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HAMPTON ROADS OUTMIGRATION

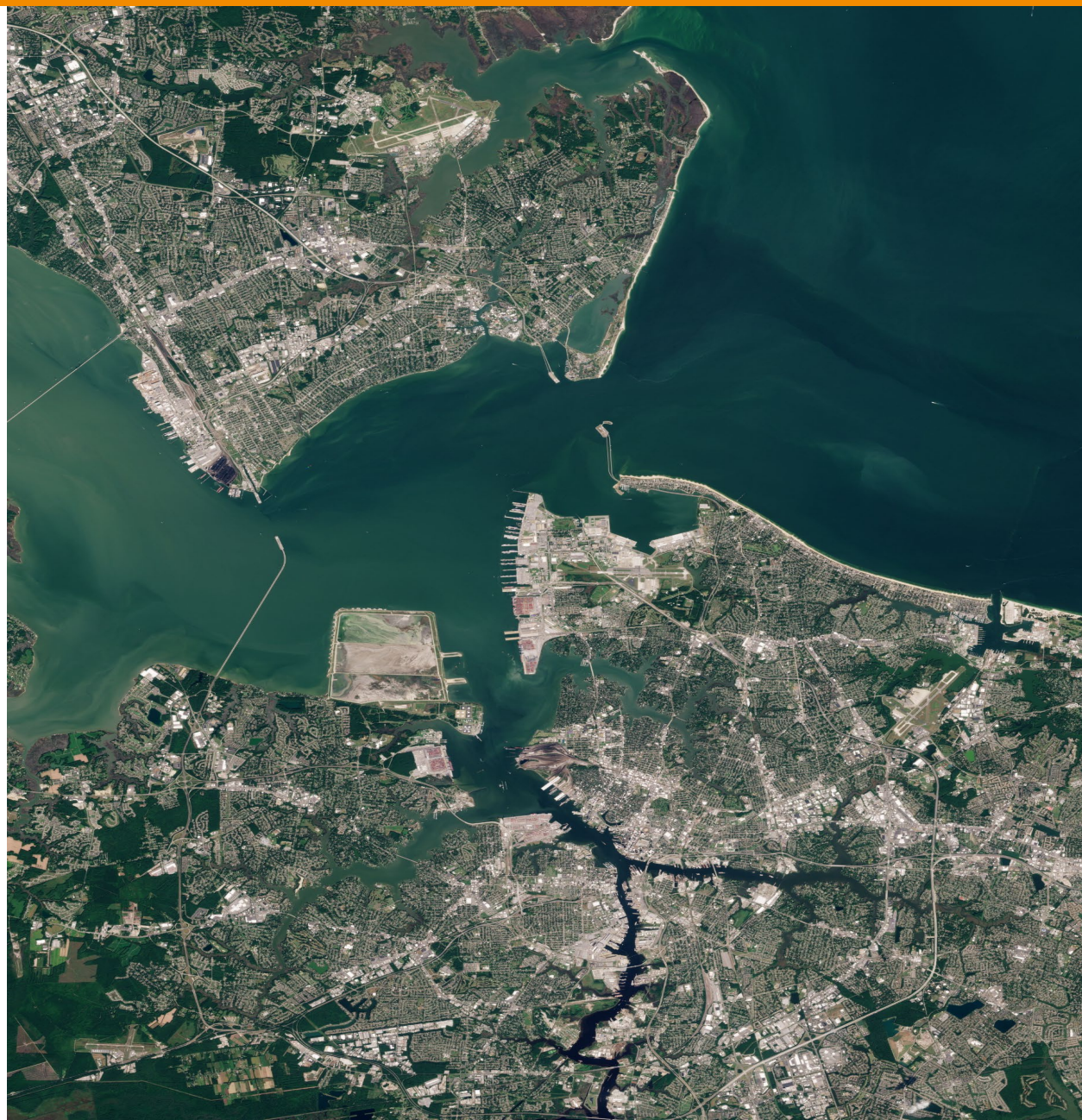
RESEARCH FINDINGS

Prepared for:

HAMPTON ROADS EXECUTIVE ROUNDTABLE

HAMPTONROADS WORKFORCECOUNCIL
ONE REGION. ONE WORKFORCE. ONE ECONOMY.

January 2024



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INTRODUCTION & BACKGROUND

The Hampton Roads Executive Roundtable's mission is to improve the trajectory of the region's economic growth and competitiveness through the creation of more and higher paying jobs, incorporating innovation and entrepreneurship into the economic base, establishing economic development and innovation strategy in an equitable manner, and strategic leadership through collaboration for the region's economic future.

For several years, regional leaders have been aware of a trend of out-migration of key population segments from the Hampton Roads region. Analyses by several key institutions have described the scope, scale, and character of this outmigration pattern to various extents. For instance, the Demographics Group of the Weldon Cooper Center for Public Service at UVA has shown that several localities in the Hampton Roads region significantly lagged nationwide trends in population growth between the 2010 and 2020 censuses.[1] Likewise, analysis from the Applied Population Lap at the University of Wisconsin shows clear patterns of outmigration from Hampton Roads over this same period, notably of those from 20-29 years of age.[2]

Business, political, and community leaders have proposed various hypotheses to explain this trend. For instance, anecdotal evidence suggests that many students who pursue their undergraduate or graduate studies in Hampton Roads—whether they are from the area or came to Hampton Roads specifically to attend school—do not remain in the region when they accept their first professional positions. Others theorize that a sizable portion of military members stationed in the Hampton Roads area—many of whom possess valuable skills and experience—leave the region when they retire or otherwise separate from the military. Still others point to rising housing costs, public safety concerns, or other quality of life issues as the key drivers.

The annual "Life in Hampton Roads" survey conducted by the Old Dominion University Social Science Research Center provides an excellent analysis of residents' perceptions of the quality of life in the region.[3] However, it was not specifically designed to analyze correlations between those perceptions and outmigration. With an eye toward enabling the development of effective strategies to address this trend, Roundtable leaders sought to better understand the underlying motivational factors that are driving outmigration in more detail. They also wanted to understand what might be driving a perceived similar trend among promising start-ups and growth-stage companies.

The Roundtable partnered with the Hampton Roads Workforce Council to engage Fahrenheit Advisors, and their partners at Brand Federation, to research the factors that motivate both individuals as well entrepreneurs and founders to come to, remain in, or relocate away from Hampton Roads.

1. https://www.coopercenter.org/demographics
2. https://apl.wisc.edu/
3. https://www.odu.edu/social-science-research-center/life-in-hampton-roads

OBJECTIVES & METHODOLOGY

OBJECTIVES

This goal of this study is to provide insights into the motivational factors driving outmigration from the Hampton Roads within two key areas of focus:

- Individuals in early- to mid-career
- Start-up and early-stage companies

METHODOLOGY

Individuals (quantitative):

- 12-minute online survey instrument, scientific panel sample
- Fielded in December 2023
- n=511 (~1/3 military active duty/reserves, ~1/3 DoD civilian/contractor, ~1/3 private industry); (22 - 45 years of age)

Start-ups / growth-stage companies (qualitative):

- Individual interviews with Founders/CEOs, economic developers, incubators/accelerators, and investors
- Conducted between November 2023 – January 2024
- n=37

KEY FINDINGS

KEY FINDINGS

- **The grass may not actually be greener.** Many of those who say they are likely to leave Hampton Roads cite the cost of living / housing as a primary reason they may leave. Interestingly, many of those who were raised in the area, moved away, and have now moved back—a cohort we refer to in this study as “Boomerangs”—cite cost of living as a primary reason for their having returned to Hampton Roads.

- **Invest in future “boomerangers”.** Those with family in the region are our biggest cheerleaders, and creating a pull to return ensures continued intergenerational roots. Areas of recommended focus and investment include private sector fundamentals (career opportunities and community building) and lifestyle attributes. Support and promote cultural and leisure activities and invest in the "future Boomerangers."

- **The region's identity is vaguely defined.** No single identity or feature of the region rises as a unique identifier. Most respondents (63%) consider Hampton Roads to be “a collection of cities and towns that share a common vibe”, while only 23% view is as “a single, unified community”. Interestingly, previous branding efforts around “757” / “The 757” seem to have had little impact. Only 8% of respondents said this is how they would describe where they live to a stranger from outside the region. The largest group (43%) said “Hampton Roads”, while another 23% said they just say their specific city / town.

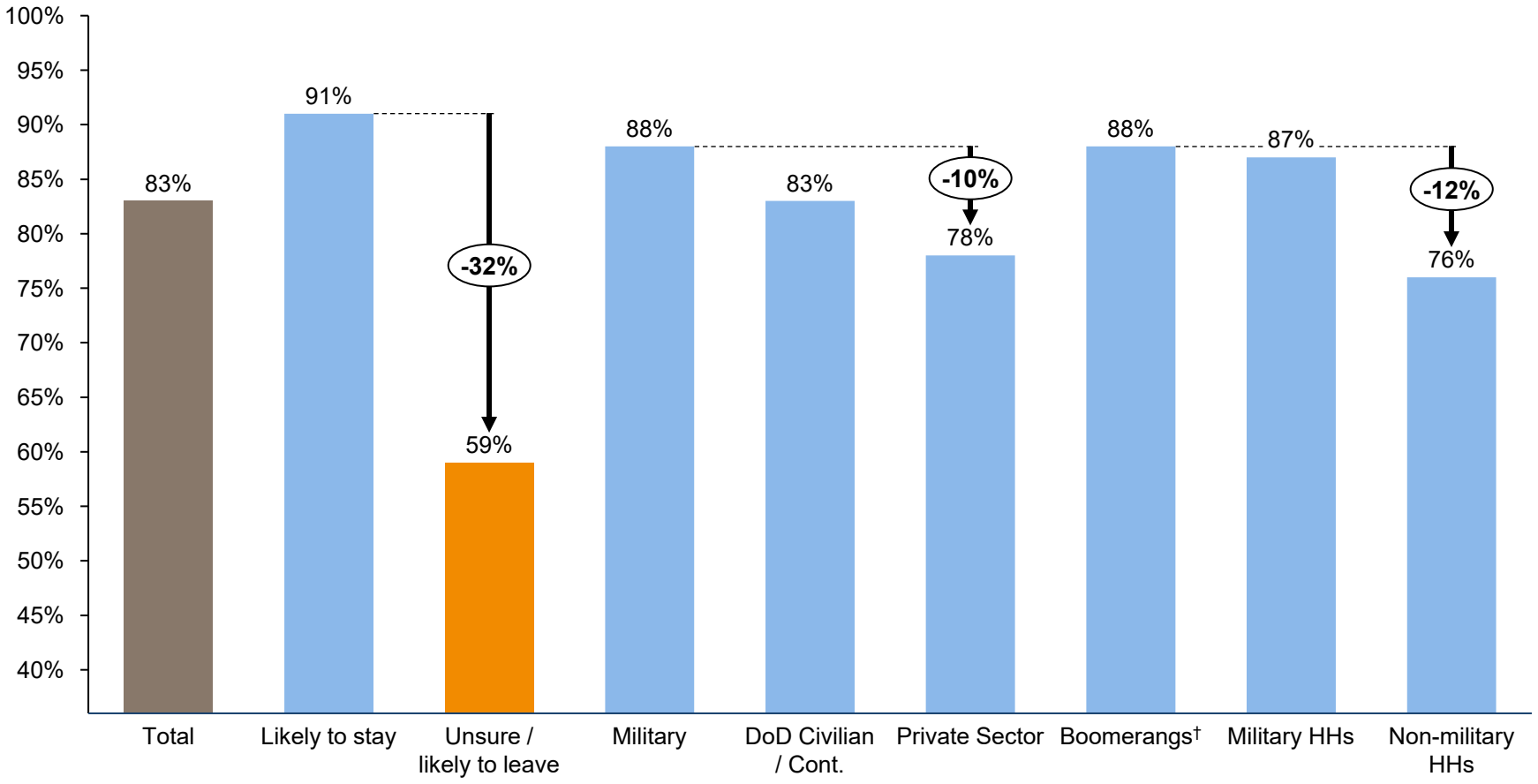
- **Connections to the military are correlated with increased satisfaction with life in Hampton Roads, and an increased likelihood to stay.** A positive outlook and high satisfaction characterize survey takers overall but coalesce more clearly for Military and DoD audiences. Those without a connection to the military are less satisfied and show higher likelihood of leaving.

- **“Placemaking” key to stemming the tide of outmigration**. On quality of life "table stakes" (practical attributes like safety, jobs, and housing) Hampton Roads receives high marks (less so for affordability). "Second tier" lifestyle attributes (recreational/outdoor, nightlife, sense of community) show room to improve. And as regional placemaking gains in national practice, second tier attributes become key deciding factors for relocators.

- **Region making progress toward realizing its entrepreneurial and innovation potential, but much work remains.** Most of the Founders, CEOs, and investors we spoke with believe the region has the potential to be a world-class hub for entrepreneurship and innovation, and they note the entrepreneurial environment in Hampton Roads has improved substantially over the past two decades. However, they report several issues that continue to hinder realization of this potential. Fragmented political geography, lack of regional awareness / branding, and lack of later-stage growth funding are among the most critical.

Overall satisfaction with living here directly correlated to migration intent

Non-military households less satisfied with life in Hampton Roads



Base: Total Respondents (n=511)
Q3.1: How satisfied are you, overall, with living in Hampton Roads? (% Very- or Somewhat-satisfied).; Q2.6: The likelihood that I will be living in HR 5 years from now is: ; Q2.1: Which of the following best describes your history in the Hampton Roads area?
(†: Those answering "Returned here after living somewhere else" referred to as "Boomerangs" throughout our analysis.)

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Top factors driving outmigration from Hampton Roads

Widely viewed as important factors in decision whether to remain in the region; those unsure / likely to leave report significantly lower satisfaction than those likely to stay

COST OF LIVING: Affordable and available housing, as well as other expenses, contribute to quality of life and are widely viewed as important.

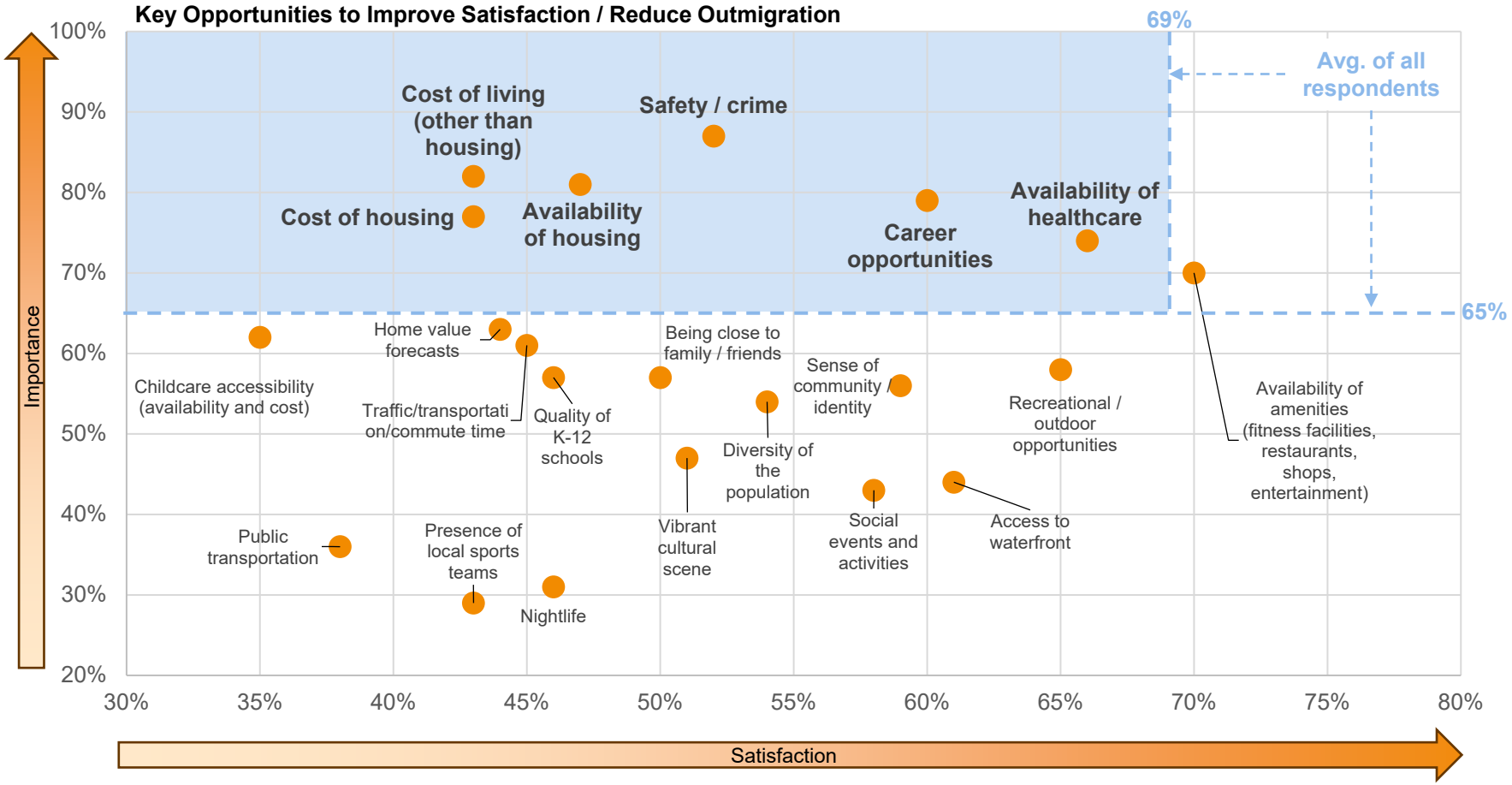
SAFETY: Respondents overwhelming agree that a sense of security is a bedrock issue when it comes to their satisfaction with life here.

JOB/CAREER OPPORTUNITIES: Career and job potential are top-of-mind for respondents who indicated they hold full-time employment; negative perceptions about the availability of sufficient career opportunities is correlated with increased likelihood of outmigration.

AVAILABILITY OF HEALTHCARE: Satisfaction gap was not as large on Availability of Healthcare, but still significant. Ranked nearly as important as other factors above.

Housing / living cost, safety, and career prospects are biggest opportunities

Those unsure / likely to leave express above average importance and below average satisfaction



Base: Unsure / Unlikely / Very Unlikely to be in HR in 5 years (n=127)
Q2.13: When thinking about whether to stay in the Hampton Roads region, please rate the importance of each of the following (% Very- or Somewhat-important); Q3.2: Please rate your satisfaction with each of the following in Hampton Roads. (% Very- or Somewhat-satisfied).

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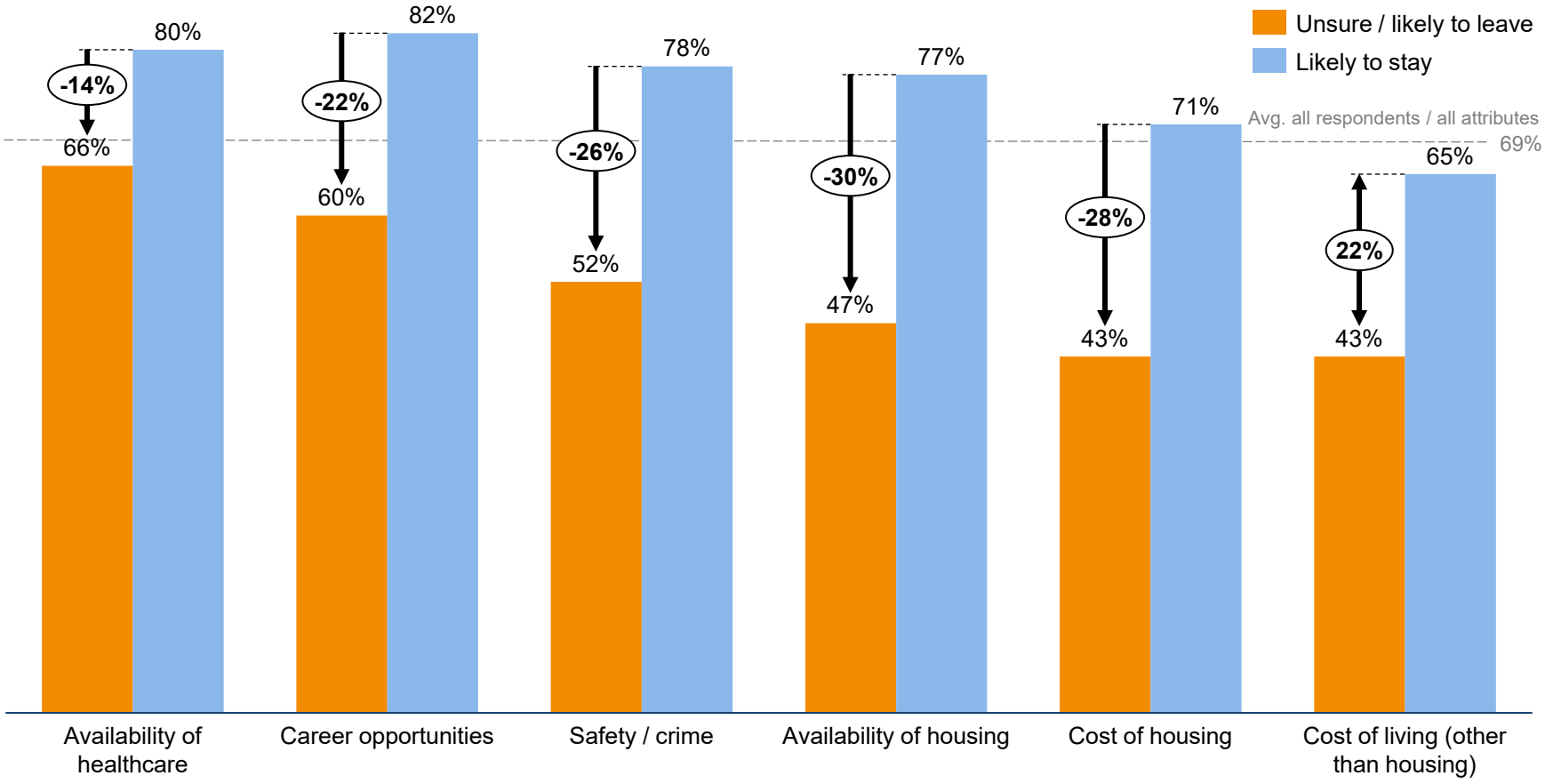
Satisfaction gaps on important attributes correlate to outmigration intent

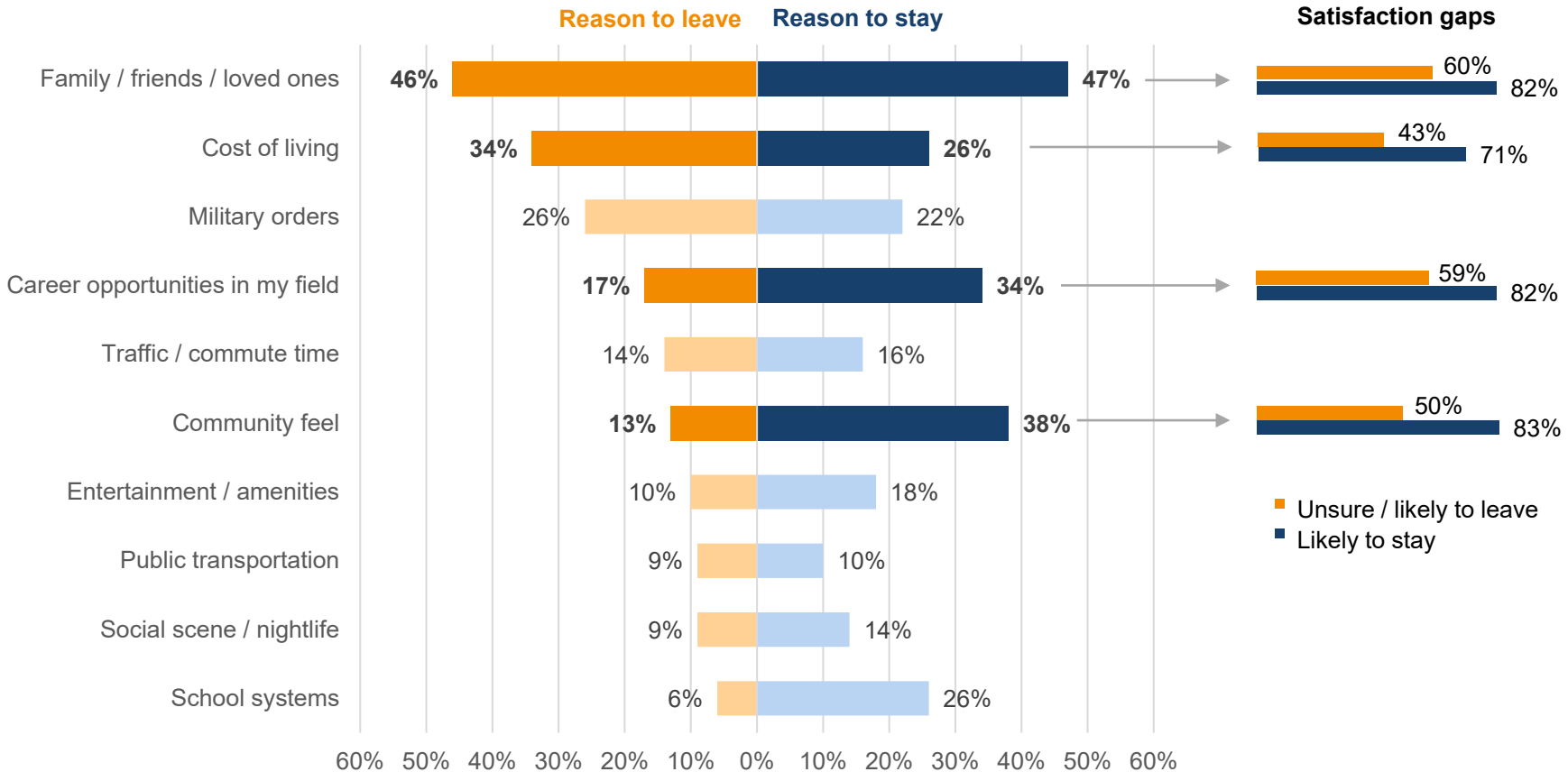
Significant gaps between those likely to stay and those unsure / likely to leave



