

At

Contents

- Background and Purpose of the Study 2
- Methodology 2
- Executive Summary 3
- Detailed Findings 4
 - Responses By Region 4
 - When Did You Last Visit Atlantic City? 5
 - Reasons for Not Visiting Since Reopening 6
 - Age of Visitors 7
- Post Reopening Questions 8
 - Reasons for Last Visit 8

Background and Purpose of the Study

In response to the COVID-19 public health crisis, the casinos in Atlantic City, New Jersey were shut down by Executive Order 104

Executive Summary

Visitors remain anxious about the threat of COVID-19 and ongoing pandemic concerns continue to depress visitor volume to Atlantic City. However, findings indicate visitor numbers should strongly rebound as pandemic conditions ease.

Results showed 72% of all survey respondents - whether they have visited since the city's casinos reopened in July or not – reported planning to visit Atlantic City within the next six months. Those who have made a visit since July were even more likely to return within the next six months (82%).

Respondents who have visited the resort since July reported feeling safe from COVID-19 exposure while enjoying their normal activities. This suggests the city has been doing a good job of managing safety protocols.

Key Findings

- x 43% of respondents reported at least one AC visit since the July 2020 reopening, with the threat of COVID-19 being the primary reason (67% for non-returners) the remaining respondents had not visited
- x Visitors reported satisfaction with their post-reopening trip even with COVID-19 related safety restrictions: 78% reported being either “extremely satisfied” or “very satisfied”, while 9% expressed dissatisfaction.
- x Most respondents believed they were safe from COVID-19 exposure while doing their normal activities such as dining, gambling, or walking the Boardwalk on their visit (s) to Atlantic City since the reopening in July.
- x 72% of total respondents said they plan to visit Atlantic City within the next six months.
- x Of those respondents who had visited post-reopening, 82% say they will visit again within the next six months.

