



Highlights from the WAVE 20 Back-To-Normal Barometer

TRAVEL/LEISURE DEMAND SPIKING

- 20% flew last month—up 10 pts... and excluding January, highest in barometer history; 22% attended live sports—Barometer high and up from 17%
- A third plan to take their next vacation by June

OPEN UP THE COUNTRY!

- 48% strongly agree that once vaccines are available for all who want one, its inappropriate for government to dictate size of gatherings outside the home—up from 42% in wave 19—total agreement is now over 2/3—up from 63% last wave.
- **A plurality of 36% most align with the perspective that once vaccines are available for all, all restrictions should be lifted--a significant shift from 29% (and the third choice) in wave 19.**
- 45% strongly agree (62% total agreement) that anyone who wants to go to a sporting event, should be allowed to go—up from 35% in wave 19
- 44% strongly agree that it's our civic duty to open up schools this Fall
- When weighing the net impact on public health and the economy, only 36% strongly agreed that the net impact of lockdowns and limitations was a positive! However more agree than disagree
- Similarly, 38% strongly agree that the NY/CA approach was better than FL/TX—25% strongly disagree.
- 46% strongly agree that COVID isn't as scary as it was at the start of pandemic—up from 40%
- Just under half are strongly concerned about COVID variants
- 45% strongly agree that overall the pandemic is getting better. Just 10% strongly disagree
- Yet, <1/3 (30%) strongly believe that the country will be open for business before June... It was 28% last month and 55% strongly believe that we'll still be asked to wear masks in the Fall
- 41% are working mostly or strictly at home...Lowest since the start of pandemic—Of those, more than half expect to be back by June!



VACCINE MOMENTUM:

- 50% strongly support Rutgers/universities rights to mandate staff and students being vaccinated to return to campus (68% agree—top 5 box). Less than 20% strongly disagree.
- 59% Strongly agree that they will get (or have gotten) the COVID vaccine—at parity with 61% in February—72% top 5 box (total agreement) (61% say they have been partially or fully vaccinated)
- **Those Who Want it, Have Likely Started the Process:**
 - 2/3 in process and another 24% want it ASAP
- 71% think they will be vaccinated by June. Stable with 74% last month
- 72% see vaccines being widely available by June (QM6d—table 79) Up from 65% last month
- 28% know someone who has lied to cut the vaccine line

THE FUTURE OF CITIES

- Only half of those who've moved out of densely populated areas into less densely populated areas see this as a permanent lifestyle change. 40% see themselves moving back.
- 40% believe that once the pandemic is over, people will return in earnest to downtown areas to enjoy dining and cultural activities; 29% see a significant drop in utilization of public transportation; 35% see a substantial downturn in commercial real estate; 37% see people spending less time in traditional shopping malls

SUSTAINABILITY AND ESG:

- Just over a third are strongly aware of the sustainability and corporate responsibility efforts of the brands that they use. 39% strongly agree that being aware of this is important. 35% strongly agree that they are getting enough information about this.
- 36% actively seek out this information (top three box)
- 32% say that this information strongly influences purchase decisions
- 29% feel that companies are moving quickly to take action to address climate change and appreciate it. Another 35% feel they need to move more quickly. On the flip side, 36% feel that they are moving too quickly (19%) or are not moving quickly enough, but that is fine with them (17%)
- Similar breakdown for corporate actions to address social inequalities—35% want quicker action; 28% are appreciative of quick action and on the flip side, 23% say they are moving too quickly with an additional 14% saying they are fine with them not moving quickly



OTHER FINDINGS OF NOTE

- <1/3 (32%) strongly support a U.S. boycott of the Beijing Olympics
- 1/3 of respondents strongly agree that they have been able to save \$\$ or accumulate more wealth during the pandemic 23% strongly disagree (We need to look at significant segment differences)
- Of those not vaccinated or planning to be vaccinated, 36% would quit their job if their employer mandated vaccinations for a return to work. 64% would reluctantly get it.
- More than half (52%) of Americans agree that the cruise industry is being unjustifiably punished with the extension of the no-sail order to November of 2021
- Top five industries that have done a good job adjusting to COVID: Restaurants, Dentists, Sports leagues, TV, airlines