Base: Unsure / Unlikely / Very Unlikely to be in HR in 5 years (n=127); Likely to stay (n=384); Q3.2: Please rate your satisfaction with each of the following in Hampton Roads. (% Very- or Somewhat-satisfied)

Family, cost of living, and job opportunities key drivers of outmigration

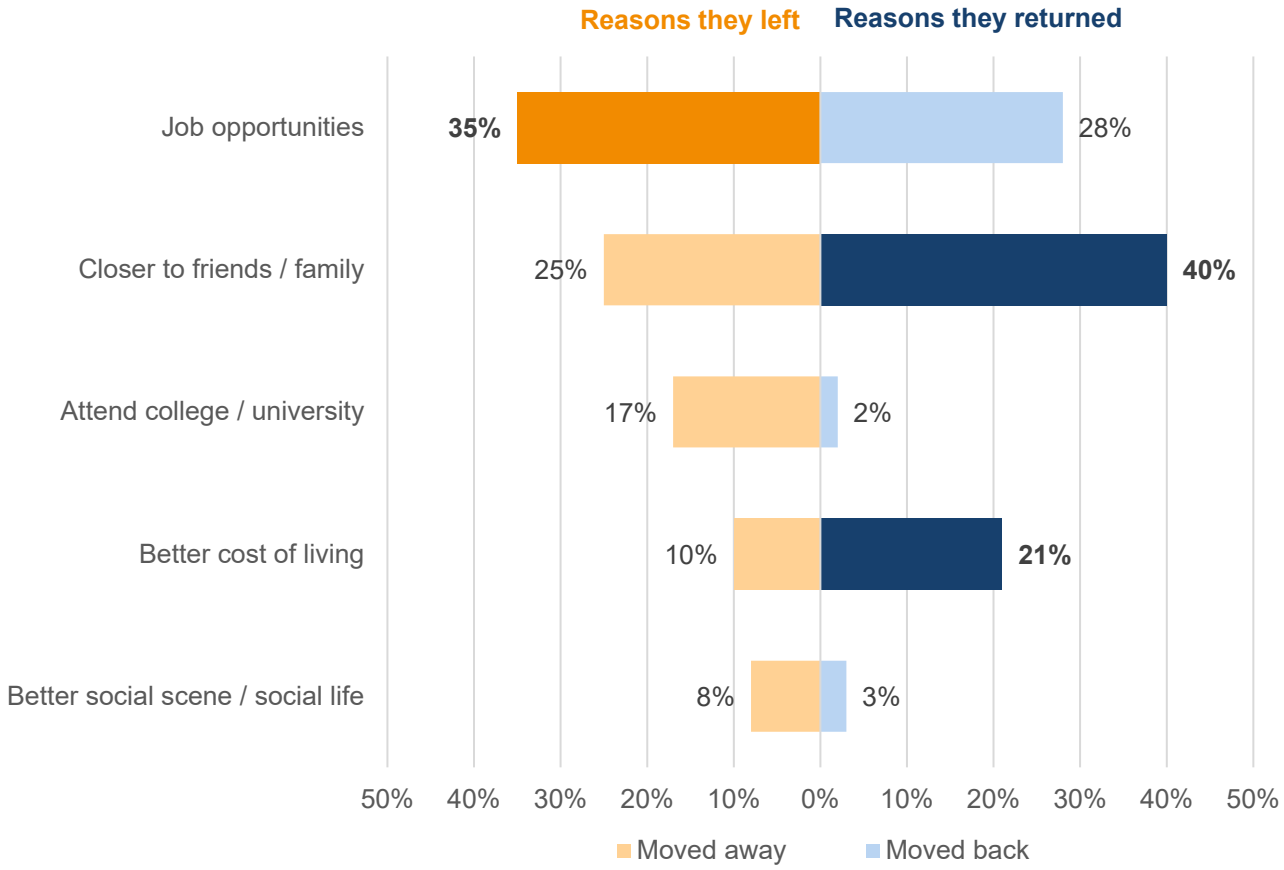
Those unsure / likely to leave report significant satisfaction gaps on these important factors



Base: Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years
Q4.3: What are the primary reasons you would consider leaving Hampton Roads to live somewhere else in the next 5 years? Q4.4: What are the primary reasons you plan to stay in Hampton Roads for the next 5 years?; Q3.2: Please rate your satisfaction with each of the following in Hampton Roads. (% Very- or Somewhat-satisfied)

Boomerangs: Careers pull residents away, social ties bring them back

Cost of living also attracts boomerangs back to the region



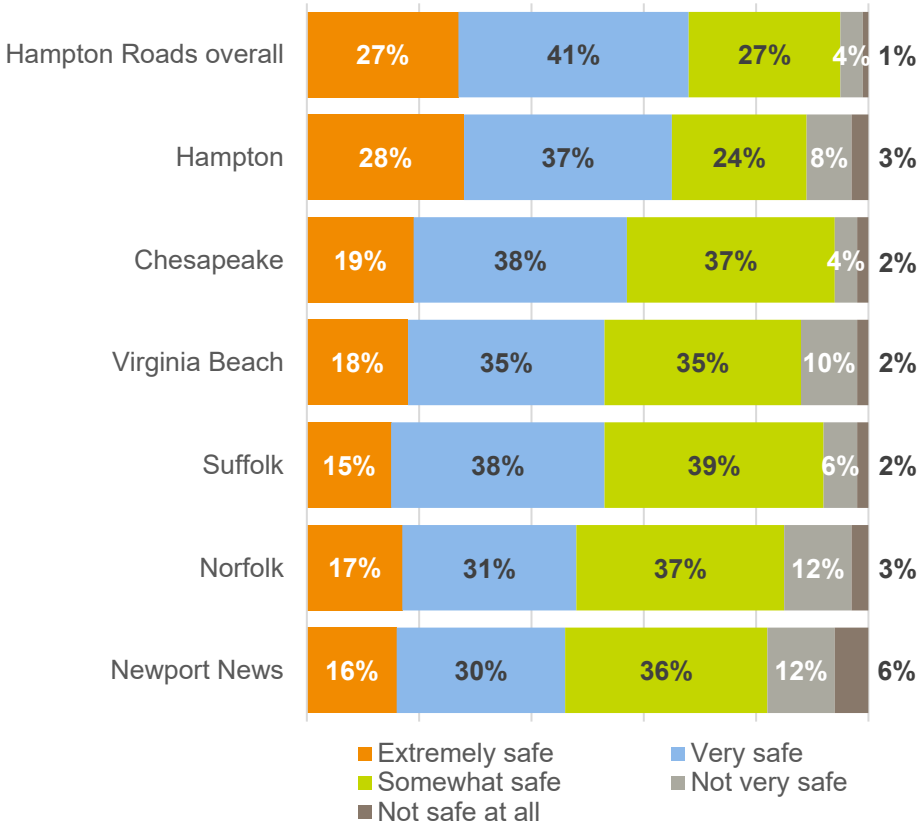
Qualitative Note

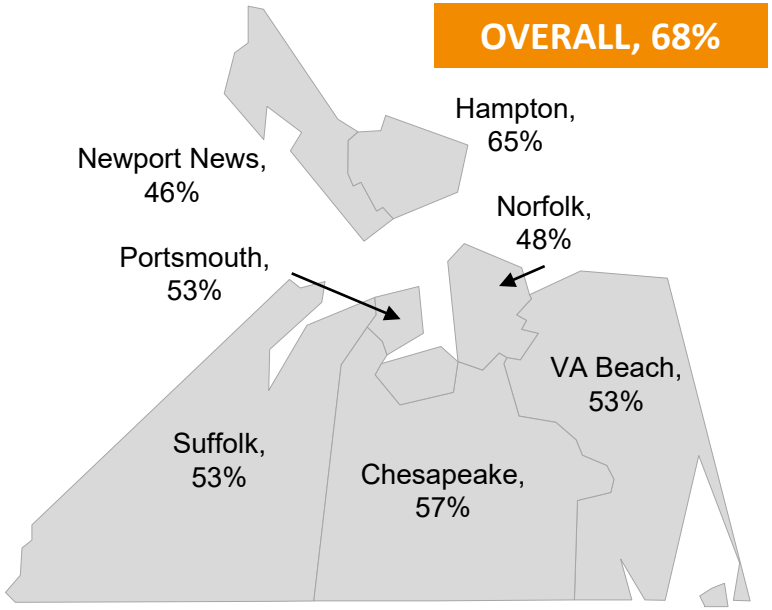
Several interviewees who self-identified as "boomerangs" reported they left the region in early adulthood for a specific job opportunity, only to return later in life with plans to raise their family back in Hampton Roads.

Base: "Boomerangs", Total Respondents who Returned to HR after Living Elsewhere (n=112)
Q2.2: What is the primary reason you moved away? Q2.3: What is the primary reason you moved back to Hampton Roads?

Over two-thirds of respondents consider region "Extremely" or "Very Safe"

Newport News, Norfolk perceived to be somewhat less safe than surrounding areas



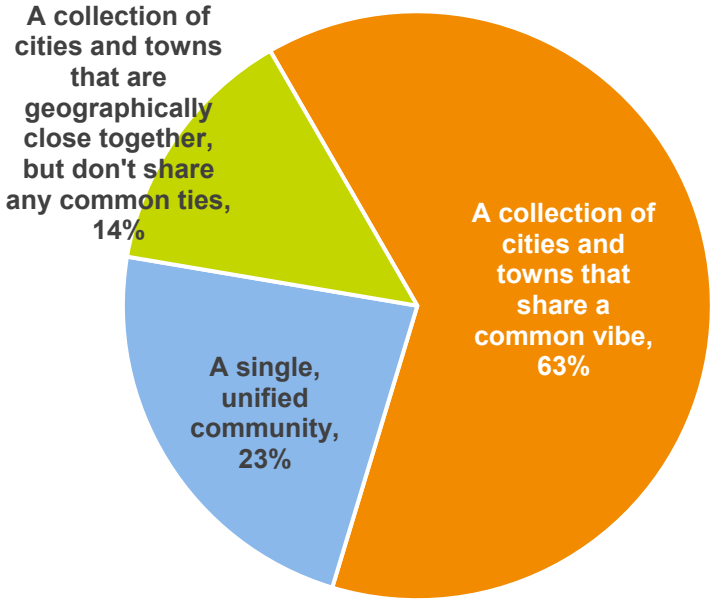


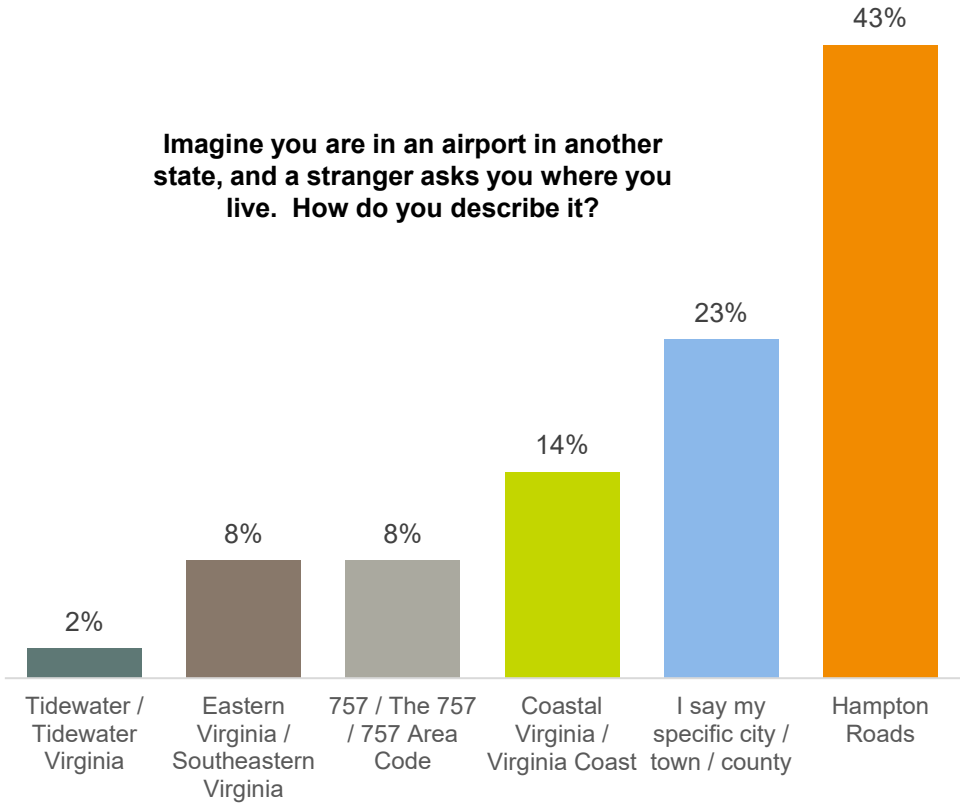
% of respondents that rated each region "Extremely Safe" or "Very Safe"

Base: Total Respondents (n=511)
Q3.10: We would like to understand your perception of safety. For each area below, please rate how safe you believe the area to be. (% Extremely or Very safe)

…but the region lacks a unifying identity

Respondents view the area as a collection of cities and towns; they even differ on what to call it





Base: Total Respondents (n=511)
Q4.6: Which of the following best describes the Hampton Roads area?
Q4.7: Imagine you are in an airport in another state, and a stranger asks you where you live. How do you describe it?

Top factors impacting start-ups / growth-stage companies

Fragmented political geography, lack of regional awareness / branding, and lack of later-stage growth funding seen as key challenges to development of robust entrepreneurial ecosystem

Interviewees expressed a broad consensus that the entrepreneurial environment in Hampton Roads, as a region, has improved substantially over the past two decades. Most also believe the region has the potential to be a world-class hub for entrepreneurship and innovation. However, they report several issues that continue to hinder realization of this potential. The concerns mentioned most frequently as impeding the development of a robust entrepreneurial ecosystem were:

1. **Geographic fragmentation**. Many of the Founders/CEOs and investors we spoke to cited the jurisdictionally-fragmented nature of the region as an obstacle to the development of a robust regional entrepreneurial ecosystem. Portions of Hampton Roads are governed by multiple county and municipal governments, many of which have their own economic development arms that can, at times, compete with one another. **Interviewees identified opportunities for improved cooperation between local governments as key to the development of a more attractive environment for entrepreneurs.**

2. **Branding / awareness**. On a related note, many interviewees point to a perceived lack of awareness among those outside the region of the area's strengths from an entrepreneurial and economic development standpoint. They feel Hampton Roads lacks a clear identity among those who have not lived or worked here. A few interviewees point to industries for which Hampton Roads, in their minds, should widely be considered a "hub." The most frequently mentioned of these were Maritime, Aerospace, Cyber, Logistics, and Un-crewed systems. Interviewees believed that **initiatives designed to promote broader awareness outside Hampton Roads of the region as a "Hub" for these industries could help attract more existing businesses and encourage the foundation of more local startups.**

   One interviewee asked, rhetorically, ***"Why don't you see stuff about Aero and Maritime and UAS and Cyber all over the Norfolk airport?"***

3. **Difficulty fundraising beyond initial seed rounds.** Interviewees largely agreed that there are ample resources available to entrepreneurs in terms of programming and pre-seed and seed capital. However, they point to challenges in securing further growth funding once a company has "graduated" from start-up stage and begins to scale their operations. Three of the Founder CEOs we spoke with said that when they went to raise their Series A round, the funding they were able to secure came from investors outside the region. Two of these founders, as a result, re-located their companies outside Hampton Roads to be in closer proximity to their new investors. **Driving awareness outside the region of the area's assets and startup culture could help attract more investment.**

Additional factors impacting start-ups / growth-stage companies

Cultural issues, local investors' relatively low risk tolerance, quality of life concerns also cited as hindrances to the region realizing its potential as a hub for entrepreneurship and innovation

In addition to the most frequently mentioned concerns discussed above, interviewees mentioned several additional factors that they believe contribute to the region's inability to reach its full potential as a hub for entrepreneurship and innovation. These included:

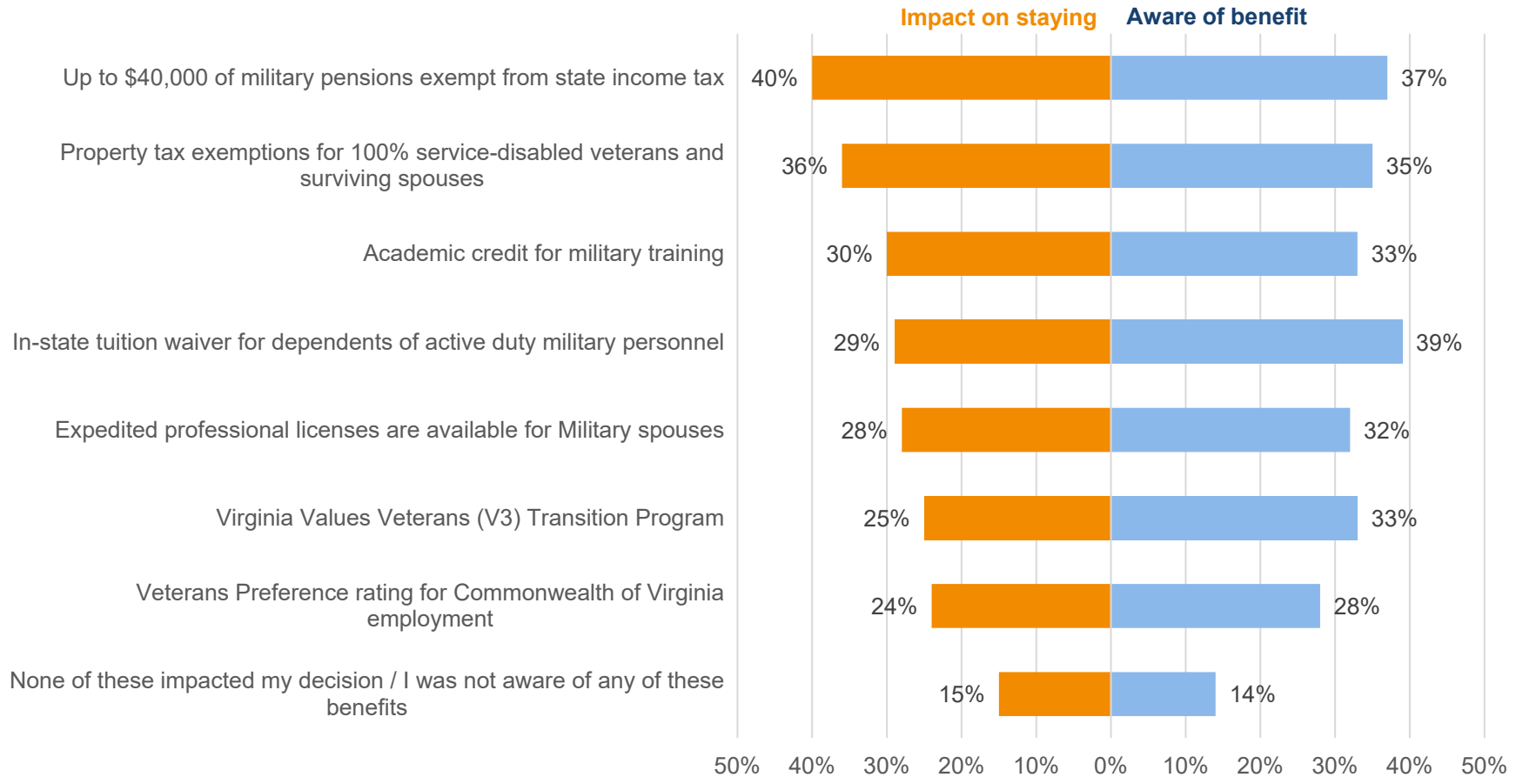
4. **Low risk tolerance among local investors**. A few interviewees we spoke with, notably those that had participated in the entrepreneurial ecosystem in Hampton Roads over long periods and in a variety of roles (ie. as founders and later investors and even, in a couple cases, as political leaders), pointed to a lower risk tolerance among local investors as compared to those in other regions of the country. They asserted that most local investors were accustomed to backing start-ups focused mostly or exclusively on government and military sector customers. Much of the risk in these ventures is often underwritten in some fashion by the government customer. For instance, the startup may be granted "cost-plus" contracts for the development of a new technology that limit or even eliminate down-side risk for the companies' investors. **Familiarity and comfort with government contracting can make local investors hesitant to back ventures in sectors with higher risk profiles**.

5. **Cultural issues**. Some interviewees pointed to the predominance of a "public-service" mentality among potential entrepreneurs in the region. They posit that a substantial portion of people who retire or otherwise separate from the military in Hampton Roads every year, and who might otherwise be good candidates to become entrepreneurs, instead seek post-military employment with the DoD or other Federal, State or Local government agencies. **Efforts to incentive those separating from the military to become entrepreneurs could increase founder density in the region.**

6. **Quality of life concerns.** Many of our interviewees asserted that quality of life issues pose the largest obstacles to the creation of a more robust entrepreneurial ecosystem in Hampton Roads. These interviewees hypothesized that issues like the absence of a professional sports team, lack of a vibrant nightlife or social scene, or perceptions of public safety issues contributed to many young, highly-educated and highly-skilled professionals opting to leave the region. Some of this is born out in our survey data. For instance, **perceptions of crime / safety clearly play a significant role in residents' decisions to remain in or leave the region. However, nightlife and the absence of local sports teams are nowhere near as important factors in these decisions as others like cost of housing/living and career opportunities.**

Pension tax exemption most impactful in reducing outmigration of military

Awareness of all military benefits shows room for improvement



Base: Respondents employed in Military / DoD sector (n=333)
Q5.1: Which of the following benefits for military citizens of VA are you aware of?
Q5.2: And which of these benefits, if any, impact your likelihood to continue to live in HR?

SURVEY SAMPLE DEMOGRAPHICS

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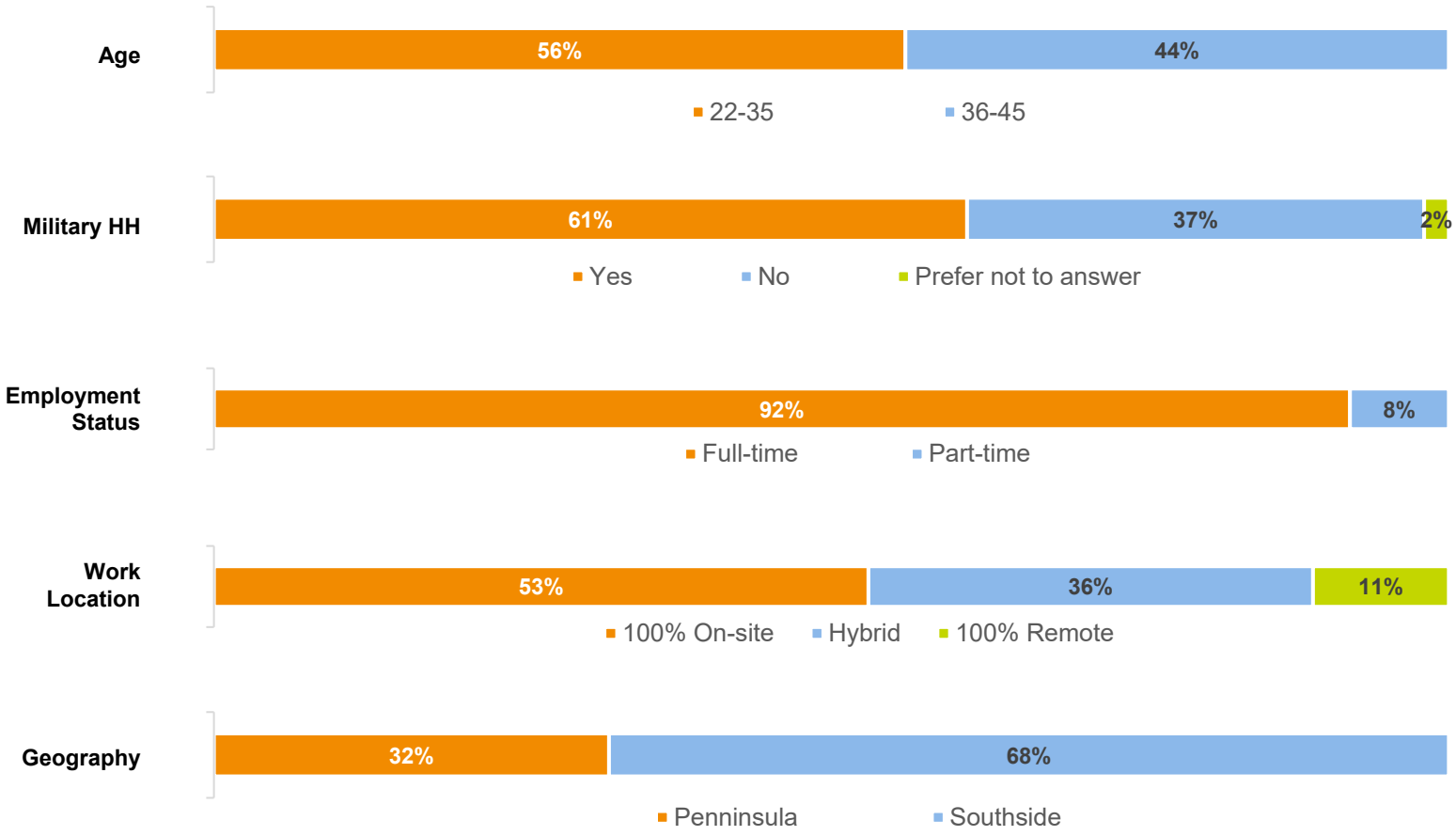

Base: Total Respondents (n=511)
Q1.1: What is your age?; Q6.9: Are you or is anyone in your household: "Yes" = Currently on active duty, currently in reserves, retired military, military veteran, former military/non-veteran status/no longer serving. Q1.3: What is your current employment status?; Q6.1: For your job, do you currently work...?; Q1.2: In which city or area of Hampton Roads do you currently reside?

