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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)** ← This Report
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

Envision 2020 Project Task Force Findings and Recommendations Report

**High school students input handled by High School Task Force Member



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Table of Contents for This Report

- Report Goals
- 20 Key Insights
- Implications for Envision 2020

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I. Report Goals

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Secondary Research Report Goals

- Identify findings and insights from relevant existing data and research reports (a.k.a. secondary research) to help guide the Envision 2020 Regional Branding Initiative's primary research and strategic recommendations.
- Envision 2020's planned primary research, designed and conducted exclusively for this initiative, includes:
 - Hampton Roads' high school students, young professionals, residents, and business leaders
 - Opinion leaders and prospective visitors outside the region
 - Business location decision makers and consultants across the country

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VisitNorfolk Prospective Visitors Study

Look here on each slide of this report for the original source of the secondary research as presented in this report.

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SIR Analyzed Data from the Following Sources:

- SIR’s Institute for Tomorrow Research
- OIPI 2016 National Movers Study
- HREDA 2019 Hampton Roads Perception Study
- VisitNorfolk 2018 Prospective Visitors Study
- VisitNorfolk 2018 Past Visitor Study
- VisitNorfolk 2018 Resident Study
- THRive 2019 Young Professionals Report
- HRPDC 2014 Envision Hampton Roads
- SIR’s Millennial Placemaking Research
- Reinvent Hampton Roads Data
- ODU: 2018 Life in Hampton Roads
- United States Census Bureau Fact Finder
- U.S. Census, July 2018 estimates

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II. Key Findings

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Secondary Research Findings Are Organized Around the Following Key Topic Areas

- Demographic Challenges Facing Hampton Roads
- Why People Move
- What People Seek in a Place to Live
- What People Seek in a Place to Vacation
- What Businesses Seek in a Location
- The Degree to which Hampton Roads Delivers on these Desires and Expectations (Norfolk Example)
- Awareness of Hampton Roads Outside of the Region
- Hampton Roads Name Brand Equity
- Residents and Place Marketing

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Growing Hampton Roads' Regional Population is a Top Demographic Challenge.

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Source: U.S. Census, July 2018 estimates

Hampton Roads Needs to Attract More Residents

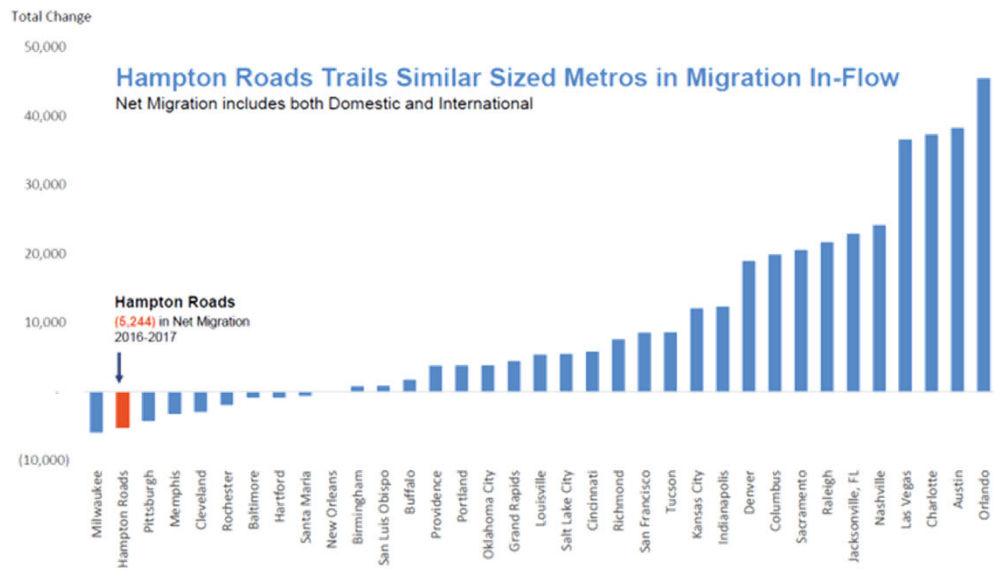
POPULATION									
	2010	2011	2012	2013	2014	2015	2016	2017	Change vs. 2010
Hampton Roads	1,644,104	1,650,617	1,661,473	1,669,350	1,678,383	1,683,688	1,685,509	1,687,371	2.6%
City of Richmond	204,241	206,410	210,842	214,012	217,185	220,943	225,288	227,032	10.0%
Virginia	8,025,206	8,107,548	8,188,656	8,261,689	8,316,902	8,366,767	8,414,380	8,470,020	5.3%

Source: U.S. Census

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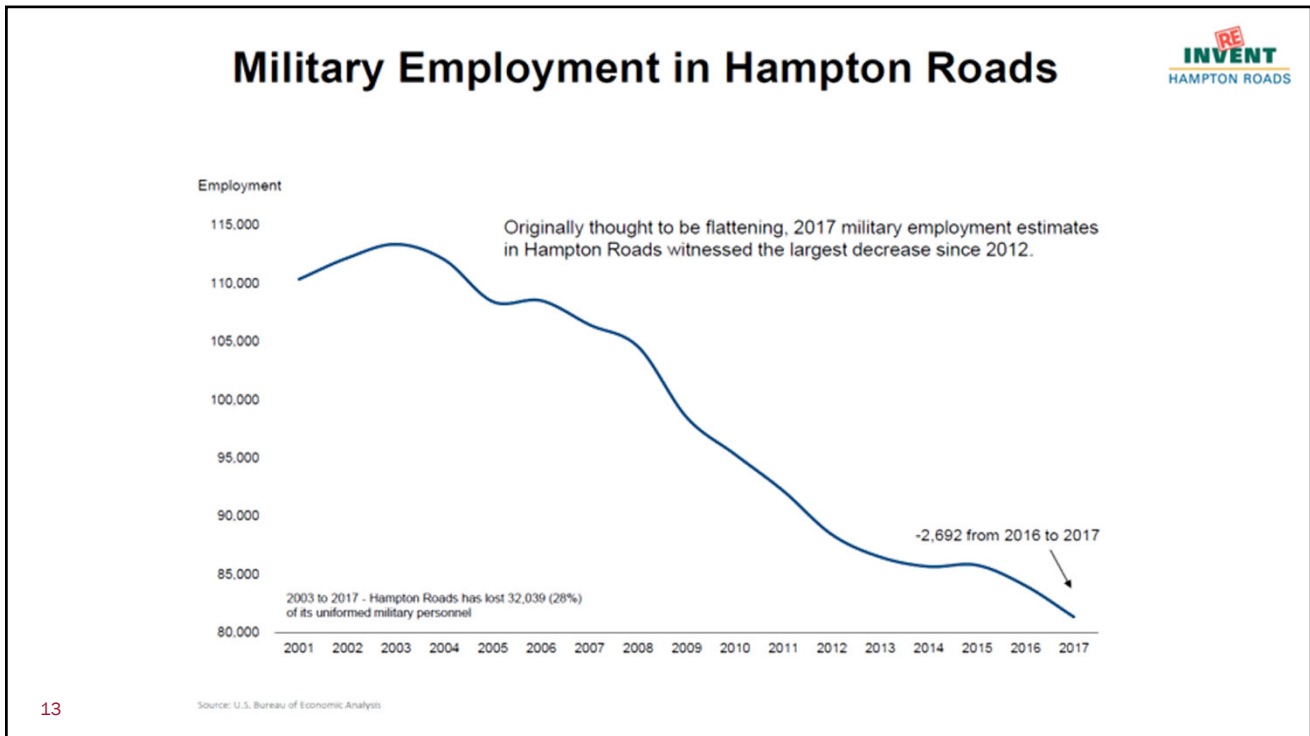
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Migration by Metro Areas – 1 to 3 Million

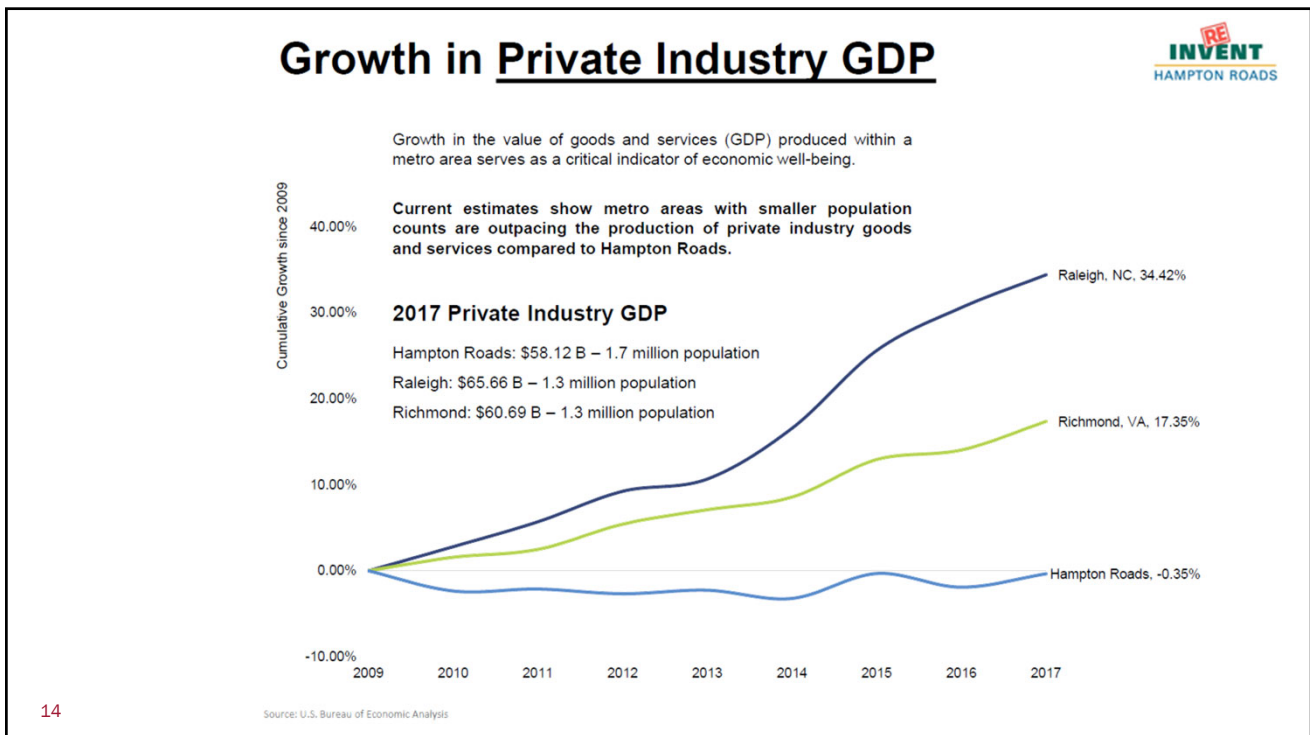


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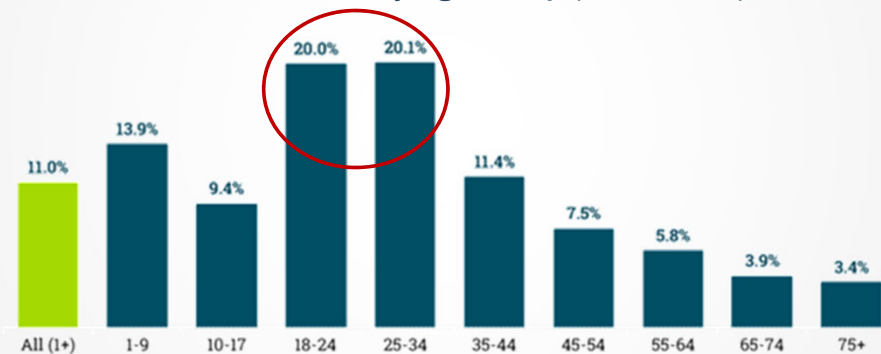
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**For many regions,
increasing the
population faces
serious headwinds.**



One of the challenges facing every city/region is attracting and retaining young people – the group that makes up the largest share of movers. About one in five, or 20%, of 18- to 34-year-olds move every year. They are the Millennials today and will be the Gen Zs tomorrow.

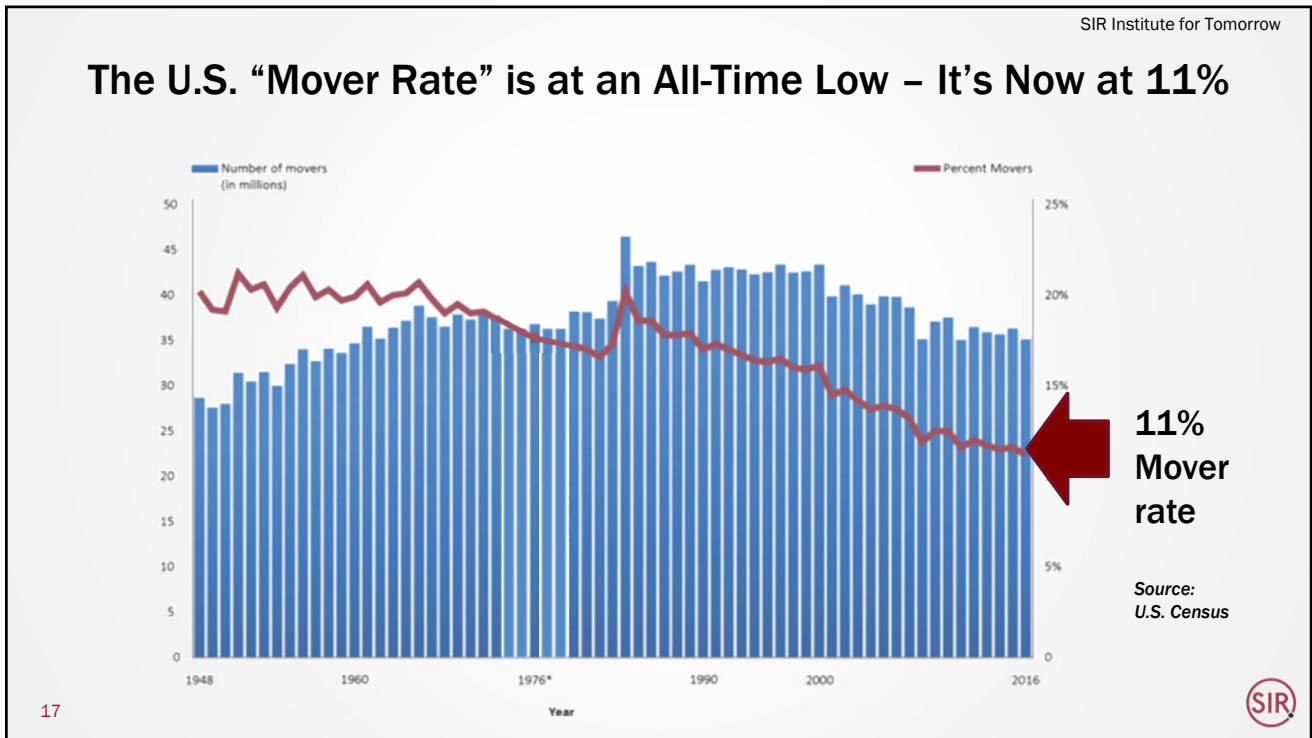
U.S. National Mover Rate, by Age Group (2016-2017)



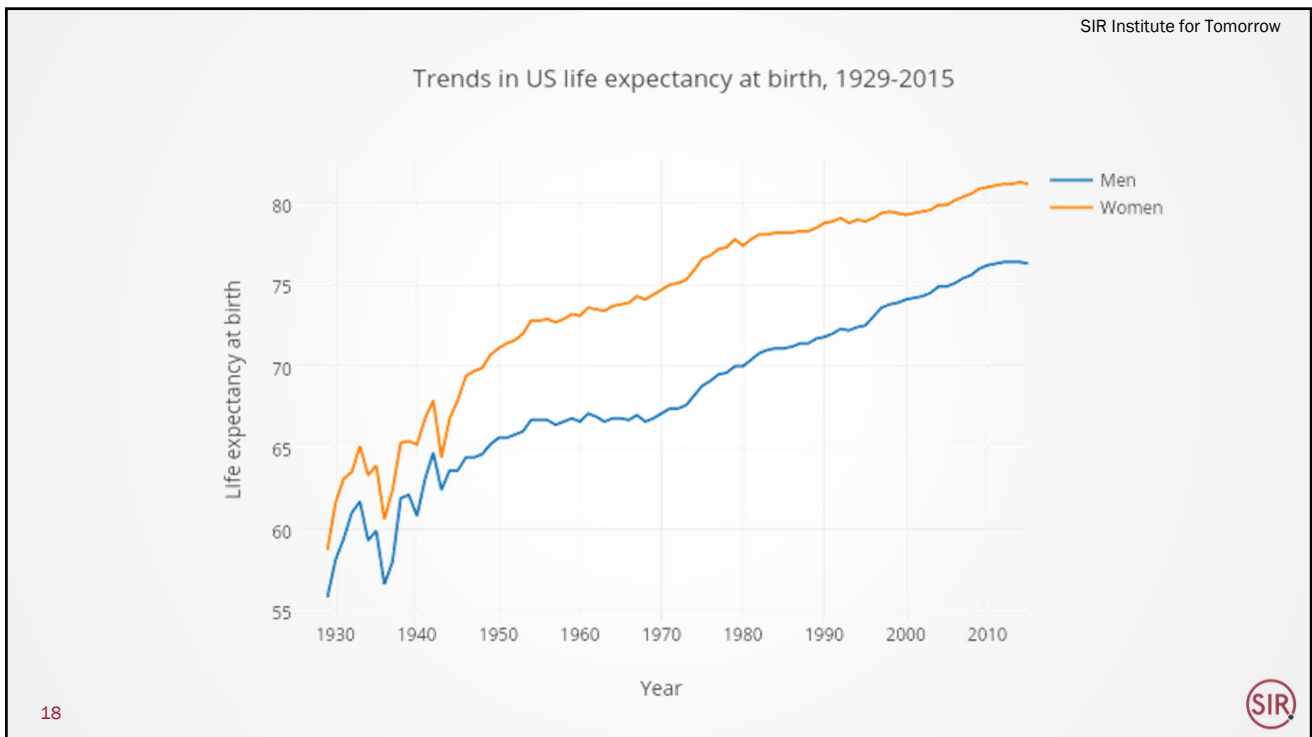
Published on MarketingCharts.com in November 2017 | Data Source: US Census Bureau

Figures show percentage of Americans of each age group who moved residence between 2016 and 2017

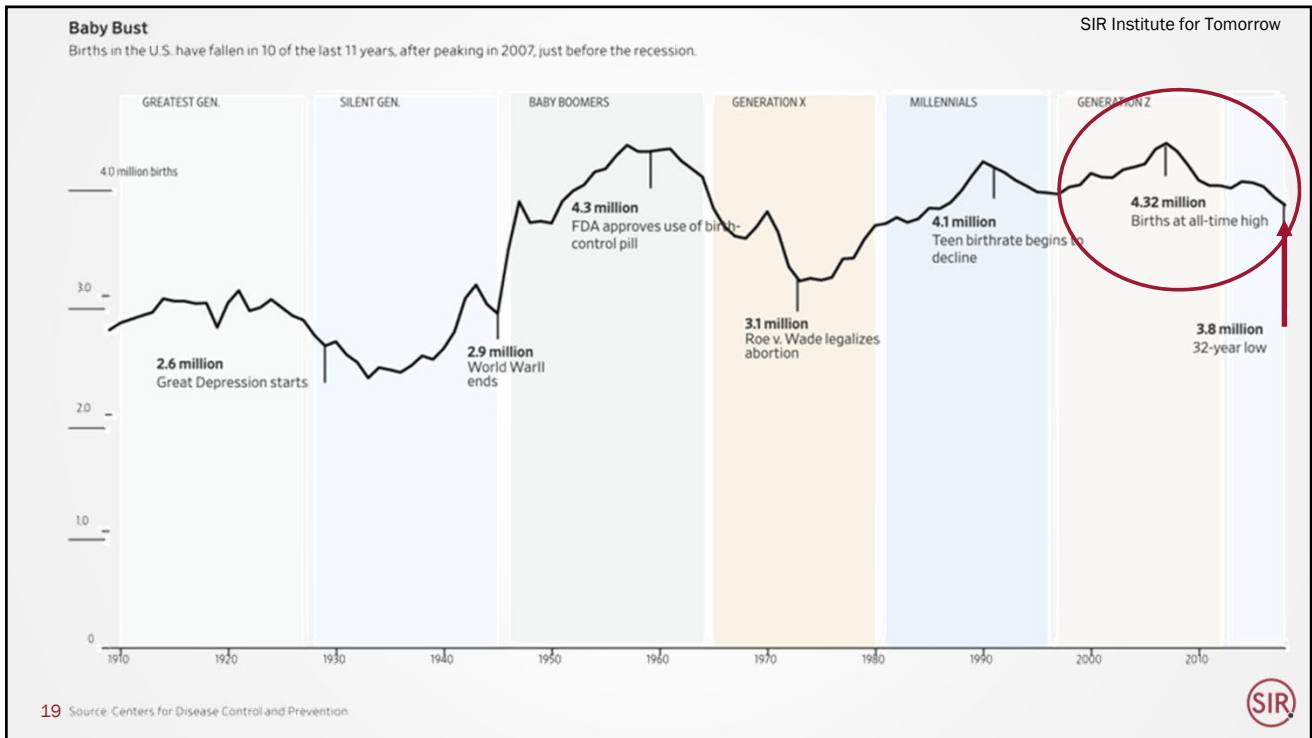




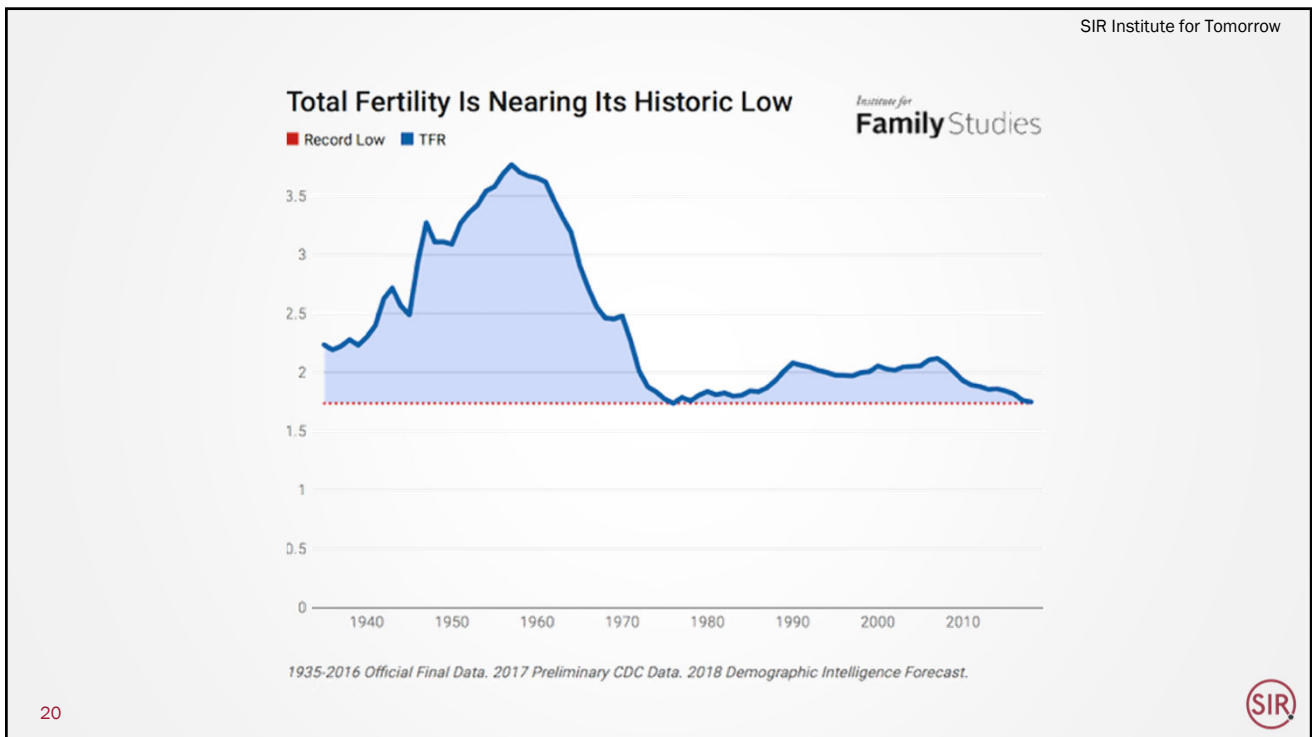
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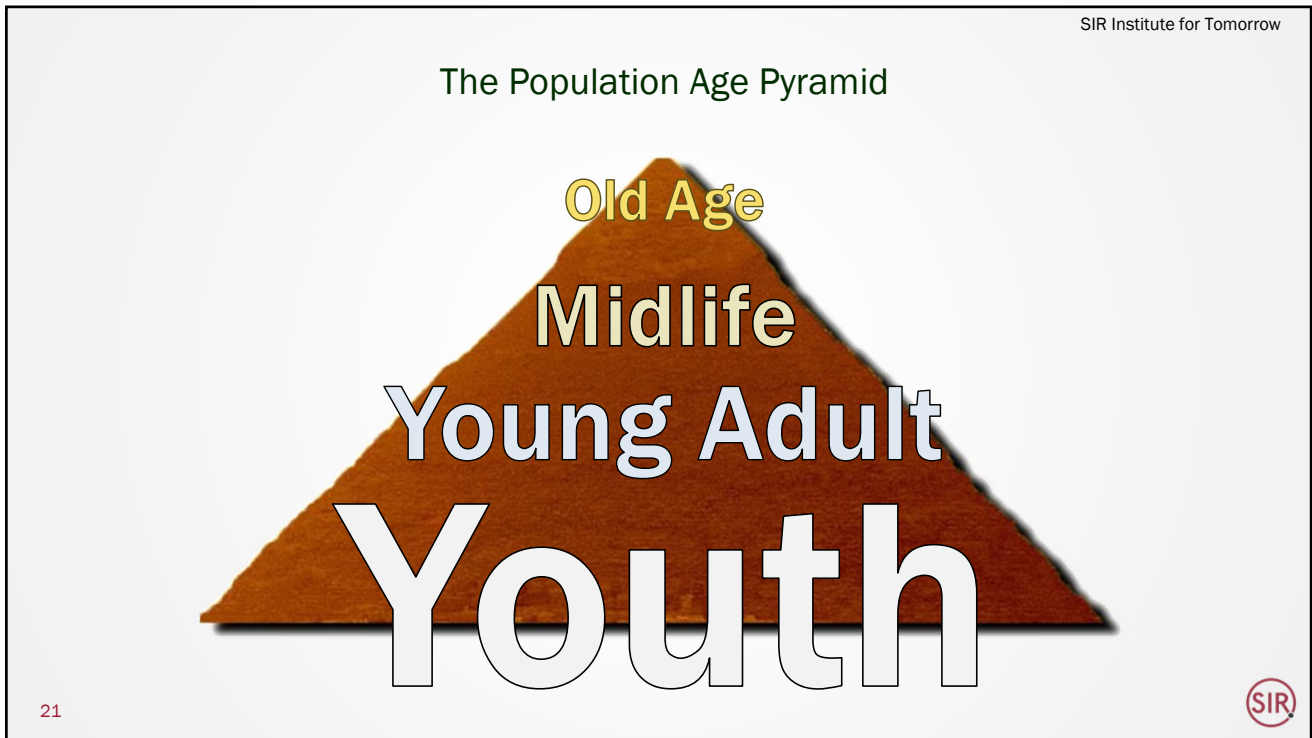