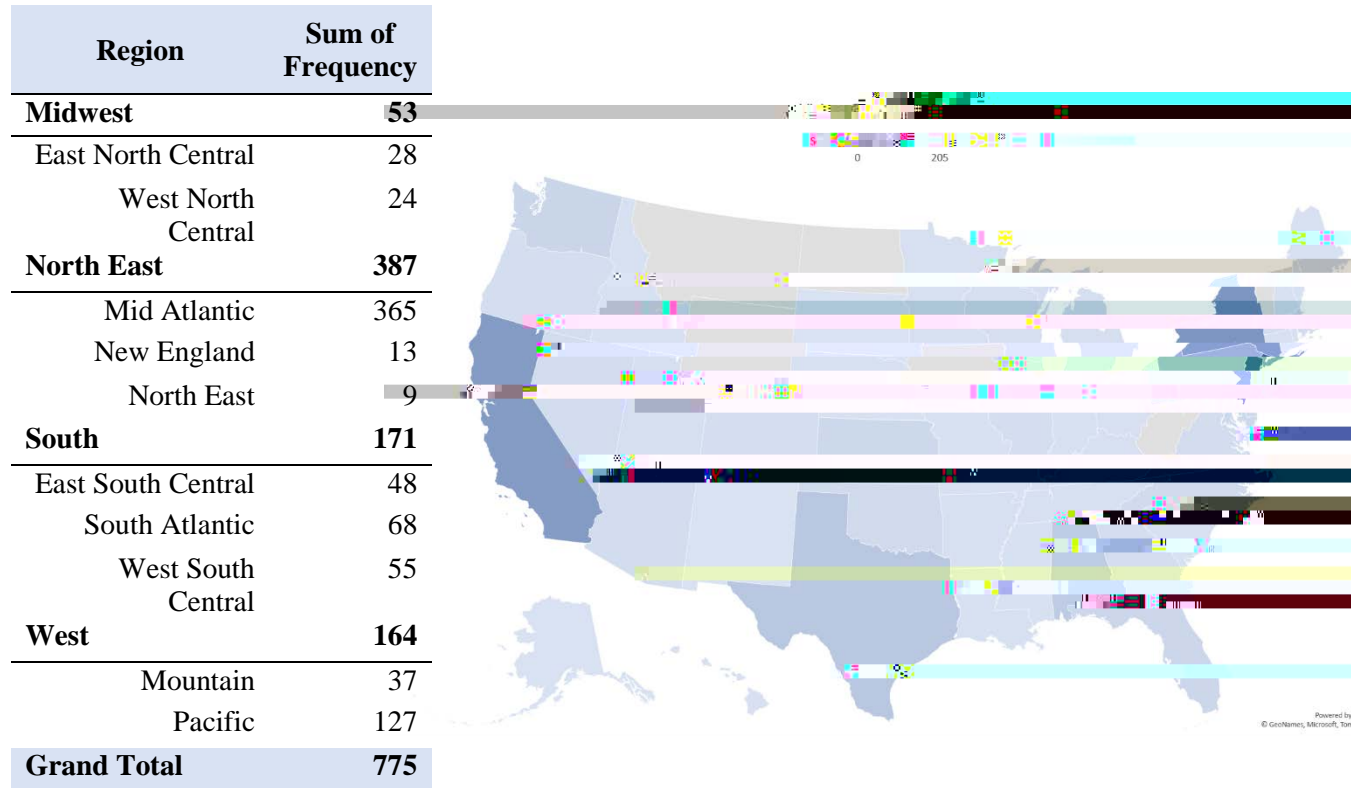
Looking Ahead

In summer 2021, Atlantic City should see a significant uptick in the number of visitors as pandemic fears recede. Recent news, increasing capacity rates at casinos and restaurants, lower COVID-19 hospitalization numbers and the rising vaccination rates can be viewed as positive signs.

Survey results showed that many respondents who stayed home due to COVID-19 concerns plan to visit Atlantic City within the next 6 months. This is a strong indicator of pent-up demand. People who have visited since the reopening perceive operators as having done a good job of enforcing safety protocols for mask-wearing and cleaning/disinfecting. Continuing these efforts, combined with easing occupancy restrictions, should make the guest experience much more enjoyable by summer 2021.

Detailed Findings

Responses By Region

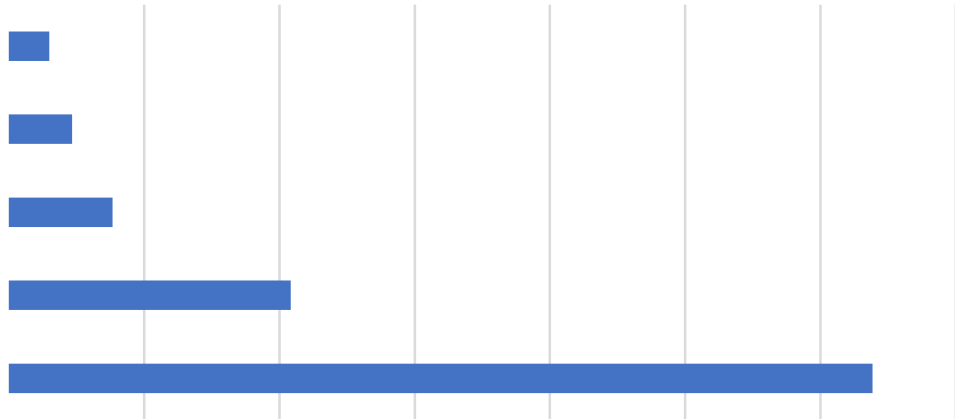


The responses were more geographically dispersed than expected with 365 coming from the Mid-Atlantic States of New York, New Jersey and Pennsylvania. Another 410 responses came from outside that area and another 30 did not enter a state of residence. Each survey question was tabulated to compare the Mid-Atlantic respondents to the total. Differences will be noted only where they are significant.

When Did You Last Visit Atlantic City?

After being shut down on March 16, 2020, the casinos in Atlantic City reopened on July 2, 2020. Most other hotels, dining

Reasons for Not Visiting Since Reopening



The question, “Why have you not visited Atlantic City since the casinos reopened in July?” was asked of the 57% of total respondents who reported not having visited Atlantic City since the reopening. This was an open-ended question, and we coded the responses into logical categories and counted the frequency of responses. Overwhelmingly, 64% of respondents gave pandemic-related reasons for not visiting. If you also add the 3% of respondents who specifically identified limited dining or entertainment options due to shutdowns as being related to the pandemic, then the total goes to 67%, or two out of three respondents. The second most frequently stated reason for not visiting was that they were busy or too busy to take a trip (21%), followed by economic reasons (8%) and family reasons (5%). We view this as good news because there is no indication that previous visitation patterns will not resume once all venues are reopened and operating at normal capacity and normal hours, and peoples’ concern about COVID-19 diminishes. We view the 8% who responded that economic reasons kept them from visiting as a good sign because it is such a low number. If more people cited economic reasons that could indicate less discretionary income, leading to more concern for future visits.

