# ENVISION 2020

### REGIONAL BRANDING INITIATIVE DRAFT REPORT

#### **DECEMBER 10, 2019**

Final Report to be released in January 2020

Thanks to a move by the U.S. Postal Service, several decades ago a group of leaders came together to officially name our region "Hampton Roads." You can read that history <u>here</u> or in this <u>article</u> from the *Virginian-Pilot*.

Over the years there have been many questions raised about this naming choice: Are people outside the region aware of our name? Do they know where Hampton Roads is located and what it offers? Does the name have positive associations? How about residents and business leaders: what do they think about the Hampton Roads name? Does the name, without a large, well-known city name as a geographic anchor, hold us back?

Fundamentally, is what we call ourselves helping move the region forward?

It's time to take stock. The Hampton Roads region, compared to other regions in the 1 to 3 million population size, lags significantly behind in terms of population growth, economic output, and new business investment. We all know not to judge a book by its cover, but are we being judged by our name?

Not knowing the answers to these questions is what brought a group of leading organizations, governments, businesses, nonprofits, and other community stakeholders together from across the region in early 2019. Their goal was to better understand the Hampton Roads "brand" and how best for the region to effectively advance a shared, compelling story. This group pooled resources and embarked on a comprehensive nine-month researchinspired planning effort called *Envision 2020 Regional Branding Initiative (Envision 2020)*.

This document presents Envision 2020's goals, planning team, planning process, planning assumptions, research insights, initial set of recommendations, and a plan for what's next for our region in developing and promoting a relevant and compelling regional brand.

#### ENVISION 2020 GOALS:

Envision 2020 set forth two goals:

- 1. Understand the current perceptions and misperceptions regarding our region's name and brand identity.
- 2. Make recommendations to advance our region's brand — how should we more seamlessly promote our region as a remarkable place to live, work, play, learn, and visit. This includes the optimal positioning, communications strategy, related messaging, and naming architecture (that is, what we call ourselves).

#### PLANNING TEAM:

Reinvent Hampton Roads and the Hampton Roads Chamber convened a Task Force and Stakeholders Group.

The Task Force was charged with the responsibility of managing the overall initiative, understanding and sharing research findings and insights, and making the final recommendations. The Task Force included more than 30 members, representing a diverse cross-section of people, perspectives, experiences, and organizations. The Task Force met over 10 times during the planning process.

The Stakeholder Group was established to serve as advisors to the Task Force. It included more than 100 individuals, organizations, and associations that reflect the Hampton Roads community. The Stakeholders Group met four times over the course of the project. A complete list of Task Force and Stakeholders Group members are listed <u>here</u>.

SIR (formerly the Southeastern Institute of Research) was hired to support the Task Force. SIR is a 55-year-old national market research consultancy with experience supporting governments, organizations, and businesses located around the Hampton Roads region and beyond. You can learn more about SIR  $\underline{here}.$ 

We estimate that the community and business leaders who served on the Task Force and Stakeholders Group contributed over 2,000 volunteer hours to this work. SIR also contributed a significant amount of pro bono professional time.

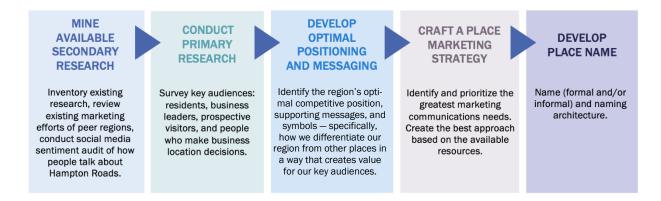
#### **PLANNING PROCESS:**

From the very beginning, the Envision 2020 Task Force leaders stated emphatically that this would be a branding initiative, not a naming assignment. That means pointing to a name, existing or new, wasn't the only goal of the project. Instead the purpose was to conduct a comprehensive brand assessment and brand refresh planning process. Any decisions about names for the region would come at the end. With this perspective, we created and followed a comprehensive, nine-month Envision 2020 planning schedule. marketing initiatives being advanced in Hampton Roads and in similar, or peer, regions.

This review of the landscape enabled the Task Force's to develop ideas on how the region can differentiate itself from other cities and regions in a way that creates value for our key audiences. In essence, we were trying to figure out *WHAT* we need to say about Hampton Roads and *HOW* we need to say it so residents, businesses, and visitors better understand what makes us special.