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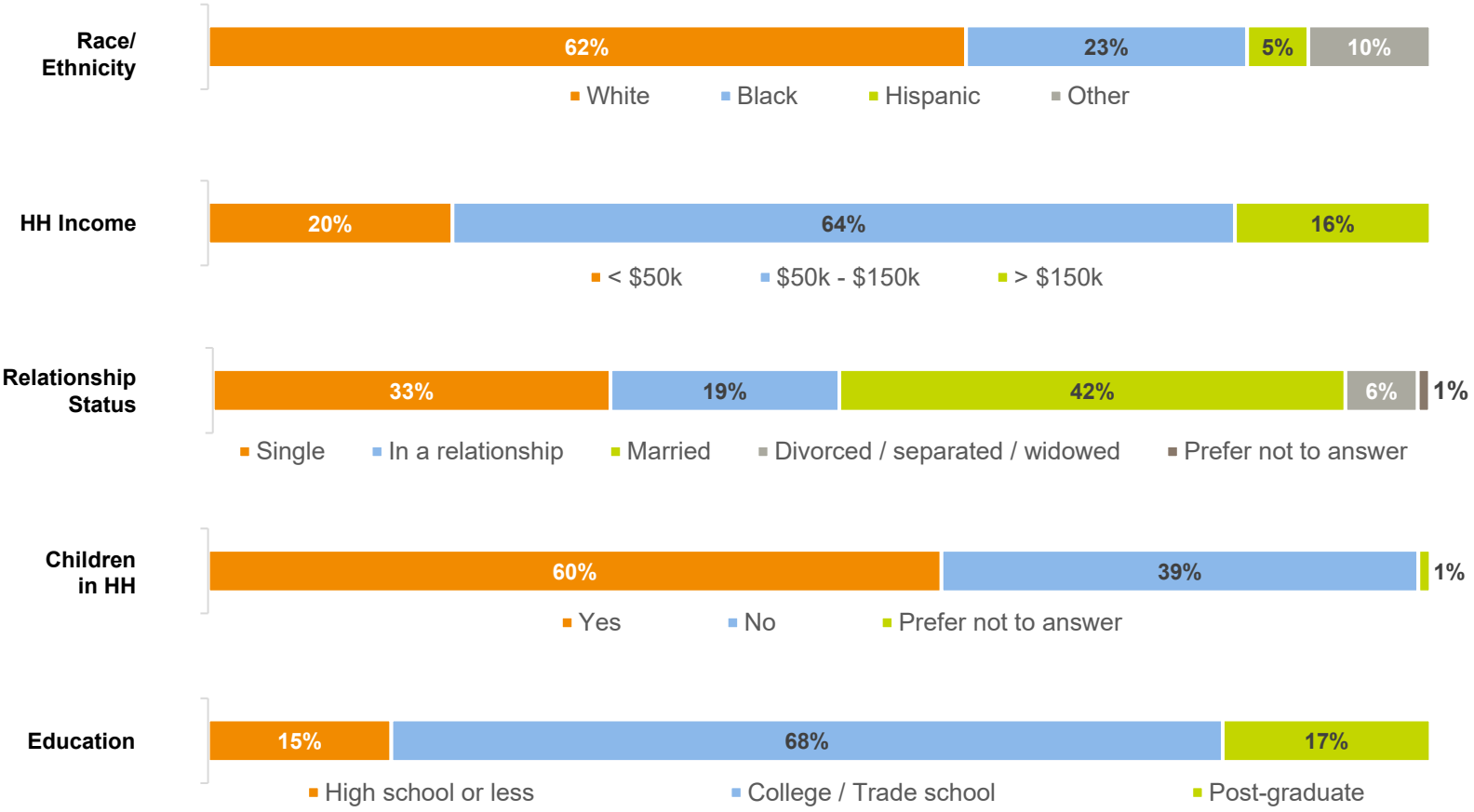
SURVEY SAMPLE DEMOGRAPHICS



Base: Total Respondents (n=511)
Q6.7: Which of these do you consider yourself to be?; Q6.6: Which of the following best describes your annual household income before taxes?; Q6.2: Are you...? Q6.4: Do you have children living at home with you at least half the time?; Q6.3: What was the last level of education that you completed?

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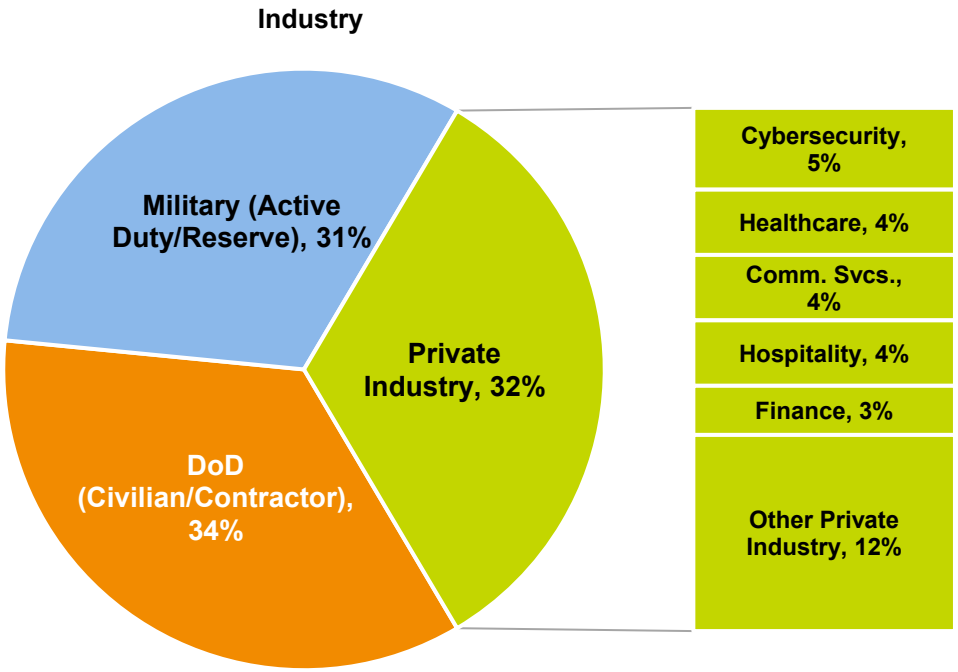
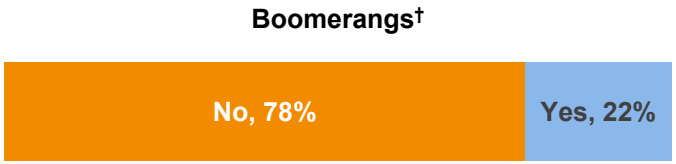
SURVEY SAMPLE DEMOGRAPHICS

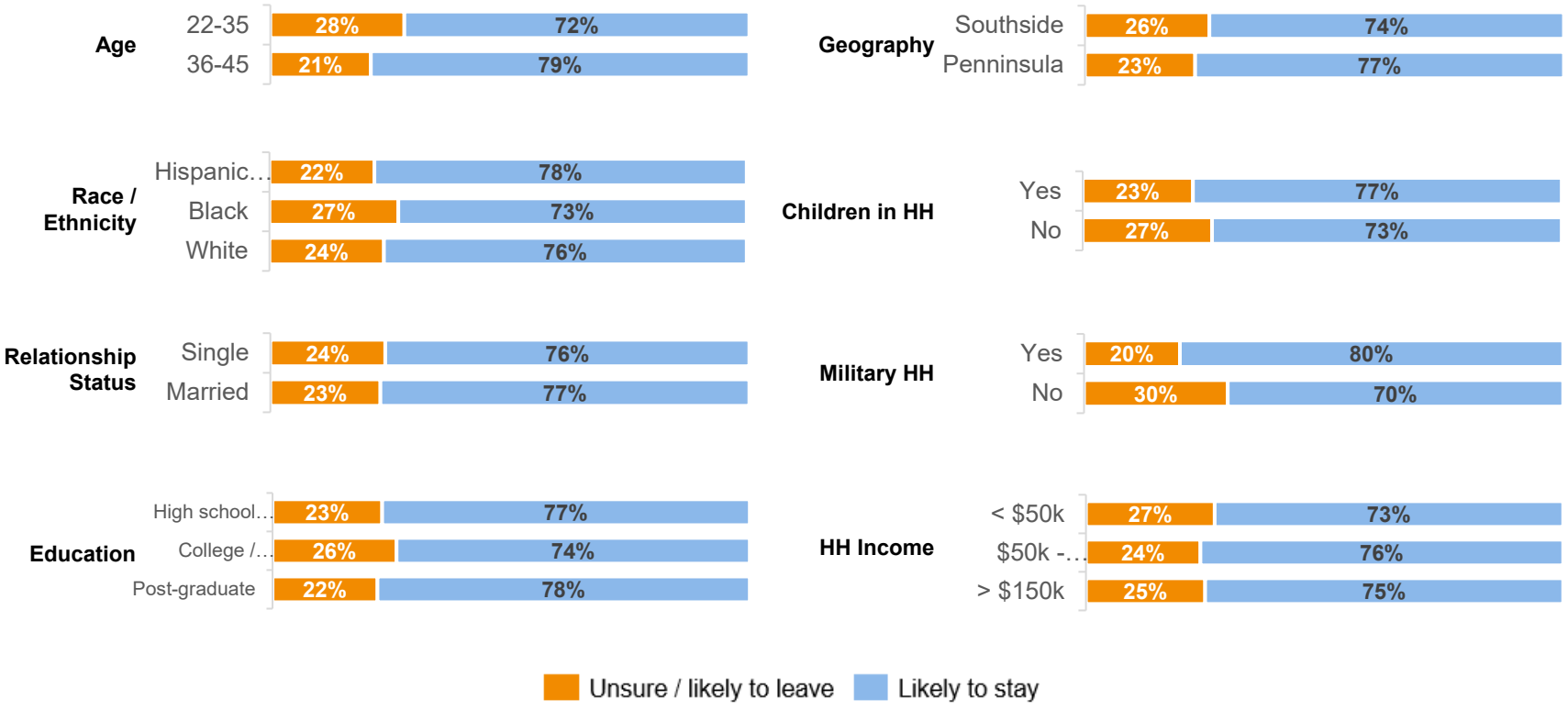




Base: Total Respondents (n=511)
Q1.4: In which sector are you employed or looking for work?; Q2.1: Which of the following best describes your history in the Hampton Roads area? (†: Those answering "Returned here after living somewhere else" referred to as "Boomerangs" throughout our analysis.)

Survey demographics by likelihood to leave / stay in Hampton Roads

Younger, non-military people with no children in the home more likely to leave

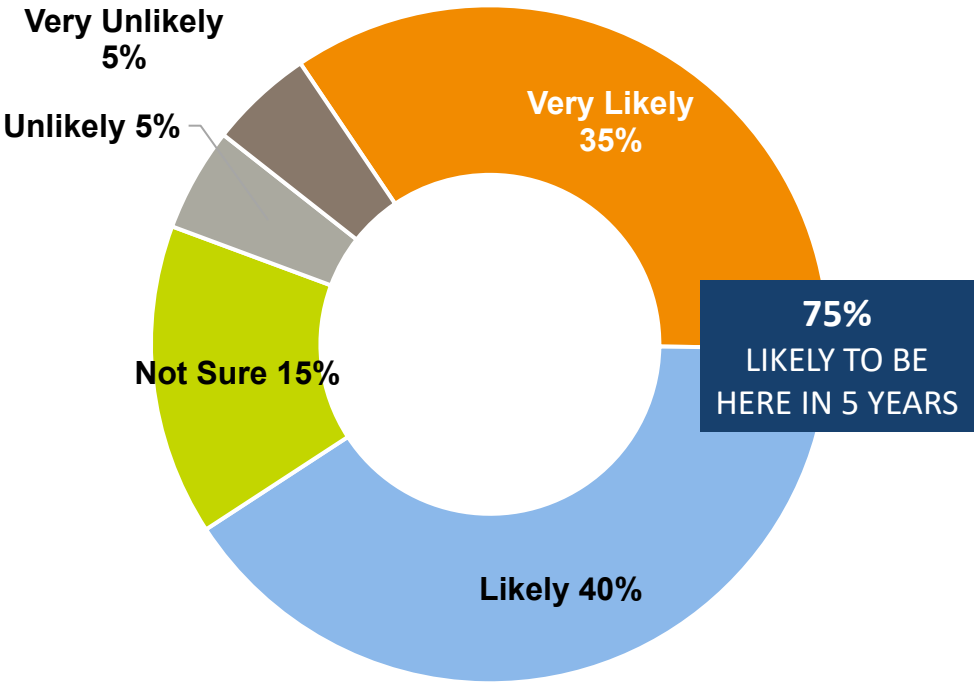


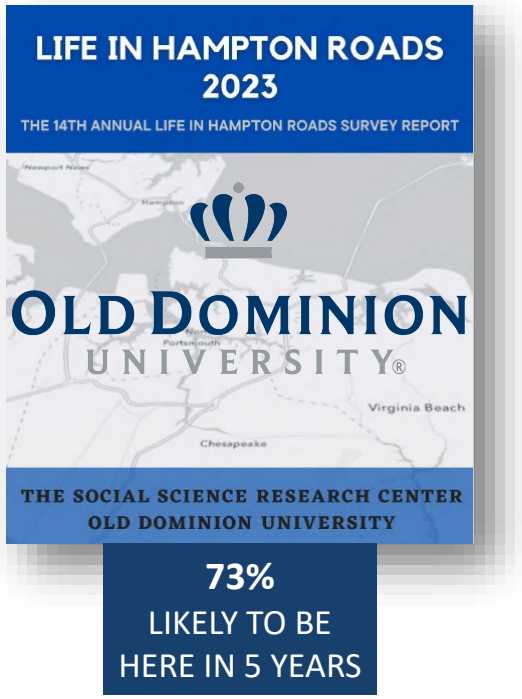
Base: Total Respondents (n=511)
Q1.1: What is your age?; Q6.7: Which of these do you consider yourself to be?; ?; Q6.2: Are you…? Q6.3: What was the last level of education that you completed?; Q1.2: In which city or area of Hampton Roads do you currently reside?; Q6.4: Do you have children living at home with you at least half the time?; Q6.9: Are you, or is anyone in your household…? Q6.6: Which of the following best describes your annual household income before taxes?; Q2.6: The likelihood that I will be living in HR 5 years from now is.

OVERALL PERCEPTIONS

3 out of 4 residents expect to stay in the area

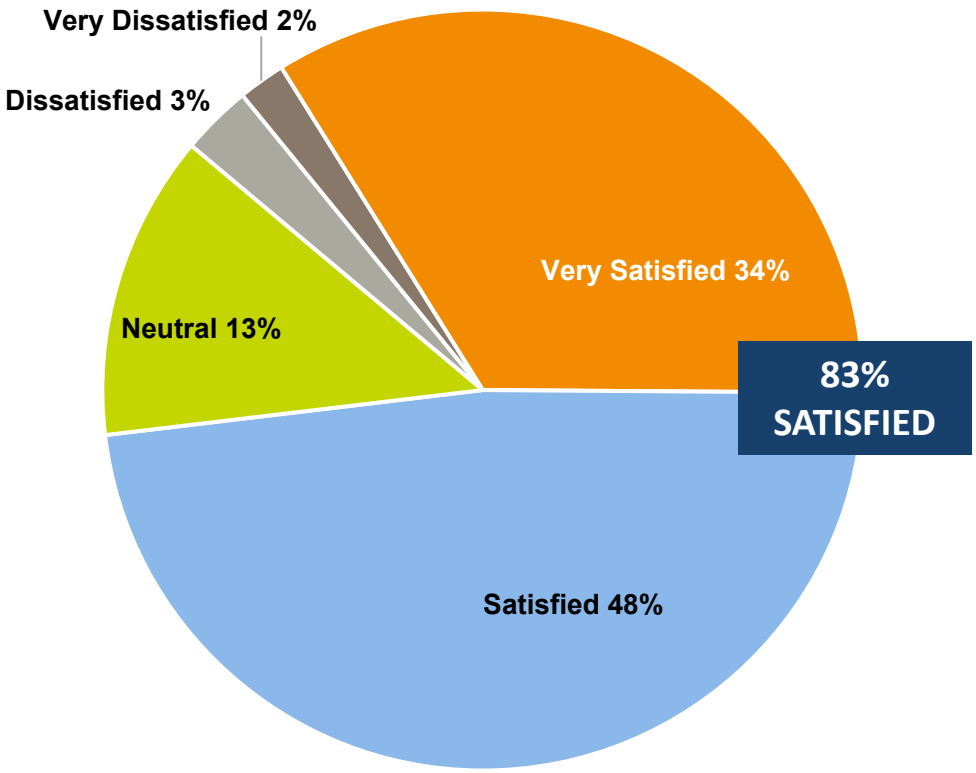
Results mirror the ODU Life in Hampton Roads Study





Base: Total Respondents (n=511)
Q2.6: Next, please estimate the likelihood that you will be living in Hampton Roads in 5 years
ODU Survey available at: https://www.odu.edu/social-science-research-center/life-in-hampton-roads

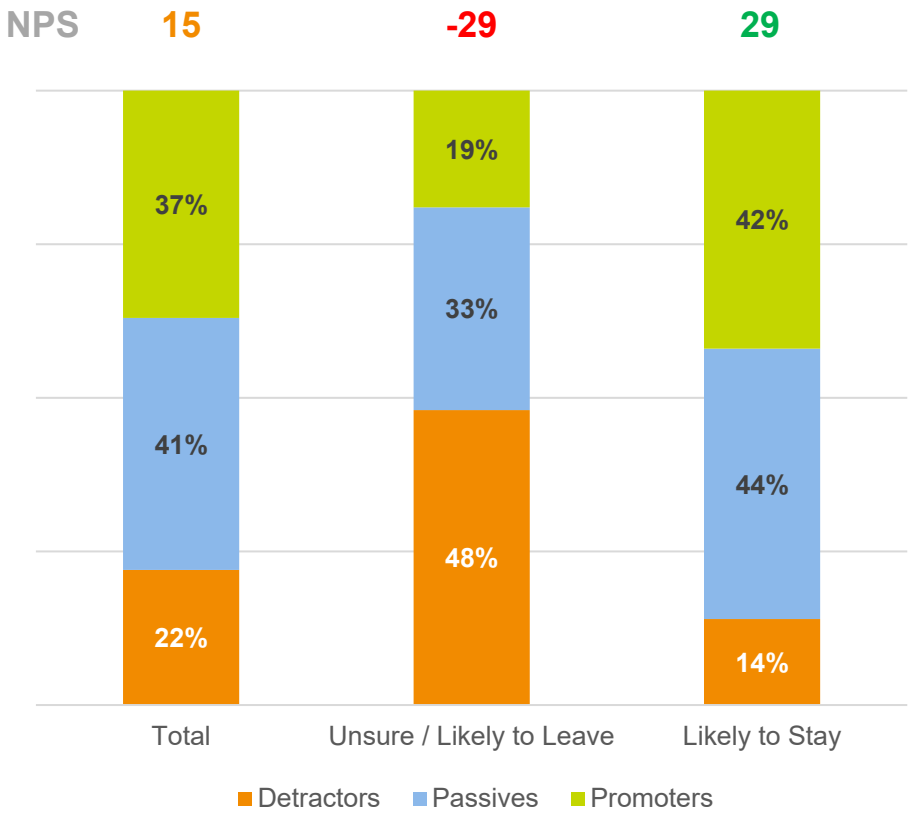
Residents are generally satisfied with life in Hampton Roads



Base: Total Respondents (n=511)
Q3.1: How satisfied are you, overall, with living in Hampton Roads?

Those with roots here are more likely to be promoters of the region

Newcomers, private sector employees, no children in the HH least likely to be promoters

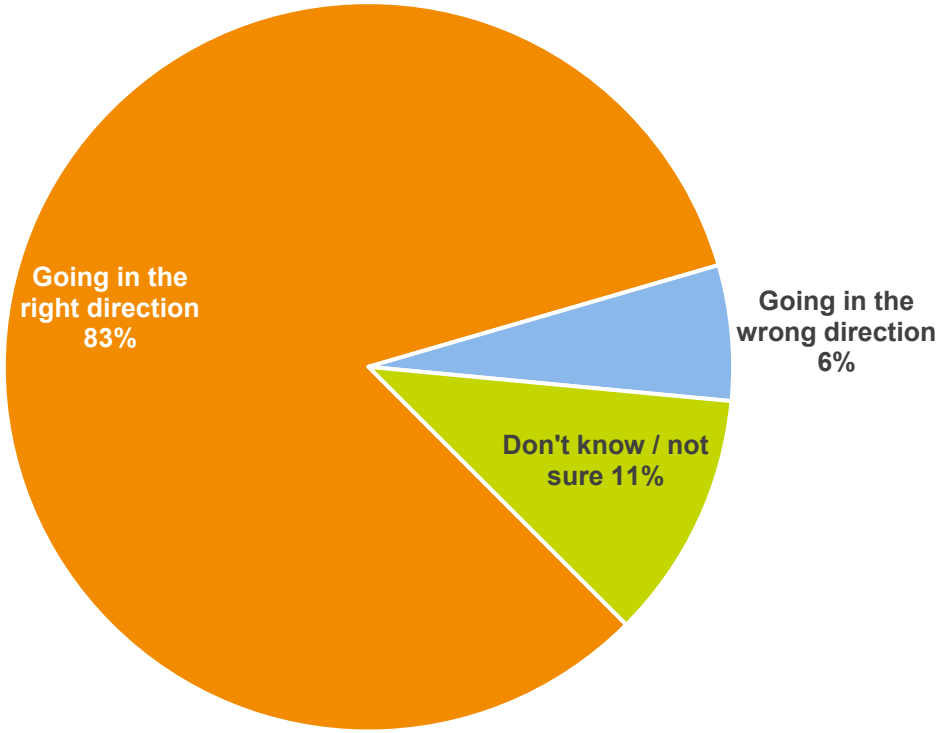


Attribute	NPS
Lived here > 10 years	31
Boomerangs	29
HH income > $75k	26
Children in HH	25
HHI < $75k	3
No children in HH	0
Private sector employees	0
Lived here < 5 years	0

Base: Total (n=511), Unsure / Unlikely / Very Unlikely to stay (n=127); Very Likely / Likely to stay (n=384).
Q3.17: Overall, how likely are you to recommend the Hampton Roads region as a place to live to friends or family members? (10=Extremely likely, 1=Not at all likely). †NPS Score = % Promoters (9-10) - % Detractors (1-6).