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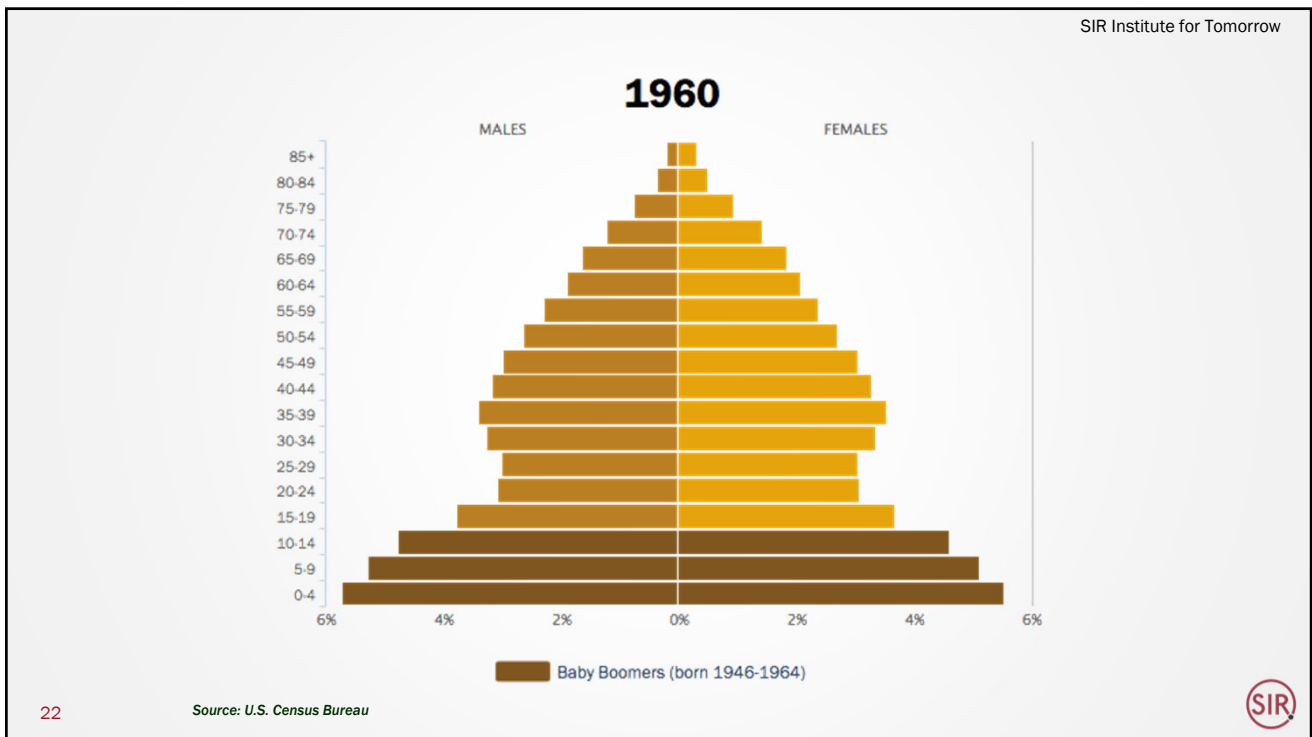


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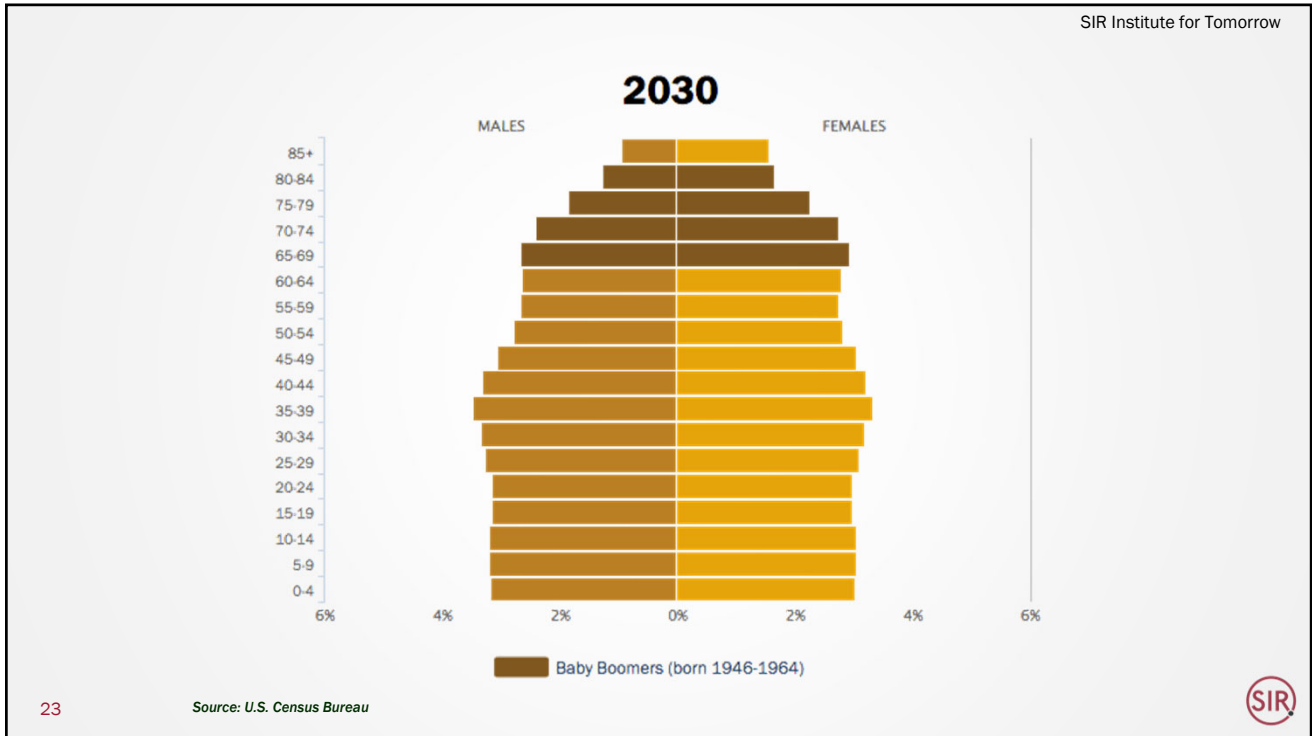
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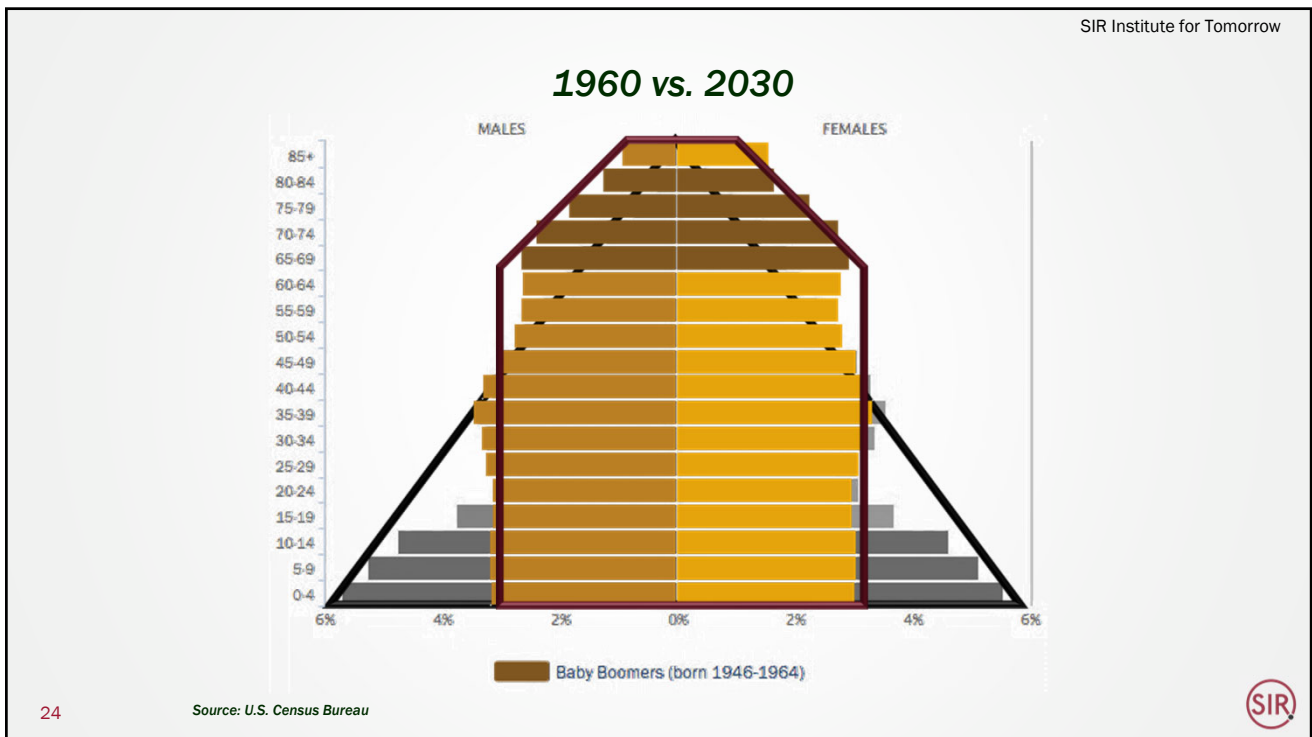
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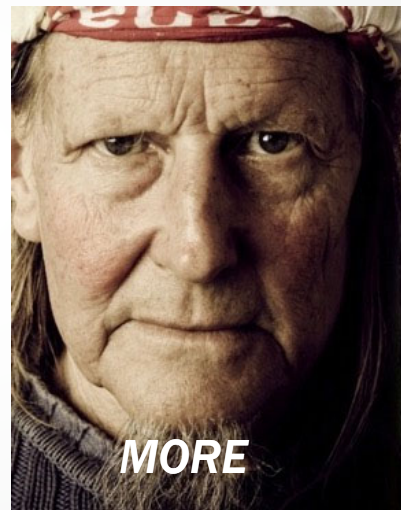
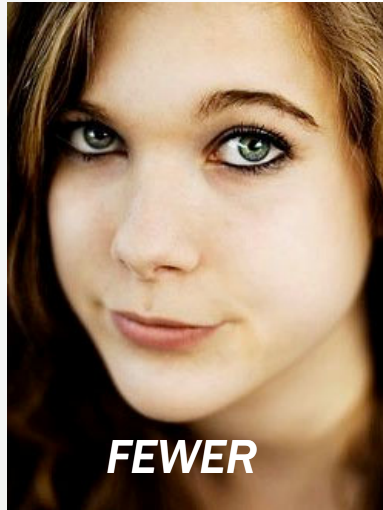
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SIR Institute for Tomorrow

In the Future, there Will Be Relatively Fewer Young People and Relatively More Older People



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SIR Institute for Tomorrow

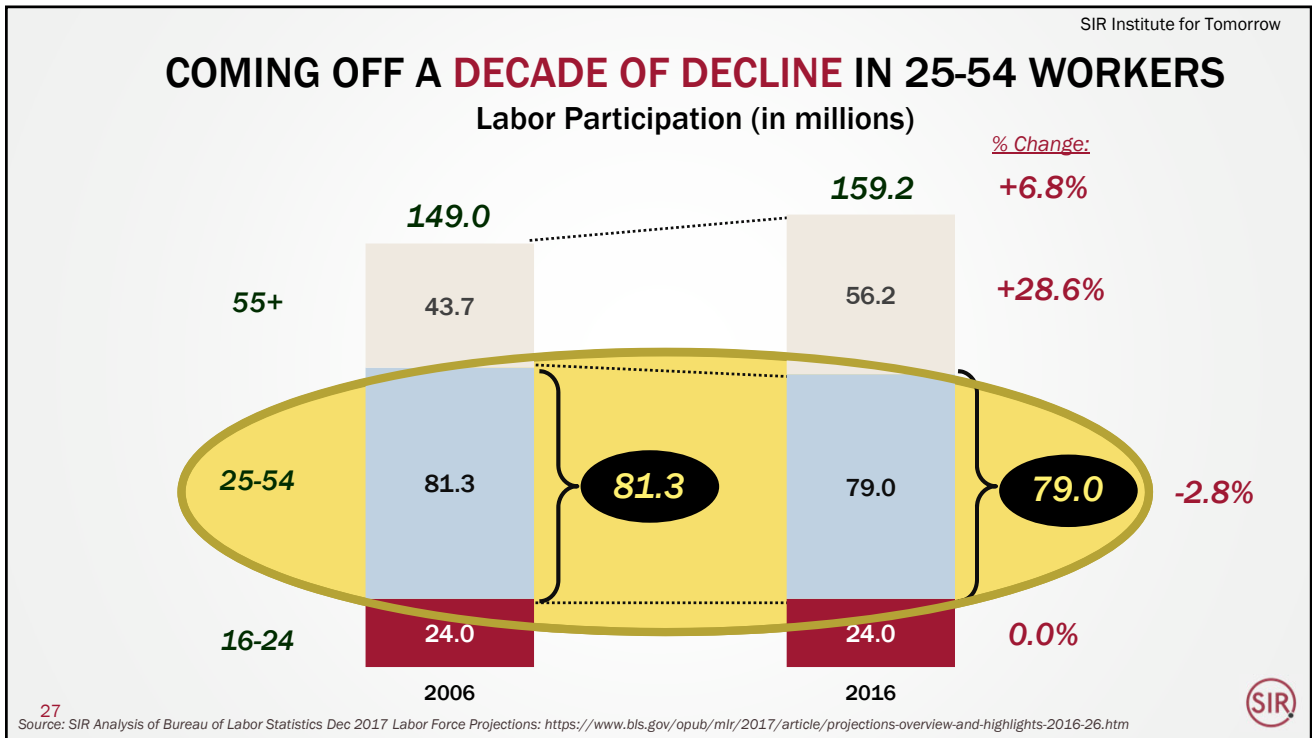
The battle
will be for
**YOUNGER
WORKERS**



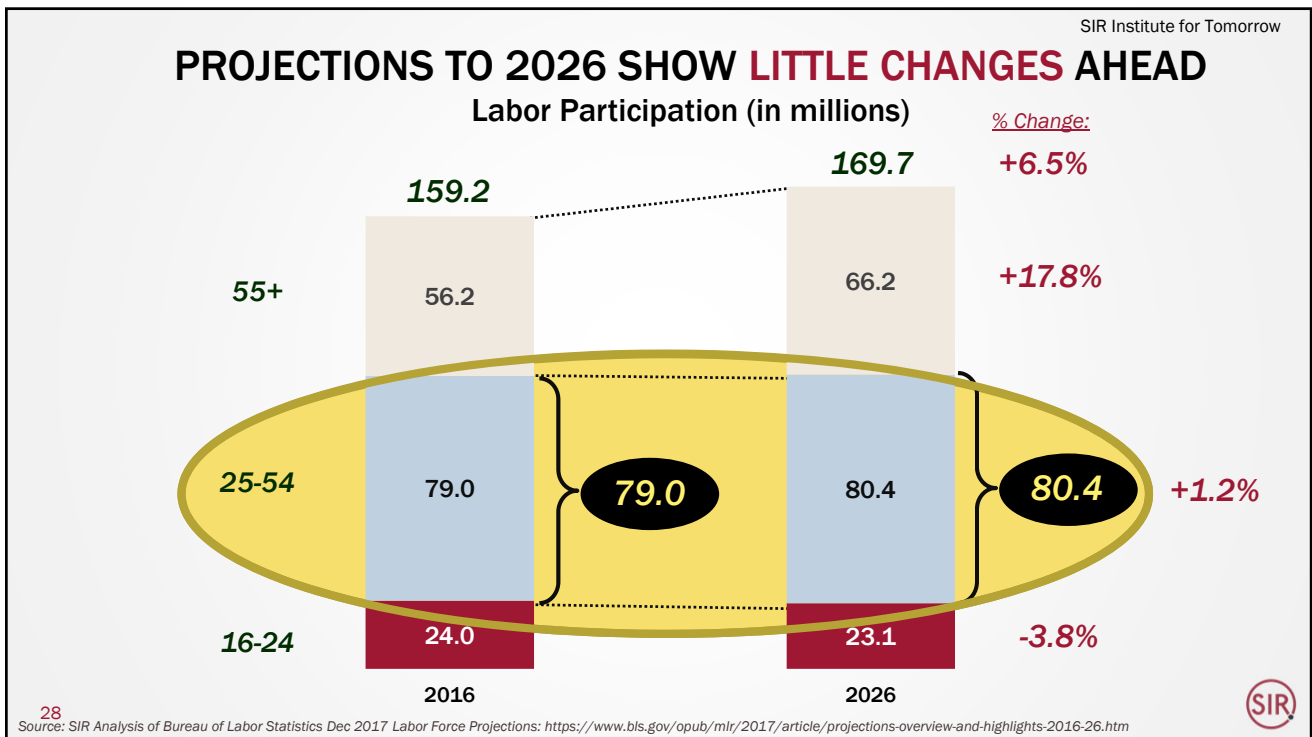
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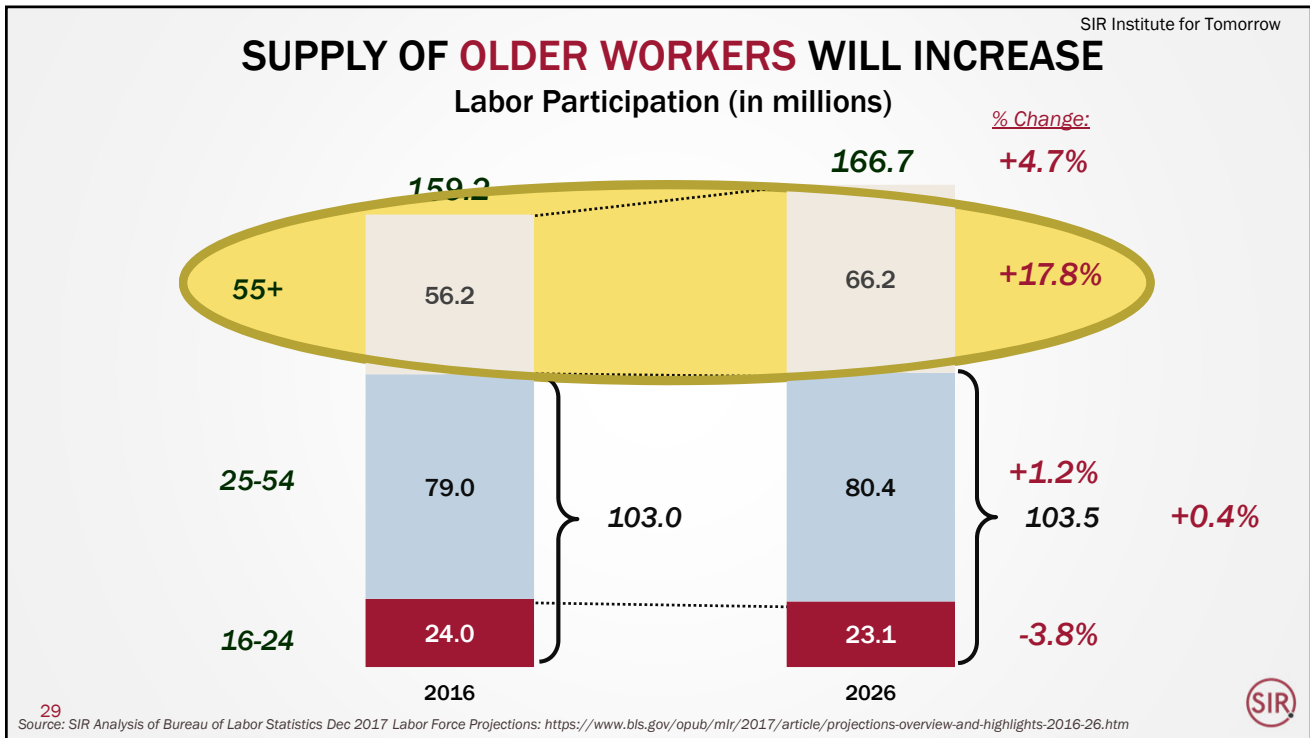
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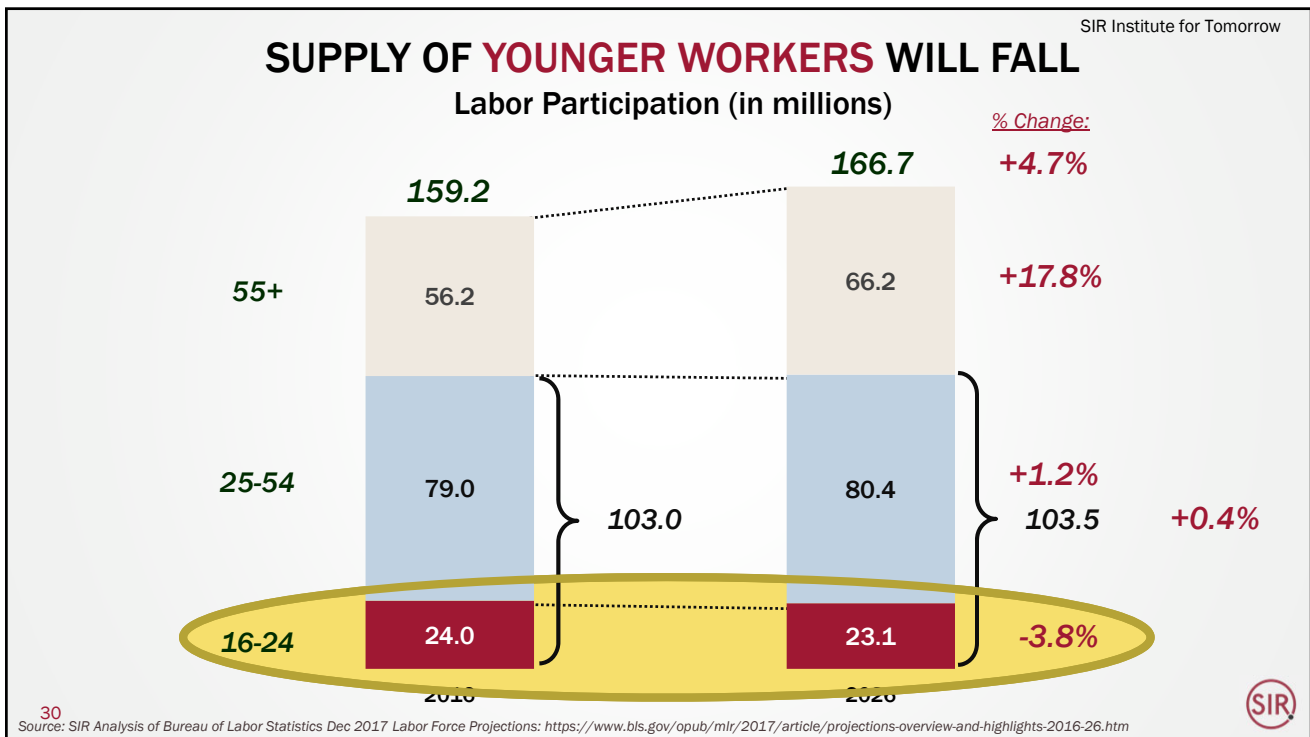
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3.6%