In marketing parlance, the *WHAT* message is what is called the region's *positioning*. The best positioning for a region typically organizes and presents the region's assets and experiences as *benefits* (that is, the position statement answers the question for residents, businesses, and visitors of "what's in this for me?").

Once this foundational work was in place, the Task Force turned their attention on the *HOW* component. Who needs to hear the message? Via what means or methods should they hear it? When?



Here's a quick summary of the process:

Envision 2020's first steps involved research to identify and assess the marketing-related situation facing the region. Two types of research were used: primary and secondary. Projects like this start by finding and reviewing any existing research or studies first (known as "secondary" research). Based on gaps in information from those studies, SIR developed original, customized research studies (or "primary" research) for this project.

These steps focused on getting a detailed understanding the current perceptions and misperceptions surrounding the region's existing brand, including its name. We also analyzed demographic and cultural trends shaping the future of cities and regions like ours, as well as the current place The Task Force developed a detailed communications strategy to share the region's brand identity and positioning.

All of the work over the nine-month project has ultimately resulted in a recommended approach to the brand identify and name for the region.

Many reports are available on the Envision2020 <u>website</u>, but a summary and highlights of the work are presented in the rest of this document.

#### PLANNING ASSUMPTIONS:

Branding projects for a region like Hampton Roads are driven by a set of initial planning assumptions that help focus the research and planning effort. Accordingly, the Task Force stated that this initiative should take into account the following:

- The Envision 2020 recommendations must unite, not divide us. Envision 2020's recommendations must not be divisive. This planning assumption is extremely important, as 17 governmental jurisdictions, thousands of organizations and businesses, and 1.7 million residents from Williamsburg to Virginia Beach must reach a consensus on what's best for the region.
- The Envision 2020 initiative should focus exclusively on place marketing, not placemaking. Placemaking is when regions or localities engage in specific and intentional activities to make their place more appealing to live, work, play, learn, and visit. There are many place-oriented aspects across our region that we must continue to address like safety, schools, congestion, affordable housing, etc. While Envision 2020 research can be mined for insights on how to improve place attributes, our charge and our recommendations center on place marketing. Place marketing is about how we promote the region and involves identifying, packaging, and sharing our unique and differentiating story.
- Place marketing is a specific type of marketing and, as such, has best practices. More and more cities and regions across the country are using place marketing to attract and retain the talent needed to support and grow their economies. This most often includes an overall communications strategy with associated messaging, imagery, and naming architecture. In addition, this includes websites that provide free access to professionally crafted place narratives (the shared "story" of the region), photography, and videos. In addition, many cities are now supporting resident-generated content on websites that showcase what it's like to live there.
- Changing an existing brand name comes with many challenges and costs. A significant number of businesses and organizations are currently using Hampton Roads in their name. Officially changing the regional name would come with significant cost to these organizations regardless of size.

• The outcome of this Envision 2020 initiative must be immediately actionable. As previously stated, the Hampton Roads region, compared to other similar-sized cities and regions, is <u>signifi-</u> <u>cantly</u> behind in terms of population growth, economic output, and new business investment. We don't have time for more debate about our region's name. Envision 2020's recommendations must be actionable and quickly embraced to help build our region's momentum.

#### **RESEARCH FINDINGS AND INSIGHTS:**

The Envision 2020 research included analyzing and synthesizing information found in relevant past research studies, understanding key trends, identifying the marketing efforts of peer regions, conducting a national social media sentiment audit on how people talk about the region, and conducting primary research targeting key audiences.

We also conducted surveys among regional residents, business leaders, potential visitors from feeder markets, corporate real estate professionals, and site selection consultants responsible for site-related business expansions and relocation decisions.

Highlights of this comprehensive landscape review are presented in the next few pages of this document, and the Envision 2020 website houses many of the reports from this work.

#### National Demographic Trends:

Four national trends are conspiring to make the younger generations (Millennials today and Gen Zs tomorrow) the key to future economic development. These include the population shift, age shift increased diversity, and worker shift.

 POPULATION SHIFT: While America is growing from 330 million Americans today to 359 million by 2030, the growth in terms of states and cities is not equal. Some places are losing people and others are gaining people. Based on U.S. Census projections, Hampton Roads' future population growth is not robust.