The future looks bright to most residents of Hampton Roads

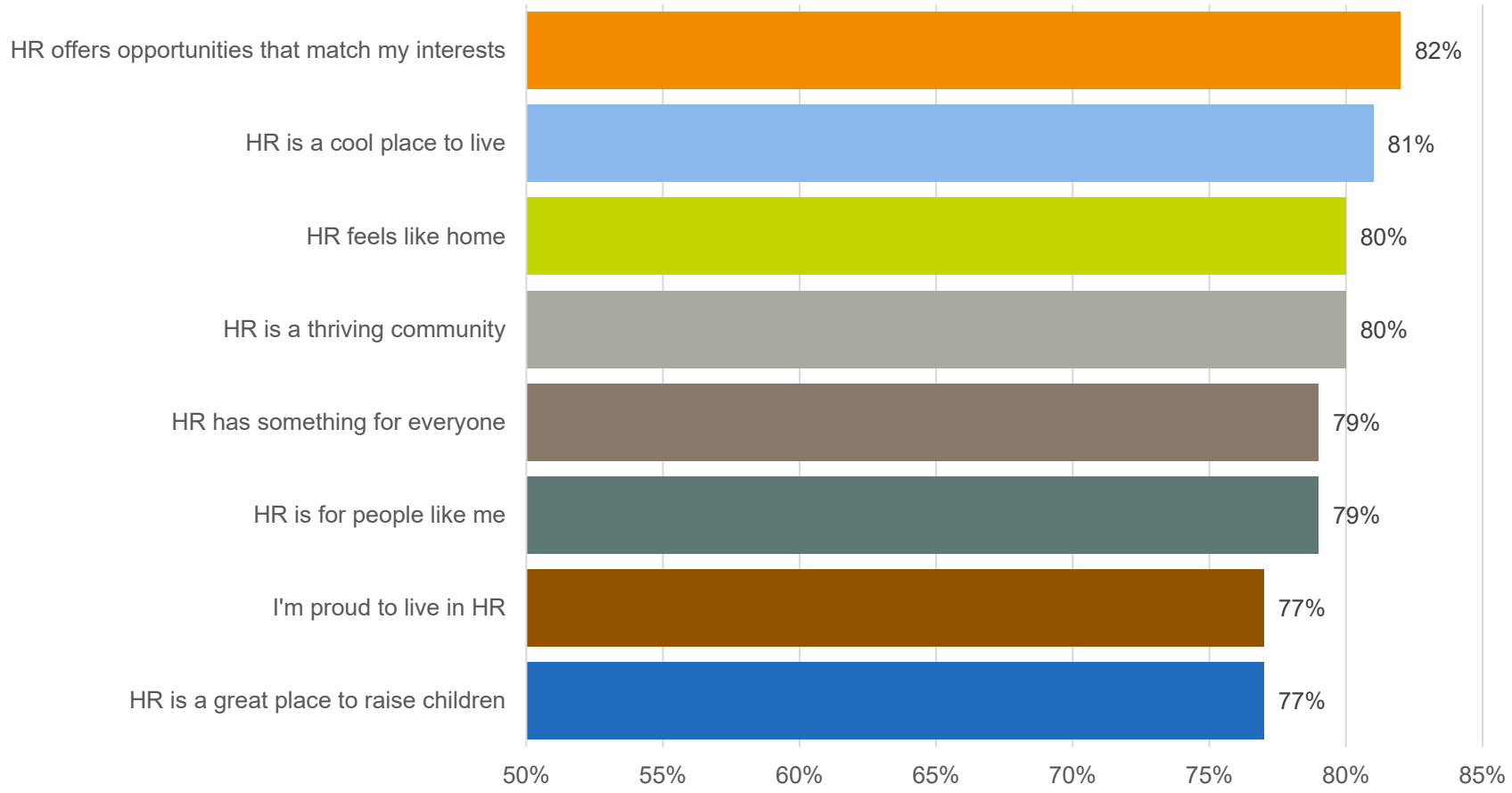
Exceptions: Private sector employees, those without children, non-military HHs, and those likely to leave



Most likely to say going in wrong dir.
Private Sector Employees
No children in HH
Non-military HH
Unsure / likely to leave

Base: Total Respondents (n=511)
Q3.8: How do you feel about the direction that Hampton Roads is going as a place to live?

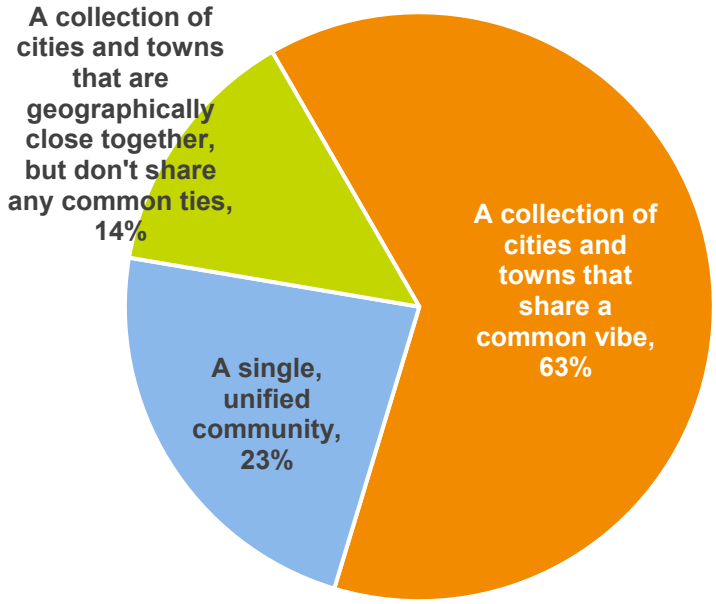
Positive perceptions of the region overall…

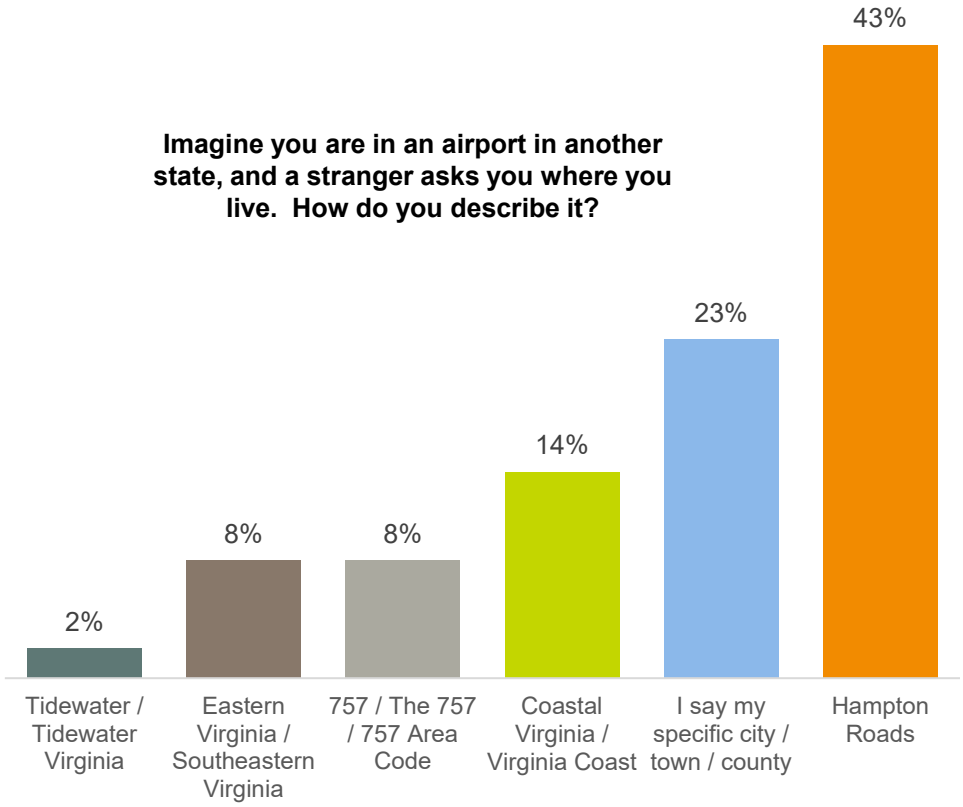


Base: Total Respondents (n=511)
Q3.5: For each of the following statements, please tell us how much you agree or disagree. (% Agree completely, somewhat)

…but the region lacks a unifying identity

Respondents view the area as a collection of cities and towns; they even differ on what to call it

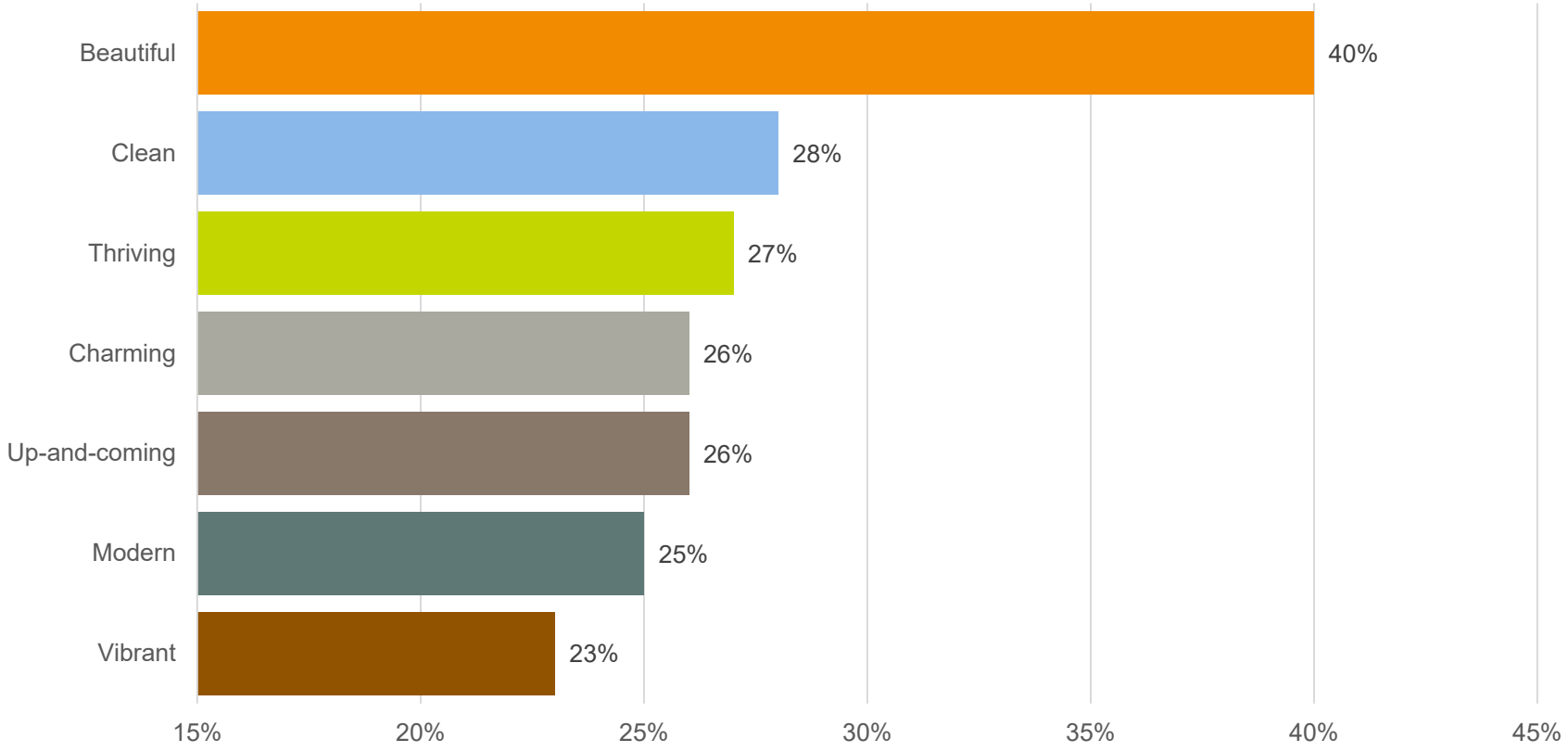




Base: Total Respondents (n=511)
Q4.6: Which of the following best describes the Hampton Roads area?
Q4.7: Imagine you are in an airport in another state, and a stranger asks you where you live. How do you describe it?

Most describe region in positive tones, “Beautiful” most common adjective

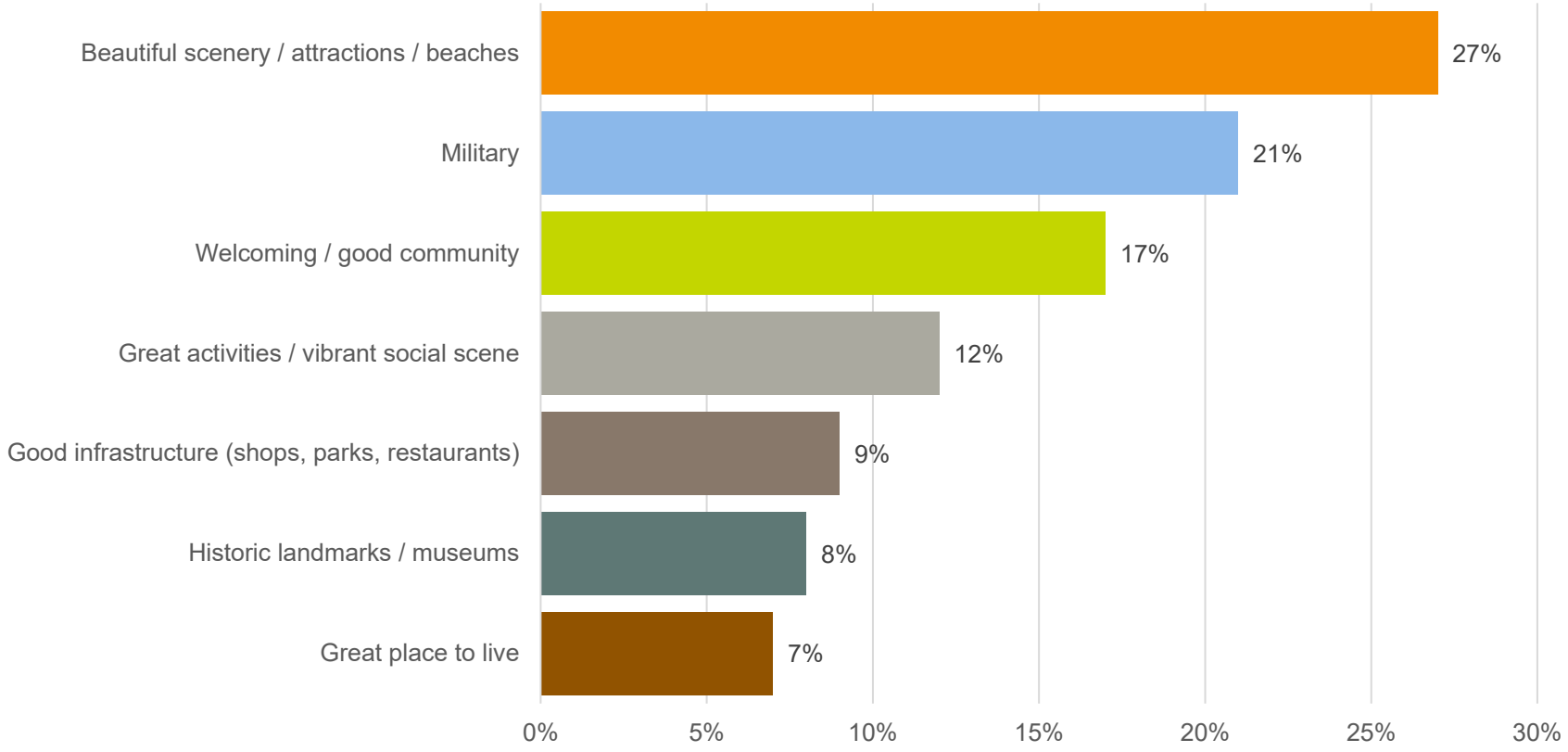
90% mention a positive descriptor, 39% mention a negative descriptor (most common “Touristy”, 19%)



Base: Total Respondents (n=511)
Q3.16: Which of the following words best describe Hampton Roads? Select up to 3

Scenic beauty is key attribute of area to just over a quarter of respondents

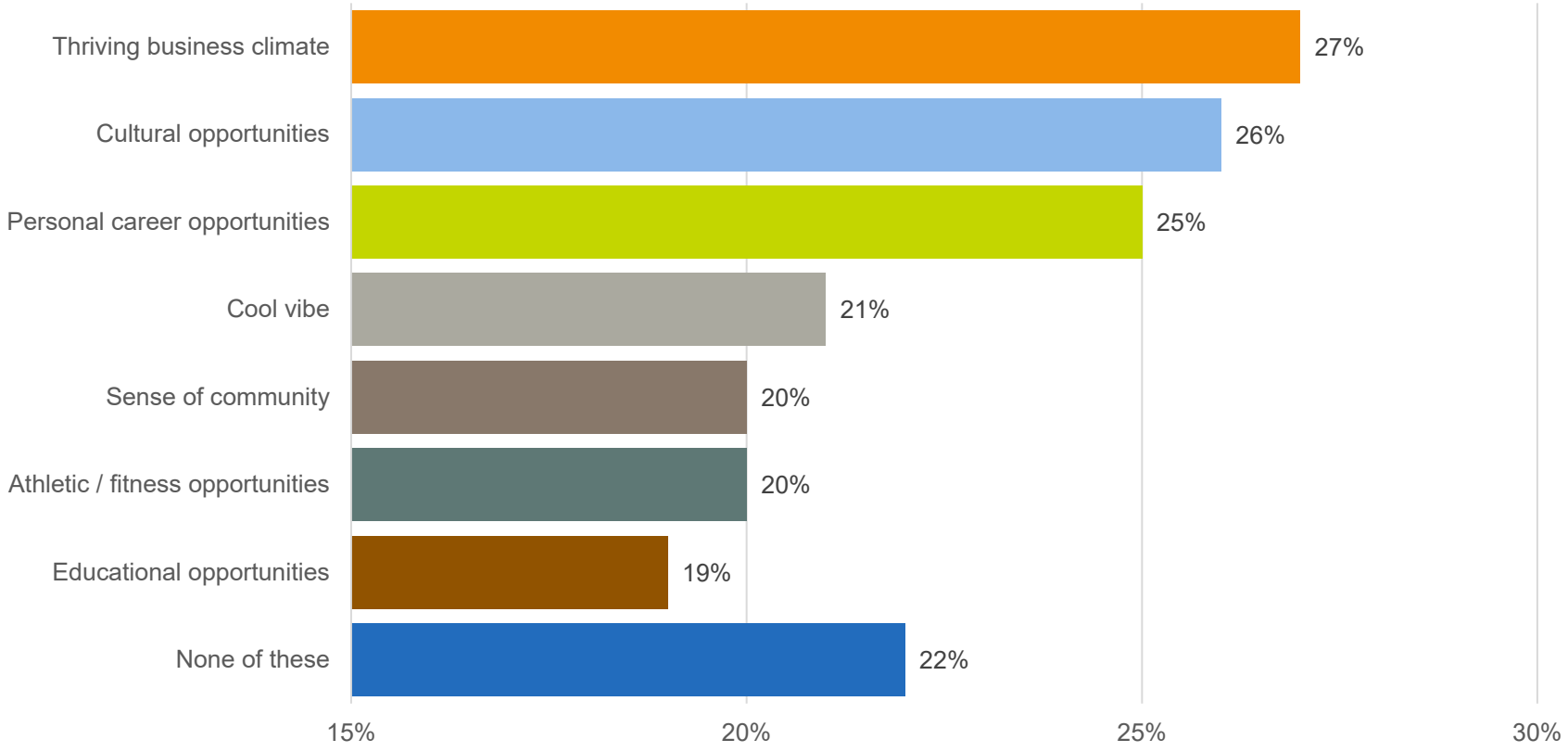
The region's connection to the military is also strongly felt



Base: Total Respondents (n=511)
Q3.6: Please finish this sentence: Hampton Roads is known for… (coded open-end)

Career prospects and cultural opportunities viewed as most lacking here

Likely correlation between overall business climate and personal career opportunities



Base: Total Respondents (n=511)
Q4.5: Which of the following do you think are most lacking when it comes to living in Hampton Roads?

QUALITY OF LIFE IN HAMPTON ROADS

Top Drivers of Satisfaction with Life in Hampton Roads

SAFETY: Respondents overwhelming agree that a sense of security is a bedrock issue when it comes to their satisfaction with life here

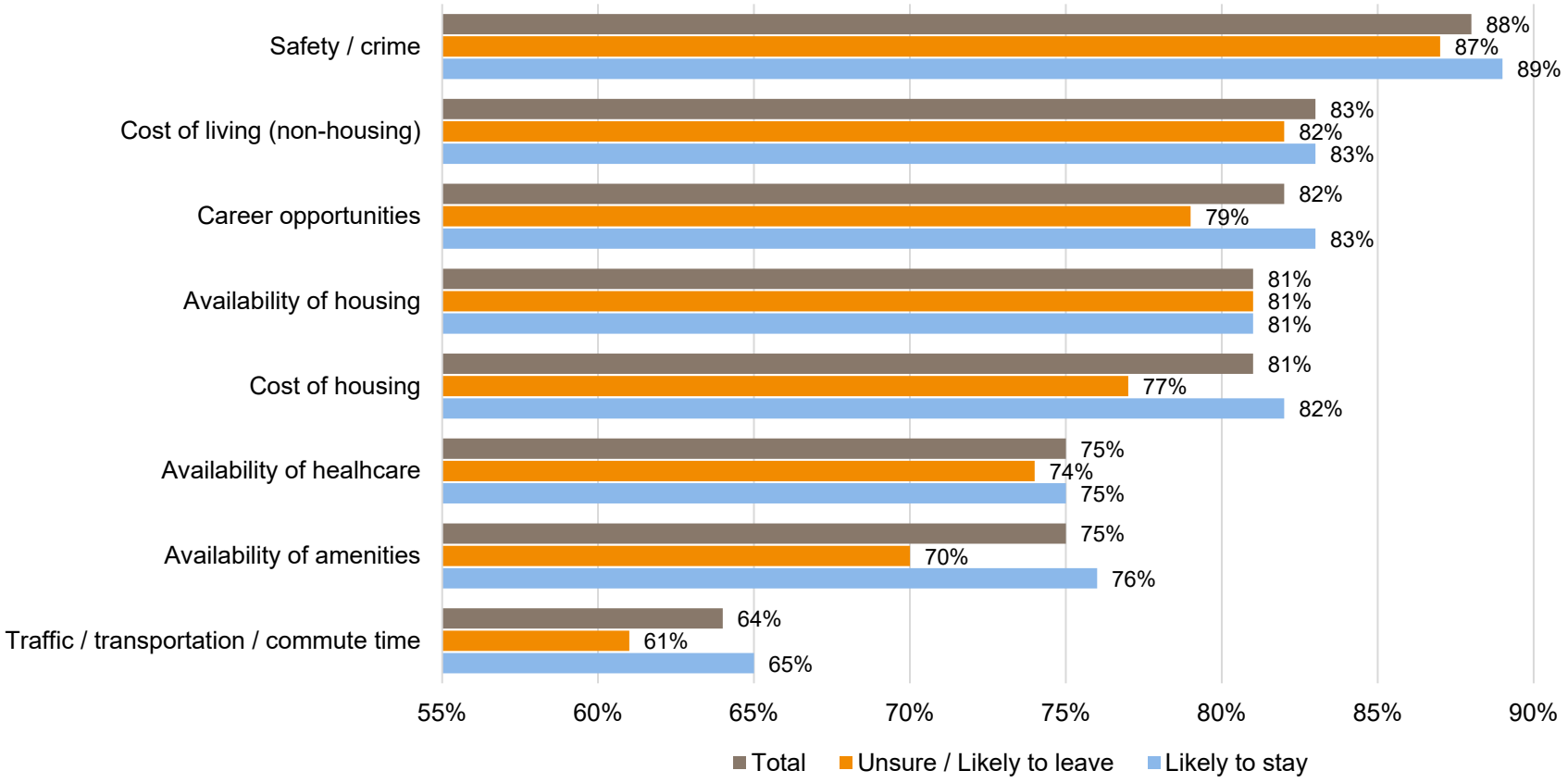
COST OF LIVING: Affordable and available housing, as well as other expenses, contribute to quality of life and are widely viewed as important

JOB/CAREER OPPORTUNITIES: Career and job potential are top-of-mind for respondents who indicated they hold full-time employment; negative perceptions about the availability of sufficient career opportunities is correlated with increased likelihood of outmigration

SOCIAL SUPPORT: Lack of a strong social network of both family and friends in the area is closely tied to likelihood of outmigration

Overwhelming agreement on relative importance of quality-of-life issues

Safety, cost of living, job/career opportunities, and housing availability / cost top the list



Base: Total Respondents (n=511); Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years; Returned to HR (n=112). Q2.13: When thinking about whether to stay in the Hampton Roads region, please rate the importance of each of the following. (% Very- or Somewhat-important)

Safety is of utmost importance, and most feel safe in Hampton Roads

Most important issue when considering whether to out-migrate

88%

Safety / crime is extremely / very important

83%

Agree “I feel safe where I live”

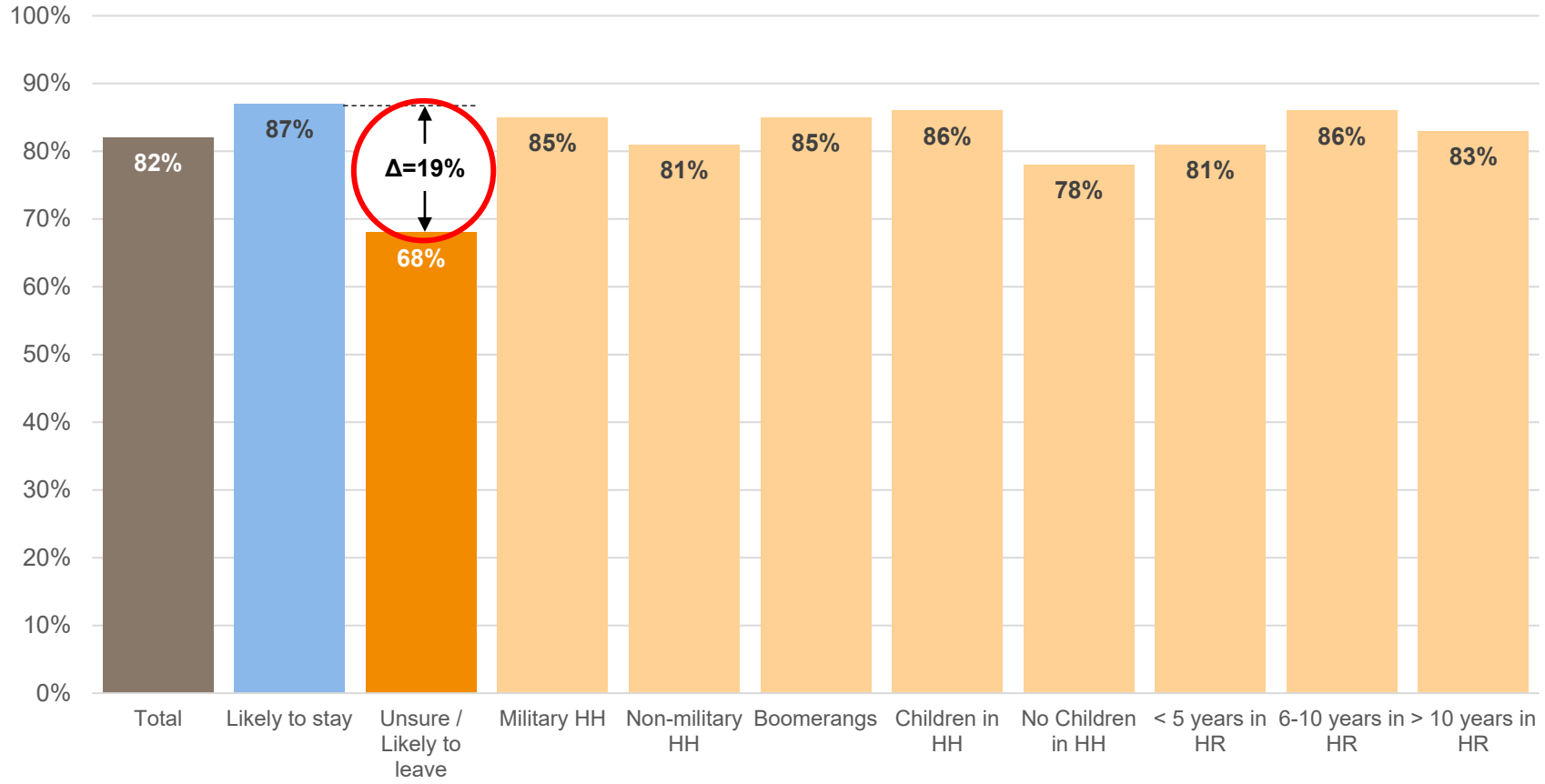
71%

Satisfied with safety / crime in Hampton Roads

Base: Total Respondents (n=511)
Q2.13: When thinking about whether to stay in the Hampton Roads region, please rate the importance of each of the following; Q3.5: For each of the following statements, please tell us how much you agree or disagree; Q3.2: Please rate your satisfaction with each of the following in Hampton Roads.