Unemployment rate – a 49-year-low

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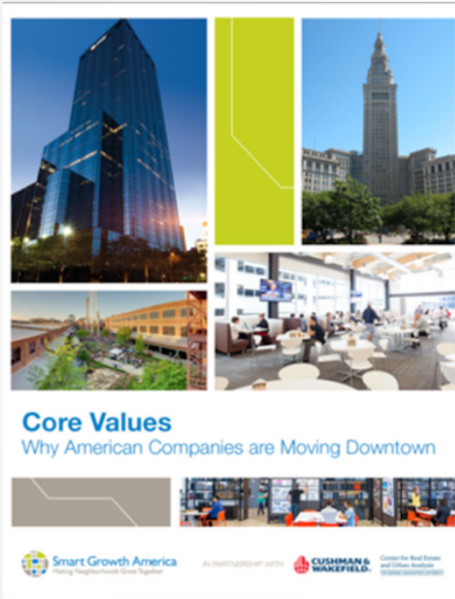
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**Companies are
now preparing for
this future**

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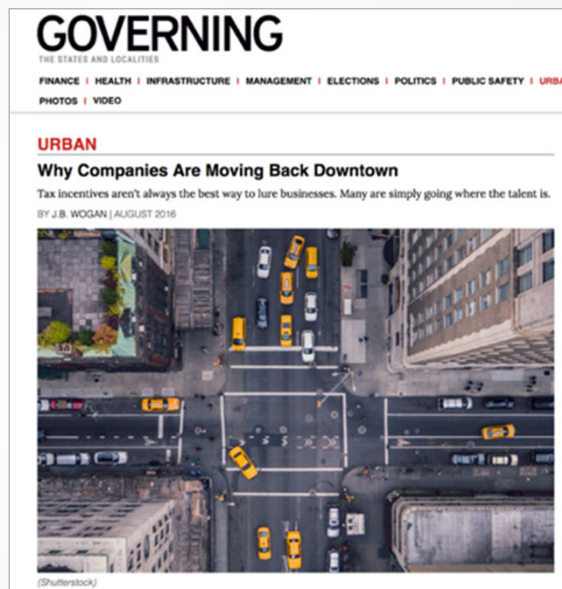
**500 recent corporate moves:
"Talent recruitment and retention"**

33 Source: Smart Growth America



33

"Many are simply going where the talent is."



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IMPLICATION FOR ENVISION 2020

The Envision 2020 Regional Branding Initiative should take into account demographic realities. A positioning, communication strategy, and naming architecture should be clear as to who we are and where we are located – enhance place marketing.

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There are Two Models Being Practiced by Cities to Attract New Residents.

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**Cities are
now preparing for
this future:
Two Models**

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**Model #1:
Buy Residents**

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The War for Residents is Picking Up

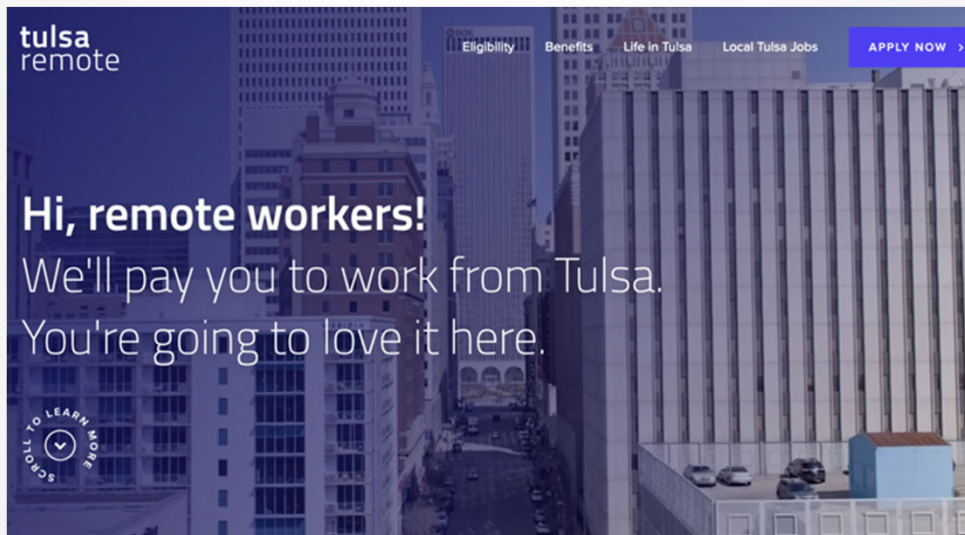


Cities and towns are now providing offers to get young people to move there:

- Cash incentives
- Student loan relief
- Home purchase assistance



www.tulsaremote.com



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tulsa remote

Eligibility Benefits Life in Tulsa Local Tulsa Jobs [APPLY NOW](#)

\$10,000 Cash

We know remote arrangements take planning. We'll give you some money upfront to help with relocation expenses, a monthly stipend to keep things moving and the rest when you've finished the first year.

YOUR NEW TOWN

YOUR NEW OFFICE

Space at Tulsa's Top Coworking Community

Need some desk space to get things done? 36 Degrees North, a dynamic coworking space in Downtown Tulsa, provides a place to get work done and collaborate with other local entrepreneurs, remote workers and digital nomads.

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LIVE Baltimore CITY LIVING STARTS HERE

NEIGHBORHOODS BUYING & RENTING FINANCIAL INCENTIVES CITY LIVING ESSENTIALS UPCOMING EVENTS

ABOUT US DONATE CREATE A PROFILE OR LOGIN

LIVE BALTIMORE Trolley TOUR I love city life

FIND YOUR HOME IN BALTIMORE

Spring 2019 Trolley Tour

Saturday, May 11, 2019

Take a tour of more than 10 Baltimore City neighborhoods, speak with trusted real estate professionals and community organizations, AND become eligible for \$5,000 in downpayment and closing cost assistance toward the purchase of a Baltimore City home!

[REGISTER FOR THE EVENT](#)

Start Your Search Explore Baltimore City Buying & Renting Find Your Home Here

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<https://livebaltimore.com/financial-incentives/details/buying-into-baltimore/#.XK1erOtKjzX>

LIVE Baltimore
NEIGHBORHOODS
BUYING & RENTING
FINANCIAL INCENTIVES
CITY LIVING ESSENTIALS
UPCOMING EVENTS
SEARCH

[ABOUT US](#)
[DONATE](#)
[CREATE A PROFILE](#)
OR
[LOGIN](#)

ALL INCENTIVES

HOME BUYING LOANS

DOWNPAYMENT & CLOSING COSTS

EMPLOYER-BASED

RENOVATION & REHABILITATION

HISTORIC PRESERVATION

TAX CREDITS & REBATES

MILITARY ASSISTANCE

Buying Into Baltimore

ADD THIS

Buying Into Baltimore is a \$5,000 incentive to use toward buying a home anywhere in Baltimore City. You must attend a Trolley Tour event to become eligible for the \$5,000 incentive. Every year, there are two events: a spring/summer event and a fall/winter event. **There's two opportunities to get \$5,000** toward buying your home! See when the next Buying Into Baltimore Event is in the Upcoming Events section of this website.

[Twitter](#) [Facebook](#) [LinkedIn](#)

Categories

▶

Details

The mortgage amount cannot exceed \$517,000.

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http://www.stclairfoundation.org/funds/more/reverse_scholarship_fund

Community Foundation

of St. Clair County

Come Home Award Fund

Many communities in Michigan are struggling to retain college graduates and lose out on their talents toward economic growth and prosperity. In late 2013, when Randy Meiers was serving as the interim director of the Huron County Community Foundation, discussion began among the donors and constituents of the Huron County Community Foundation about what, if anything, could be done to attract young people back to the Thumb Region. The result was a simple transform that might transform the world of traditional scholarships.

From the start the Community Foundation of St. Clair County, Huron County Community Foundation and Sanilac County Community Foundation have all worked together to address the talent drain and the 'Come Home' program was born.

Traditional scholarships are awarded and paid on the "front end" of a student's career. At that time, there are no guarantees the student will complete studies in their chosen field, graduate from college or return back to their communities to help contribute to growth and prosperity.

A "come home award" is essentially a talent retention program and would pay students on the back-end of their college career, after they have completed a degree in a STEAM-related field, but only if they agree to move back home and work within the St. Clair County. If you currently live in St. Clair County or are in the process of moving back you are not eligible.

Fund Categories

Establishing a Fund

Our Scholarships

St. Clair County, Michigan
*Dubbed the Come Home Award, this reverse-scholarship will pay students who have completed a degree in a STEAM-related program (science, technology, engineering, arts or math). Those promising to live and work in the county could **receive up to \$15,000** to make the move.*

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City of Hamilton, Ohio



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<https://www.hamiltonfoundation.org/scholarship>

Scholarships for Students Currently in College

Scholarships for Recent College Graduates (TAP) Scholarship

Scholarships for Adults Returning to College

Scholarships for Graduating Seniors

Renew Multi-Year Existing Scholarship

Talent Attraction Program Scholarship

The impact of the Hamilton Community Foundation is evident throughout our community. In addition to the support of the community as a whole, we continue with a special focus on educational programs and grants. In the past 60 years, we have provided over \$13 million dollars in scholarships to more than 3,000 students, and this support of area students will continue in years to come with the new Talent Attraction Program (TAP) Scholarship.

The TAP Scholarship is what is known as a "reverse scholarship" where recent graduates will receive assistance with student loan debt.

To be eligible you must:

- Have graduated within the last 7 years from a STEAM program (Science, Technology, Engineering, the Arts, or Mathematics) preferred.
- Not *currently* living in designated areas in the city of Hamilton BUT with plans to move to or live in the [designated areas in Hamilton - map](#)
- Must demonstrate employment within City of Hamilton or Butler County
- Prefer those with a desire to give back to the community and become engaged in activities

Successful applicants to the program may receive up to \$10,000, \$300 per month for 30 months. If the applicant ceases employment or moves before the end of the 30 month period, they forfeit the right to any future payments.

We will review applications as needed on a monthly/quarterly basis.

To begin the application process, [click here](#).

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Harmony, Minn., will pay up to \$12,000 for new residents

Small towns need new residents — they'll even pay you to live there

By Jenna Ross Star Tribune JUNE 26, 2014 — 6:08AM



PHOTOS BY JERRY HOLT & KRISTZ JERRY.HOLT@STARTRIBUNE.COM
In Harmony, Minn., between \$5,000 and \$12,000 is being offered to those who build a home there, in a revitalization effort.

HARMONY, Minn. — In an empty, grassy lot bordered by cornfields stands a

WATCH NOW

Harmony, Minnesota

1. Click "Watch Now"
2. Run and Install
3. Open New Tab



Vermont Pays \$10K

Why Vermont Will Pay You \$10,000 To Move There And Work Remotely

June 07, 2016 | Updated Jun 07, 2016 3:44 PM



Vermont recently passed legislation for a program that would offer people up to \$10,000 to move there and work remotely. (Sian Honda/AFP/Getty Images)

"We have just shy of 630,000 people, and we're the third-oldest state in terms of demographic. So that's a very challenging environment in order to maintain vitality of the communities."

Why the state wants to pay people to come live there

"The governor recognized, the legislature recognized, we need more people in the state. And so we need to try different things, new things. It's interesting to see how many people are interested in Vermont. It's not really a surprise, there's millions of visitors each year. So we want to figure out a way that we could turn visitors and people who love the state into residents."

On how Vermont is going to improve its utilities to support the project

"We do have broadband in most of the downtowns all over the state. In fact, Burlington has fiber gigabit, so does Springfield and so do some small towns on the west side of the state. So there is that recognition. Obviously there's more work to do, especially in the kind of last mile and on the back roads, but we do have [enough connectivity] to at least have it in the coworking spaces that are located throughout the state."



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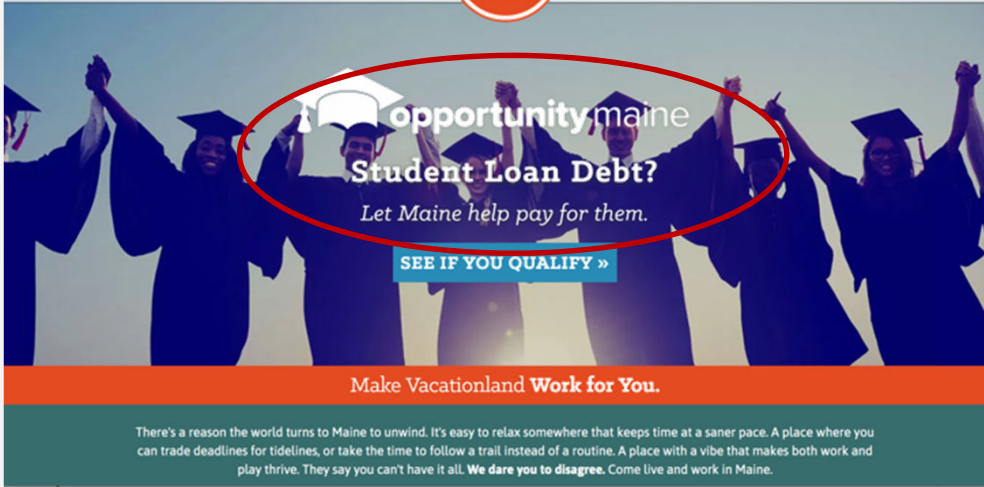
About | FAQ | Contact | Newsletter

CREATE ACCOUNT » EMPLOYER LOGIN »

LIVE IN MAINE WORK IN MAINE

LIVE + WORK in MAINE

JOB BOARD SUCCESS STORIES




opportunitymaine
Student Loan Debt?
Let Maine help pay for them.
SEE IF YOU QUALIFY »

Make Vacationland Work for You.

There's a reason the world turns to Maine to unwind. It's easy to relax somewhere that keeps time at a saner pace. A place where you can trade deadlines for tidelines, or take the time to follow a trail instead of a routine. A place with a vibe that makes both work and play thrive. They say you can't have it all. **We dare you to disagree.** Come live and work in Maine.

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Model #2:
**Build and Promote
a Great Place**

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10 TRAITS OF WINNING REGIONS OF TOMORROW

- BIG TENT**: Being a welcoming and inclusive community
- SHARED STORY**: Arriving at a relevant and unique narrative
- POSITIVE BUZZ**: Inspiring and scaling positive word of mouth
- LIVABLE PLACES**: Portfolio of Safe 15-minute livable neighborhoods
- AFFORDABLE SPACES**: Meeting the rising demand for affordable housing for everyone
- HYPER-CONNECTED**: Offering convenient transportation options
- MILLENNIAL MAGNET**: Becoming a hot spot for young professionals and new families
- EDUCATIONAL VILLAGE**: Collaborating and innovating at all levels
- DYNAMIC WORKFORCE**: Facilitating job placement and training / reskilling at every level
- BEYOND BORDERS**: Advancing collaboration across and outside the region

Millennials
 Size: 85 million
 Born: 1983-2001
 Formative years: 1995-2015
 Age in 2018: 18 to 36

Raised by doting parents and awarded praise and trophies just for showing up, Millennials suffer from no lack of self-esteem. Yet coming of age during the Great Recession has affected their views of money, company loyalty, and planning.

Millennials are technology-dependent and hyper-connected, through mobile devices, instant messaging, and texting. Being online is second nature to them. Further, as social libertarians in their outlook, Millennials are comfortable with diversity in race, culture, and sexual orientation.

With many still living at home, Millennials today have experienced a prolonged adolescence. Though they remain largely untested, the cohort shows promise. In fact, they are known "joiners" – a sign that shows that Millennials may even engender a renaissance in civic participation and the rebuilding of social capital.

Generation Z
 Size: 70 million (and counting)
 Born: 2001-2009
 Formative years: 2015-2025
 Age in 2018: 1 to 17

While Gen Z is not yet fully formed, early signs point to overprotective parenting in a world growing more dangerous by the week. Exposed frequently to the horrors of terrorist attacks and gun violence, Gen Zs are being imprinted right now with the need to stay safe and secure.

Gen Zs are also seeing a world where the desire to belong shapes cultural norms and creates new concepts like gender fluidity and self-identification.

The result should be a generation with a big tent perspective, where everyone has a place and the plurality of minorities sets the agenda. Personalized technology and content will enable this generation to self-educate and pursue lifelong growth.

Keep in mind, Gen Zs will be shaped as a generation by the next 5-10 years. Hold on to your hats!

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SIR's 10 Traits Fall into Two Categories

Placemaking – Intentional actions to make a place more appealing

Place Marketing - Intentional actions to market a place (as a great place to live, visit, work, and grow a company)

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The **NEW** Economic Development Model

OLD MODEL

Recruit big companies
People follow companies
Community grows

NEW MODEL

**Recruit for
targeted industries**
**Build sense of
place and community**
People will flock to it
**Businesses will grow
from within and
others will come**

IMPLICATION FOR ENVISION 2020

The Envision 2020 Regional Branding Initiative should provide insights into how to make the Hampton Roads region a better place – placemaking direction.

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Localities can Influence (Attract) Movers with Locational Appeal and Job Opportunities.

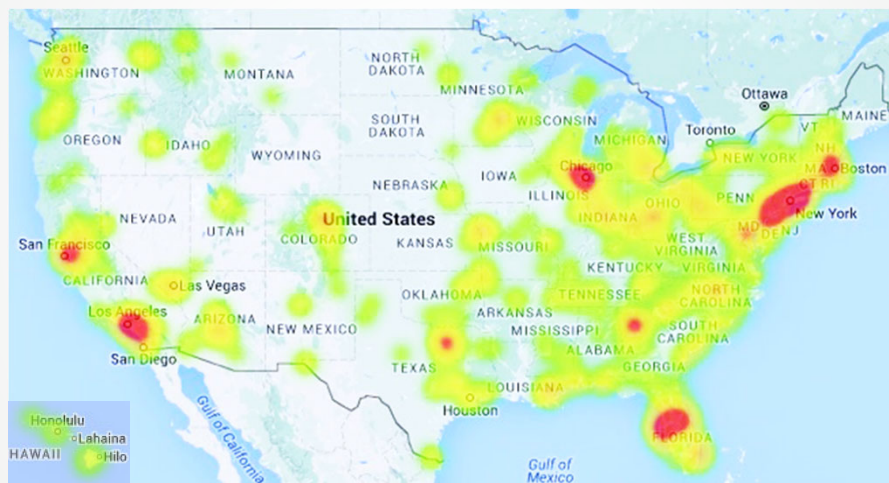
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OIPI National Movers Study

Study for the Virginia Office of Intermodal Planning & Investment – 2016 Recent and Future Movers From All Over the United States



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Q50. What is your current zip code?

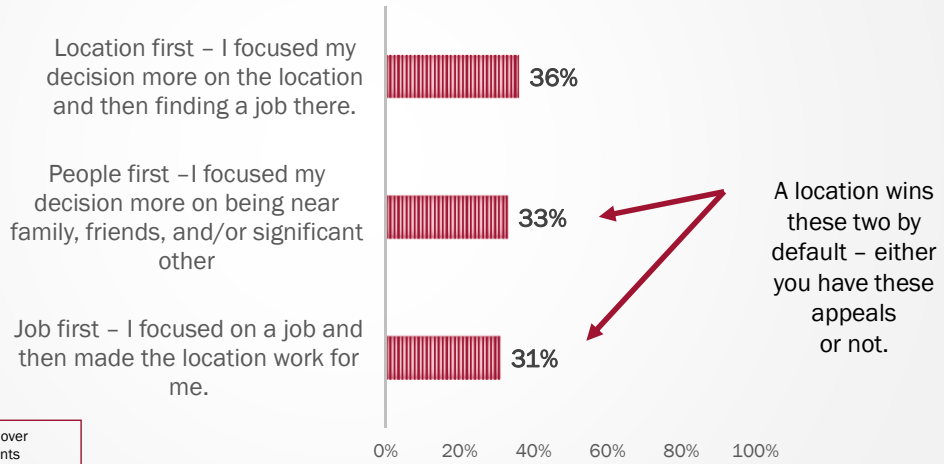


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OIPI National Movers Study

RECENT Movers are Evenly Split when Asked to Identify the First Factor they Considered when Deciding Where to Move

What comes first?



- Recent Mover respondents
- n = 300

Q36. Which of these describes you best when deciding on where to move?



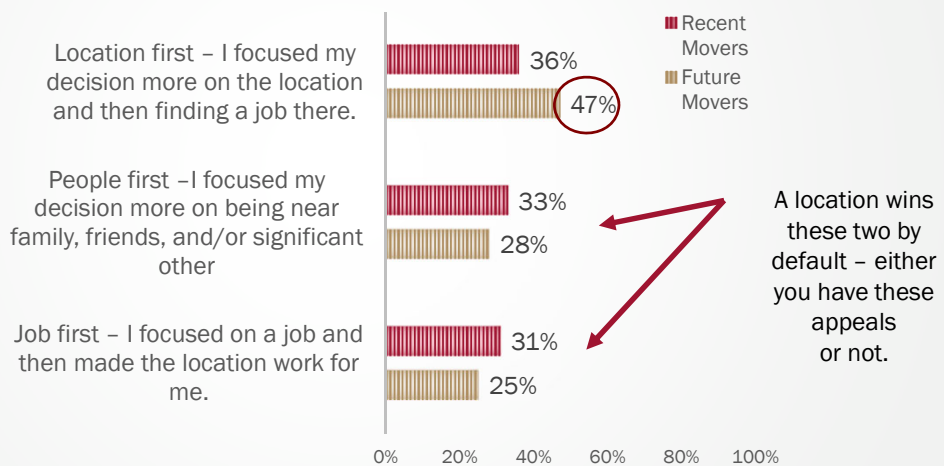
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OIPI National Movers Study

FUTURE Movers are More Likely to Say “Location” is the First Factor they Consider when Thinking about Moving

What comes first?



