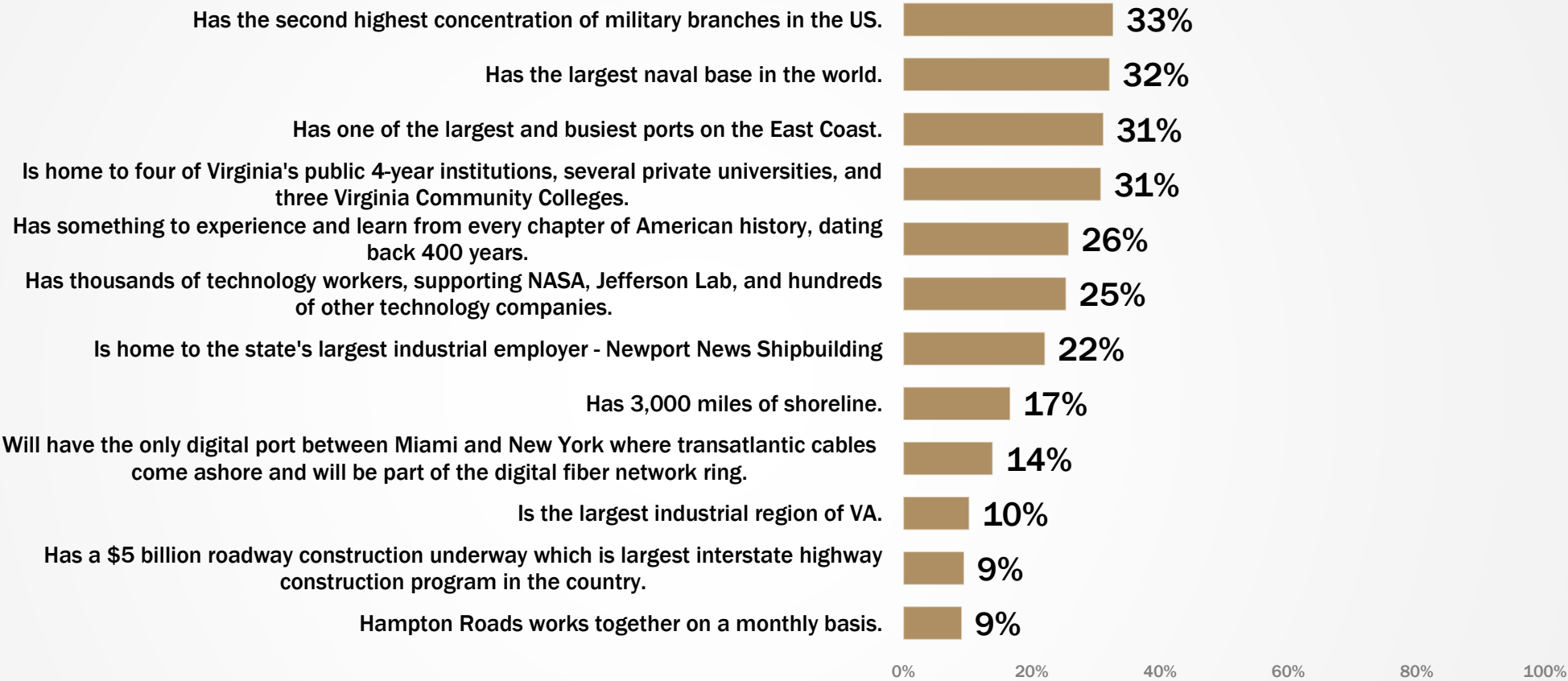
- *"There's a diversity of people, opinions, living areas, interests and activities here. That's a good thing."*
- *"There is pride within each culture and they have many festivals, events and such to display that."*
- *"[Hampton Roads has a] celebration and exposure to many different cultures via festivals and other events."*
- *"I appreciate the acceptance of all people regardless of race or preference."*
- *"[Hampton Roads is] friendly, welcoming to all people."*
- *"This is no NYC, but compared to NYC, I feel like there's more inclusivity in this area. I think a lot of people being in the military which promote and force inclusiveness helps this area, which influences the whole area"*
- *"[Diversity] is what makes us interesting."*
- *"I love being enmeshed in a variety of cultures through entertainment, food, and other events."*
- *"The region seems to embrace people of various ethnicities, sexual orientations and religious beliefs."*
- *"The combination of flavors makes for an amazing stew."*