Perception of safety is correlated with likelihood of outmigration

Those planning to stay were significantly more likely to say they felt safe where they live



Base: Total Respondents (n=511)
Q3.10: For each of the following statements, please tell us how much you agree or disagree…"I feel safe where I live". (% Very- or Somewhat-safe)

Satisfaction with career and business opportunities are generally positive

Those who have low satisfaction and higher concern about finding a job more likely to leave

82%

Career opportunities extremely / very important

76%

Satisfied with career opportunities in Hampton Roads

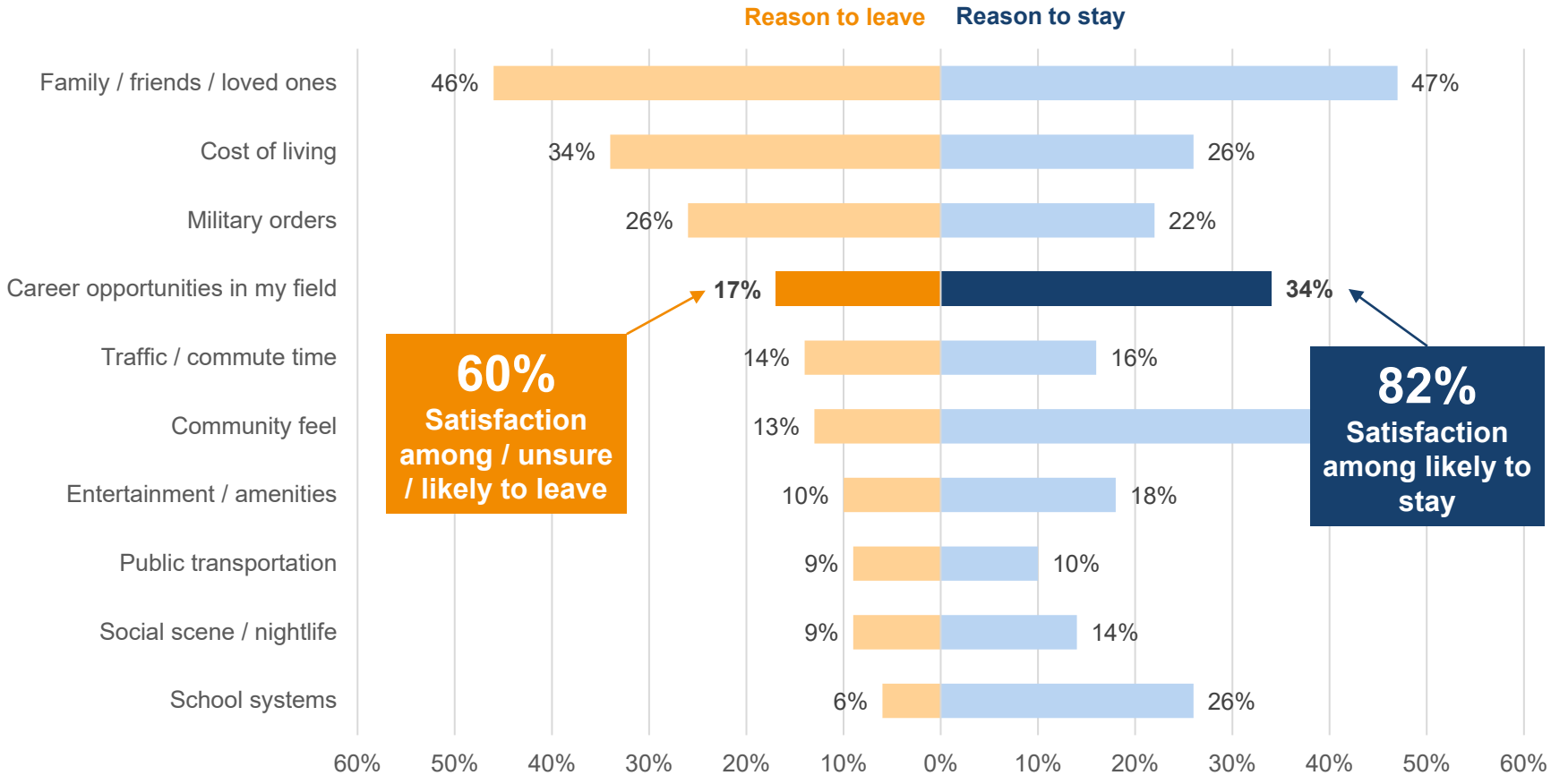
40%

Feel connected to community because of work

Base: Total Respondents (n=511)
Q2.13: When thinking about whether to stay in the Hampton Roads region, please rate the importance of each of the following. Q3.2: Please rate your satisfaction with each of the following in Hampton Roads. Q2.9: What aspects of HR make you feel most connected to the community?

Career opportunities have some positive pull

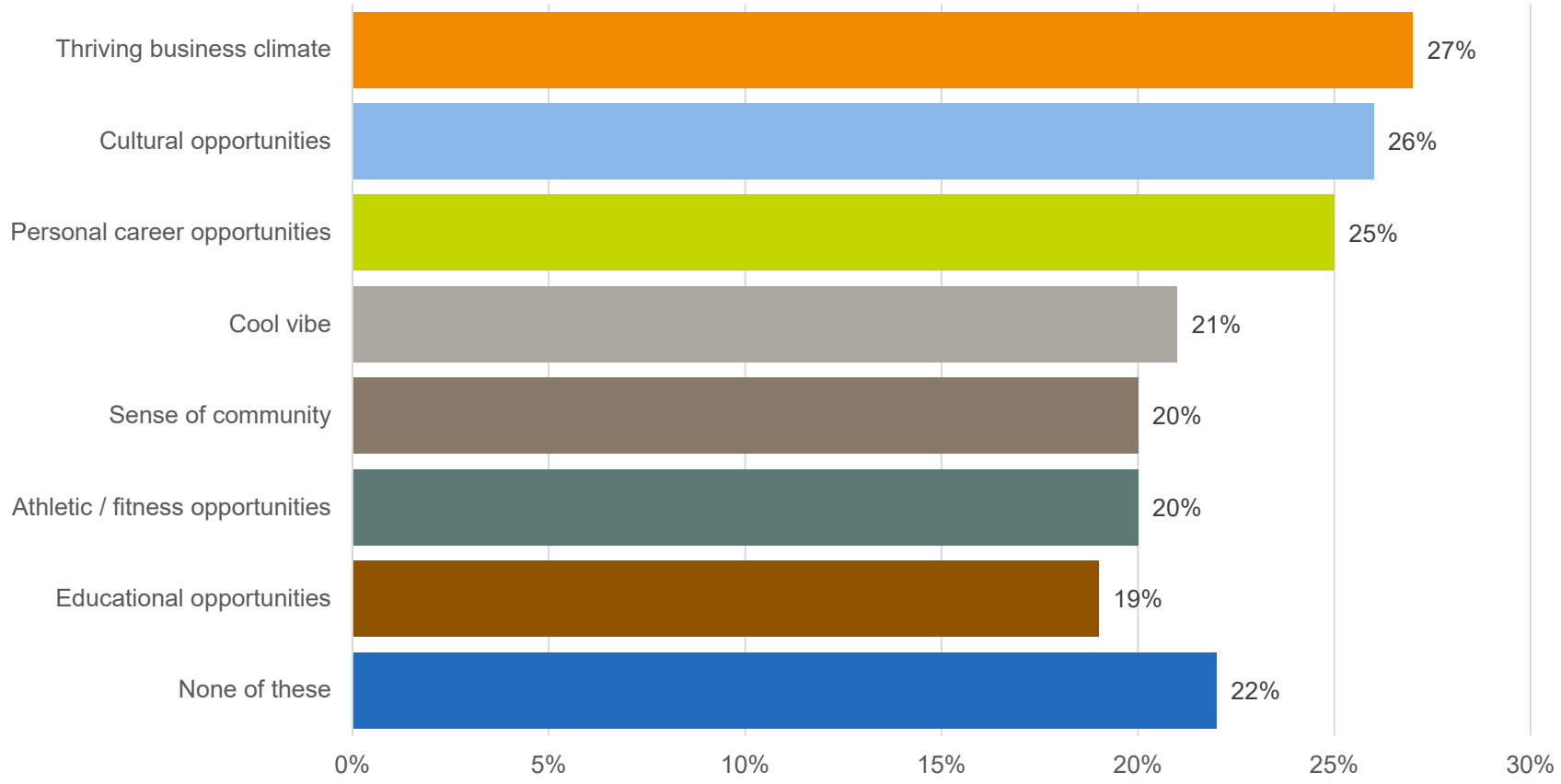
But those who are more likely to leave are much less satisfied with career opportunities here



Base: Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years
Q4.3: What are the primary reasons you would consider leaving Hampton Roads to live somewhere else in the next 5 years? Q4.4: What are the primary reasons you plan to stay in Hampton Roads for the next 5 years?; Q3.2: Please rate your satisfaction with each of the following in Hampton Roads.

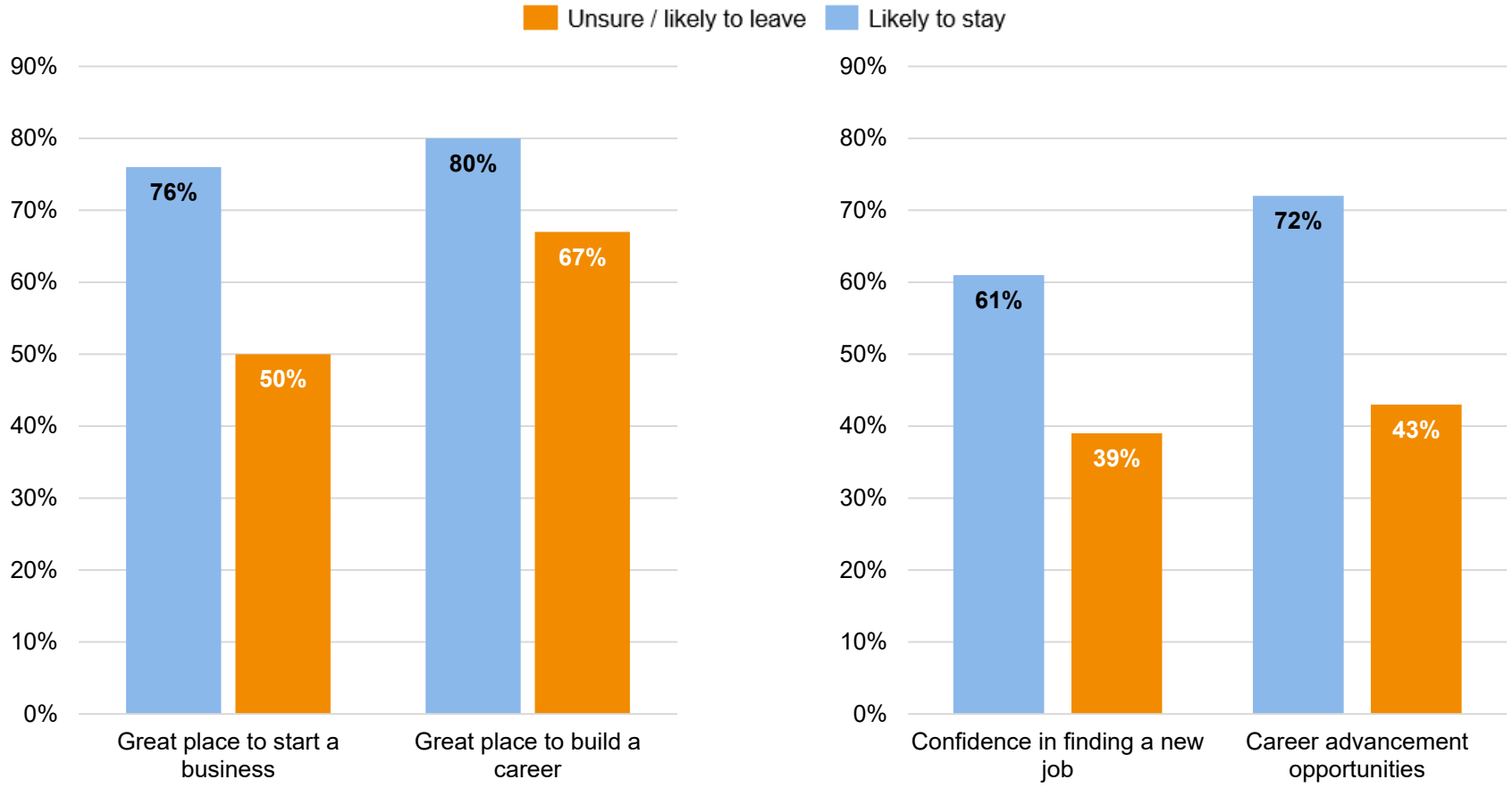
Career opportunities mentioned as a concern by 1 in 4

Two of top three answers to "what is lacking most" here related to economic opportunities



Base: Total Respondents (n=511)
Q4.5: Which of the following do you think are most lacking when it comes to living in Hampton Roads?

Career opportunities are especially a concern for those most likely to leave



Base: Total Respondents (n=511); Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years
Q3.5: For each of the following statements, please tell us how much you agree or disagree: Hampton Roads is…. Q3.13: Thinking about the professional climate of Hampton Roads, how would you rate career advancement opportunities within HR? Q3.14: If you needed to change jobs, how confident are you that you could find a new job in your field in HR within 3 months?

Cost of living is a key motivator for those more likely to leave

83%
Cost of living extremely / very important

60%
Satisfied with cost of living (other than housing)

34%
Would move somewhere else for lower cost of living

Base: Total Respondents (n=511); Unsure / Unlikely / Very Unlikely to be in HR in 5 years (n=127)
Q2.13: When thinking about whether to stay in the Hampton Roads region, please rate the importance of each of the following. Q3.2: Please rate your satisfaction with each of the following in Hampton Roads. Q4.3: What are the primary reasons you would consider leaving Hampton Roads to live somewhere else in the next 5 years?

Cost and availability of housing are key concerns as well

Feelings are mixed about housing availability

81%
Cost of housing extremely / very important

81%
Availability of housing extremely / very important

64%
Satisfied with cost of housing

69%
Satisfied with availability of housing

48%
Rate availability of housing as excellent / good

Base: Total Respondents (n=511)
Q2.13: When thinking about whether to stay in the Hampton Roads region, please rate the importance of each of the following. Q3.2: Please rate your satisfaction with each of the following in Hampton Roads. Q3.12: How would you rate the availability of affordable housing in Hampton Roads?

Sufficiency of career opportunities is “table stakes” for living in the area

82%

Career opportunities extremely / very important

76%

Satisfied with career opportunities

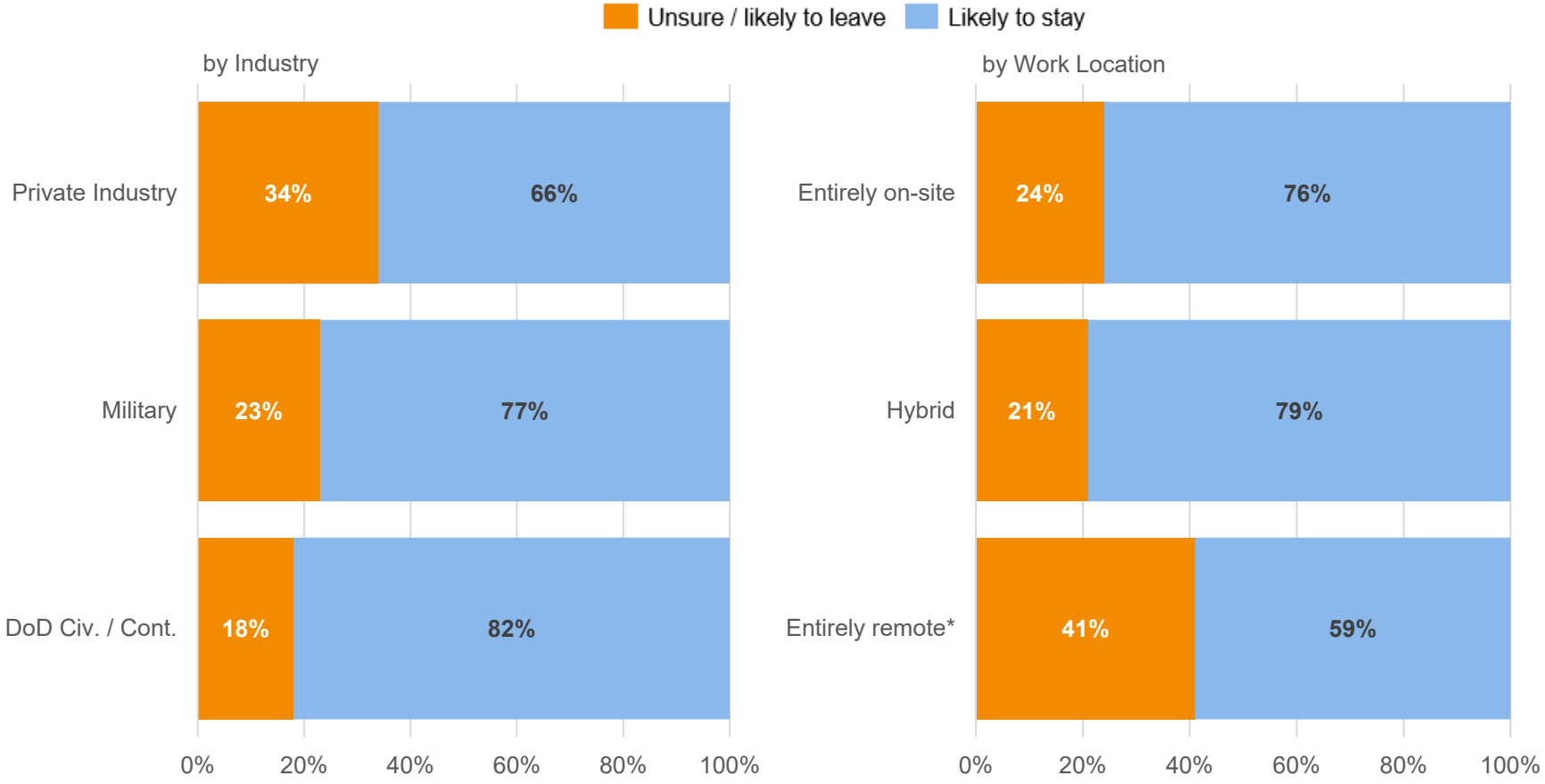
40%

Feel connected to community because of work or career

Base: Total Respondents (n=511); Unsure / Unlikely / Very Unlikely to be in HR in 5 years (n=127)
Q2.13: When thinking about whether to stay in the Hampton Roads region, please rate the importance of each of the following. Q3.2: Please rate your satisfaction with each of the following in Hampton Roads. Q4.3: What are the primary reasons you would consider leaving Hampton Roads to live somewhere else in the next 5 years?

DoD affiliation and work location impact likelihood to leave the region

Private sector employees who work remotely significantly more likely to leave



Base: Total Respondents (n=511); Private industry (n=162), Military (n=160), DoD (n=173), Entirely on-site (n=270), Hybrid (n=184), Entirely remote (n=56) *Caution: Small base size. Q2.6: Please estimate the likelihood that you will be living in Hampton Roads in 5 years. Q.1.4: In which sector are you employed or looking for work? Q6.1: For your job, do you currently work…?

Strong social support networks drive feelings of connection

66%

Being close to family / friend extremely / very important

74%

Satisfied with being close to family / friends

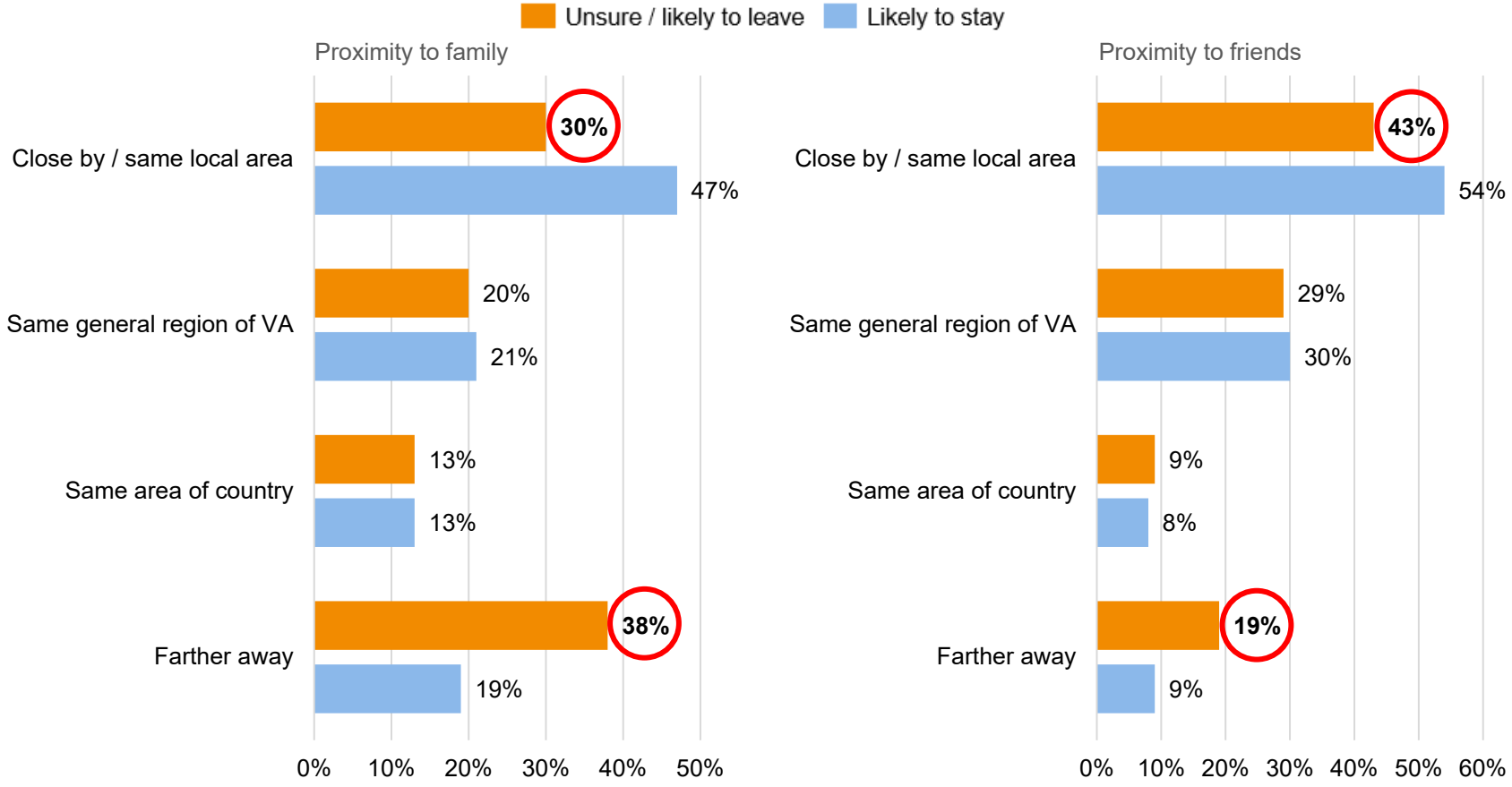
39%

Feel connected to community due to proximity to family / friends

Base: Total Respondents (n=511)
Q2.13: When thinking about whether to stay in the Hampton Roads region, please rate the importance of each of the following. Q3.2: Please rate your satisfaction with each of the following in Hampton Roads. Q2.9: What aspects of HR make you feel most connected to the community?