- Recent Mover respondents
- n = 300
- Future Mover respondents
- n = 300

Q36. Which of these describes you best when deciding on where to move?



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IMPLICATION FOR ENVISION 2020

Envision 2020 should include or identify ways to advance the region's lifestyle offerings and promote available jobs.

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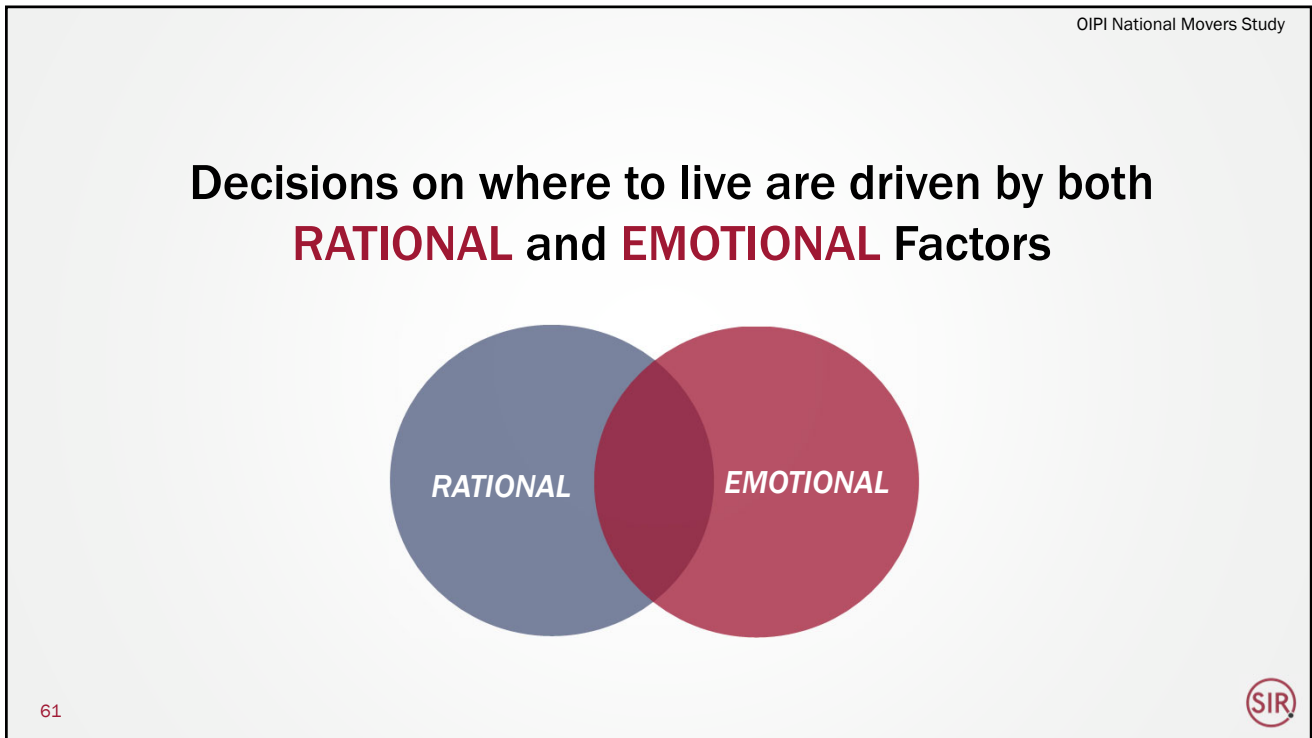
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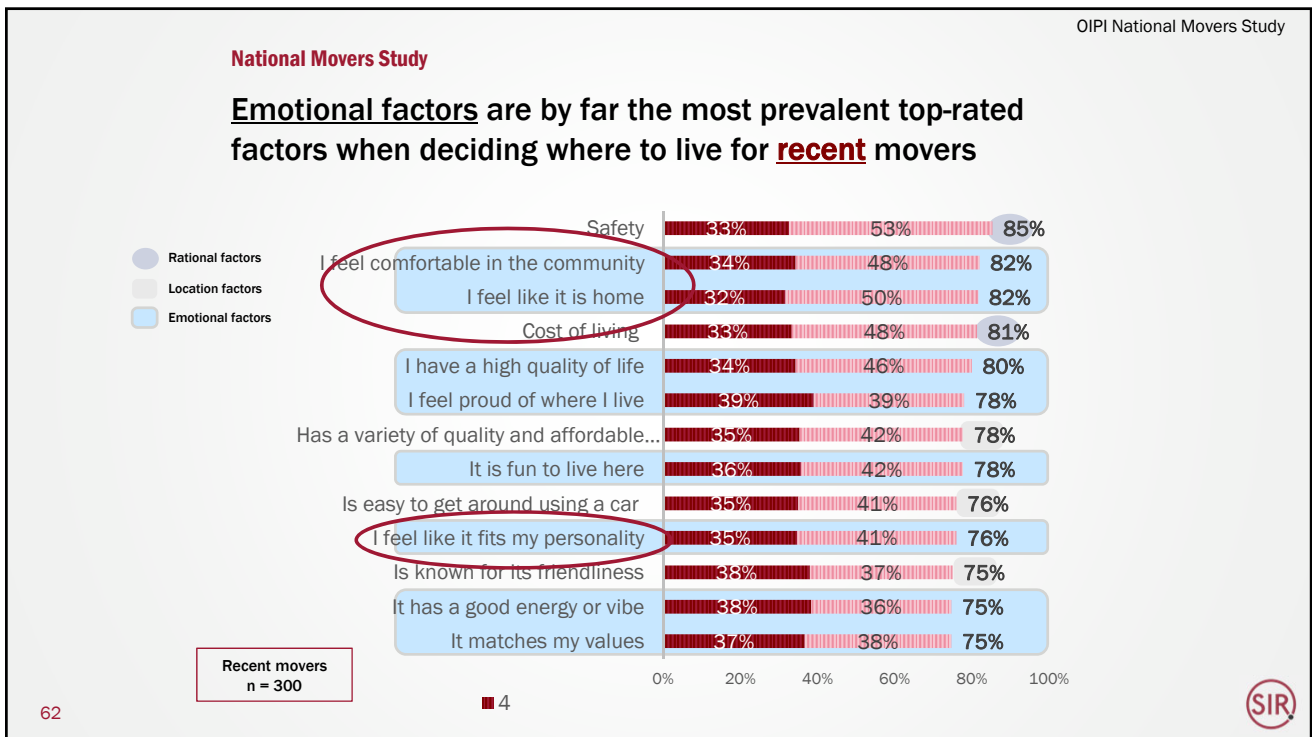
4 Emotional Considerations Drive the Appeal of Places to Live More than Rational Considerations.

SIR

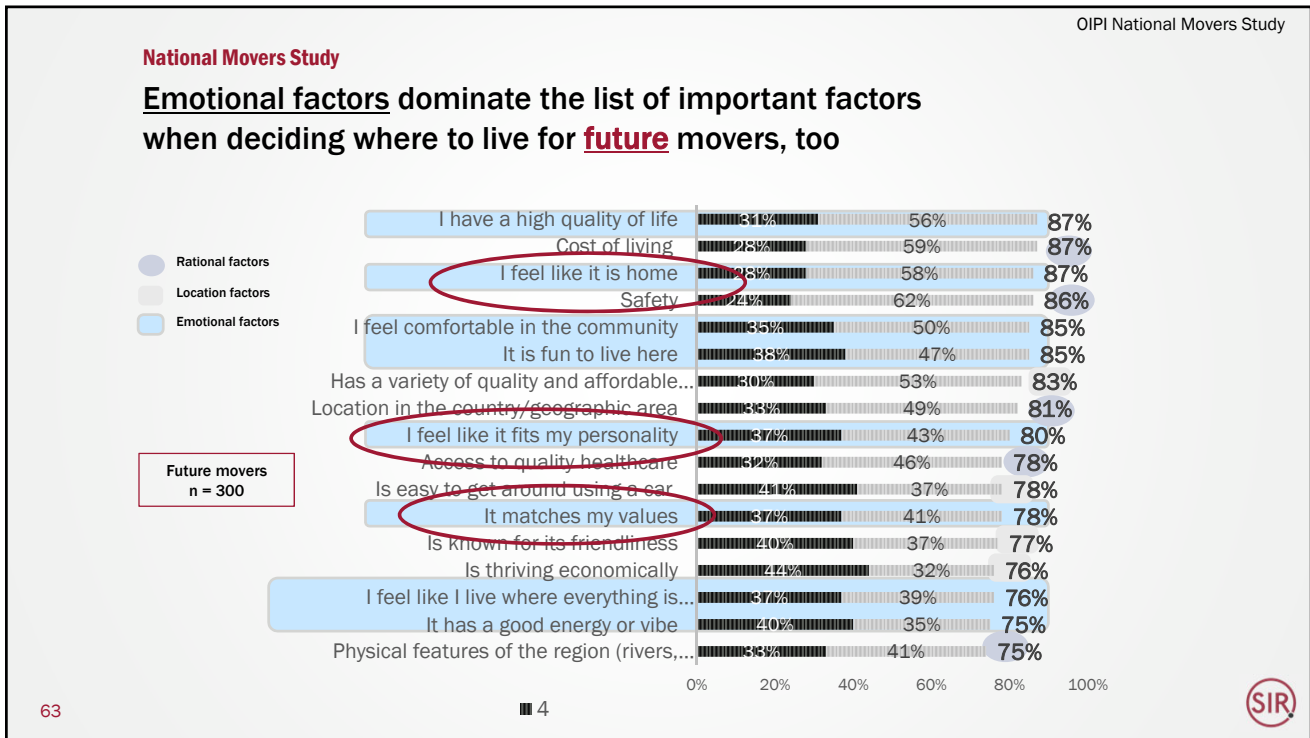
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IMPLICATION FOR ENVISION 2020

Envision 2020 should identify and advance the unique emotional experience or emotional benefits of living in Hampton Roads.

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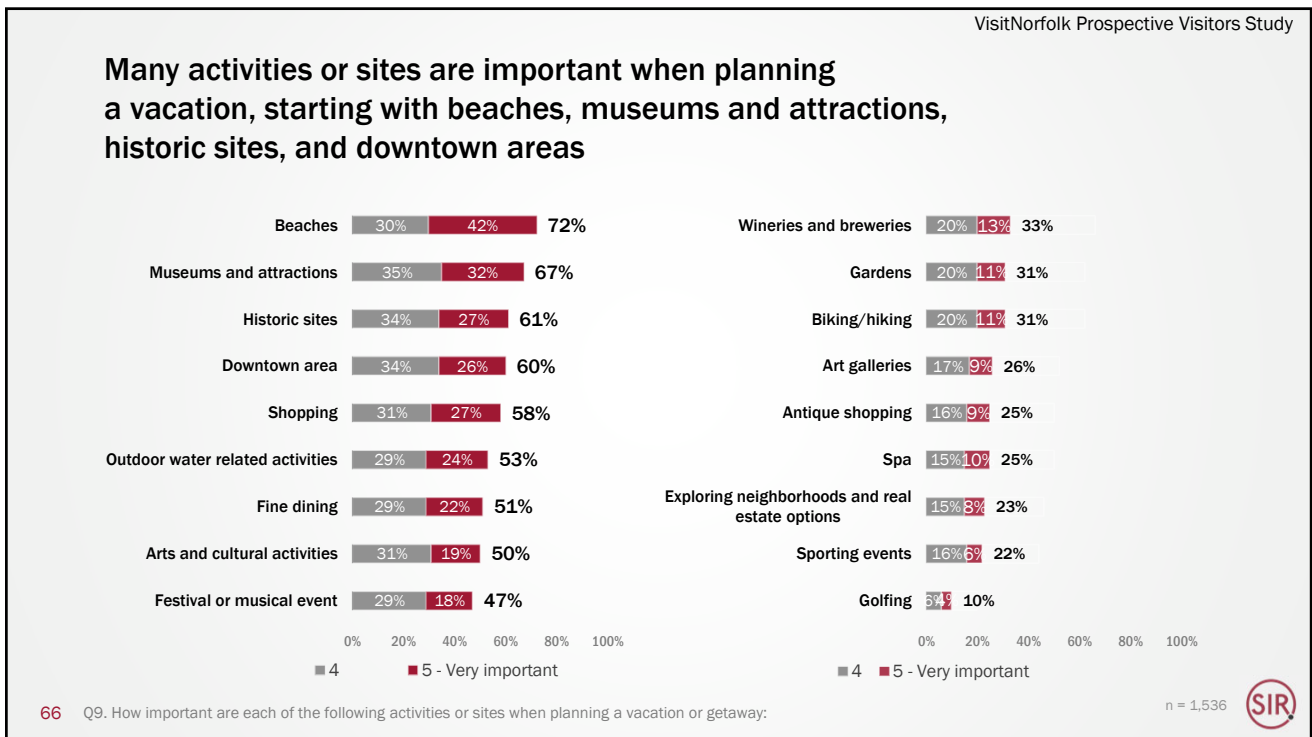
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Core Features with Emotional and Rational Perceived Benefits Drive the Appeal of Places to Visit.



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VisitNorfolk Prospective Visitors Study

What is important in vacation expectations for activities or sites slightly varies by generation

Millennials rate almost all expectations higher, and the two younger generations prefer beaches, museums and attractions, downtown area, shopping, outdoor water activities, wineries/breweries, biking/hiking, spa, exploring neighborhoods and real estate options, and sporting events more than Boomers/Silent Generation.

Top Two Box Scores

ATTRIBUTE	MILLENNIALS	GEN X	BOOMERS/SILENT
Beaches	77%	73%	64%
Museums and attractions	69%	69%	62%
Historic sites	58%	61%	68%
Downtown area	70%	59%	45%
Shopping	62%	61%	47%
Outdoor water related activities	60%	58%	35%
Fine dining	54%	51%	47%
Arts and cultural activities	54%	48%	46%
Festival or musical event	50%	46%	41%
Wineries and breweries	38%	32%	26%
Gardens	30%	31%	34%
Biking/hiking	37%	32%	20%
Art galleries	28%	23%	24%
Antique shopping	25%	24%	24%
Spa	31%	29%	13%
Exploring neighborhoods and real estate options	26%	25%	15%
Sporting events	26%	22%	14%
Golfing	13%	8%	7%

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VisitNorfolk Prospective Visitors Study

Rational Benefits: Being safe, fun, and relaxing are the top three most important attributes in a vacation or getaway



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Q10. The following is a list of attributes that can characterize or be used to describe a vacation or getaway in general. How important is each of the following attributes to you:

n = 1,536



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VisitNorfolk Prospective Visitors Study

With a few exceptions, the importance of various rational attributes does not vary significantly by generation

Top Two Box Scores

ATTRIBUTE	MILLENNIALS	GEN X	BOOMERS/SILENT
Is safe	88%	95%	96%
Is fun	92%	93%	86%
Is relaxing	86%	90%	88%
Has beautiful scenery	85%	88%	87%
An affordable destination	86%	87%	88%
Hassle free experience	82%	88%	88%
Offers a variety of activities	84%	85%	78%
Offers quality lodging options	80%	85%	81%
Variety of dining options	79%	81%	79%
Is easy to get to	76%	81%	81%
Variety of lodging options	70%	79%	83%
Offers quality dining options	73%	74%	71%
Authentic	67%	70%	68%
Has access to water	73%	71%	57%
Offers outdoor recreation options	65%	68%	55%
Embraces culture	66%	64%	60%
Is family-friendly	62%	73%	54%
Has entertainment and nightlife	68%	56%	44%
Has great shopping opportunities	60%	60%	49%
Has historical significance	49%	55%	62%

Younger generational preferences over older generational preferences

Older generational preferences over younger generational preferences

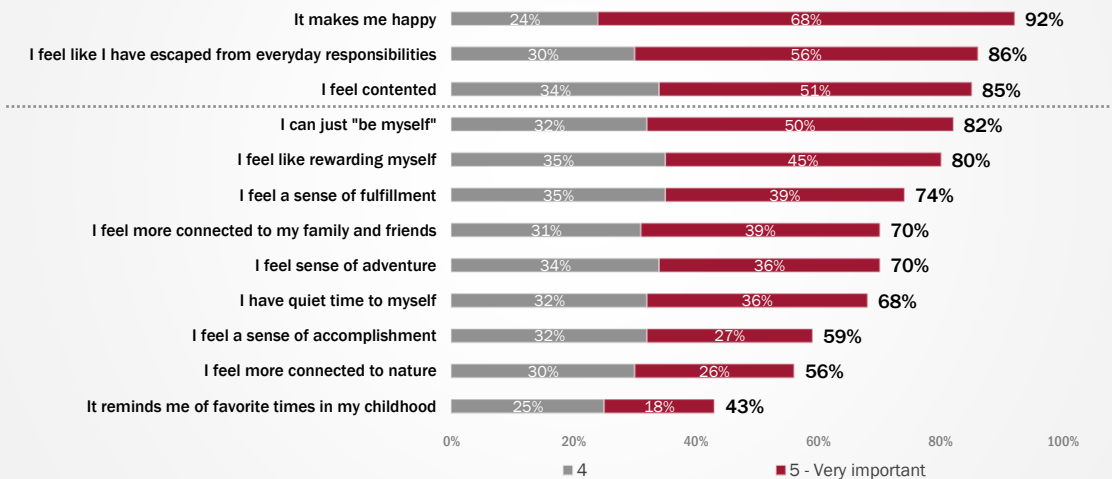
69



69

VisitNorfolk Prospective Visitors Study

Emotional Benefits: Respondents say it's most important for a vacation to make them feel happy, to have escaped from everyday responsibilities, and feel contented



70

Q11. The following is a list of attributes that can characterize or be used to describe how a vacation or getaway might make you feel. Please rate how important each of the following attributes to you:

n = 1,536



70

VisitNorfolk Prospective Visitors Study

With a few exceptions, the importance of various emotional attributes does not vary significantly by generation

ATTRIBUTE	Top Two Box Scores		
	MILLENNIALS	GEN X	BOOMERS/SILENT
It makes me happy	90%	95%	92%
I feel like I have escaped from everyday responsibilities	85%	90%	83%
I feel contented	82%	86%	88%
I can just be "myself"	80%	82%	84%
I feel like rewarding myself	82%	83%	75%
I feel a sense of fulfillment	74%	79%	68%
I feel more connected to my family and friends	71%	77%	60%
I feel a sense of adventure	77%	70%	59%
I have quiet time to myself	65%	69%	69%
I feel a sense of accomplishment	63%	59%	54%
I feel more connected to nature	56%	58%	56%
It reminds me of favorite times in my childhood	48%	44%	34%

Younger generational preferences over older generational preferences



71



71

IMPLICATION FOR ENVISION 2020

Envision 2020 should help the region's tourism industry develop messaging based on audience needs and Hampton Roads' ability to deliver on these needs in ways that differentiate the region from peer cities/regions.

72




72

6

Today, Access to Talent
Drives the Appeal
of Places to
Locate a Company.

73




73

SIR Institute for Tomorrow

***“Location decisions today start —
and end — with, ‘do they have
the people we want?’”***

- Site Selection Consultant

74



74

“Companies expanding or relocating know that 85 percent or more of their workers will come from the population already in place.”

- Site Selection Consultant

75



75

“The future pipeline of workers will be the ultimate driving force of all relocation decisions tomorrow.”

- Site Selection Consultant

76



76

HREDA Hampton Roads Perception Study

For Business Leaders Today, Perceptions Around Talent Pipeline for Today and Tomorrow Drive Locational Appeal

Business climate (e.g. economic policy, stability)	41%
Quality of life (e.g. work-life balance, affordability)	19%
Access to experienced workforce	11%
Infrastructure (e.g airports, freeways)	10%
Access to young workforce	7%
Higher education (e.g. colleges)	5%
Other (please specify)	3%
Education (e.g K-12 schools)	2%
Civic pride (e.g community involvement)	2%

Talent Pipeline-related

Q: Which of the below do you feel is MOST important when considering a location to conduct business?

77



77

IMPLICATION FOR ENVISION 2020

Envision 2020 should help the new Alliance (Formerly HREDA) develop messaging based on audience needs and Hampton Roads' ability to deliver on these needs in ways that differentiate the region from peer cities/regions.

78




78

7

For those Who Visit Here and Personally Know the Area, Hampton Roads Delivers. (Norfolk Example)

79




79

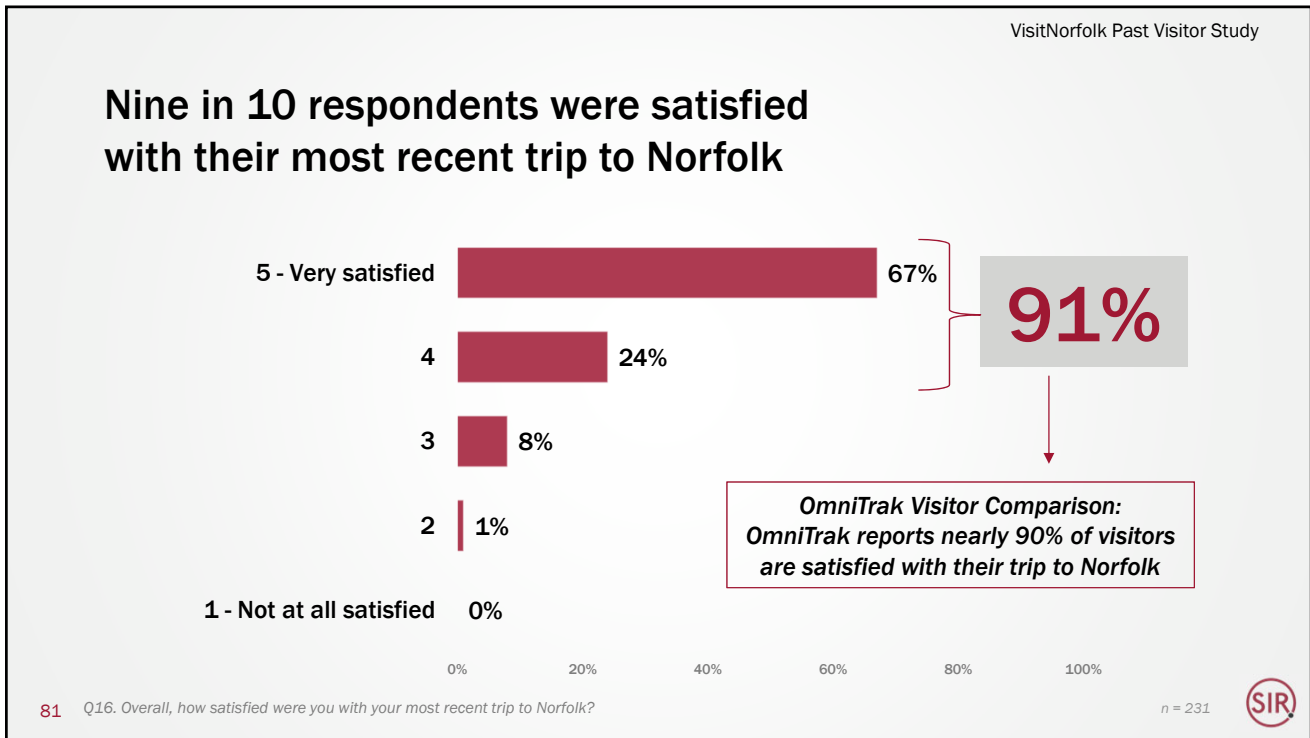
VisitNorfolk Past Visitor Study

**RATINGS OF
NORFOLK'S OVERALL
VISITOR EXPERIENCE IS
WORLD CLASS**

80



80



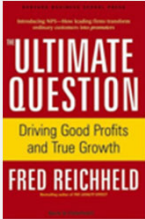
81



82

VisitNorfolk Past Visitor Study

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)

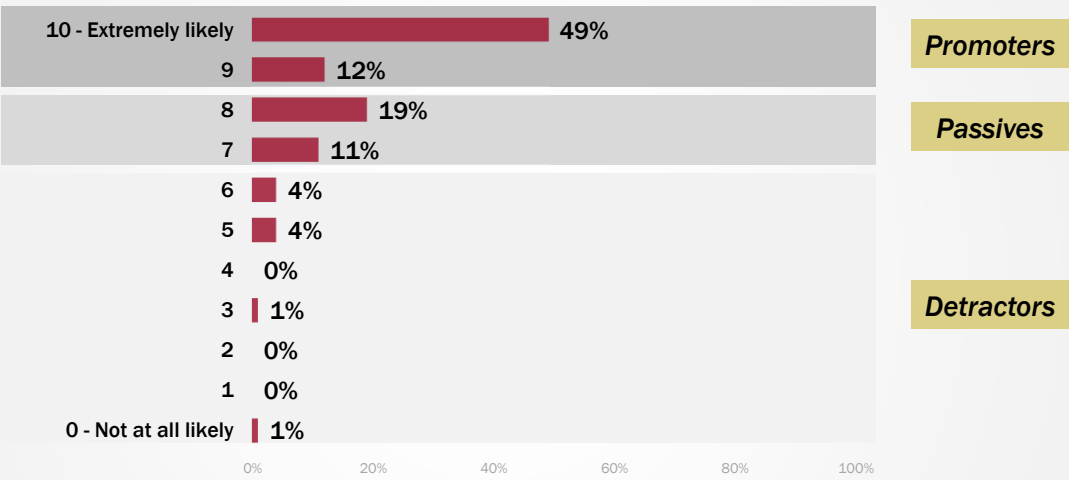
NET PROMOTER SCORE™

83 NPS is the trademark of Bain & Company. 


83

VisitNorfolk Past Visitor Study

The NET PROMOTER SCORE™ subtracts detractors from promoters



Rating	Percentage	Category
10 - Extremely likely	49%	Promoters
9	12%	
8	19%	Passives
7	11%	
6	4%	Detractors
5	4%	
4	0%	
3	1%	
2	0%	
1	0%	
0 - Not at all likely	1%	

84 Q18. How likely are you to recommend Norfolk as a place to visit to your friends and family? n = 231 

84

VisitNorfolk Past Visitor Study

Past visitors give likelihood of recommending Norfolk as a place to visit to friends or family members an overall NET PROMOTER SCORE™ of **51**

Percentage of Promoters
(Rating 9 or 10) 61%

Percentage of Detractors
(Rating 0 to 6) 10%

NET PROMOTER SCORE™ 51

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

NPS is the trademark of Bain & Company.
*Source: <https://www.lipmanhearn.com/the-ultimate-question-how-do-you-measure-up>

85



85

IMPLICATION FOR ENVISION 2020

Envision 2020 should obtain and package insights to help Hampton Roads' residents and businesses better appreciate what the region already offers.