KNOWLEDGE SCORE

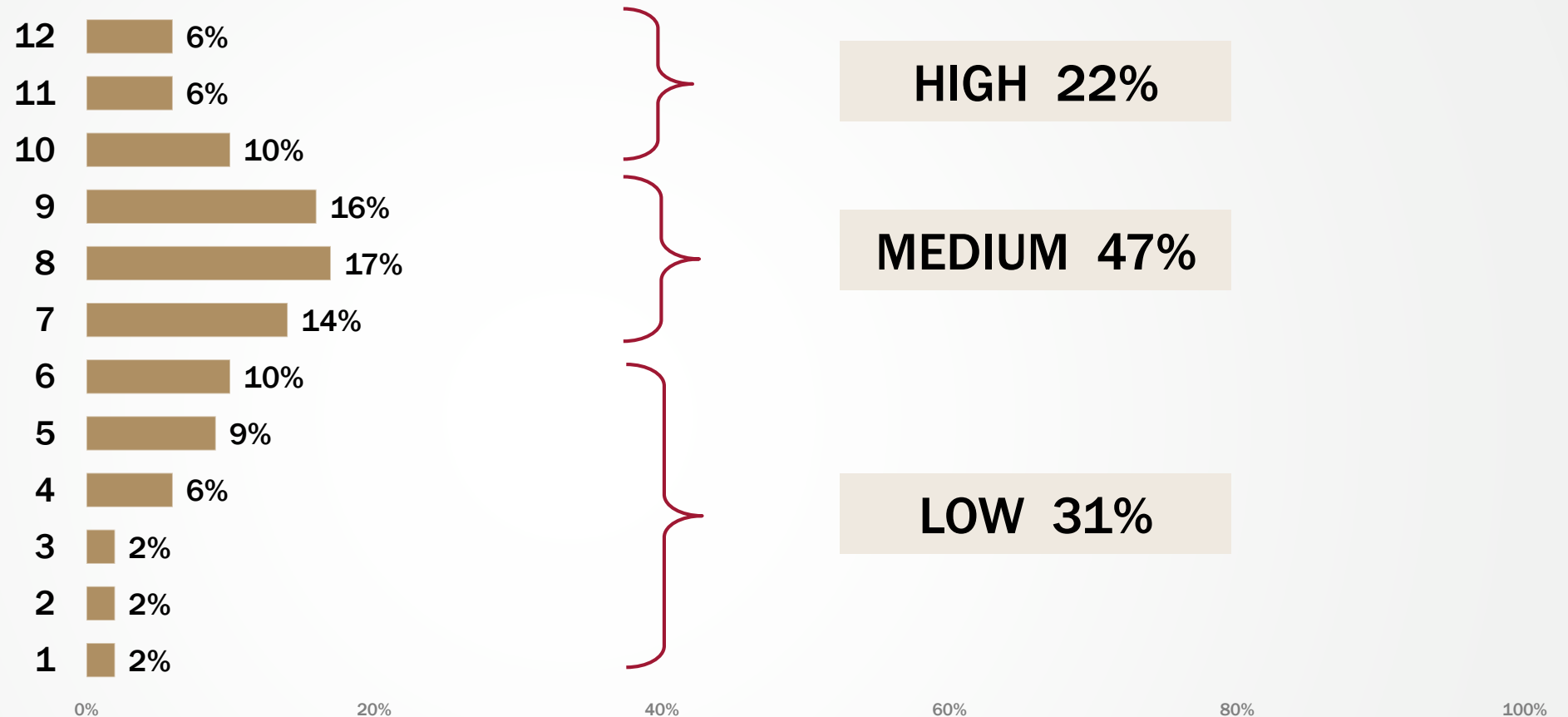
12 facts about the Hampton Roads region were shown to convenience survey respondents, and knowledge about the region was assessed