Proximity to family and friends is a key issue in outmigration

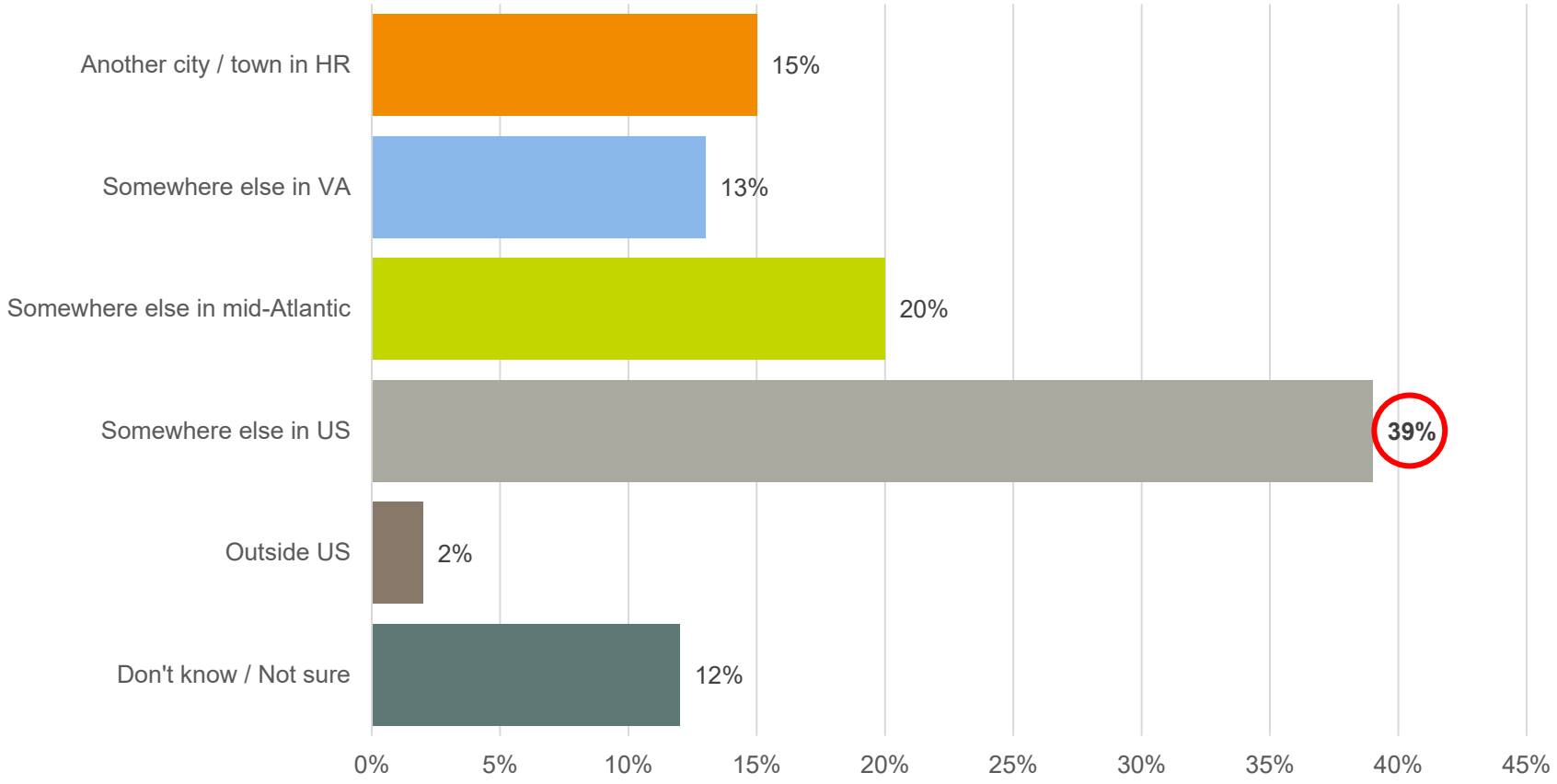
Distant family and friends likely draws some residents away



Base: Total Respondents (n=511); Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years
Q3.5: For each of the following statements, please tell us how much you agree or disagree: Hampton Roads is…. Q3.13: Thinking about the professional climate of Hampton Roads, how would you rate career advancement opportunities within HR? Q3.14: If you needed to change jobs, how confident are you that you could find a new job in your field in HR within 3 months?

Those likely to leave are likely to go far from Hampton Roads

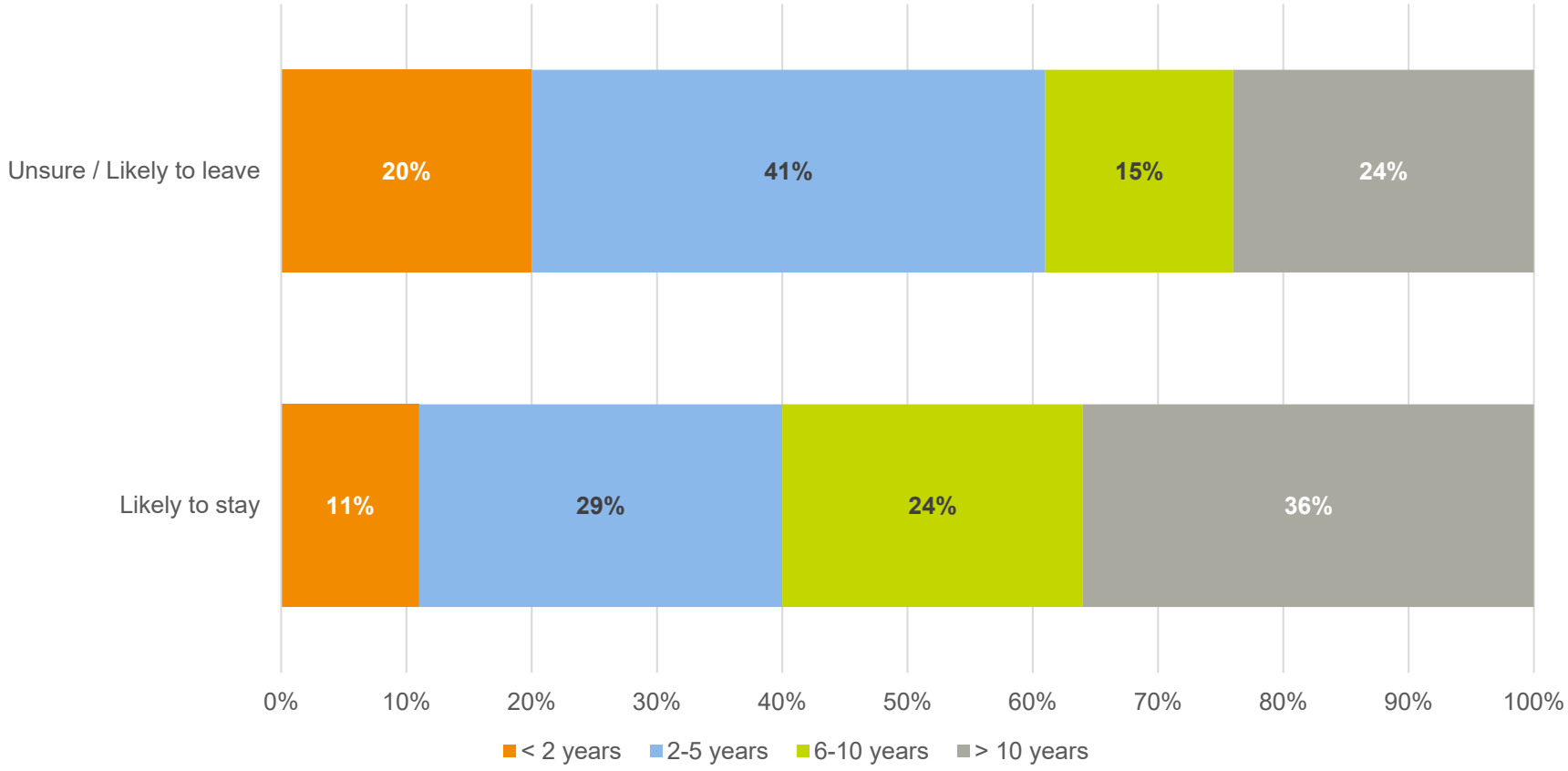
This could be attributed to more distant friends and family



Base: Unsure / Unlikely / Very Unlikely to be in HR in 5 years (n=127)
Q4.1: If you were to move away from where you currently live in HR, where would you most likely move to?
Q4.2: If you were to move away from where you currently live in HR, would you most likely move to an area that is…?

Newer arrivals to Hampton Roads less sure about staying long-term

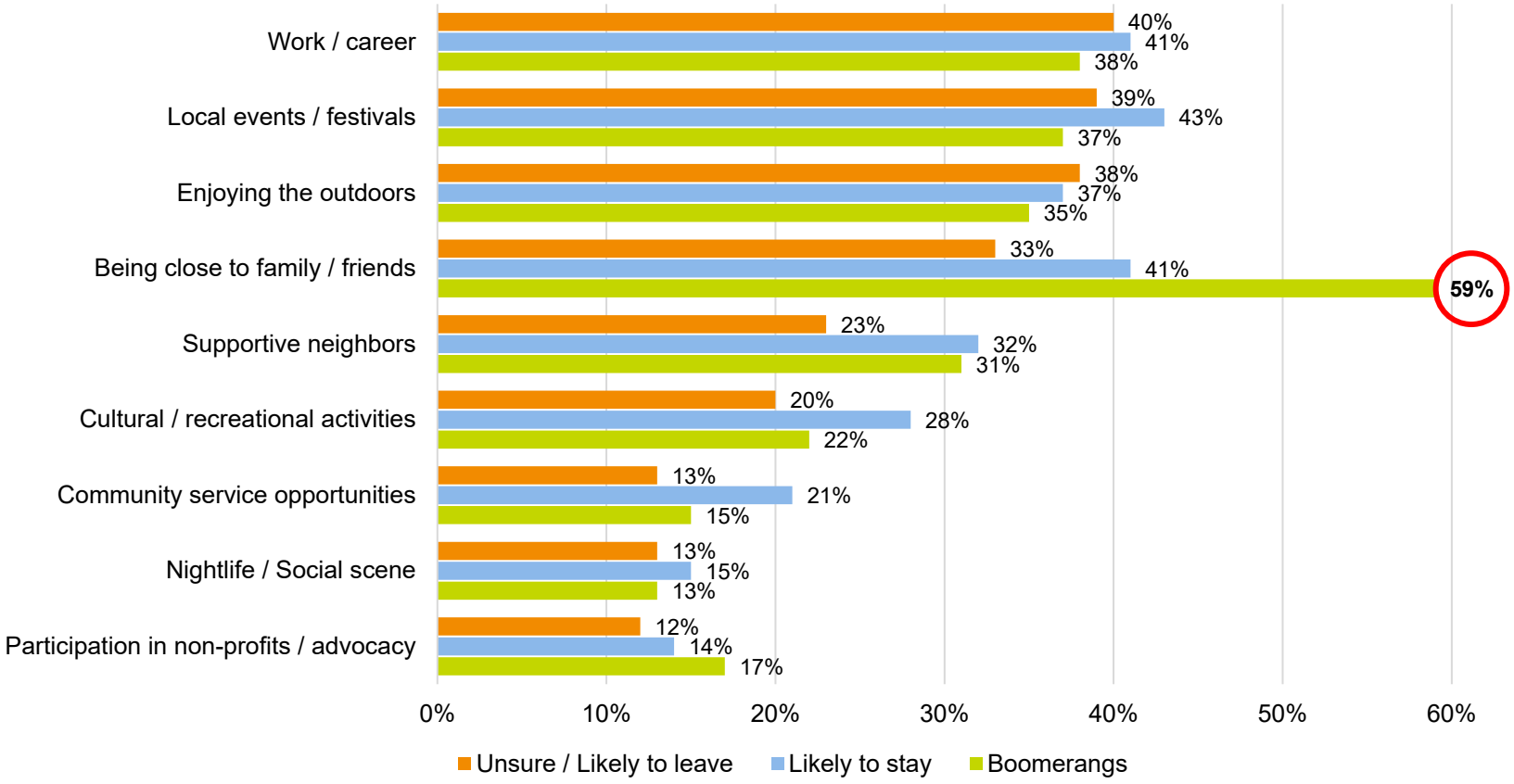
Those likely to stay have put down roots, with 1 in 3 having lived in here for more than a decade



Base: Total Respondents (n=511)
Q3.10: We would like to understand your perception of safety. For each area below, please rate how safe you believe the area to be.

Proximity to family / friends drives a feeling of connection to the community

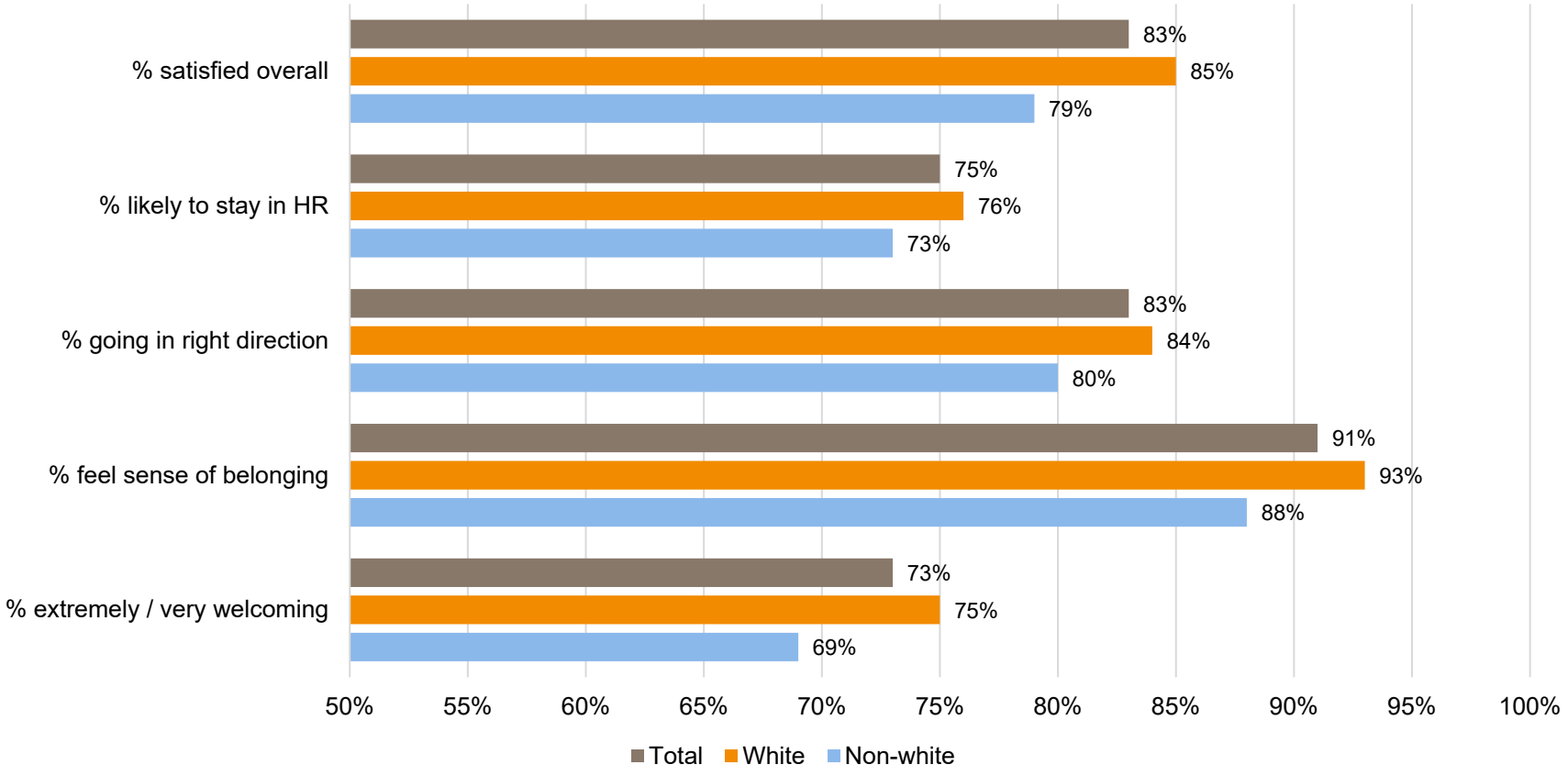
This is especially true for boomerang residents



Base: Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years; Returned to HR (n=112)
Q2.9: What aspects of Hampton Roads make you feel most connected to the community?

Non-white residents are directionally less happy living in HR

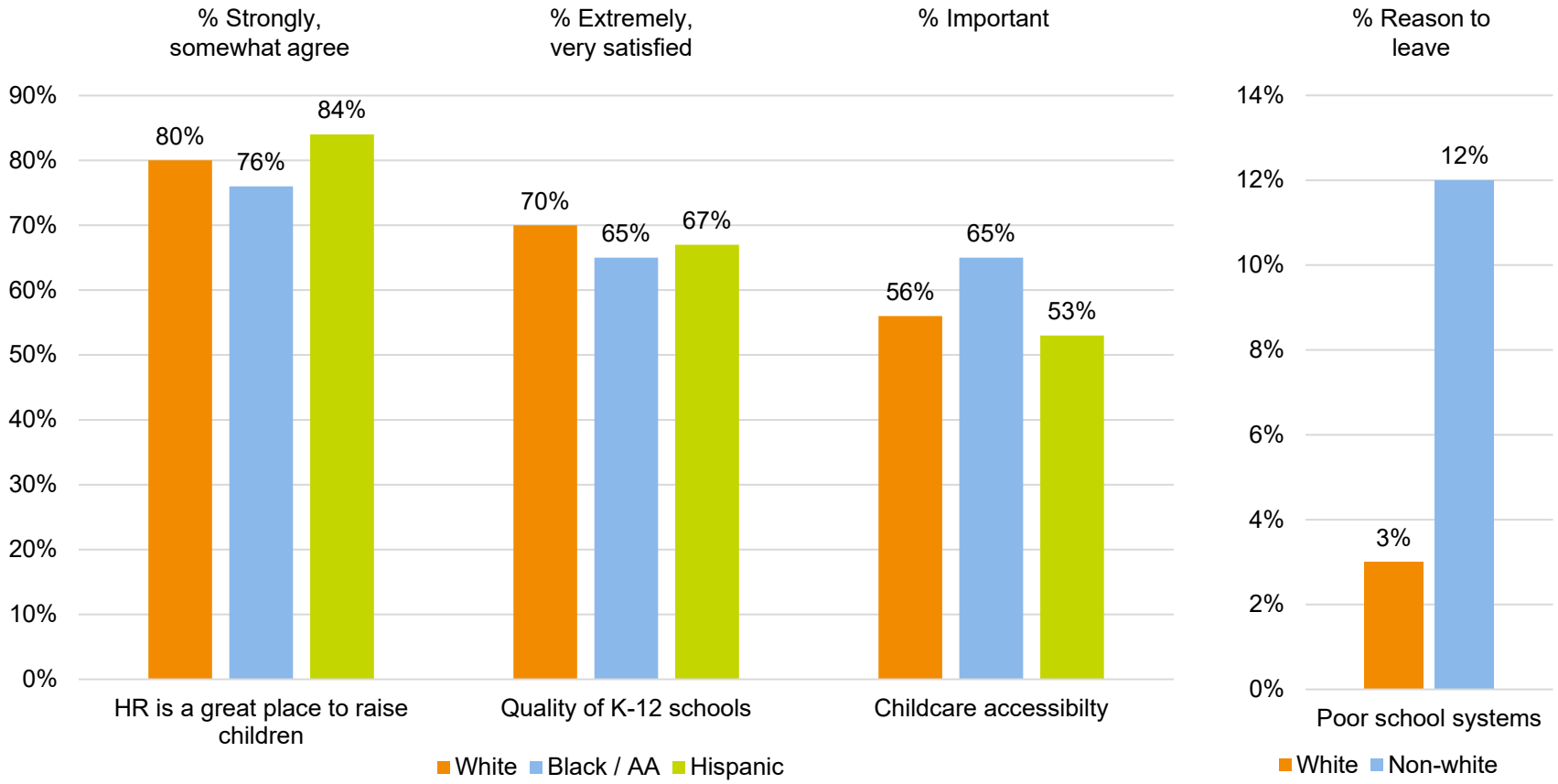
Though differences are not statistically significant



Base: Total Respondents (n=511); White (n=327); Non-White (n=184). Q2.6: Next, please estimate the likelihood that you will be living in Hampton Roads in 5 years. Q3.1: How satisfied are you, overall, with living in Hampton Roads? Q3.8: How do you feel about the direction that Hampton Roads is going as a place to live?; Q2.11: Do you feel a sense of belonging in Hampton Roads? Q3.7: How welcoming or inclusive would you say the region of HR is?

White residents more satisfied with HR as place to raise kids than non-white

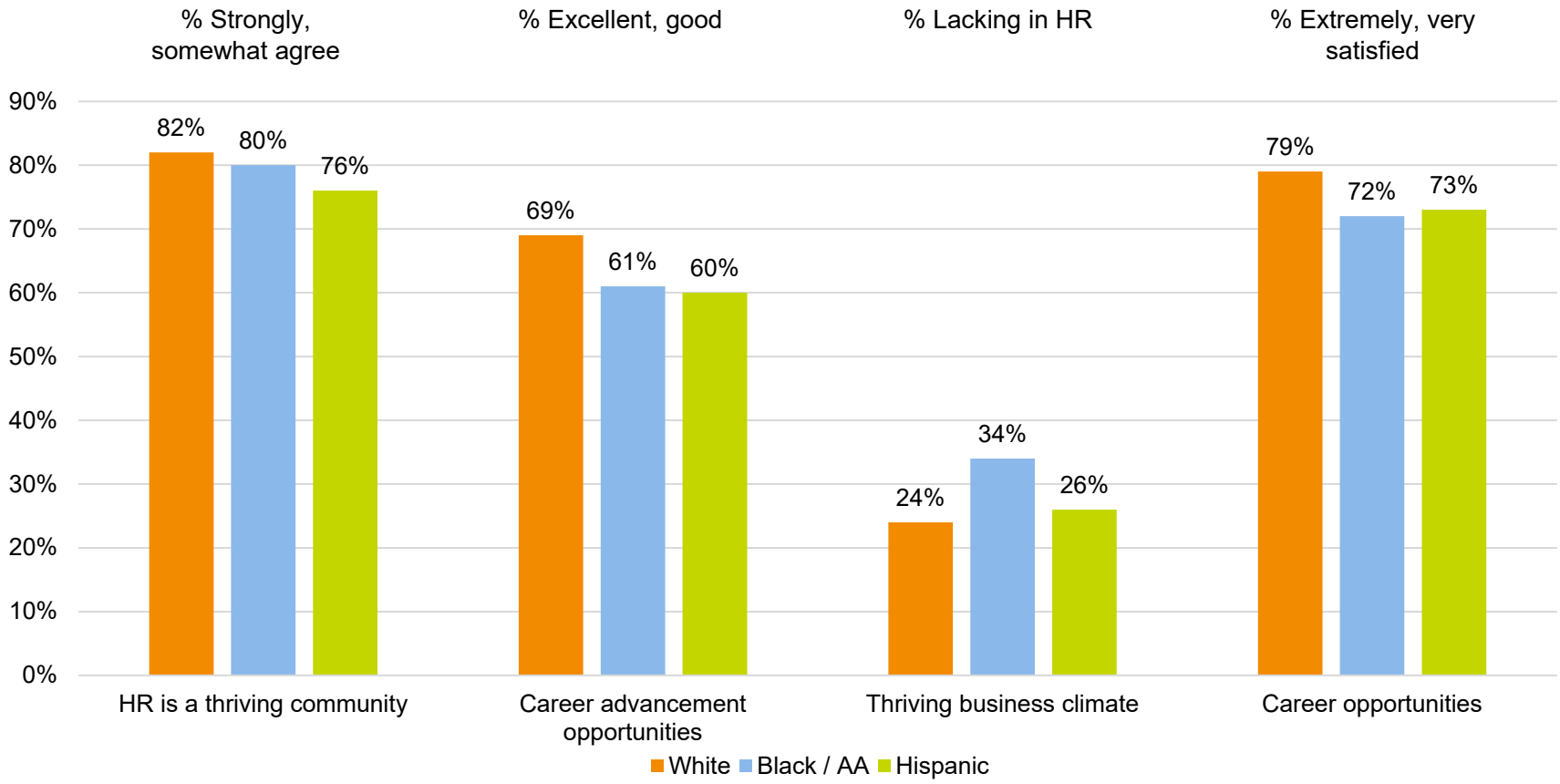
Non-white residents cite poor K-12 schools as a reason they may leave HR 4x more frequently



Base: White (n=327); Black / African-American (n=148); Hispanic / Latino (n=85). Q3.5: For each of the following statements, please tell us how much you agree or disagree. Q2.13: When thinking about whether to stay in the Hampton Roads region, please rate the importance of each of the following. Q3.2: Please rate your satisfaction with each of the following in Hampton Roads. Q4.3: What are the primary reasons you would consider leaving Hampton Roads to live somewhere else in the next 5 years?