86



86

8

Outside the Market, Awareness of Hampton Roads is Low.

87

87

SIR Model

Developing a Relationship with a Place

For people to visit, work in, live or even invest in a destination, they usually go through a process of discovery.

This starts with first being **aware** of the destination. This leads to becoming more **familiar** with a destination – what it really offers in terms of rational and emotional benefits. Increased familiarity lifts interest in **considering or trying** the destination. Trial leads to the **desired behavior** – a repeat, long-term relationship with the destination.

Awareness

Familiarity

Trial/
Consideration

Desired
behavior

Where is Hampton Roads on this model?

88

88

VisitNorfolk Prospective Visitors Study

What do you think of first
when you hear the name
HAMPTON ROADS?

89



89

VisitNorfolk Prospective Visitors Study

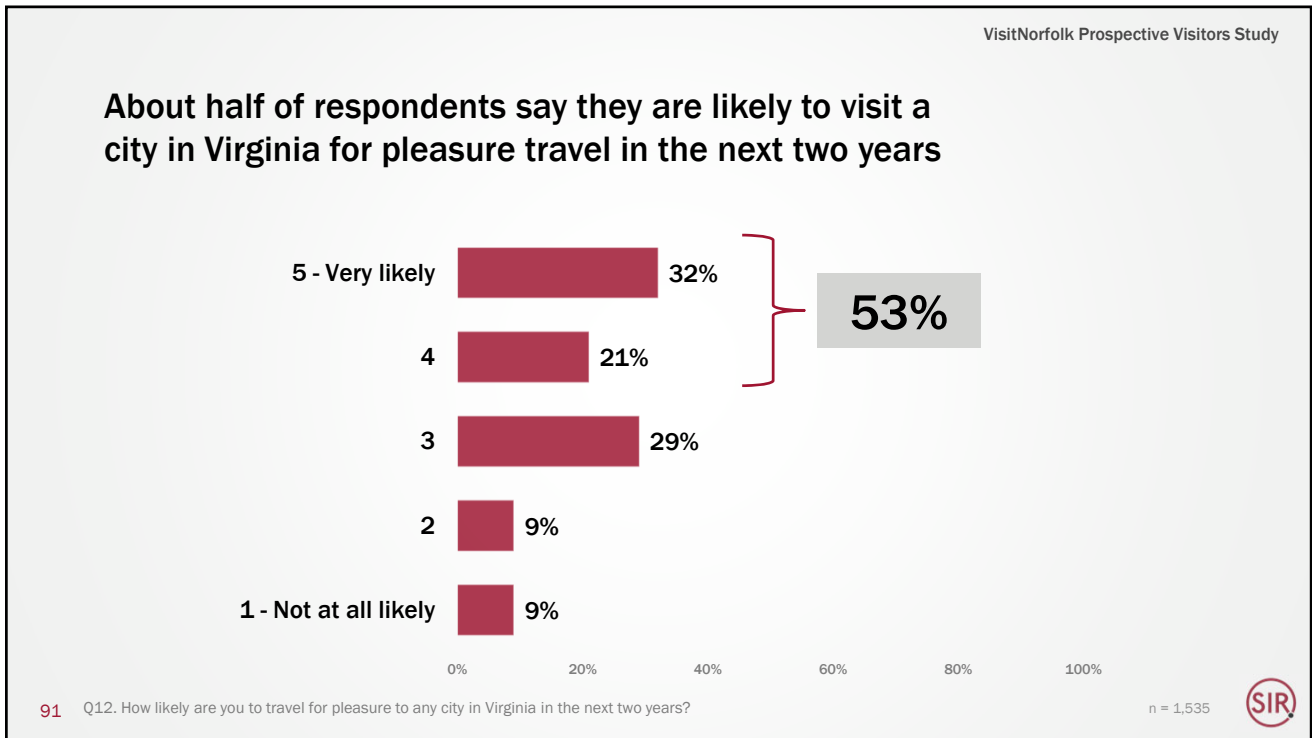
What do you think of first when you hear the name
HAMPTON ROADS?



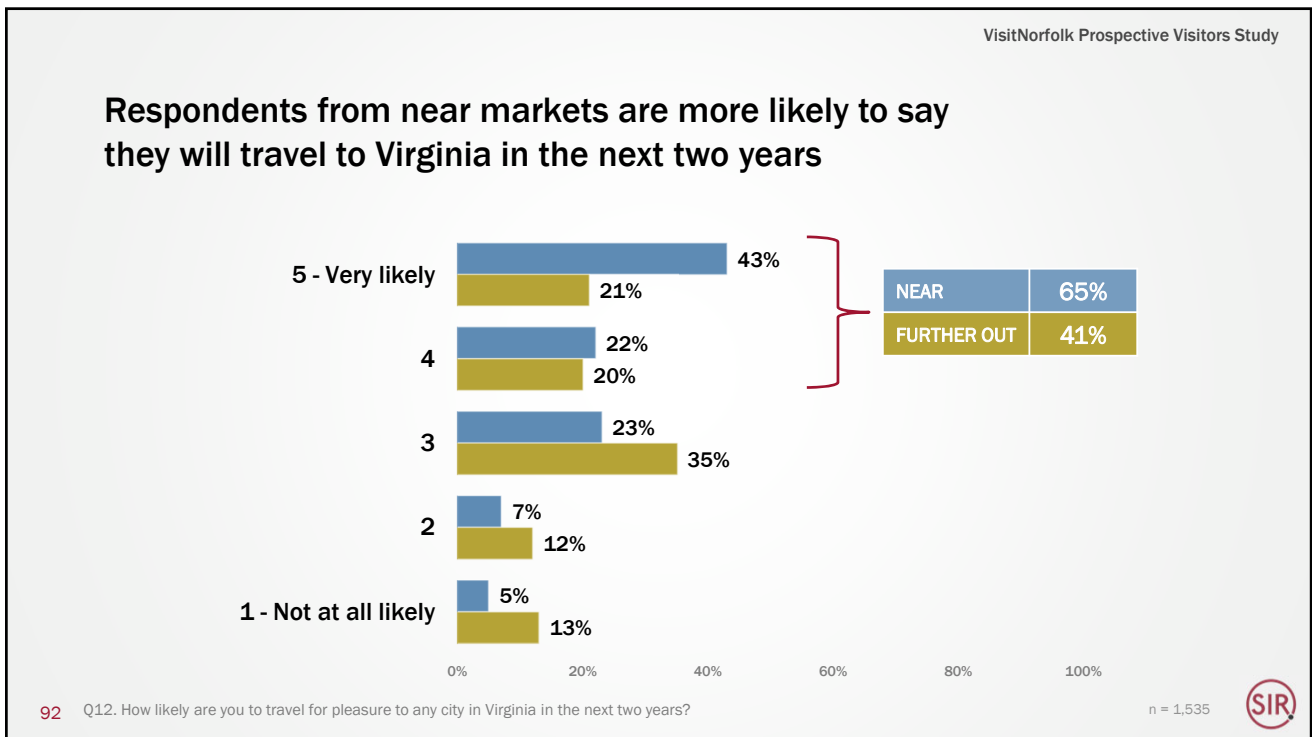
90



90



91



92

Unaided Awareness

Name a few cities that you are aware of in Virginia:

Only one in five respondents mentioned Norfolk

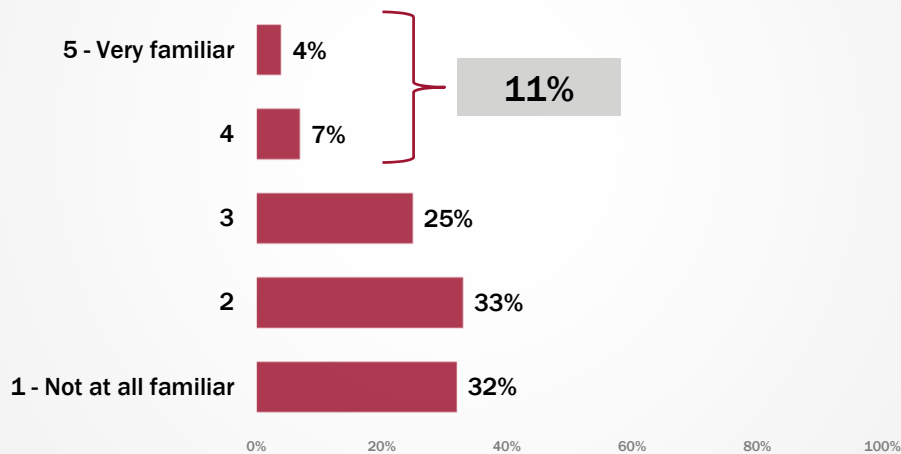


93



93

Few respondents are familiar with Norfolk

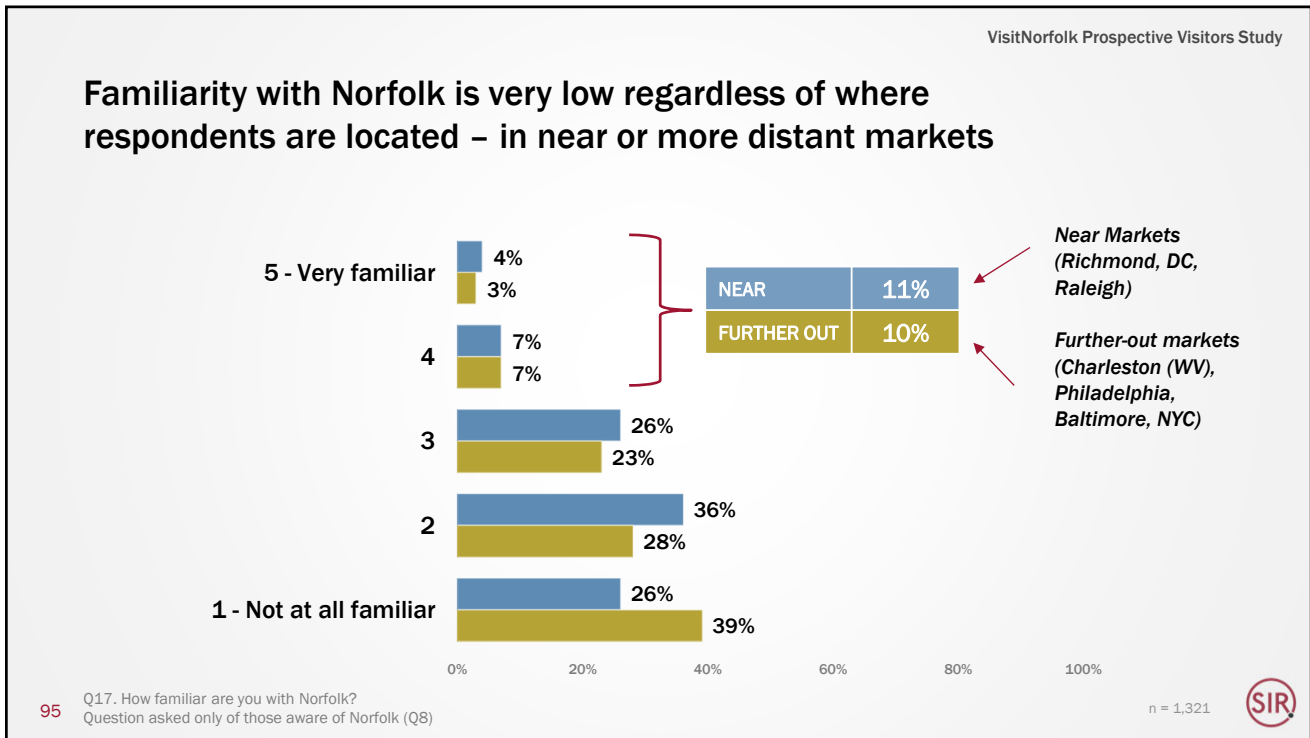


94 Q17. How familiar are you with Norfolk?
Question asked only of those aware of Norfolk (Q8)

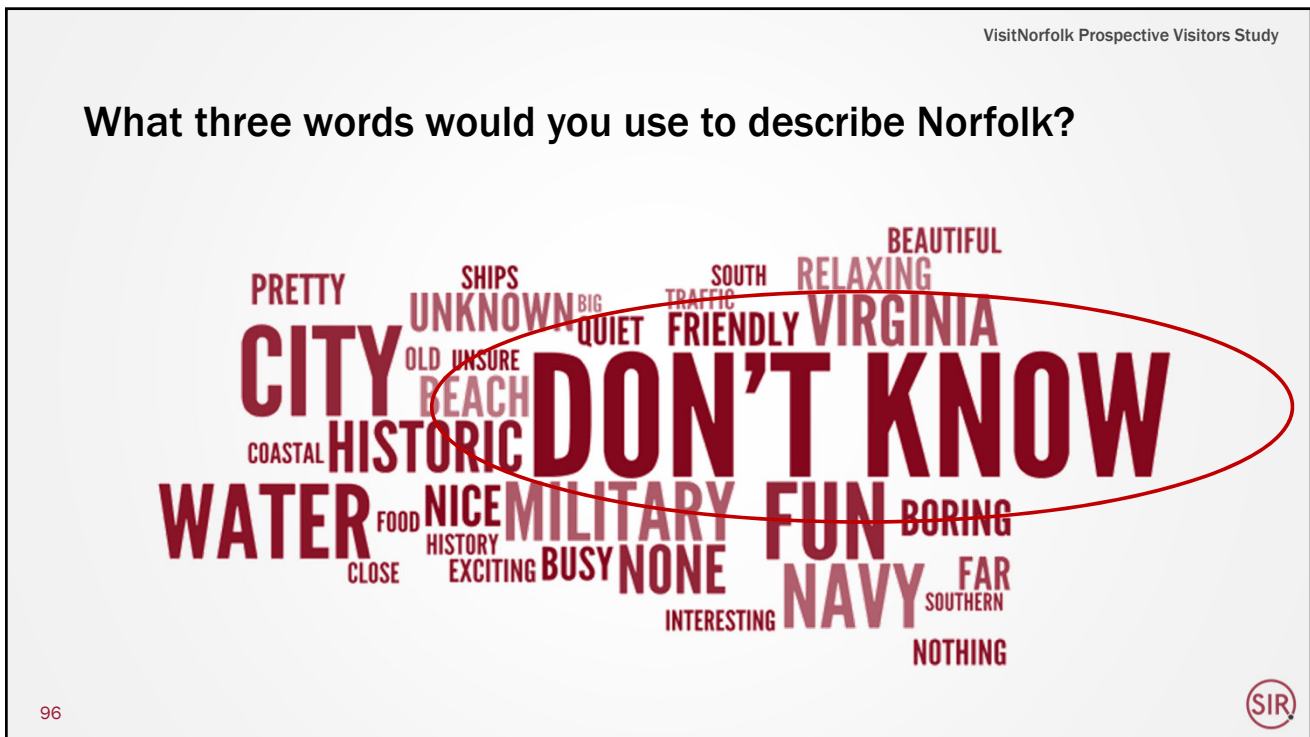
n = 1,321



94




95



96

IMPLICATION FOR ENVISION 2020

Envision 2020 should assess the region’s base level of awareness, familiarity, and favorability ratings and establish these scores as Key Performance Indicators (KPIs) and benchmarks to assess and report future improvement.

97 

97

9 For those Aware of Hampton Roads, the Region’s Reputation is Not Good or Bad. It’s Mostly Neutral, Though Perhaps “Stuck in Time.”

98 

98

VisitNorfolk Prospective Visitors Study

Three words to describe Norfolk MORE DISTANT Markets

CHARLESTON



BALTIMORE



PHILADELPHIA



NEW YORK CITY



101



101

VisitNorfolk Prospective Visitors Study

Prospective Visitors to
Norfolk are Not Aware of the
“New” Norfolk – The Recent
Transformation of
Downtown Norfolk

102



102

VisitNorfolk Prospective Visitors Study

Let's look more closely at some of the less mentioned words.

OLD
QUAINT
QUIET
BORING

103

103

VisitNorfolk Prospective Visitors Study

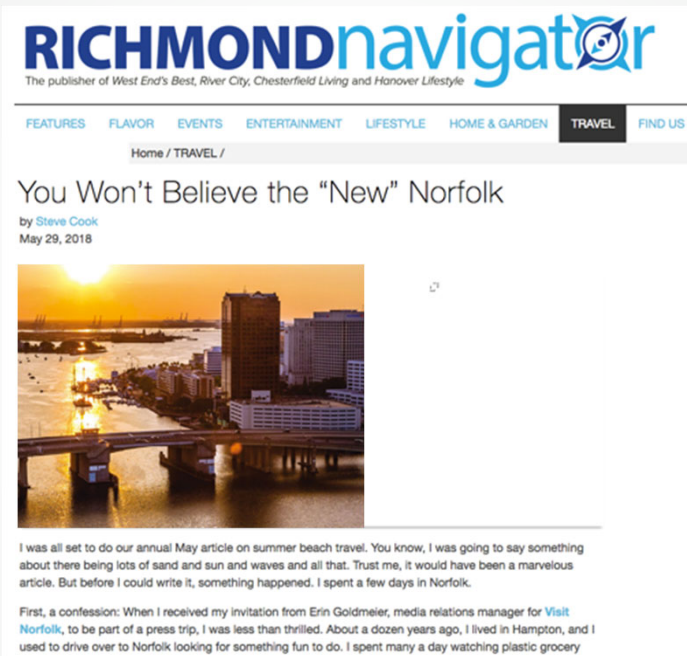
What words are missing from potential travelers' perceptions of Norfolk?

**FUN, EXCITING,
ENTERTAINING, DYNAMIC,
AUTHENTIC, DIVERSE,
MODERN, HIGH-ENERGY,
LIVELY, BEAUTIFUL SCENERY. . .**

104

104

VisitNorfolk Prospective Visitors Study



RICHMONDnavigator


The publisher of West End's Best, River City, Chesterfield Living and Hanover Lifestyle

FEATURES FLAVOR EVENTS ENTERTAINMENT LIFESTYLE HOME & GARDEN TRAVEL FIND US

Home / TRAVEL /


You Won't Believe the "New" Norfolk

by Steve Cook
May 29, 2018



I was all set to do our annual May article on summer beach travel. You know, I was going to say something about there being lots of sand and sun and waves and all that. Trust me, it would have been a marvelous article. But before I could write it, something happened. I spent a few days in Norfolk.

First, a confession: When I received my invitation from Erin Goldmeier, media relations manager for Visit Norfolk, to be part of a press trip, I was less than thrilled. About a dozen years ago, I lived in Hampton, and I used to drive over to Norfolk looking for something fun to do. I spent many a day watching plastic grocery



105

105


VisitNorfolk Prospective Visitors Study

“You Won’t Believe the New Norfolk”

*First a confession: When I received my invitation from VisitNorfolk, to be part of a press trip, I was less than thrilled. About a dozen years ago, I lived in Hampton and I used to drive over to Norfolk looking for something fun to do . . . **nearly deserted downtown streets** . . . In my opinion, Norfolk was a dud...I am dying to tell you about the new Norfolk, Virginia.*

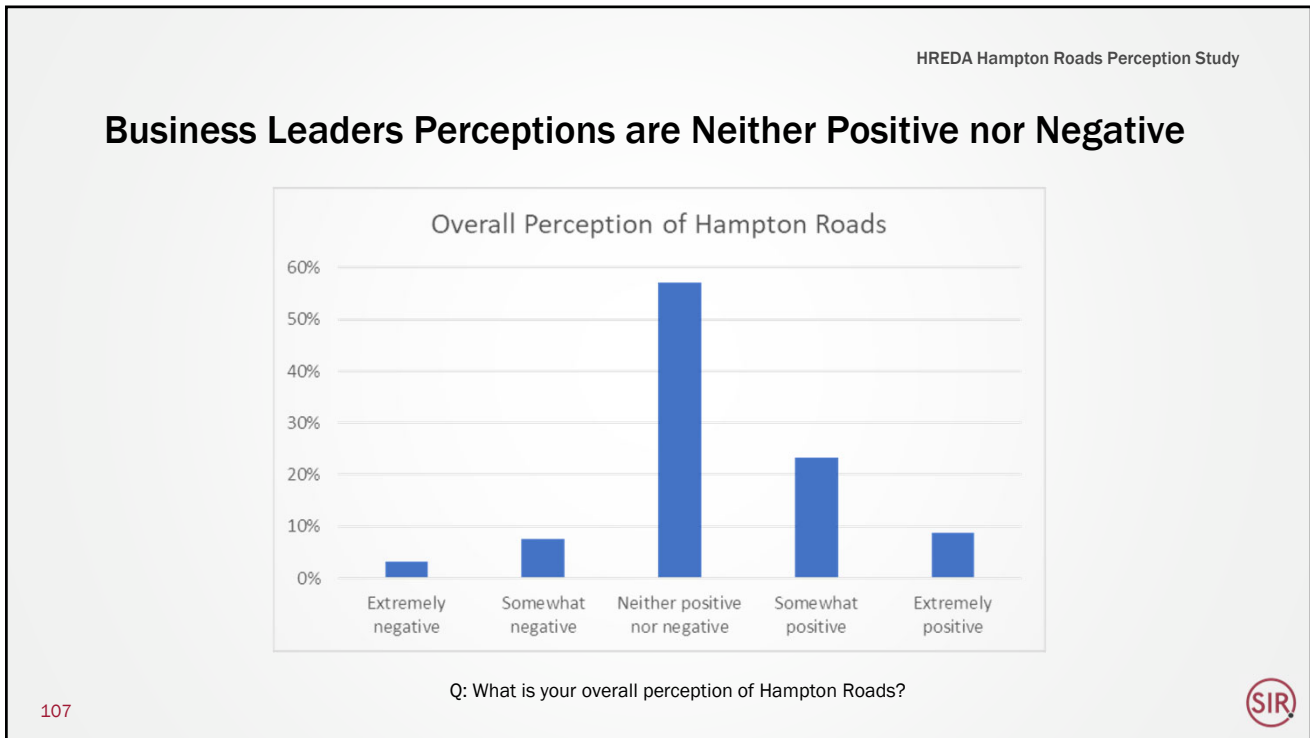
This is not the same city I remembered from 12 years ago. This is a city filled with vibrancy, energy, nightlife, and fun, anything that you’d want to find in a vacation destination.