1. Has the second highest concentration of military branches in the US. All five branches are represented.
2. Has 3,000 miles of shoreline.
3. Has one of the largest and busiest ports on the East Coast.
4. Has thousands of technology workers, supporting NASA, Jefferson Lab, and hundreds of other technology companies.
5. Will have the only digital port between Miami and New York where transatlantic cables come ashore and will be part of the digital fiber network ring connecting the region's cities.
6. Is the largest industrial region of VA.
7. Has something to experience and learn from every chapter of American history, dating back 400 years.
8. Has a \$5 billion roadway construction underway which is largest interstate highway construction program in the country.
9. Has the largest naval base in the world.
10. Is home to four of Virginia's public 4-year institutions (CNU, ODU, NSU, and W&M), several private universities, and three Virginia Community Colleges.
11. Is home to the state's largest industrial employer - Newport News Shipbuilding, the only designer, builder and refueler of Nuclear Carriers in the world.
12. The mayors, city managers, and planning departments of all of the jurisdictions that make up Hampton Roads work together on a monthly basis.

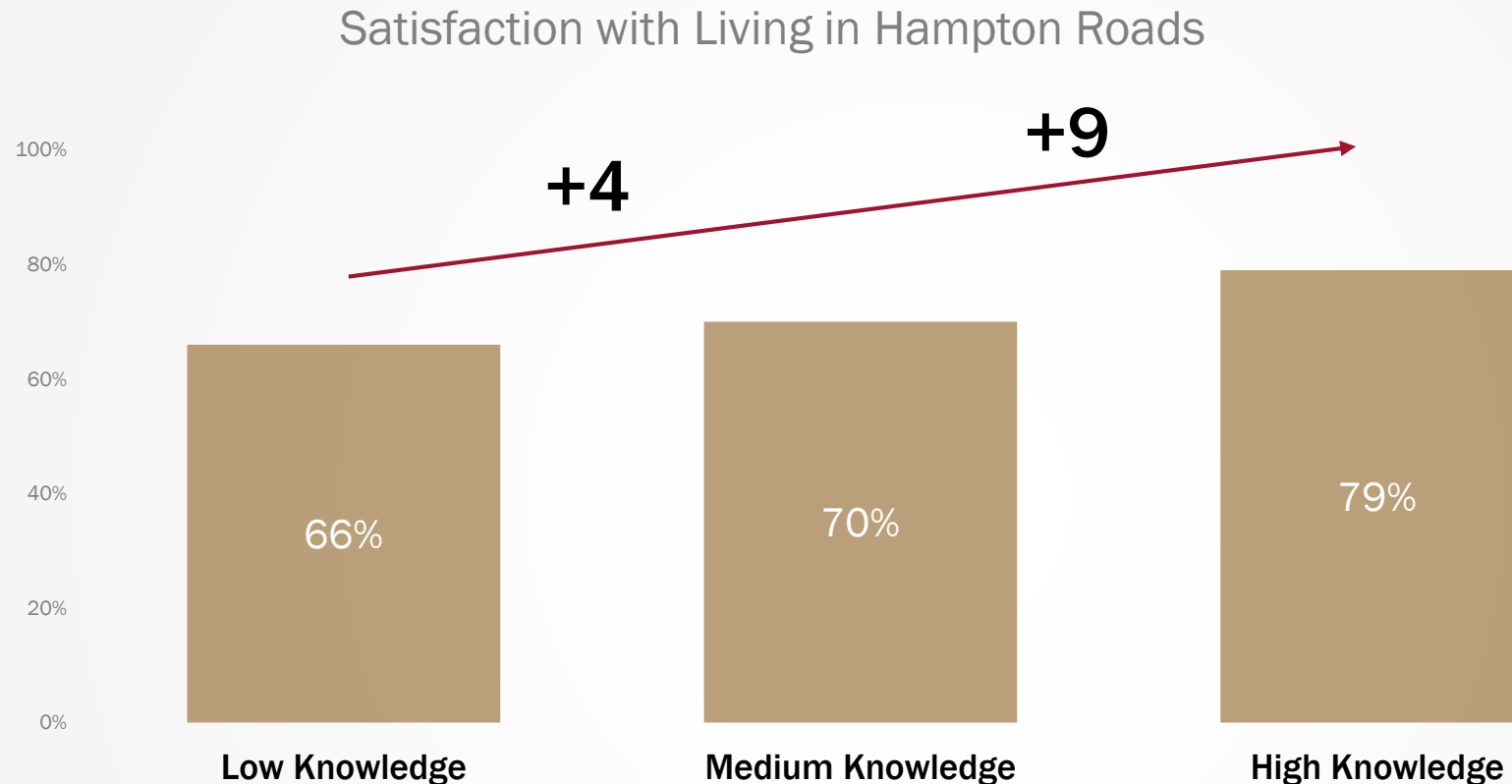
The top known facts about the region revolve around the military, the port, and educational opportunities in Hampton Roads