HR's business climate viewed less favorably by non-white residents

Non-white residents less satisfied with career opportunities in Hampton Roads



Base: White (n=327); Black / African-American (n=148); Hispanic / Latino (n=85)
Q3.5: For each of the following statements, please tell us how much you agree or disagree. Q4.5: Which of the following do you think are most lacking when it comes to living in Hampton Roads? Q3.13: How would you rate career advancement opportunities within HR? Q3.2: Please rate your satisfaction with each of the following in Hampton Roads.

COMMUNITY INVOLVEMENT

Community involvement is strongly correlated with likelihood to stay

Those more likely to stay significantly more likely to participate in community activities

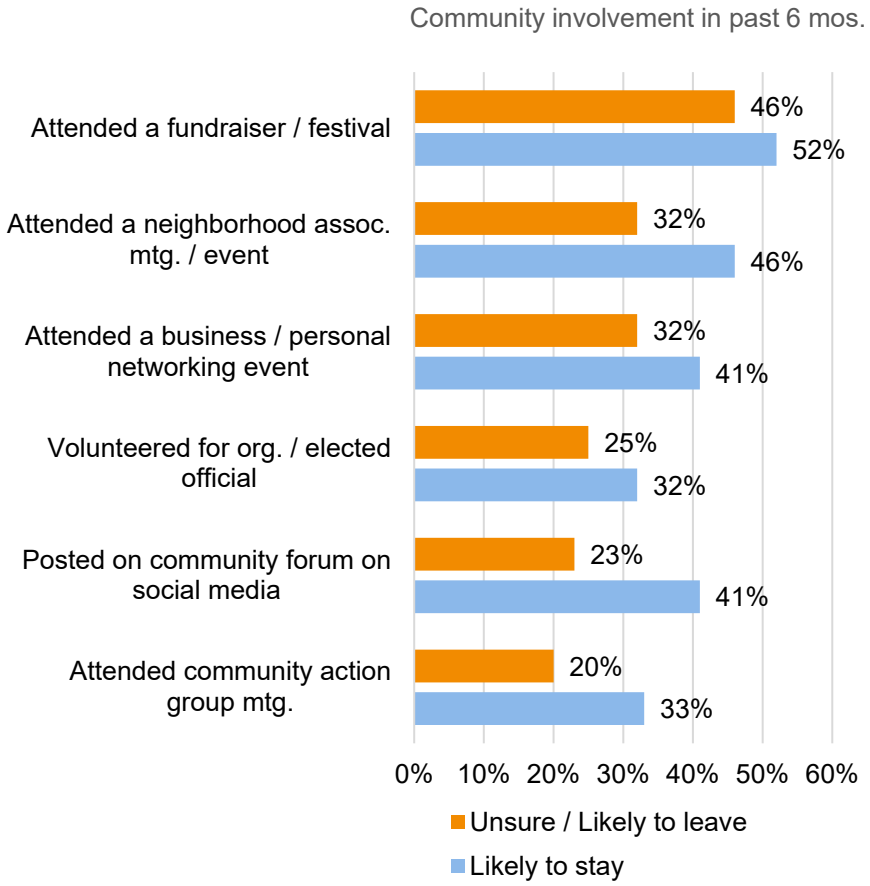
86%

of those likely to stay are very or somewhat involved in community activities

VS

60%

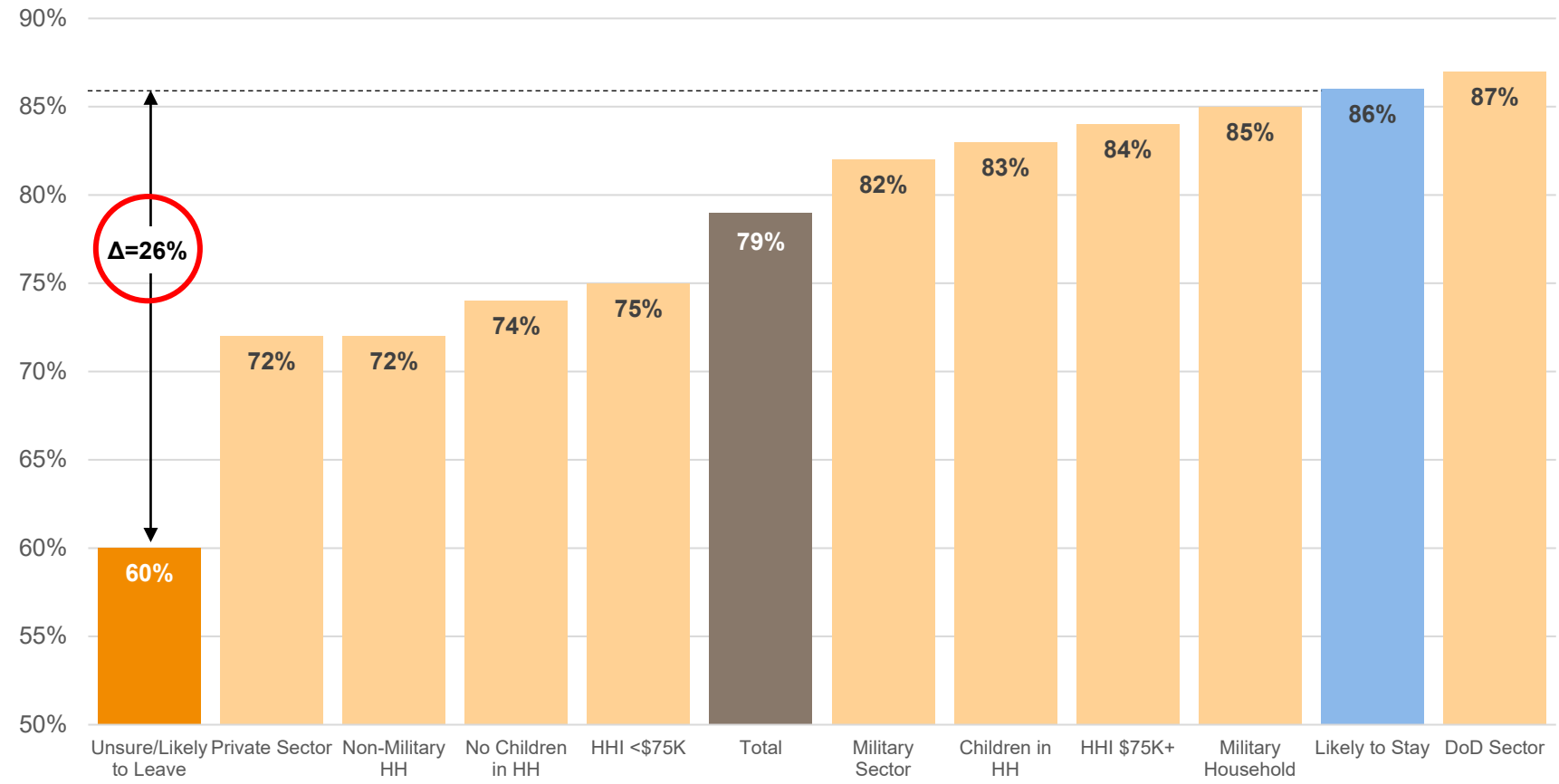
of those unsure or likely to leave



Base: Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years
Q2.7: How involved are you in community activities, events or local organizations in Hampton Roads?
Q2.8: In which of the following ways have you been involved in the Hampton Roads community in the past 6 months?

Military and DoD families have strongest community involvement

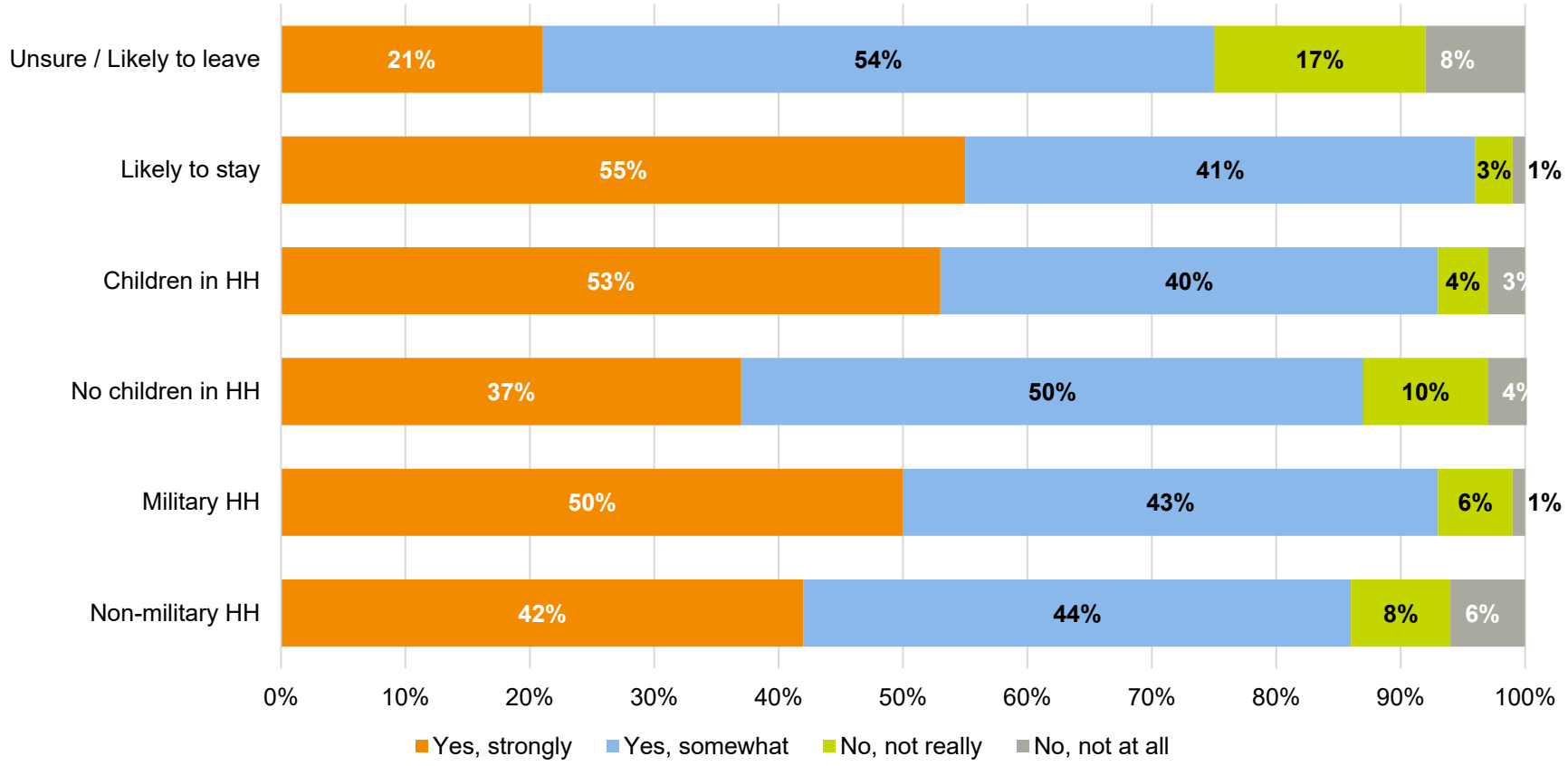
Not surprisingly, those unsure or likely to leave have lowest community involvement



Base: Varied bases.
Q2.7: How involved are you in community activities, events or local organizations in Hampton Roads?

A sense of belonging correlated to likelihood to stay in Hampton Roads

Military HHs, especially those with children in the home, feel more sense of belonging here



Base: Varied bases.
Q2.11: Do you feel a sense of belonging in Hampton Roads?

Most residents feel that Hampton Roads provides a sense of community

67%
Sense of community extremely / very important

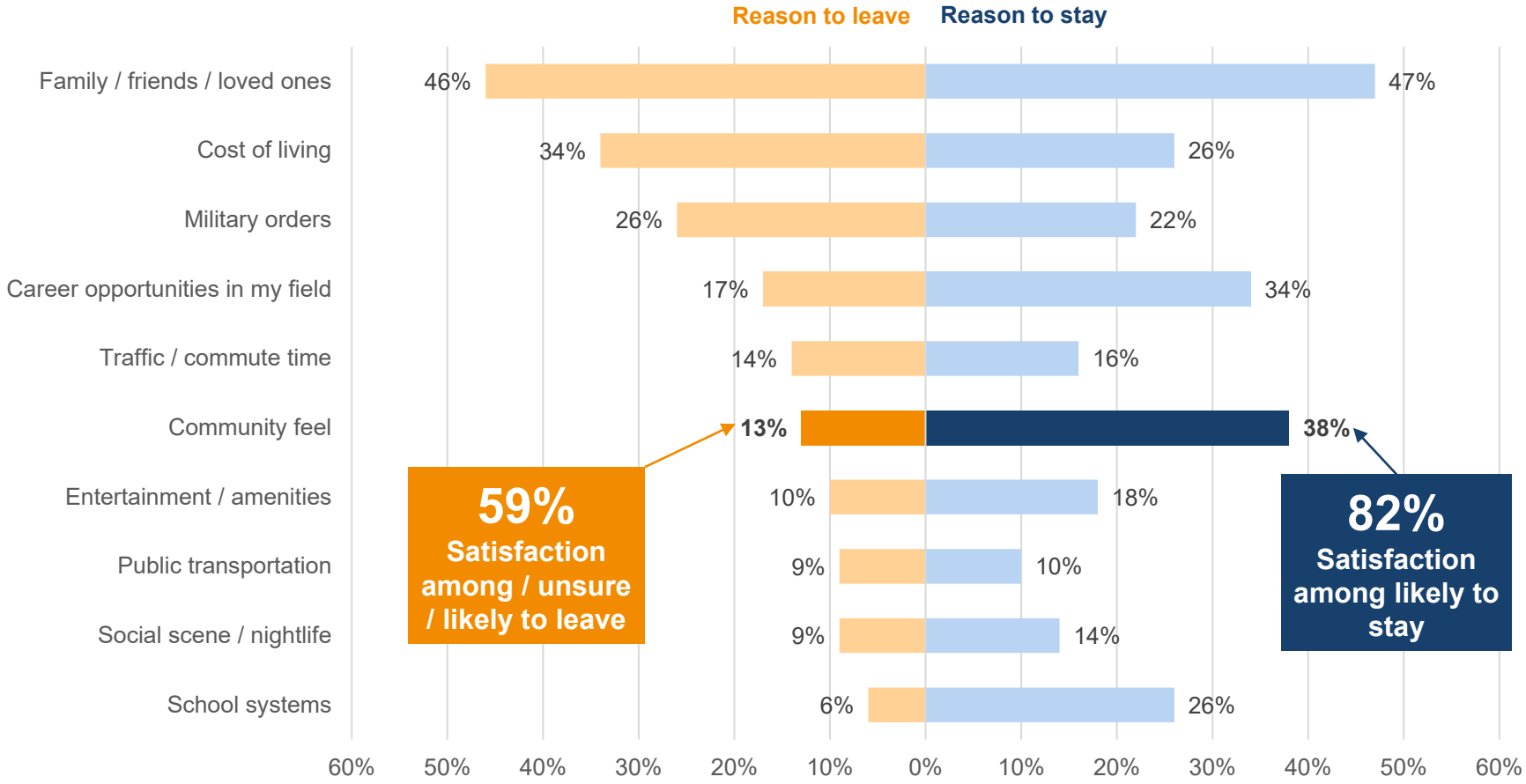
76%
Satisfied with sense of community

80%
Agree Hampton Roads feels like home

Base: Total Respondents (n=511)
Q2.13: When thinking about whether to stay in the Hampton Roads region, please rate the importance of each of the following. Q3.2: Please rate your satisfaction with each of the following in Hampton Roads. Q2.9: What aspects of HR make you feel most connected to the community?

Community feel drives intention to stay in Hampton Roads

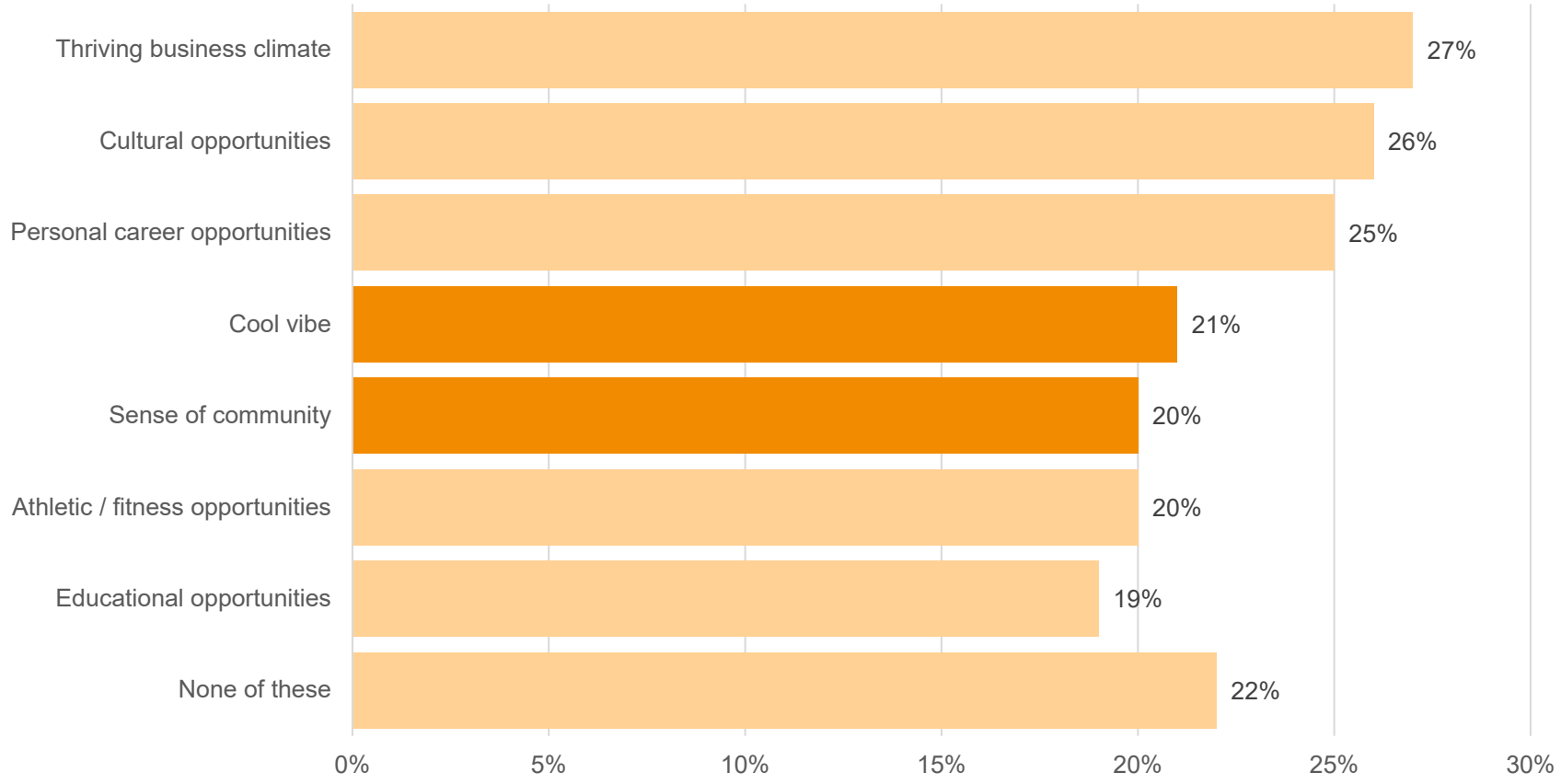
Those who are more likely to leave are much less satisfied with sense of community here



Base: Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years
Q4.3: What are the primary reasons you would consider leaving Hampton Roads to live somewhere else in the next 5 years?; Q4.4: What are the primary reasons you plan to stay in Hampton Roads for the next 5 years?; Q3.2: Please rate your satisfaction with each of the following in Hampton Roads.

1 in 5 say sense of community is lacking in Hampton Roads

Likely linked to lack of a clear regional identity



Base: Total Respondents (n=511)
Q4.5: Which of the following do you think are most lacking when it comes to living in Hampton Roads?

Most agree the region is welcoming, but not necessarily diverse

73%

The region is extremely / very welcoming

56%

The region is very / moderately diverse

- 64% of Black / African Americans
- 47% of Hispanic / Latinos

71%

Satisfied with diversity of the population

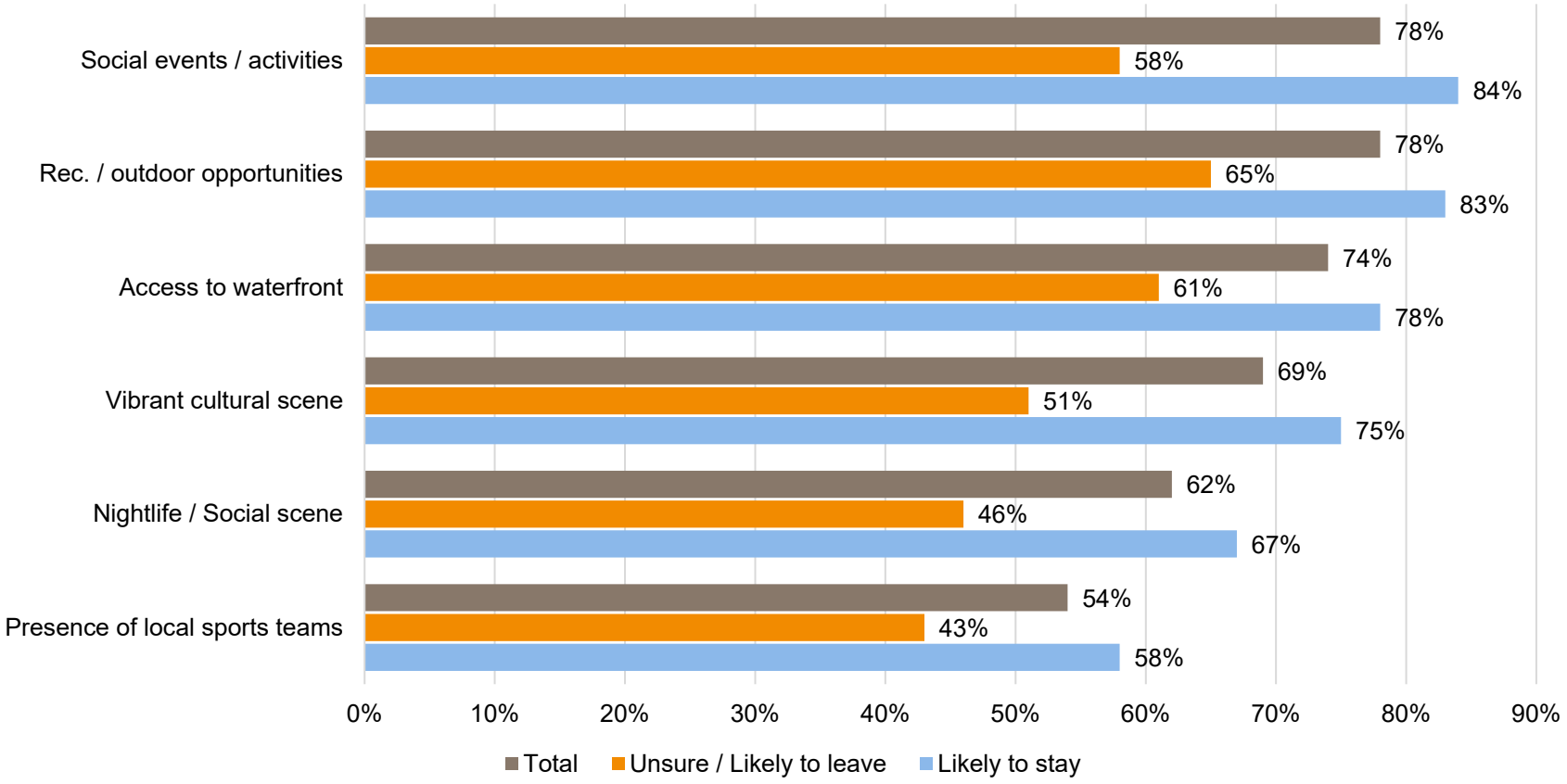
- 54% of those unsure / likely to leave
- 77% of those likely to stay

Base: Total Respondents (n=511)
Q3.7: How welcoming or inclusive would you say the region of HR is? Q3.15: How diverse is the HR region in terms of race and ethnicity? Q3.2: Please rate your satisfaction with each of the following in HR.