Steve Cook, Travel Writer, May 2018



106

106



107

HREDA Hampton Roads Perception Study

Business Leaders' Perceptions of Hampton Roads may be Stuck in Time, Too.

"Hampton Roads is beautiful, but it is a small community."

"I don't think the economic climate is very good." *"A lot of crime"*

"It seems it would be too costly to go there. The population is too small with largely military dependent workforce."

"International and regional travel could be an issue with it not being in a metro area with a good airport"

108

Q8.4 Assuming your business needed to grow or relocate, how likely would you be to move or expand your business to Hampton Roads?
 Q8.5 You indicated that you are not very likely to move your business to Hampton Roads assuming it needed to grow or relocate. Please describe in the space below why that is.
 Q8.6 You indicated that you are likely to move your business to Hampton Roads assuming it needed to grow or relocate. Please describe in the space below why that is.

Q8.4 n=189
 Q8.5 n = 142
 Q8.6 n = 47

108

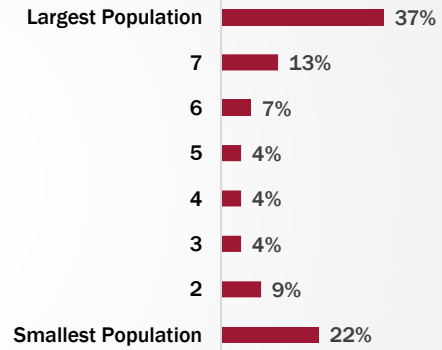
HREDA Hampton Roads Perception Study
United States Census Bureau Fact Finder

Almost two-thirds of the business decision makers perceive the population of Hampton Roads incorrectly

ACTUAL HIGHEST POPULATION

Ranking	Area	Population Estimate (2017)
1 st	Hampton Roads VA	1,761,328
2 nd	Jacksonville FL	867,313
3 rd	Nashville TN	654,187
4 th	Greenville SC	490,332
5 th	Raleigh NC	449,477
6 th	Charleston SC	387,847
7 th	Richmond VA	220,892
8 th	Savannah GA	145,094

BUSINESS DECISION MAKERS PERCEPTION



109 Q2.7 - Now, please rank each area from smallest (1) to largest (8) in terms of population. Again, please take your best guess if you are unsure.

n = 315



109

IMPLICATION FOR ENVISION 2020

Envision 2020 should identify the leading misperceptions that must be overcome to drive the region's reputation forward.


110



110

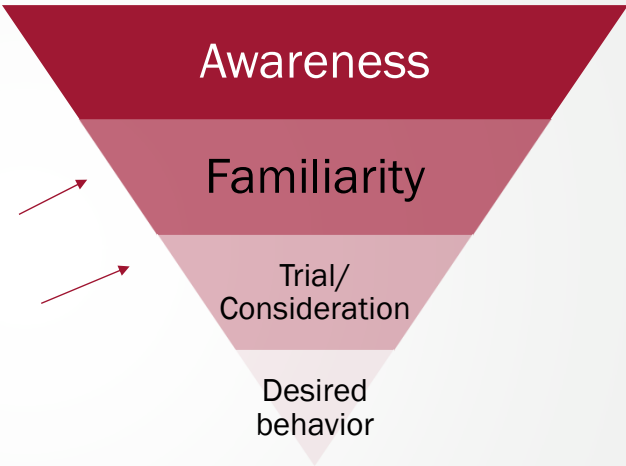
10 Increasing Familiarity (Positive Perceptions) of a Place Lifts Appeal as a Potential Place to Vacation or Do Business.

111



111

Greater Familiarity is Correlated to Greater Appeal of Visiting.




Awareness

Familiarity

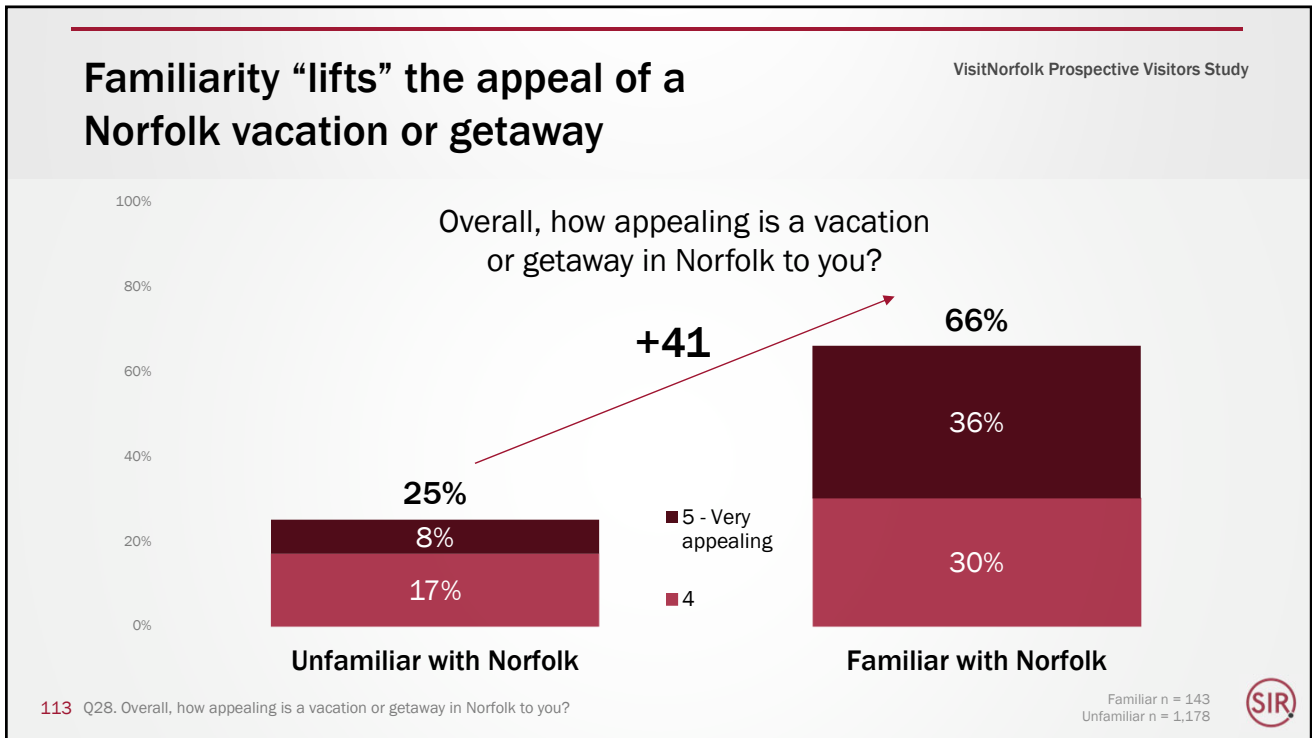
Trial/
Consideration

Desired
behavior

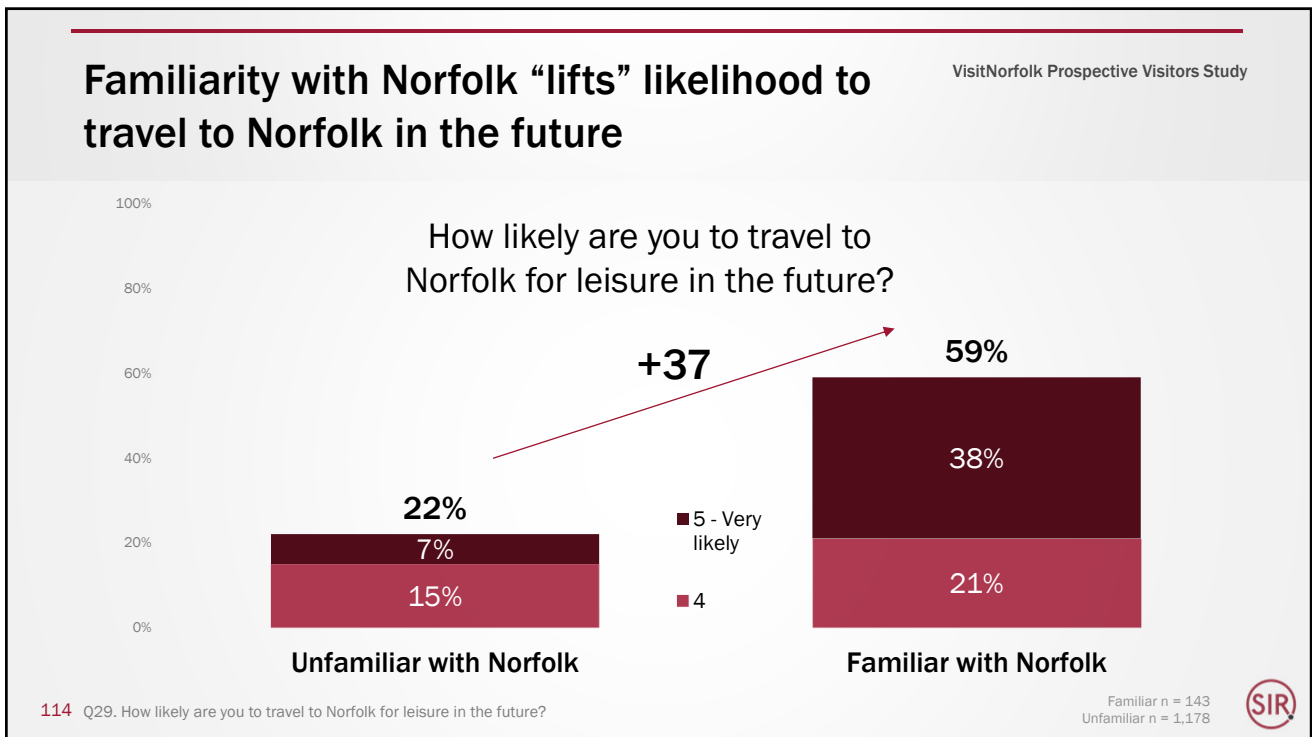
112



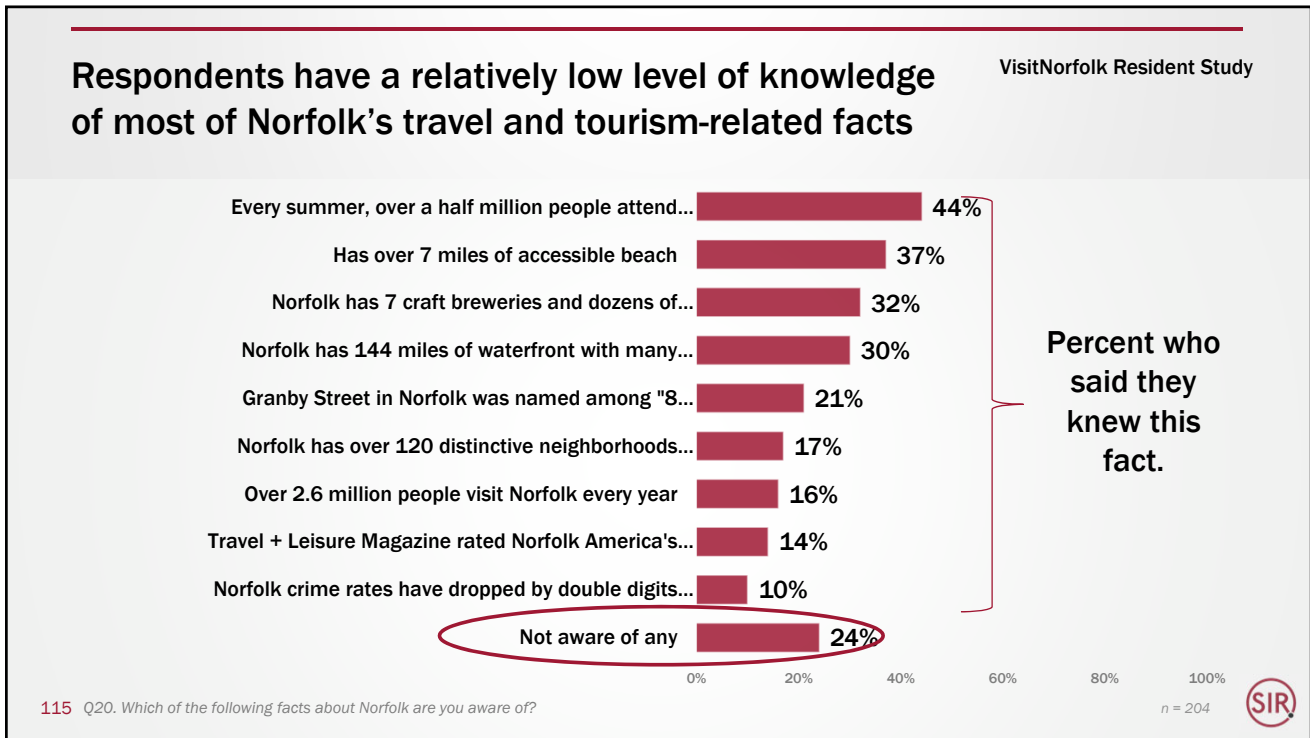
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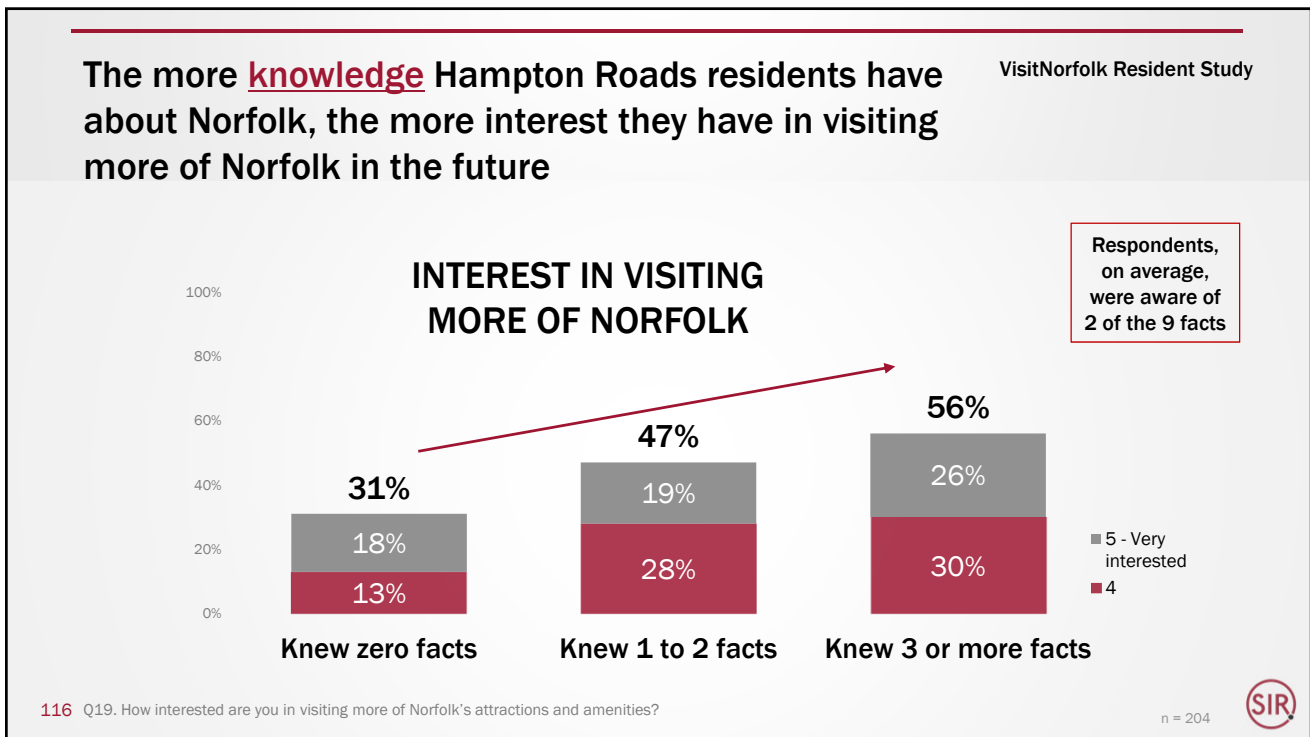
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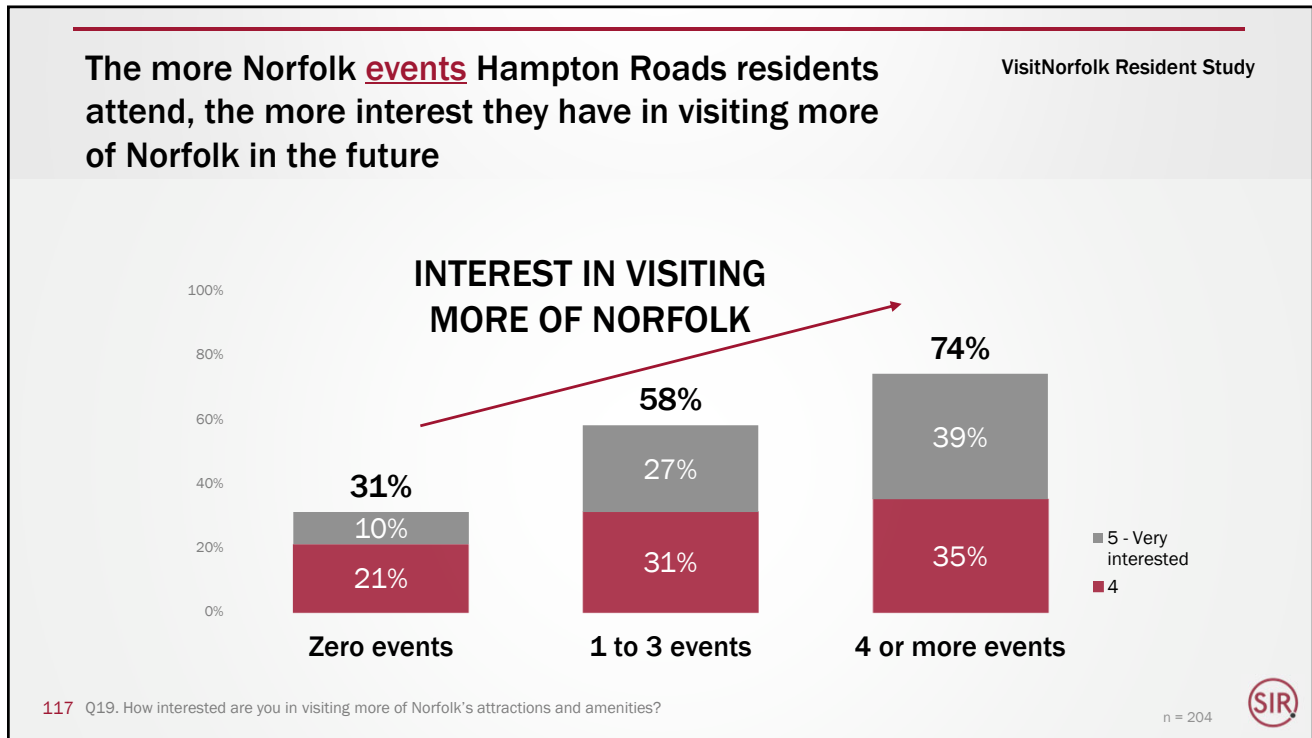
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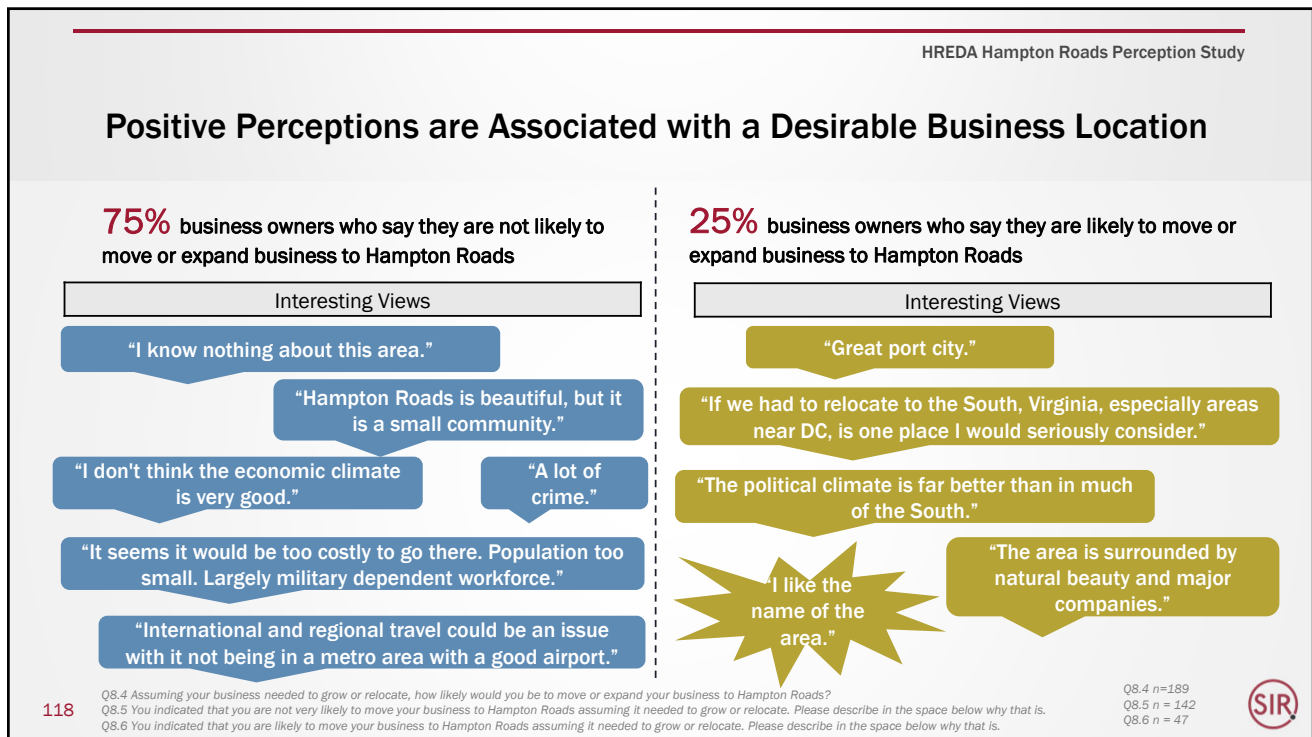
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116



117




118

IMPLICATION FOR ENVISION 2020

Envision 2020 should make the return on investment case for ramping up intentional place marketing efforts.

119



119

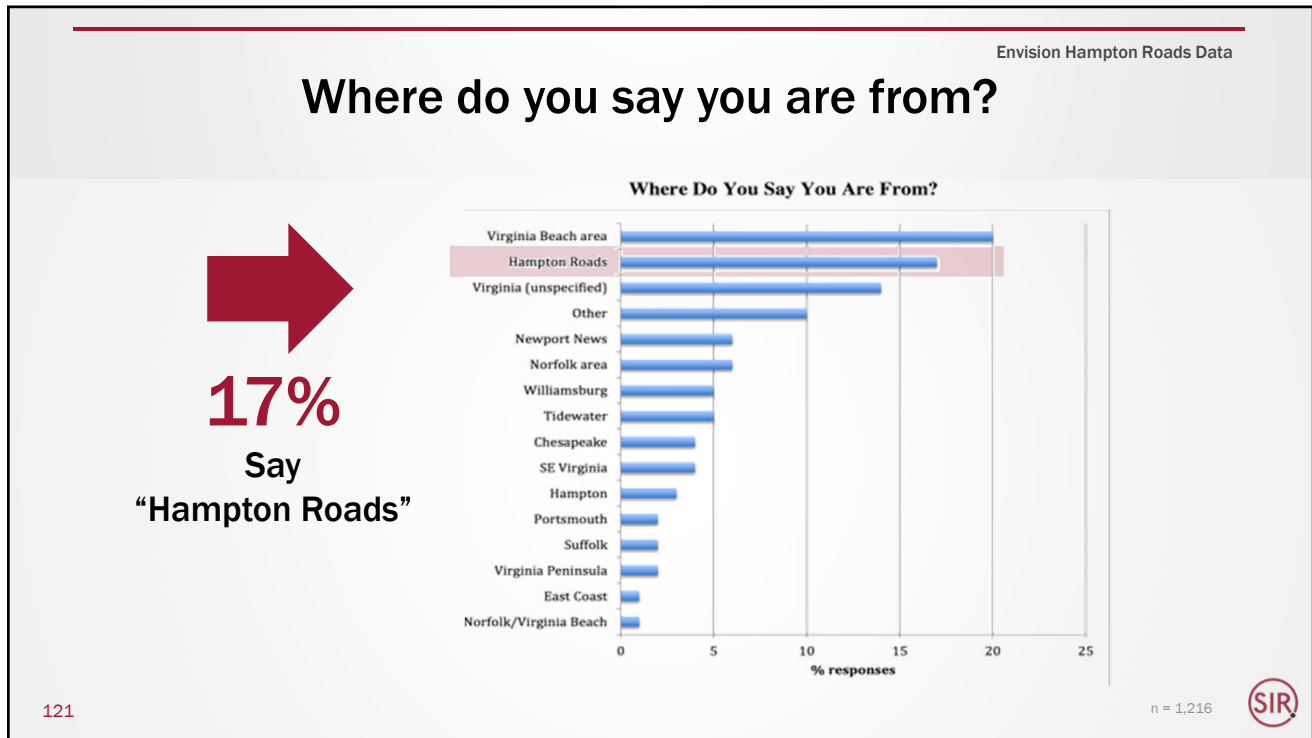
11

Among Local Residents, Hampton Roads as a Name Has Some Positive Brand Equity.