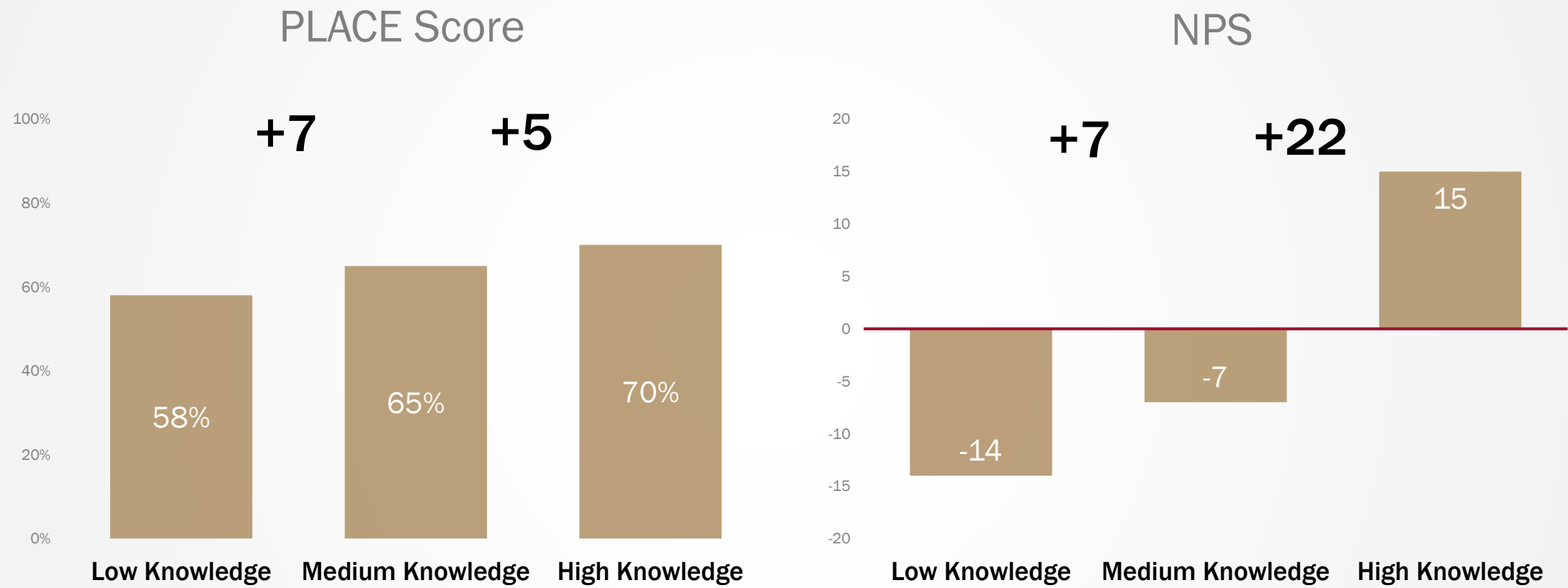
Respondents' **KNOWLEDGE SCORES** were sorted into Low, Medium, and High for analysis