OTHER QUALITY OF LIFE MEASURES

Satisfaction with area activities is generally strong

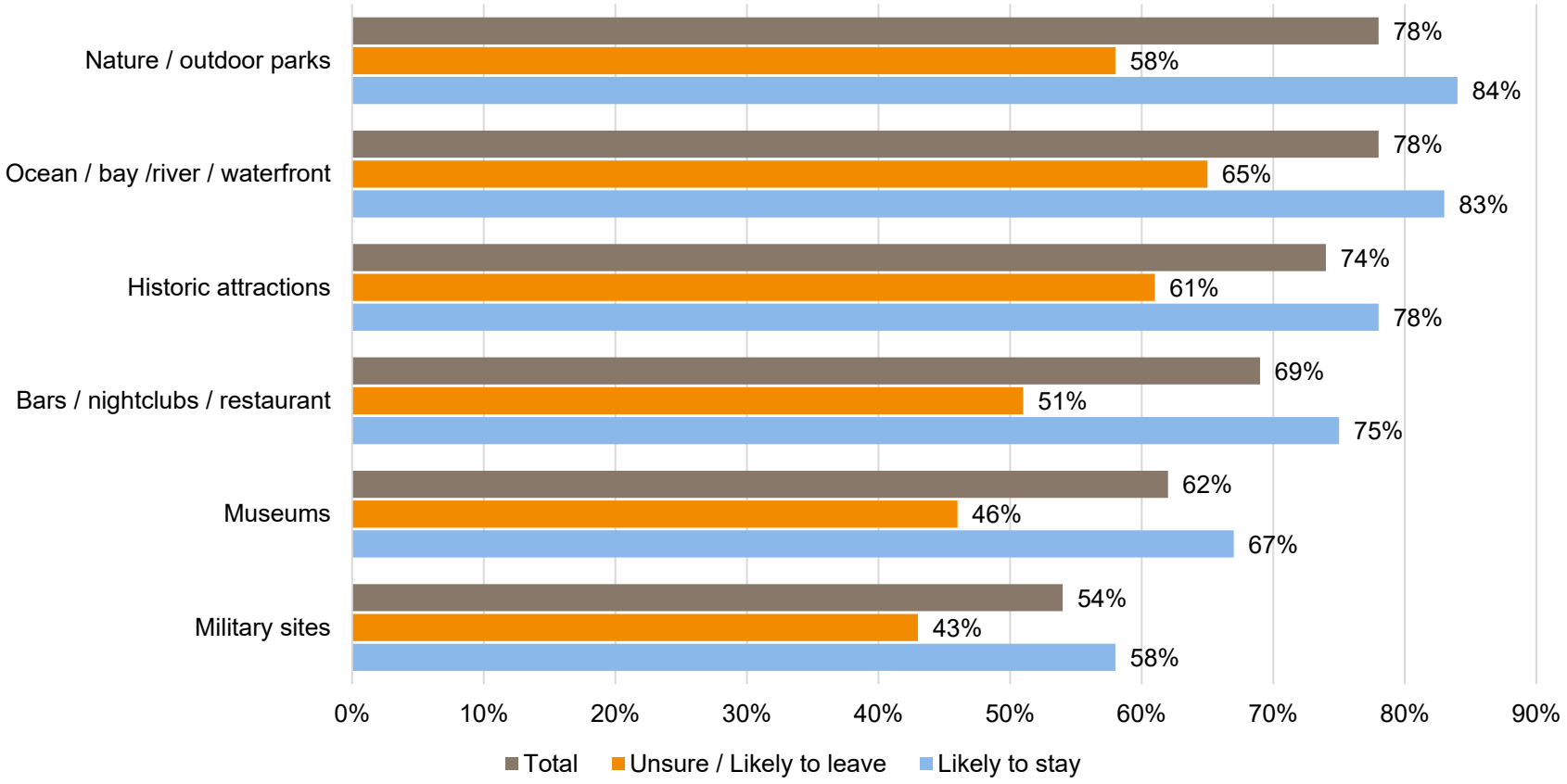
Especially true for those most likely to stay in Hampton Roads



Base: Total Respondents (n=511); Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years
Q3.2: Please rate your satisfaction with each of the following in Hampton Roads.

However, those likely to stay are more likely to take advantage of attractions

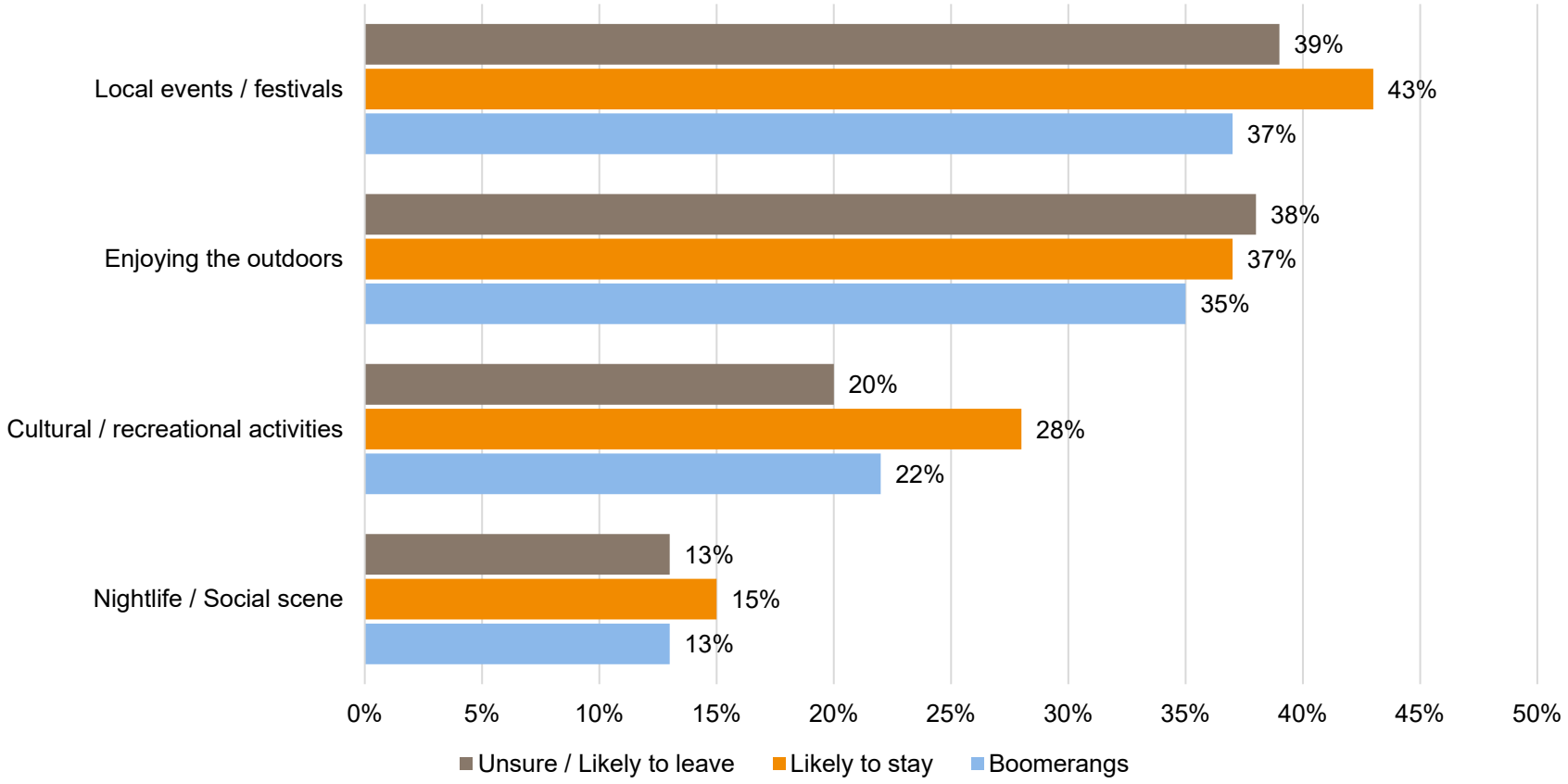
Visiting these kinds of attractions is strongly correlated with likelihood to stay in Hampton Roads



Base: Total Respondents (n=511); Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years
Q3.3: How often do you visit the following attractions in the Hampton Roads area?

Local events and the outdoors drive connection to the community

Social scene less impactful to perceptions of community connection



Base: Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years; Returned to HR (n=112)
Q2.9: What aspects of Hampton Roads make you feel most connected to the community?

Traffic is a recognized problem, but less correlated to outmigration intent

64%
Traffic / transportation / commute time extremely / very important

65%
Satisfied with traffic / transportation / commute time

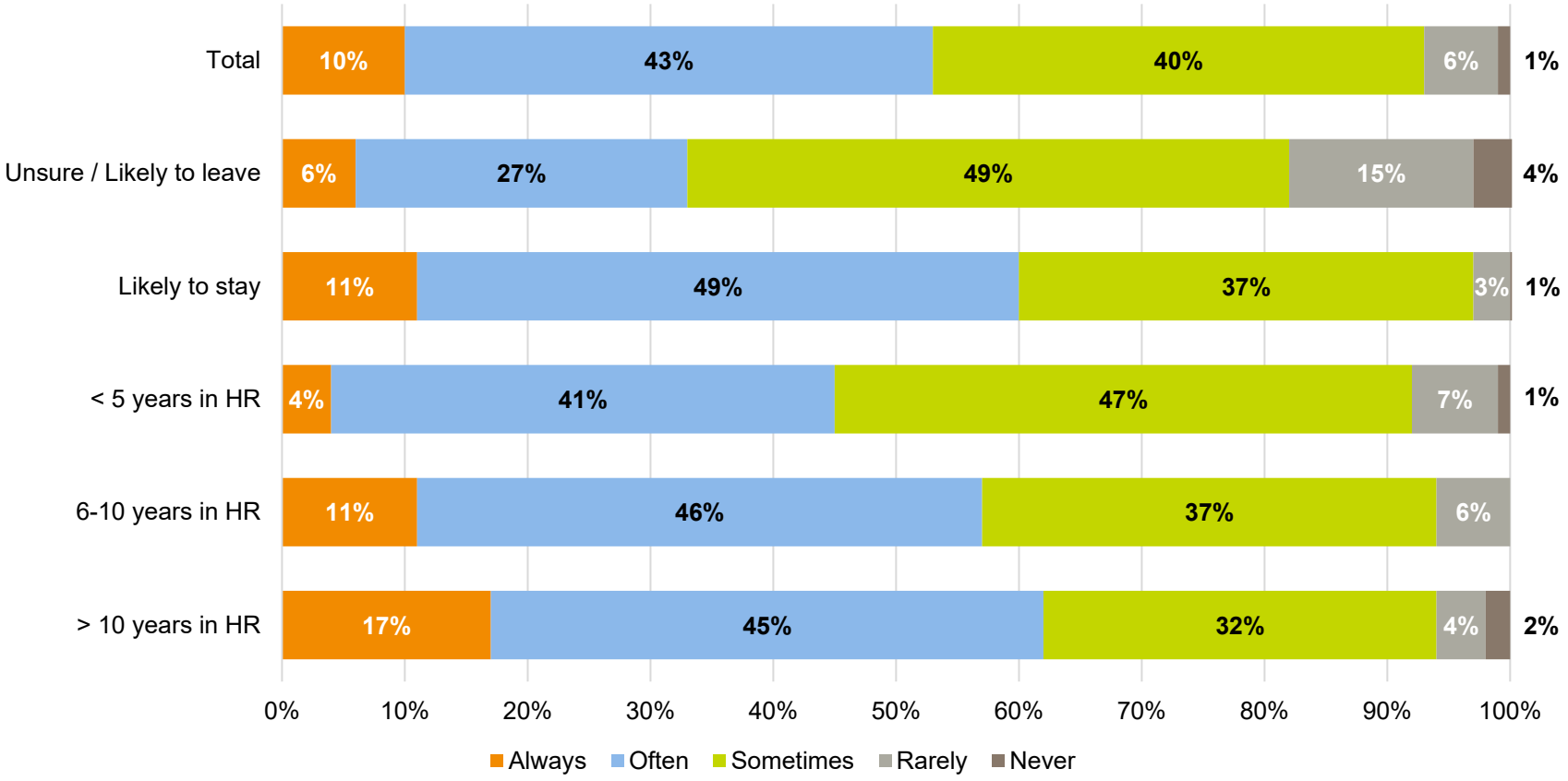
47%
Agree activities / events that interest me are too far away / hard to get to

14%
Traffic / commute time primary reason to leave Hampton Roads

Base: Total Respondents (n=511); Unsure / Unlikely / Very Unlikely to be in HR in 5 years (n=127)
Q2.13: When thinking about whether to stay in the Hampton Roads region, please rate the importance of each of the following. Q3.2: Please rate your satisfaction with each of the following in Hampton Roads. Q3.5: For each of the following statements, please tell us how much you agree or disagree. Q4.3: What are the primary reasons you would consider leaving HR to live somewhere else in the next 5 years?

Those likely to leave travel throughout the community less often

Long-time residents travel more frequently around the region

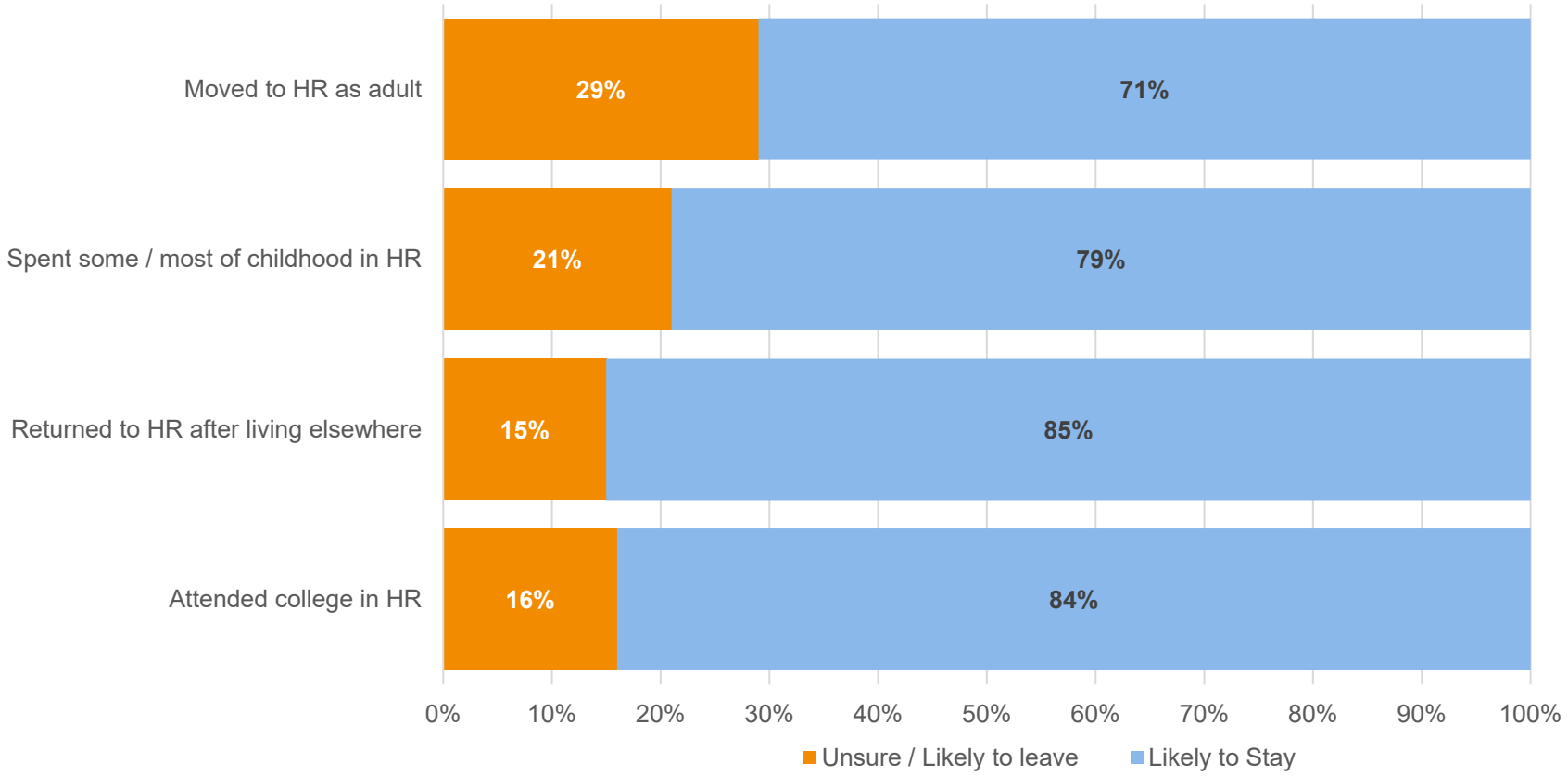


Base: Varied bases.
Q2.10: How often do you travel to other parts of the Hampton Roads area to participate in activities, dine out, visit parks or attractions, etc.?

APPENDIX

Those who moved to Hampton Roads as adults are most likely to leave

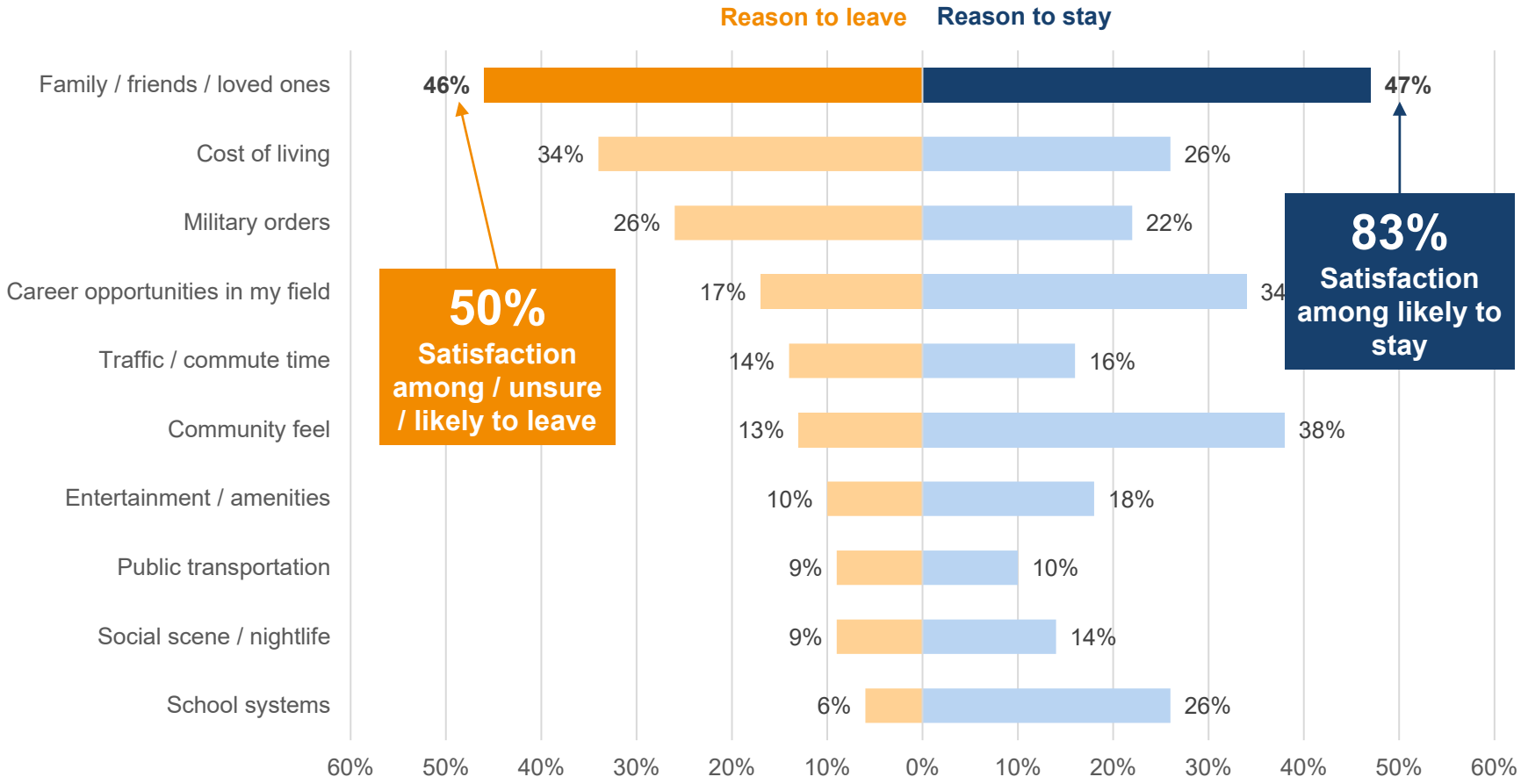
Boomerangs are most likely to stay in Hampton Roads



Base: Total Respondents (n=511); Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years
Q2.1: Which of the following best describes your history in the Hampton Roads area?

Proximity to family / friends a key driver of location decision

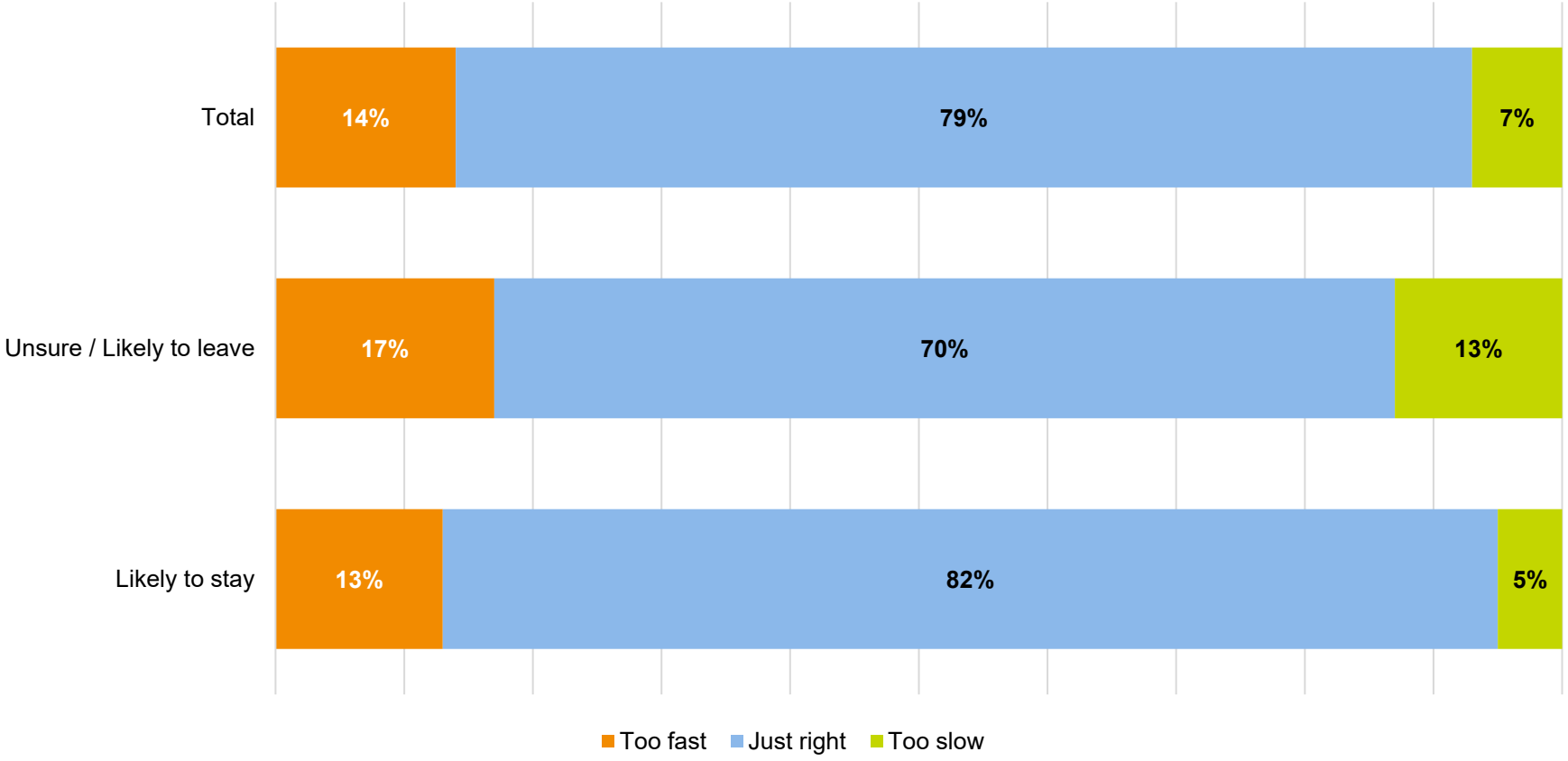
Those most likely to leave lack strong social networks in Hampton Roads



Base: Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years
Q4.3: What are the primary reasons you would consider leaving Hampton Roads to live somewhere else in the next 5 years?; Q4.4: What are the primary reasons you plan to stay in Hampton Roads for the next 5 years?; Q3.2: Please rate your satisfaction with each of the following in Hampton Roads.

Most people are satisfied with the pace of life in Hampton Roads

However, satisfaction is lower among those most likely to leave



Base: Total Respondents (n=511); Unsure / Unlikely / Very Unlikely (n=127); Very Likely / Likely (n=384) to be in HR in 5 years
Q3.11: How do you feel about the pace of growth of the Hampton Roads region?

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