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	2020 PROJECTION	2030 PROJECTION	2040 PROJECTION	GROWTH (2020 TO 2040)	PERCENTAGE GROWTH
State of Virginia	8,655,021	9,331,666	9,876,728	+1,221,707	+14.1%
Richmond Region	1,111,633	1,219,936	1,309,540	+197,907	+17.8%
Hampton Roads Region	1,744,049	1,804,797	1,841,858	+97,809	+5.6%

- AGE SHIFT: The longevity revolution and declining birth rate are shifting the population pyramid from a triangle to a rectangle. The percentage of seniors (people over 65) in our total population is on the rise. By 2030, seniors will make up 20% of the overall population, up from 13% today. For the first time in history we will have just as many people over 65 as we will have 18 and under. This has implications for the composition of America's workforce. The only age segment slated to grow is the 55+. The 25 to 54 segment will remain flat with little growth. The youngest segment, 18 to 21 age cohort, is slated to continue to decrease. The battle is now on for younger workers.
- INCREASING DIVERSITY: In 2020, minority children will become the majority of all children. By 2043, the minority will become the majority in the total population. This shift is fueling the growing need to belong to be included and respected. Reputation for diversity and inclusion is fast becoming a place brand attribute. The winning cities of tomorrow will be "Big Tent" localities and regions: places that welcome people and ensure everyone feels like they belong.
- THE WORKPLACE: America is shifting toward a distributed workforce. Today, one-third of the workforce are "gig" or freelance workers, not fulltime employees (FTEs). Over the next 10 years, this may climb to 50%. This makes location decisions more and more about quality of life, and less about the physical job location.

These national trends are now shaping how cities and regions conduct economic development and how much value they place on younger workers and the talent pipeline. An alarming trend related to place marketing is the practice of paying people to move to a location. The states of Maine and Vermont are doing this. So, too, are cities like Tulsa, St. Claire, Minn., and Baltimore.

#### NATIONAL SOCIAL MEDIA:

As part of this project, we conducted an analysis of the sentiment found on social media around Hampton Roads.

- The vast majority of social media sentiment surrounding the region is positive. Diversity, history, military support, and water are the major assets that are most associated with Hampton Roads in social media posts.
- Hampton Roads' social media presence benefits from the military. Most social media posts about a place originate from that place. While this is true for Hampton Roads, too, it appears that social media posts about Hampton Roads are also being generated across the country, originating from cities with military installations.
- "Something in the Water" festival generated an unprecedented reach and volume of social media mentions about the Hampton Roads region. These mentions were positive.
- Nationally, "757" is the most popular informal name and hashtag associated with the Hampton Roads region.

#### PEER REGION EFFORTS:

- Regional place marketing is a team sport. In the age of social media, everyone is part of place marketing and related brand-building efforts.
  Successful regional branding efforts leverage local support.
- The local organizational leaders of regional branding initiatives vary — from regional tourism organizations (destination marketing organizations) and regional economic development organizations to separate, new organizations

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tasked with managing the regional branding efforts. There is not one model or best organizational structure.

- Most regional branding efforts include a marketing tool kit or resource center — messaging guidelines, narratives, photography, videos, and other "how to" resources for local organizations to use, especially when recruiting future employees from outside of the market.
- Most regional branding initiatives include a regional ambassador program where the residents and employees are recruited and trained to advance stories about the locality.
- Many regional branding efforts target both national audiences to help attract new residents/business investment and local residents to build pride in the local community. To this end, most efforts include a lifestyle/culture website.

#### LOCALLY-BASED PLACE MARKETING:

- There is a tremendous amount of locality-based place marketing happening across Hampton Roads. An informal audit of the 17 jurisdictions' total budgets directed to tourism and economic development organizations totaled over \$50 million.
- Local, jurisdictional-related marketing efforts promote each respective locality. There's little mention of the larger region.
- Two regional marketing efforts are the Coastal Virginia Tourism Alliance and the Hampton Roads Economic Development Alliance (HREDA). However, neither of these organizations have had adequate funding for a sustained, paid advertising effort.

#### **SURVEY FINDINGS:**

#### PROSPECTIVE VISITORS:

 A third of respondents said they were aware of the Hampton Roads region before this survey. However, when shown a map of Virginia, only half of those who said they were aware could point to where Hampton Roads is located. In total, only approximately 15% of potential visitors could locate Hampton Roads on a map before this survey.