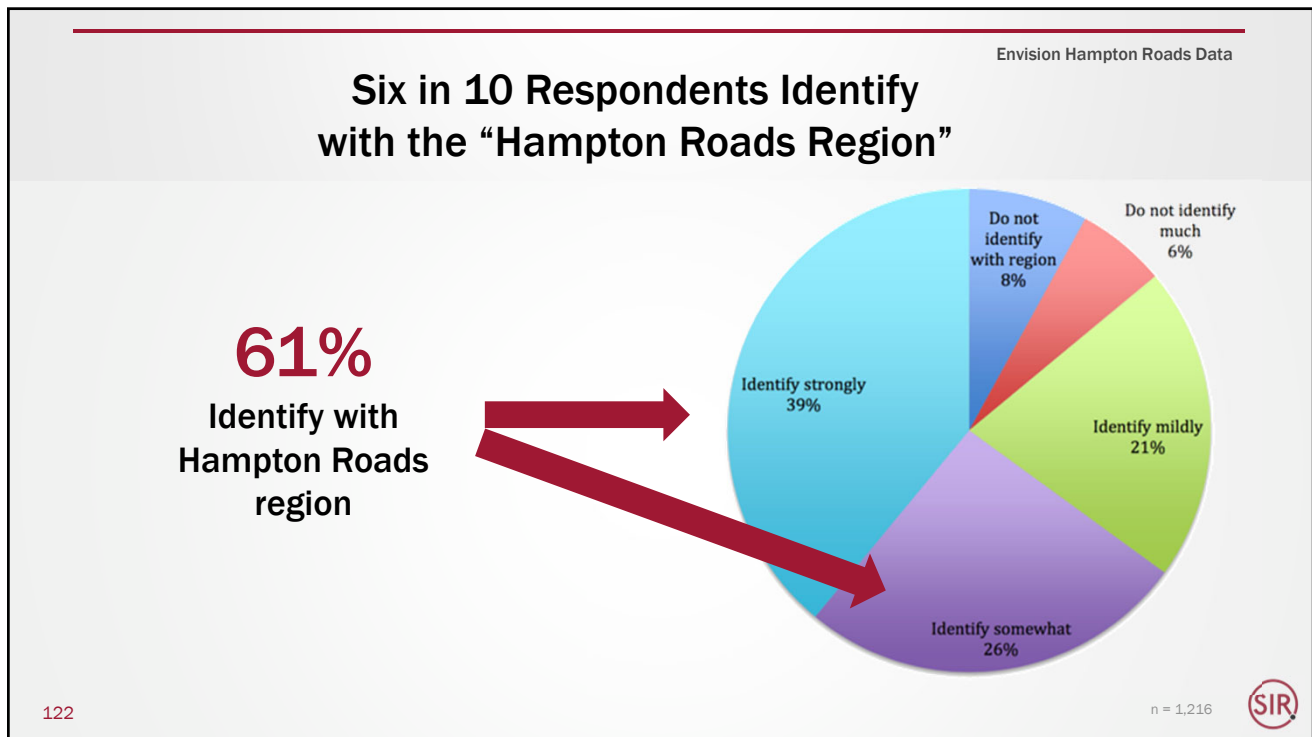
120



120




121



122

IMPLICATION FOR ENVISION 2020

Envision 2020 should identify both the negative and positive aspects of the Hampton Roads name to decide if a new name would be the best course of action.

123 


123

12 Hampton Roads' Residents and Visitors Can Easily Identify Differentiating Place Values and Symbology

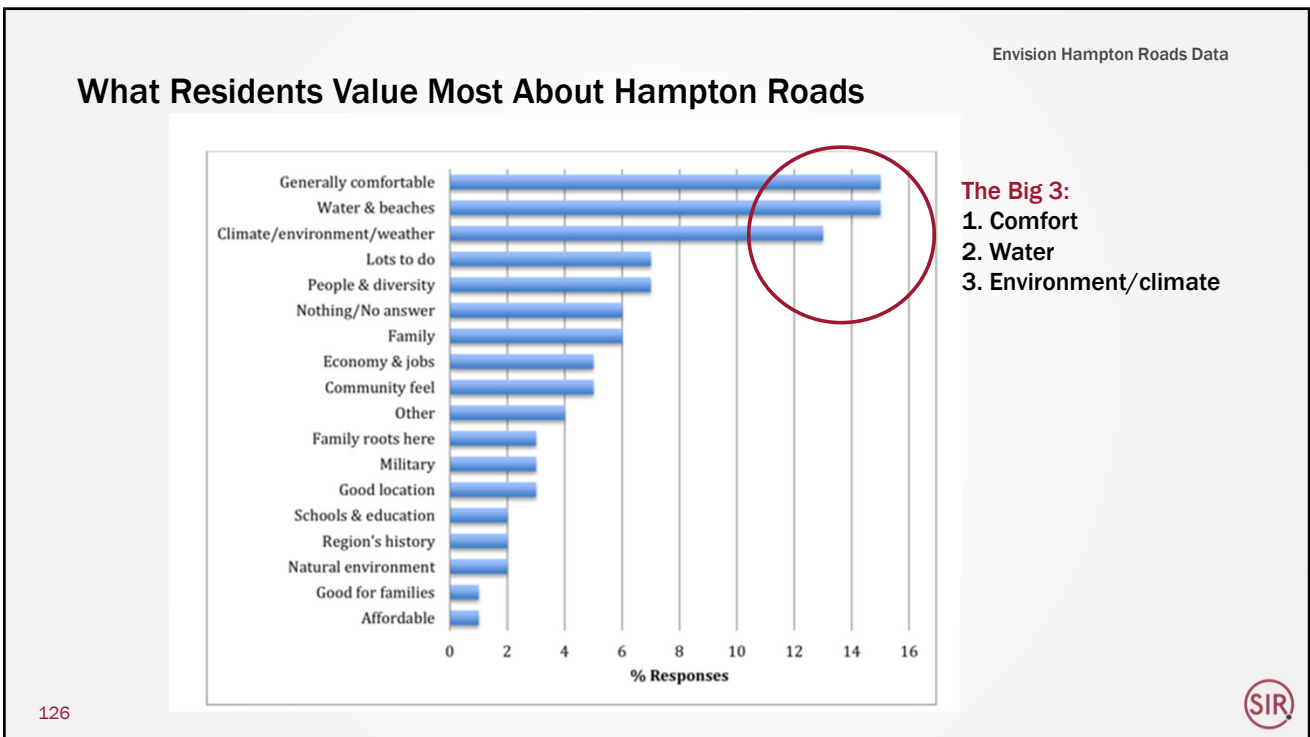
124 

124

Shared Values Regarding the Hampton Roads Region (Potential Foundational Components for Hampton Roads' Unique Place Narrative)

125 

125



126

131

13 Residents can Rate their City/Region as a Place.

SIR

131

SIR Research

SIR PLACE SCORE

A Comparative Assessment of a City as a PLACE (to play, live, visit, work, and learn)

Intentional placemaking and place marketing are becoming common best practices among regions, cities, and towns across the world. This trend has several guiding tenets. First, cities are in competition with each other when it comes to attracting and retaining workforce talent. Second, through deliberate and intentional actions, regions, cities, and towns can improve as great places to play, live, visit, work, and learn. Third, efforts to make a location more appealing should never stop. Enlightened places are always improving. The challenge is to know where you stand and what areas need the most focus.

SIR answers this call through the SIR PLACE SCORE™. SIR's Placemaking "PLACE" score measures a "place's quality" across five key areas:

"PLACE" is an acronym that stands for:

- Play
- Live
- Adventure (visit)
- Careers (work)
- Education (learn)

Comparing your region's, city's, or town's place score to other localities offers insights into your current performance as a place and identifies areas that may benefit from more deliberate and intentional actions.

132

SIR

132

SIR Research

SIR's PLACE Score input questions

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

P

PLAY

Q25. Overall, how would you rate _____ as a region to **play** and enjoy recreation, pastimes, hobbies, etc.?*

L

LIVE

Q12. Overall, how do you feel about **living** in the _____ region?

A

ADVENTURE

Q19. Overall, how satisfied are you with the _____ region as a **destination for tourists and visitors**?*

C

CAREERS

Q17. Overall, how satisfied are you with the **employment opportunities** available to you in the _____ region?^

E

EDUCATION

Q42. Overall, how satisfied are you with the **educational opportunities** available to you in the _____ region? This includes formal education options, as well as informal opportunities to learn and grow.^

133 Notes: *Includes "Don't know" option; ^Includes "Don't know" and "Not interested" options

133

SIR Research

**RVA's
PLACE
score**

68%

Out of a potential score of 100%

← ● 54% ● ● ● **RVA** ● ● 80% →

134

134

SIR Research

Looking at PLACE elements allows you to see how your city or region performs against others in specific PLACE areas

MEASURE	FORT WORTH	CITY X	MINNEAPOLIS	NASHVILLE	COLUMBUS	Richmond
PLAY	76%	57%	86%	80%	71%	70%
LIVE	85%	54%	82%	73%	77%	72%
ADVENTURE	71%	60%	74%	80%	58%	70%
CAREERS	75%	43%	78%	75%	81%	64%
EDUCATION	79%	58%	81%	73%	77%	57%
PLACE SCORE	77%	54%	80%	76%	73%	68%

 = Highest Score



135

135

IMPLICATION FOR ENVISION 2020

Envision 2020 should assess Hampton Roads' Place Score and compare it to other cities in SIR's research database.



136

136

14

Young Professionals* Have Clear Expectations on what they Seek in a Place.

**Millennials today and Gen Zs tomorrow*

137



137



ChamberRVA Senior Vice President Chrystal Neal said they used SIR's research to attract and retain more young professionals — and the strategy worked.
"The business community is thrilled," said Neal.

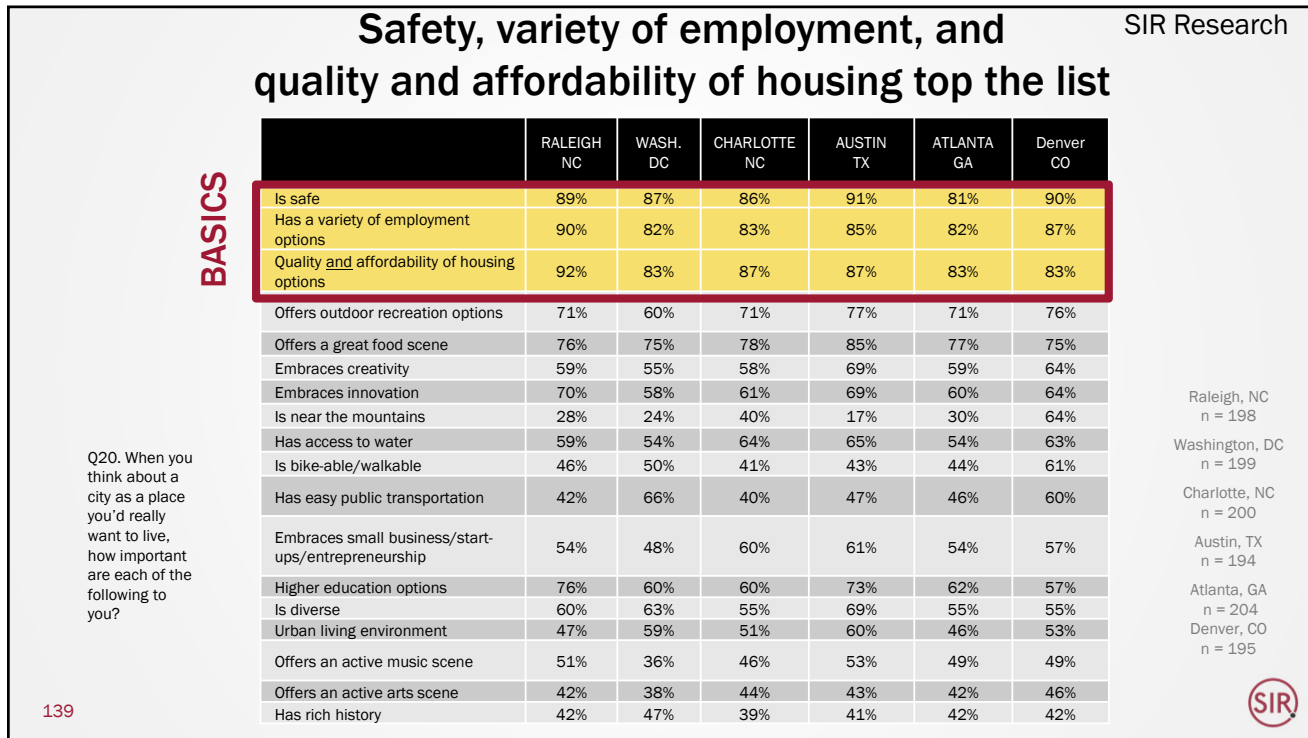


"we used SIR's research to attract and retain more young professionals — and the strategy worked."

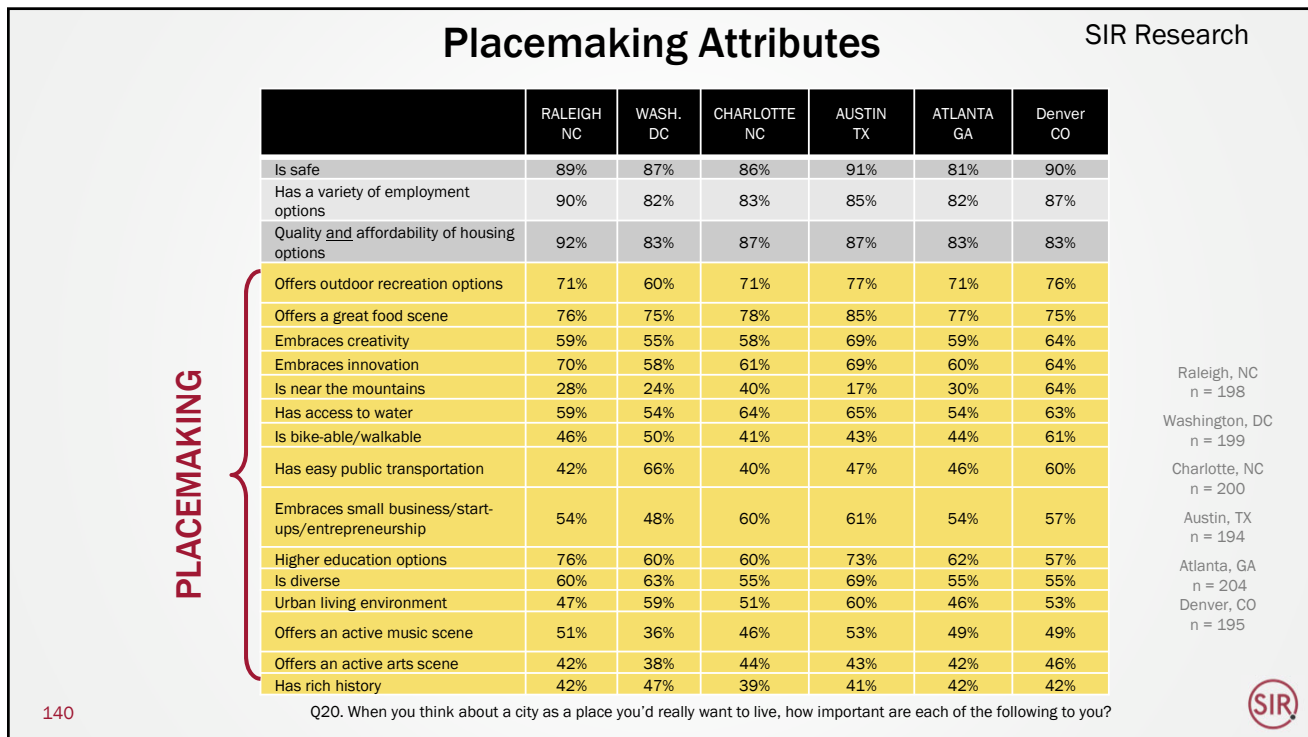
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138



139



140

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 the location – its performance.

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

Note: The following three slides present an example of a location's gap analysis scores and are used for illustrative purposes only.

141



141

GAP ANALYSIS: RATIONAL ATTRIBUTES

Among the most-important areas, those performing below expectations are safety, the public school system, housing options, and friendliness

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
Is safe	4.5	3.1	69%
Has quality, affordable housing options	4.3	3.4	79%
Is easy to get around using a car	4.2	3.8	90%
Offers outdoor recreation options	4.2	3.8	90%
Embraces creativity and innovation	4.2	3.7	88%
Embraces small business/start-ups/entrepreneurship	4.2	3.6	86%
Offers a great food scene	4.2	4.0	95%
Is known for its friendliness	4.2	3.3	79%
Is thriving economically	4.2	3.4	81%
Has a good public school system	4.2	3.1	74%
Is diverse	4.2	4.0	95%
Has access to water (e.g., river, lakes, ocean)	4.2	4.4	105%

100%
Perfect alignment

Below 80%
Below expectations

Above 100%
Above expectations

142 Note: "Don't know" responses were removed from this data set.

n = varies

142

SIR Research

GAP ANALYSIS: RATIONAL ATTRIBUTES (cont'd)

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
Has a variety of employment options	4.2	3.4	81%
Has neighborhoods where most of what you need is within 15 minutes	4.1	4.0	98%
Has exciting public festivals and events	4.1	3.9	95%
Has congestion-free commute routes	4.1	2.8	68%
Offers a great social scene	3.9	3.7	95%
Is bikeable/walkable	3.9	3.7	95%
Has interesting museums	3.9	3.8	97%
You can get around without a car - not car dependent	3.8	3.3	87%
Offers an active arts scene	3.8	3.7	97%
Offers an active music scene	3.8	3.7	97%
Has a culture of volunteering	3.8	3.5	92%
Has a rich history	3.7	4.1	111%
Has good private school options	3.4	3.6	106%

100%
Perfect alignment

Below 80%
Below expectations

Above 100%
Above expectations

143 Note: "Don't know" responses were removed from this dataset.

n = varies 

143

SIR Research

GAP ANALYSIS: EMOTIONAL ATTRIBUTES

Comfort in the community and a feeling of home are the emotional attributes performing below expectations for this city

ATTRIBUTE	IMPORTANCE AVERAGE	PERFORMANCE AVERAGE	GAP SCORE
I feel comfortable in the community	4.3	3.4	79%
I feel like it is home - where I belong	4.3	3.3	77%
I have a high quality of life	4.2	3.4	81%
I feel like I live where everything is within easy reach	4.2	3.7	88%
It is fun to live here	4.1	3.5	85%
It matches my values	4.1	3.4	83%
I feel proud of where I live	4.0	3.5	88%
I feel I am part of a community	4.0	3.2	80%
I feel like it fits my personality	4.0	3.3	83%
It has a good energy or vibe	4.0	3.3	83%
People of a variety of traditions and backgrounds are included in the community	4.0	3.8	95%
It is an exciting place to live	3.8	3.4	89%
I experience a sense of adventure	3.8	3.2	84%
I experience a sense of discovery	3.8	3.2	84%
I feel like it's a unique place to live	3.8	3.4	89%
I feel smart living here	3.7	3.2	86%
It is a cool / hip place to live	3.6	3.4	94%

100%
Perfect alignment

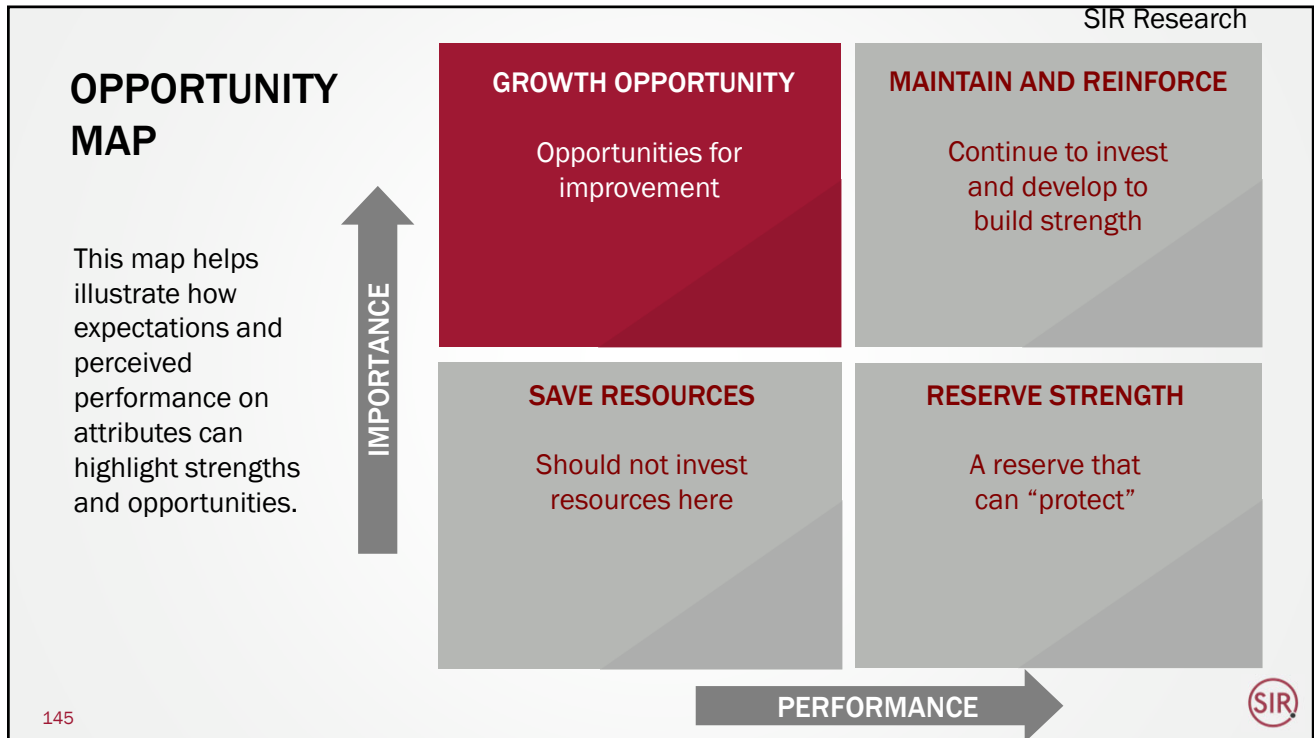
Below 80%
Below expectations

Above 100%
Above expectations

144 Note: "Don't know" responses were removed from this dataset.

n = varies 

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IMPLICATION FOR ENVISION 2020

Envision 2020 should create a strategy map on how to make Hampton Roads a more appealing place for young professionals.