Knowledge score is correlated with overall satisfaction with living in Hampton Roads



Knowledge score is also correlated with higher PLACE and NPS scores

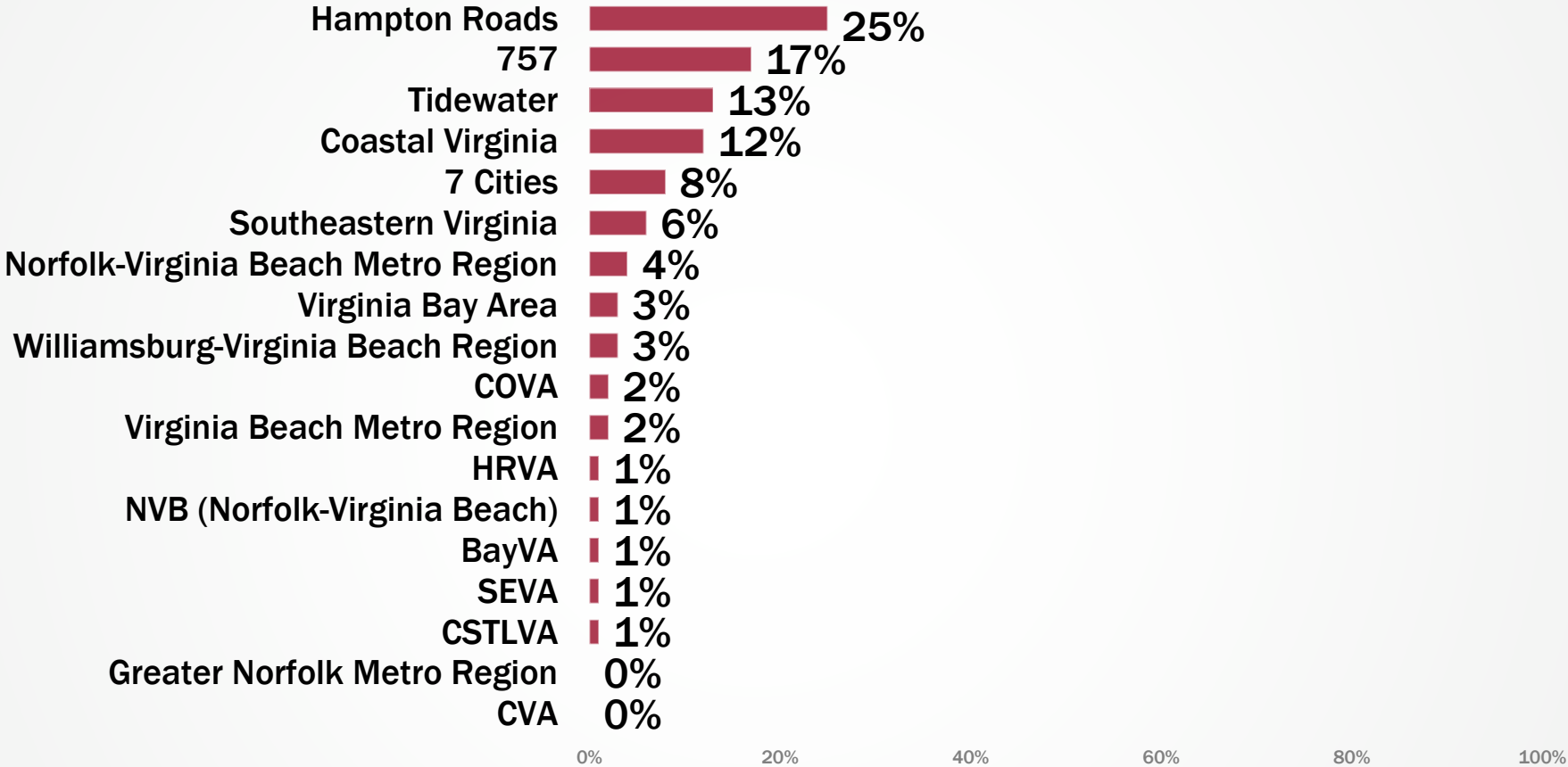


Coastal Virginia was the most chosen favorite name for Low, Medium, and High Knowledge Score respondents