#### HAMPTON ROADS RESIDENTS:

- Unaided, 40% of respondents named the region where they live as "Hampton Roads."
- Less than half (40%) of residents say they identify strongly with the Hampton Roads region.
- "The 7 Cities" were most mentioned as being a part of the "Hampton Roads region," and fewer than 25% of residents thought the other jurisdictions were part of the region.
- Residents believe water, history, military, and diversity are what make the region unique from other places.
- Residents feel the water and nautical themes are the images or symbols that best represents the Hampton Roads region.
- There's a general sentiment that the region doesn't act like a region:

"Our cities don't seem to work well together — I feel like I live in my city, not a greater region. I wish we made plans as a cohesive unit. If there IS cohesion and collaboration, it's very hard to discern ... it doesn't seem like there's a whole lot of bigger picture thinking outside of each city, or even within."

"There isn't a cohesive sense of community."

"There is no regional focus here...instead of the cities working together, they compete."

"There is very little regional pride and, therefore, investment."

- When it comes to the region, residents' Net Promoter Score (NPS) is 2. There are too few advocates or promoters. Most cities and regions have a 10 to 25 NPS.
- When shown a list of 12 key facts about what's happening in regard to the region, like the \$5+ billion roadway improvement underway, only one-third of the residents or less are aware of any specific fact. Greater awareness of the facts is correlated to higher Net Promoter Scores.

BUSINESS LEADERS IN HAMPTON ROADS:

- Half (51%) of business leader residents say they strongly identify with the Hampton Roads region.
- "The 7 Cities" were most mentioned as being a part of the "Hampton Roads region." Apart from these cities, business leaders mentioned the other 10 jurisdictions as being part of the region to varying degrees, with the lowest jurisdictions being included as little as 21% of the time, and others being included 50% of the time.
- Business leaders believe military, diversity, and the port are what make the region unique from other places.
- Water or the military are the images or symbols that best represent the Hampton Roads region.
- Business leaders feel that regionalism (or lack thereof) is the greatest challenge facing the Hampton Roads region as a business location.
- There's a general sentiment that the region doesn't act like a region:

"We're acting as 17 or more independent entities/localities versus one major region."

"We should act like the big metro area we are. Instead, we act like 1 medium sized market and 6 small markets all fighting each other."

"The lack of regionalism stunts the area's growth. Individual cities and communities don't share a larger vision and sense of purpose for the region as a whole."

"Our region does not yet speak with one collective voice. The work of Reinvent and the reconstituted HREDA are making efforts to change that. Getting our cities to work together is critical."

"Well, we don't even know who's in Hampton Roads and who isn't. Try searching online to find a definitive description of Hampton Roads...I did just that and ended up more confused than enlightened. So how can we promote Hampton Roads as a business location when we cannot clearly define what it is?"

• When it comes to the region, business leaders, like residents have a low Net Promoter Score (NPS). Again, there are too few advocates.

#### NAMING:

- Residents most prefer "Hampton Roads" as a regional name.
- Business leaders most prefer "Coastal Virginia" as a regional name.
- Very few support a geographic anchor name like Norfolk-Virginia Beach.
- The further you travel up the James River, the less support there is for Coastal Virginia and zero support for geographic anchor names like Norfolk-Virginia Beach.
- The informal name that resonates with people is "757." This support is consistent across all segments and geographic areas.

#### THERE ARE THREE MAJOR TAKEAWAYS FROM ENVISION 2020'S ASSESSMENT OF THE MARKETING SITUATION FACING HAMPTON ROADS.

- 1. The Hampton Roads region doesn't have a naming issue; it has a marketing issue. We do not promote the Hampton Roads region to the outside world. We just promote the individual cities that make up our region.
- 2. We are not united as a region, and this ties back to the first point. It's hard to promote a region if you don't know about it or act like one.
- 3. Everyone is competing for workforce talent, especially young talent. We must excel at placemaking and place marketing.

# **ENVISION 2020**

#### **RECOMMENDATIONS:**

The Envision 2020 Task Force, supported by the Stakeholders Group, has arrived at five, interrelated strategic recommendations:

1. Regional Positioning: Position our region as the place where people easily CONNECT to each other, our coastal environment, our country, and the world.

Envision 2020's national social media sentiment audit and survey research among regional residents and business leaders point to six assets and experiences that make this region unique from all other places. These include: water, diversity, military, history, port, and innovation.