Sample Quotes¹

“Covid shutdown”

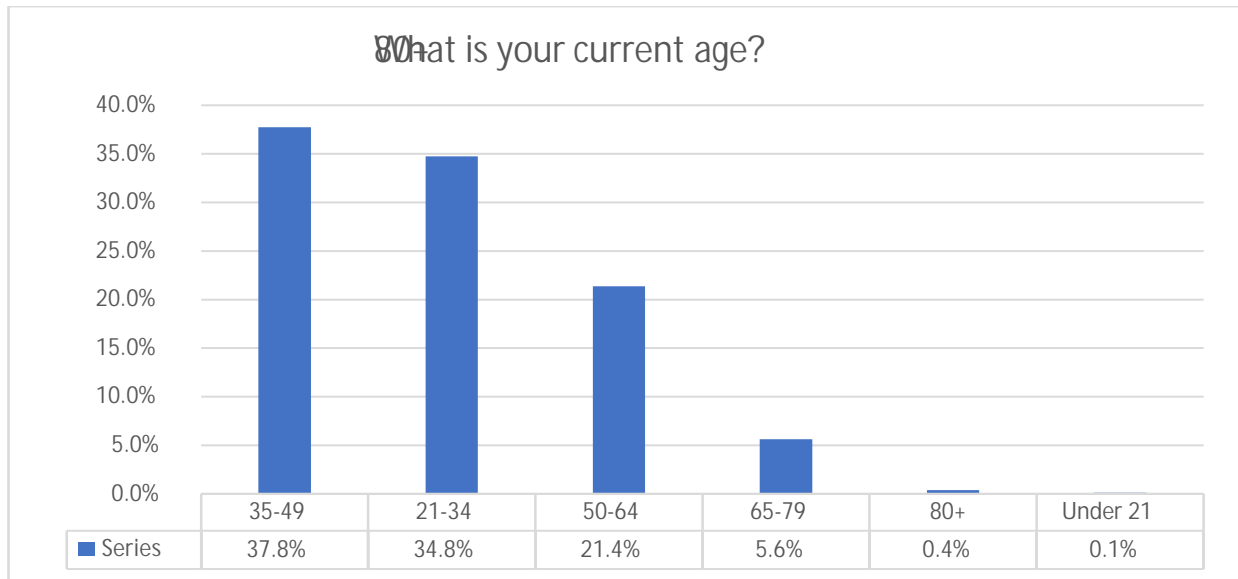
“Covid, busy being essential employee”

“No drinks and indoor dining, no clubs”

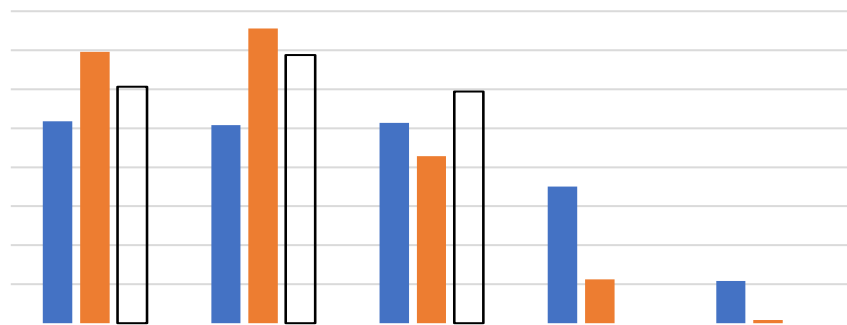
“Due to the serious epidemic situation, I seldom go out and recently choose to stay at home”

¹ The complete report of the open-end responses to the question, “Why have you not visited Atlantic City since the casinos reopened in July?” is included in the Addendum

Age of Visitors



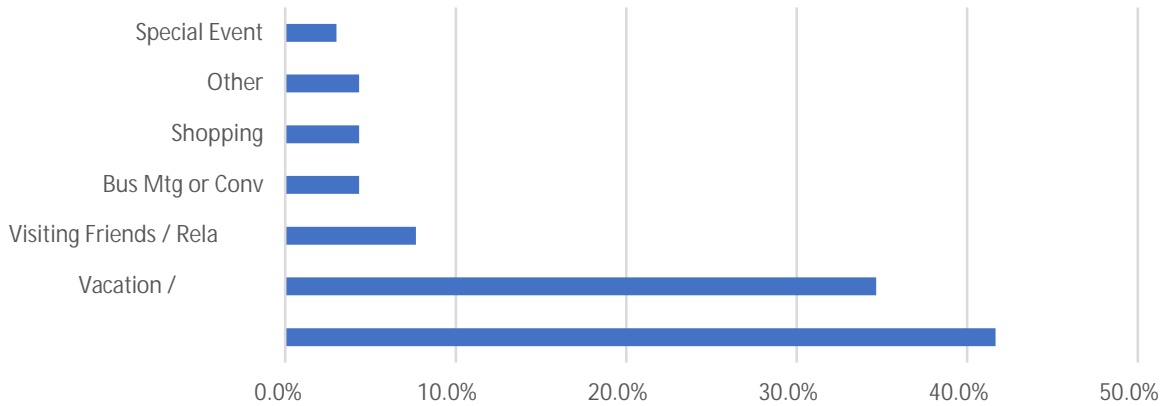
The chart above shows a breakdown of all survey respondents by age range. We thought it more illuminating to add the total U.S. population proportions for those age ranges as well as the age ranges of respondents who visited after the July 2020 reopening for comparison purposes, as shown in the following chart.