TOP 6 NAMES	KNOWLEDGE SCORE		
	Low	Medium	High
1	Coastal Virginia (27%)	Coastal Virginia (26%)	Coastal Virginia (19%)
2	Hampton Roads (17%)	Tidewater (17%)	Hampton Roads (17%)
3	757 (12%)	Hampton Roads (14%)	Tidewater (12%)
4	Tidewater (9%)	757 (9%)	757 (8%)
5	COVA (7%)	Southeastern Virginia (8%)	Norfolk-Virginia Beach Metro Region (8%)
6	Southeastern Virginia (6%)	COVA (5%)	NVB (Norfolk/Virginia Beach) (8%)

NAMING EXPLORATION: FAVORITE OVERALL NAME

When considering both formal and informal names for the region, Hampton Roads is the favorite



While the top name for Scientific respondents is Hampton Roads and the top name for Convenience study respondents is Coastal Virginia, both groups have the same top four favorite name choices – Hampton Roads, 757, Tidewater, and Coastal Virginia

	ALL RESPONDENTS (Scientific)	ALL RESPONDENTS (Convenience)
	n=615	n=1018
Hampton Roads	25%*	17%
757	17%*	8%
Tidewater	13%	13%
Coastal Virginia	12%	25%*
7 Cities	8%*	3%
Southeastern Virginia	6%	8%
Norfolk-Virginia Beach Metro Region	4%	4%
Virginia Bay Area	3%	2%
Williamsburg-Virginia Beach Region	3%	1%
COVA	2%	6%*
Virginia Beach Metro Region	2%	1%
NVB (Norfolk/Virginia Beach)	1%	3%
Other (combined)	4%	8%

757 has appeal for those who lived in Hampton Roads pre-adulthood, while Coastal Virginia ranks higher with those who moved to Hampton Roads as an adult

Overall Favorite	Spent most of my childhood here	Attended college here	As an adult, moved here after living elsewhere	Lived all of my life here
Hampton Roads	26%	22%	25%	24%
757	25%	26%	10%	22%
Tidewater	13%	13%	15%	13%
Southeastern Virginia	7%	5%	8%	5%
Coastal Virginia	7%	6%	14%	8%
7 Cities	6%	5%	8%	11%
Norfolk-Virginia Beach Metro Region	4%	3%	4%	2%
Virginia Bay Area	3%	6%	2%	3%
COVA	3%	4%	2%	1%
Other (combined)	6%	10%	12%	9%

Military respondents are more likely to prefer Hampton Roads as their preferred name for the region than non-military

Overall Favorite	MILITARY RESPONDENTS	NON-MILITARY RESPONDENTS
Hampton Roads	31%	22%
Tidewater	15%	13%
757	13%	18%
Coastal Virginia	10%	12%
Southeastern Virginia	7%	6%
Norfolk-Virginia Beach Metro Region	4%	4%
Williamsburg-Virginia Beach Region	4%	2%
Virginia Bay Area	3%	3%
Virginia Beach Metro Region	3%	1%
7 Cities	2%	10%
Other (combined)	6%	8%

The four uppermost locales are not significantly different than other locations for choosing the names Hampton Roads or Coastal Virginia, but did have significantly higher rates of choosing Williamsburg-Virginia Beach Region as their favorite name

	All Respondents (Scientific + Convenience)	Williamsburg, Isle of Wight, James City, & Suffolk ONLY (Scientific + Convenience)
	n=1650	n=161
Hampton Roads	20%	19%
Coastal Virginia	20%	20%
Tidewater	13%	16%
757	11%	9%
Southeastern Virginia	7%	9%
7 Cities	5%	7%
COVA	5%	3%
Norfolk-Virginia Beach Metro Region	4%	2%
Virginia Bay Area	2%	0%
Williamsburg-Virginia Beach Region	2%	9%*
NVB (Norfolk/Virginia Beach)	2%	1%
Other (combined)	9%	5%



**For more information about this research study
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