When people talk about these assets and experiences, they do so from an emotional perspective, how these place attributes make them feel about living here. A key word that's often used in these descriptions is "connection." Like no other city or region, people feel this region is a place where it's easy to <u>CONNECT</u> – to one another, our coastal environment, our country, and the world.



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

In a world that's becoming increasingly divided, where people feel more and more isolated and disconnected, our unique "place DNA" helps people feel they belong and are part of a larger, more welcoming and accepting community. This is how we should talk about our region — our story from a *what's in it for me* (WIIFM) benefit-oriented perspective.

2. Regional Messaging and Symbolism: Use our leading place assets and experiences as the pillars of our region's story as depicted in the message architecture below.

Where Everyone CONNECTS to One Another, Our Coastal Environment, Our Country, and the World



Use the relevant combination of these supporting messages customized for each audience. For example, the messaging that's most appropriate for Millennials or young professionals will lean into diversity, quality of life, water experiences, and the future. Perhaps relatively less appealing for this audience may be history and the global port.

#### 3. Regional Name: Advance 757 as the region's place name.

There a number of reasons this name makes the most sense.

First, the Envision 2020 research, and even hashtags being used today, point to what we all know -757 is the way many emotionally CONNECT with the entire region:

#### I am from 757. I work in 757. My business is in the 757.

#### I am proud to represent 757. We are 757.

There is no other word or sentiment that ties us together more. When people use 757, it represents both the region overall and all the individual parts as well – 757 is everything!

It beautifully CONNECTS all 1.7 million of us. The 757 is 100% inclusive and rooted in what is undeniable about us - our culture.

Second, 757 is already being used. We do not have to introduce this brand shorthand, just support it even more.

757 has been used as our region's informal name for almost two decades. In fact, it has been used so much that it has transformed from an "area code reference" to a brand place name. This was



clearly seen in Envision 2020's research. When residents were asked to name the first three things they think of when they hear the term 757, relatively few people mentioned an "area code." Parenthetically, this is why we are not concerned about an additional area code to 757 that will start to show up in the region for new phone numbers issued in 2022 and beyond.

Envision 2020's research and popular hashtags being used today support this. 757 comes with widespread support across generational cohorts, race, geography, etc.

Third, 757 will not divide us. As previously mentioned, the other leading name alternatives come with the potential to divide the region.

Lastly, 757 offers everyone an opportunity to join in without undergoing a major name change or rebranding. There are many 757 options businesses and organizations can embrace — from adding 757 to their name or taglines to simply using 757 as a separate logomark or seal on their website. For example, the informal name "Coastal Virginia" that's currently being used by the region's tourism industry could become "Costal Virginia757." The 17 jurisdictions could state on their websites that, "our community is part of the 757," or use 757 in their marketing efforts — Hampton757, Virginia Beach757, Williamsburg757, etc..

One of the next steps of Envision 2020 Task Force leaders is to work with the region's creative talent to offer specific suggestions on how the 757 naming architecture could work best as part of this pride-build-ing effort, which may include "VA" as part of 757 (757VA) during the initial rollout.

### 4. Regional Pride-Building Campaign: Backed by research, the Envision 2020 Task Force believes that what's needed now more than anything else is a regional pride-building campaign that brings us together.

757 is the centerpiece of this campaign. It will serve as the unifying theme and call to action — "We are 757," "Join 757," "Be 757!" This campaign will be a celebration of who we are. It will effectively unify our region, helping people become even better ambassadors to share OUR region's story far and wide.

While there is still a lot of work to be done on shaping, producing, and launching the 757 campaign, the Envision 2020 Task Force envisions that this effort will include some of the following features:

• Designate an Organization as the Home Base for the Regional Branding Work: Establish a permanent organizational home for the regional branding effort and line up initial funding to support regional marketing efforts. Formulate specific game plan, performance goals, and reporting.