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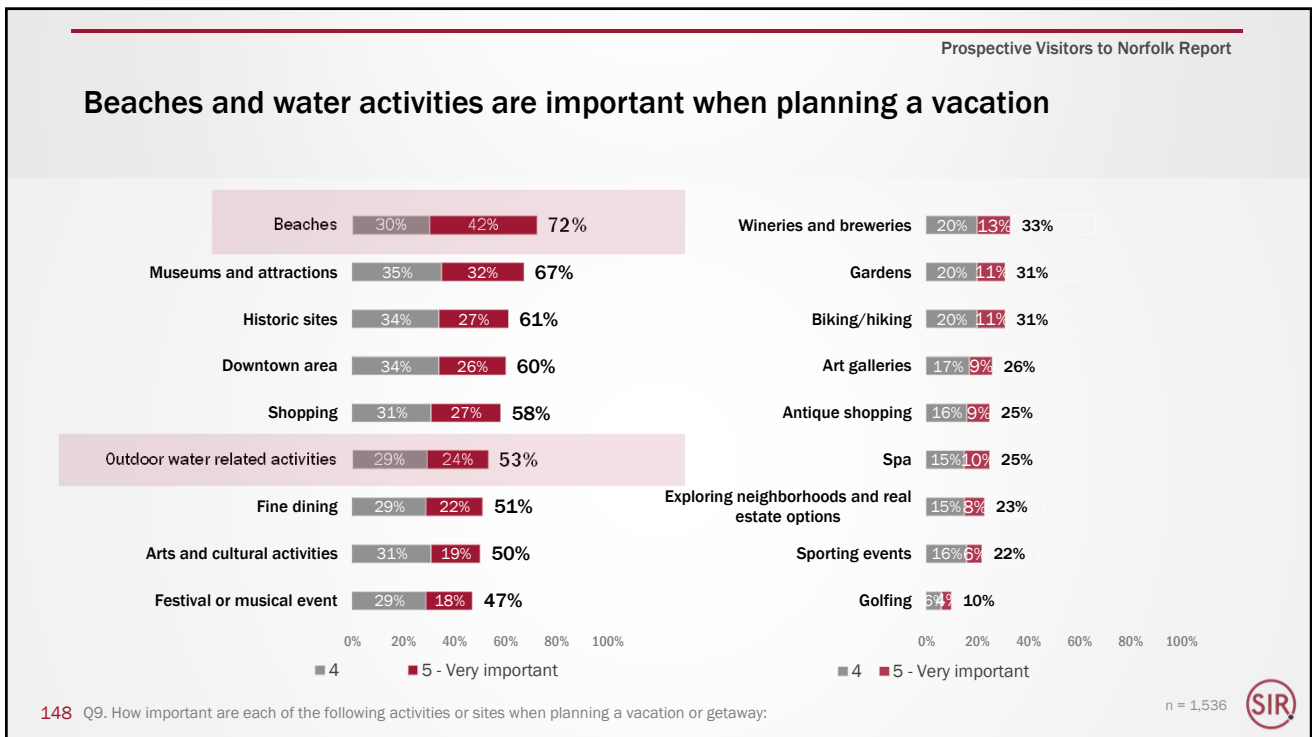
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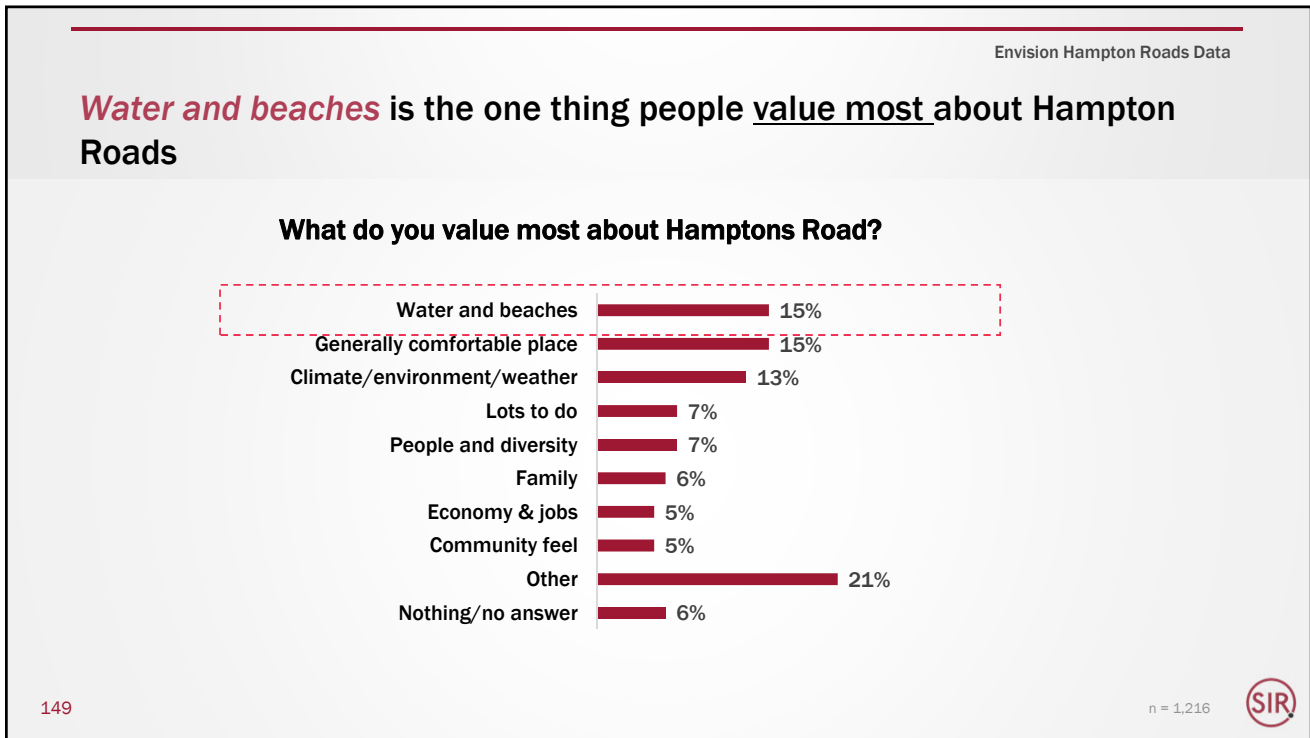
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The Water that Surrounds Hampton Roads is a Tremendous Place Asset.

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SIR Millennial Placemaking Research

Access to Water is Attractive to Millennials

Q20. When you think about a city as a place you'd really want to live, how important are each of the following to you?

	RALEIGH NC	WASH. DC	CHARLOTTE NC	AUSTIN TX	ATLANTA GA	Denver CO
BASICS						
Is safe	89%	87%	86%	91%	81%	90%
Has a variety of employment options	90%	82%	83%	85%	82%	87%
Quality <u>and</u> affordability of housing options	92%	83%	87%	87%	83%	83%
Offers outdoor recreation options	71%	60%	71%	77%	71%	76%
Offers a great food scene	76%	75%	78%	85%	77%	75%
PLACEMAKING						
Embraces creativity	59%	55%	58%	69%	59%	64%
Embraces innovation	70%	58%	61%	69%	60%	64%
Is near the mountains	28%	24%	40%	17%	30%	64%
Has access to water	59%	54%	64%	65%	54%	63%
Is bike-able/walkable	46%	50%	41%	43%	44%	61%
Has easy public transportation	42%	66%	40%	47%	46%	60%
Embraces small business/start-ups/entrepreneurship	54%	48%	60%	61%	54%	57%
Higher education options	76%	60%	60%	73%	62%	57%
Is diverse	60%	63%	55%	69%	55%	55%
Urban living environment	47%	59%	51%	60%	46%	53%
Offers an active music scene	51%	36%	46%	53%	49%	49%
Offers an active arts scene	42%	38%	44%	43%	42%	46%
Has rich history	42%	47%	39%	41%	42%	42%

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The statements referencing access to water are appealing in both near and more distant markets

ATTRIBUTE	NEAR MARKETS	FURTHER OUT
Norfolk has over 7 miles of accessible beach	65%	65%
Norfolk as 144 miles of waterfront with many public access points	62%	61%
Travel + Leisure Magazine rated Norfolk America's Favorite Place for 2018 and top 50 place to travel to in the world	53%	54%
Granby Street in Norfolk was named "8 Amazing American Streets You've Never Heard Of" by the New York Post	45%	46%
Norfolk as 7 craft breweries and dozens of cultural and performing arts venues	43%	42%
Every summer, over half a million people attend festivals in downtown Norfolk	43%	42%
Norfolk has over 120 distinctive neighborhoods offering all types of lifestyles and opportunities to explore	37%	40%
Over 2.6 million people visit Norfolk every year	27%	33%

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Millennials are significantly more likely to say all of these statements impact the level of appeal of Norfolk. Statements referencing access to water have the greatest appeal.

ATTRIBUTE	MILLENNIALS	GEN X	BOOMERS/ SILENT
Norfolk has over 7 miles of accessible beach	70%	66%	57%
Norfolk as 144 miles of waterfront with many public access points	65%	61%	56%
Travel + Leisure Magazine rated Norfolk America's Favorite Place for 2018 and top 50 place to travel to in the world	57%	55%	47%
Granby Street in Norfolk was named "8 Amazing American Streets You've Never Heard Of" by the New York Post	48%	48%	40%
Norfolk as 7 craft breweries and dozens of cultural and performing arts venues	50%	41%	33%
Every summer, over half a million people attend festivals in downtown Norfolk	50%	41%	33%
Norfolk has over 120 distinctive neighborhoods offering all types of lifestyles and opportunities to explore	43%	39%	38%
Over 2.6 million people visit Norfolk every year	35%	29%	24%

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IMPLICATION FOR ENVISION 2020

Envision 2020 should explore how residents feel, think, and talk about the water. This includes testing the relative appeal of some descriptive water-related words and statements.

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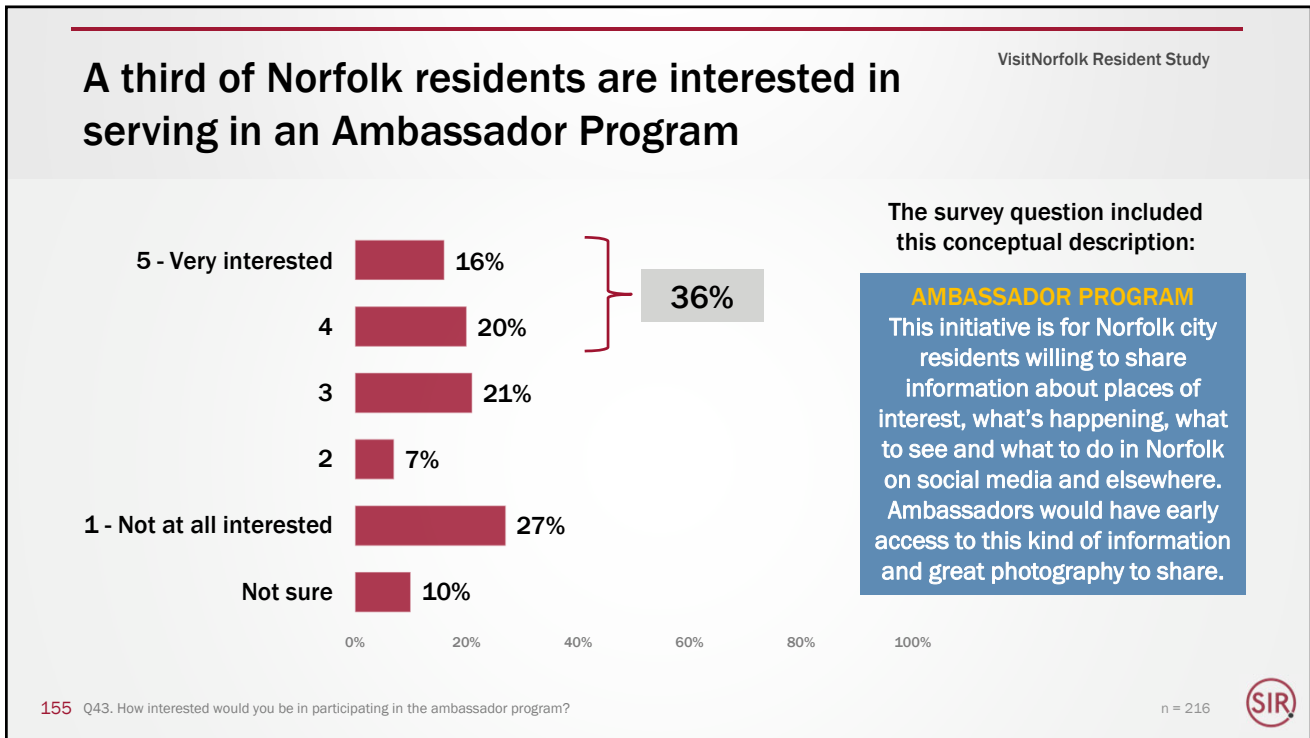
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Residents Want to Help with Place Marketing

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IMPLICATION FOR ENVISION 2020

Envision 2020 should assess the degree to which residents and businesses across Hampton Roads will become ambassadors and identify the tools they would like provided.

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The Hampton Roads Region's Young Professionals are Commenting on Regionalism and Regional Naming.

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In 2019, tHRive, the Hampton Roads Chamber's Young Professionals Group, released its first regional report.

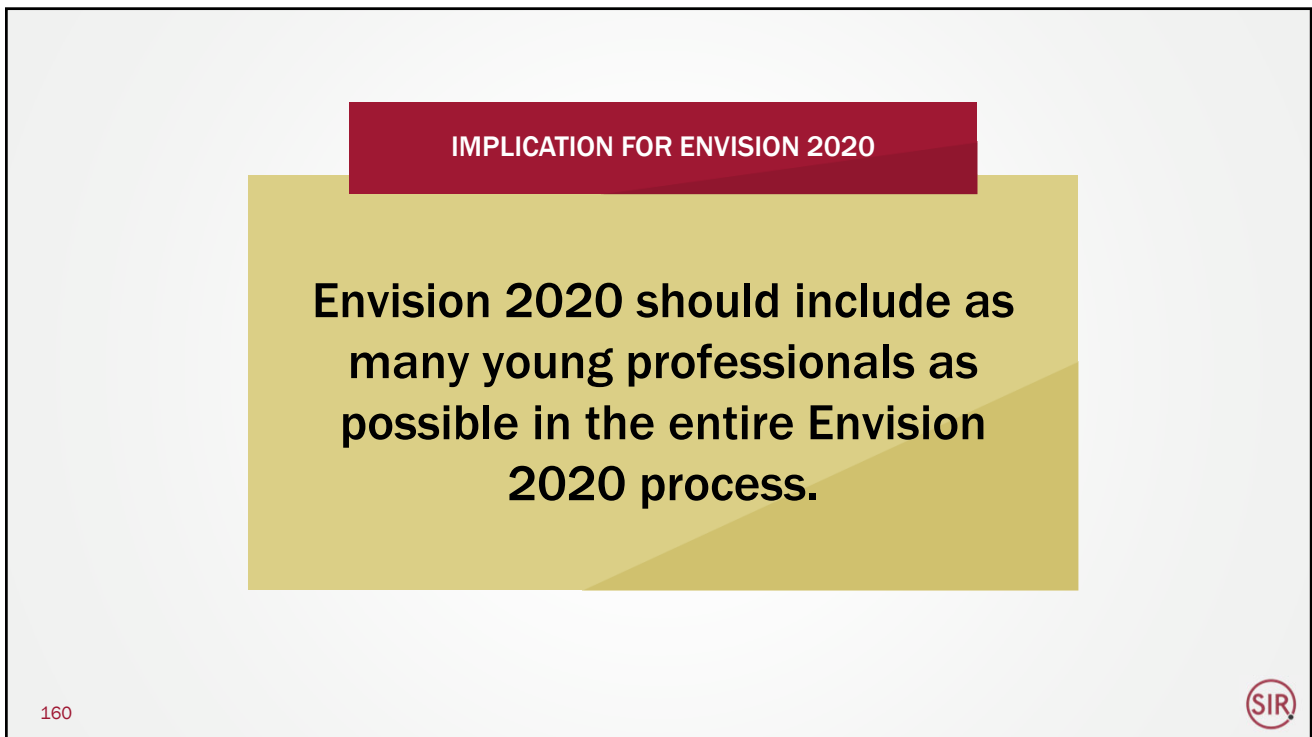
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18 Hampton Roads is a Very Diverse Community

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ODU 2018 Life in Hampton Roads Report

Race or Ethnicity	Percentage
White	52.5%
Black or African-American	30.4%
American Indian or Alaskan Native	0.9%
Asian	1.0%
Native Hawaiian or Pacific Islander	0.4%
Multiracial	6.3%
Other	5.5%
Don't Know/Refused	2.9%

Unweighted data from 2018 survey

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IMPLICATION FOR ENVISION 2020

Envision 2020 should include as many diverse audiences and groups as possible.

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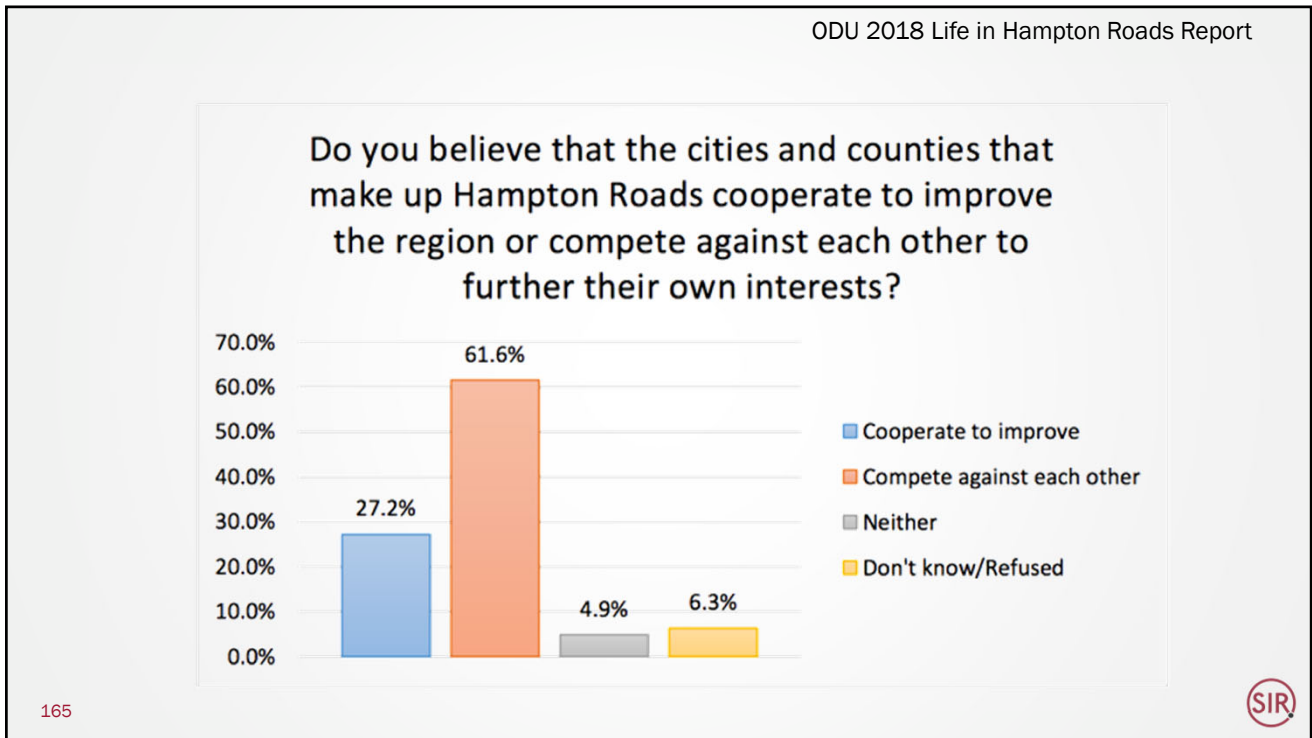
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19 Most People in Hampton Roads Believe the Local Cities Compete Against Each Other

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IMPLICATION FOR ENVISION 2020

Envision 2020 should be positioned and promoted as the truly regional effort that it is.

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Place Marketing is
Becoming a More Common
Practice Among Cities, and the
Practice is More than a Logo
and Tagline.

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BUSINESS | LEADERSHIP

Why Cities Need to Create Their Own Global Brands

Urbanist Greg Clark talks about which cities do it really well, and how some could do a lot better



168



168

<https://www.wsj.com/articles/why-cities-need-to-create-their-own-global-brands-1492394882>

“The typical failure is to think that cities need a logo, a slogan and an iconic image. Stuff like that can be useful, but they aren’t solutions unless they are the culmination of other events.”

Greg Clark, Urbanist

Note to Reader: See Envision 2020 Peer Cities/Regions Place Marketing Report for Best Practices Overview

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IMPLICATION FOR ENVISION 2020

Envision 2020 should continue to be packaged and promoted as the larger place marketing initiative that it is, not just a naming project.

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Envision 2020 Secondary Research Report Insights Recap

1. Growing Hampton Roads' regional population is a top demographic challenge.
2. There are two models being practiced by cities to attract new residents.
3. Localities can influence (attract) movers with locational appeal and job opportunities.
4. Emotional considerations drive the appeal of places to live more than rational considerations.
5. Core features with emotional and rational perceived benefits drive the appeal of places to visit.
6. Today, access to talent drives the appeal of places to locate a company.
7. For those who visit here and personally know the area, Hampton Roads delivers. (Norfolk Example)
8. Outside the market, awareness of Hampton Roads is low.
9. For those aware of Hampton Roads, the region's reputation is not good or bad. It's mostly neutral, though perhaps "Stuck in Time."
10. Increasing familiarity (positive perceptions) of a place lifts the appeal as a potential place to vacation or do business.

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Envision 2020 Secondary Research Report Insights Recap (cont'd)

11. Among local residents, Hampton Roads as a name has some positive brand equity.
12. Hampton Roads' residents and visitors can easily identify differentiating place values and symbology.
13. Residents can rate their city/region as a place.
14. Young Professionals have clear expectations on what they seek in a place.
15. The water that surrounds Hampton Roads is a tremendous place asset.
16. Residents want to help with place marketing.
17. The Hampton Roads region's young professionals are commenting on regionalism and regional naming.
18. Hampton Roads is a very diverse community.
19. Most people in Hampton Roads believe the local cities compete against each other.
20. Place marketing is becoming a more common practice among cities, and the practice is more than a logo and tagline.

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III.

Implications for Envision 2020

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Secondary Research-Inspired Implications

Envision 2020 should:

- Take into account demographic realities: A positioning, communication strategy, and naming architecture must be clear on who we are and where we are located.
- Ultimately, include or identify ways to advance the region's lifestyle offerings and promote available jobs.
- Identify and advance the unique emotional experience or emotional benefits of living in Hampton Roads.
- Help the region's tourism industry and new Alliance (HREDA) develop messaging based on audience needs and Hampton Roads' ability to deliver on those needs in ways that differentiate the region from peer cities/regions.
- Obtain and package insights to help Hampton Roads' residents and businesses better appreciate what the region already offers.
- Identify the misperceptions that must be overcome to drive the region forward.
- Assess the region's base level of awareness, familiarity, and favorability ratings. Establish these scores as Key Performance Indicators (KPIs) and benchmarks to assess and report future improvement.
- Make the return on investment case for ramping up intentional place marketing efforts.

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Secondary Research-Inspired Implications (cont.)

Envision 2020 should:

- Identify both the negative and positive aspects of the Hampton Roads name to decide if a new regional name is really needed.
- Identify Hampton Roads' top place marketing symbols, iconology, and narrative storyline – what makes this place unique.
- Assess Hampton Roads' Place Score and compare it to other cities in SIR's research database.
- Create a strategy map on how to make Hampton Roads a more appealing place for young professionals.
- Assess to what degree residents and businesses across Hampton Roads will become ambassadors and identify the tools they would find most useful.
- Engage the region's young professionals.
- Keep in mind that the practice of place marketing is more than a logo and symbol.
- Acknowledge that there are no clear best practice examples of regions like Hampton Roads, regions without a dominant city center like Columbus or Jacksonville. The N.C. Research Triangle could be an example, but their effort to date is not compelling (based on Envision 2020's research to date).

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For more information about this research study,
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