The total survey respondents and the post-reopening visitors skew younger than the U.S. population. For the survey, 94% of all respondents were between the ages of 21 and 64, which is a much higher proportion than the U.S. adult population for those same age ranges. Based on the 2019 estimate from the U.S. Census Bureau, adults ages 21 to 64 represent 77% of the U.S. Adult 21+ population. The post-reopening visitor age range also skewed younger than the U.S. adult age range with ages 21-64

Post Reopening Questions

In this section we report the results from the questions asked only of the respondents who had visited Atlantic City since the July 2 reopening. We will show the responses from all who reported visiting since the reopening and will not show the Mid-Atlantic results broken out separately unless there is a significant difference from the total.



Approximately 75% of the respondents who had visited Atlantic City after the reopening stated that their primary reason for the visit was either “Gambling” (41.7%) or “Vacation/Pleasure (34.7%)”. It makes sense that the “Special Events” and “Business Meeting or Convention” numbers were low because those activities were canceled or very limited due to pandemic restrictions on occupancy.

Place Stayed

As shown in the previous chart, about four out of every five visitors reported staying at least one night in the Atlantic City area on their most recent visit. Of those who stayed at least one night, 71% reported staying at a casino hotel, with slightly less than 9% of the visitors staying in a non-casino hotel. Bed and breakfasts captured 8% of the overnight visits with another 10% reporting having stayed at non-commercial places such as a friend or relative's home or the respondent's vacation home.

Qxgtcm"Ucvkuhcevkap" y kv j "Ncuv"Xkukv"

Post-reopening visitors were asked to rate their most recent trip to Atlantic City using a standard 5-point satisfaction scale ranging from “extremely dissatisfied” to “extremely satisfied.” Over 78% of respondents reported being either satisfied or extremely satisfied, whereas only 7.8% reported dissatisfaction. This ratio of 10:1 satisfied to dissatisfied respondents was a surprising, positive finding considering the COVID-19 restrictions endured by visitors during the evaluation timeframe from July 2020 to early February 2021. The next section will explore the reasons given by respondents for the satisfaction ratings. sa14.114624 cm 1CSdncs.72.1670.8627366-0.7 ti

Tgcuqpu"hqT"Ucvkuhcevkkp

Over 240 individual open-ended responses were reviewed and organized into logical “buckets” so that we could determine the incidence levels. As with all open-ended “reason why” questions, respondents most often cite a general positive reason that is not specific. This survey was no exception; 38% of the overall positive ratings fell into that “general positive” category. Included in that grouping are responses such as, “very satisfied with all aspects,” or really like the environment here or “I always have a great time when I visit Atlantic City,” or “everything was great” While these are nice to hear, they do not add much to our understanding.

The second most frequently cited reason for positive ratings were those that we grouped as “Good COVID-19 Protocols”, which made up 14% of the positive ratings. Examples of this grouping include, “they were taking the proper precautions to make everyone feel safe” or “it was very refreshing to see Atlantic City up and running, safely within the guidelines set forth by the government. On one hand it was different than it had been before the pandemic, but everyone and every business we encountered was working above and beyond to make it feel normal, fun and relaxing.” One respondent stated, “I had a

Safety Protocol Satisfaction with Specific Activities

Scores in the chart above represent mean values. The 5-point semantic differential scale used 1 as "extremely unsatisfied" and 5 as "extremely satisfied" as the anchors.

Survey respondents who had visited Atlantic City after the July reopening were asked to rate their level of satisfaction with the COVID-19 safety protocols that they observed as being in place for the activities they participated in. An interval scale was used for the rating, and the means were calculated. Based on the evaluations, respondents rated "indoor dining" the highest at a 4.1, with "indoor wedding" receiving the lowest score at 3.6. There was not a great degree of variance between the highest and lowest rated items, and the differences are not statistically significant; but can it be interpreted

Future Intent to Participate in S

Past Visitation Frequency

The vast majority of respondents (92%) who had visited since the July 2020 reopening reported they made multiple trips to Atlantic City each year prior to the COVID-19 shutdown; 43% of the visitors could be classified as frequent visitors who made six or more trips each year in normal non-pandemic times, and 8% said that they visited just once per year.

Future Visitation Timing

Of ye

Addendums

Questionnaire - Click to View

Visit satisfaction question open-ended responses - Click to View

Reason for not visiting since reopening open-ended responses - Click to View