- Engage our Region's Creative Talent: Culture attracts. Culture unites. Culture distinguishes. We will engage, inspire, and support the region's creative talent, regional artists, and creative marketing forces to advance the 757 in ways that unites our region.
- Create Regional Digital Marketing Resources: Create online regional branding tools and resources. This should include a 757 resident website where everyone shares what it is like to live in 757.
- Partner with Businesses: Work with the region's business leaders to amplify our 757 theme and regional messaging. In the Envision 2020 Business Leaders Survey, business leaders said they will support this effort in many ways including:
  - o 85% say they will include the name of the region on their website.
  - 81% say they will use shared descriptive language and images of the region in their employee recruitment materials.
  - 71% say they want to receive in-depth briefings on advancing the region's branding efforts.
  - 62% say they will send some of their employees to half-day regional ambassador training sessions to learn how to promote the region.
- Leverage All 17 Jurisdictions and Other Partners: Work with the 17 jurisdictions to amplify the 757 theme and messaging. Ask cities to include 757 in their promotional activities, including municipal government websites, travel and tourism websites, and economic development websites. Over time, closely coordinate with other regional marketing efforts like Coastal Virginia Tourism Alliance and HREDA.
- Engage Next Gen: We must especially empower our young people to lead the way. Young people, or "Next Gen," will build our regional culture in a way we never have before. Their passion will create a buzz and attract the future talent our region needs to grow and thrive.

#### 5. National Friends: Tap Into Our National Connections:

Through Envision 2020 research, the Task Force took note of the remarkable national reach and amazingly positive word-of-mouth power that the *Something in the Water Festival* generated. With this evidence, the Task Force approached Pharrell Williams to see if he would be interested in joining our initiative. While he is an advocate, the extent of his participation is still to be determined. The Task Force looks forward to tapping into Pharrell's insights and experience to advance broad adoption of 757.

#### WHAT'S NEXT:

There's a lot of work to do in building and advancing our region's story. It starts internally – within our region – with our recommended pride-building campaign centered on advancing 757. This campaign will benefit from everyone's engagement and direct participation.

To help get this started, the Envision 2020 Task Force offers the following immediate next steps:

- 1. Share this report: Share this report with your friends, family, and colleagues.
- 2. Hear the Envision 2020 Research and Recommendations Firsthand: For large organizations and gatherings (over 100 people), Envision 2020 leaders will make in-person presentations of the research and recommendations. If you represent a large group, call Reinvent Hampton Roads (757-373-6998) to discuss this option.
- 3. Use 757 Now: Consider ways your business or organization can use 757 in your name, products, services, promotions, etc.
- 4. Get Creative with Us: Tap into the region's creative leaders to inspire everyone to get behind the 757 pride-building campaign. The Envision 2020 team will reach out to the region's creative community in the new year.

5. Get Ready to Hear From Our Region's Next Gens: Through the Envision 2020 process, the region's senior leaders have asked our Next Gen leaders to provide specific recommendations on what it will take to make 757 an even more appealing place for younger generations to live, work, play, learn, and visit here.

The region's 17 Next Gen groups, comprised of thousands of talented and motivated young professionals, are answering this charge by tapping into Envision 2020's research dataset to formulate specific placemaking recommendations. These recommendations will be shared this Spring 2020.

Business and civic leaders *must* encourage and support this Next Gen initiative. Let Next Gen cohorts know that we see them, we hear them, and we want them at the table. Let them know that we are uniting as a region for them and for their future. When you see the Next Gen Placemaking Report, share it. For large organizations, schedule time for one of their representatives to present to your board. Chances are you already have a few Next Gens on your 757 team.

#### IN SUMMARY:

On behalf of the Envision 2020 Task Force and Stakeholders Group, it has been an honor to serve our region through this regional branding initiative.

Our major conclusion is that the Hampton Roads region does not have a naming issue, it has a marketing issue. People outside of our region don't know who or where we are. Our local residents and business leaders do not universally relate to our region, our name, or the breadth of our geographic scope. Before we can effectively market ourselves to the outside world, we have to become one unified region.

To this end, the Envision 2020 Task Force and Stakeholders Group are recommending a regional 757 pridebuilding campaign — one that unifies us, celebrates us, and sparks everyone's emotional connection and commitment to our region. This effort will make us magnetic. The campaign will work. We are using 757, a name that already defines our region. We are tapping into the insights and experience of Pharrell Williams, who is already one of our region's most outspoken advocates. Most importantly, we are empowering young people to chart the future of our region.

We invite everyone to join us in building our region's momentum.

WE ARE 757!								
CHESAPEAKE 757 NEWPORT					JAMES CITY 757			
757 southampton 757	suffolk 757	57 75 surry 757	57 7 VIRGINIA BEACH 757	57 75 WILLIAMSBURG 757	57 <sub>Уогк</sub> 757			