



# THE EFFICACY OF HAWAII COVID-19 BUSINESS MANDATES

OCTOBER 11, 2021



**UHERO**  
THE ECONOMIC RESEARCH ORGANIZATION  
AT THE UNIVERSITY OF HAWAII





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## **The Efficacy of Hawaii COVID-19 Business Mandates**

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## EXECUTIVE SUMMARY

Faced with the largest increase in cases since the beginning of the COVID-19 pandemic, new COVID-19 vaccination and testing mandates were implemented in mid-September to reduce the spread of COVID-19 and increase COVID-19 vaccination in Oahu and Maui. In the second half of September 2021, the [University of Hawaii Economics Research Organization](#) and the [Pacific Alliance Against COVID-19 \(PAAC\)](#), in partnership with the [City and County of Honolulu](#) and other organizations, conducted a representative survey of businesses and community organizations in the state of Hawaii.

Unlike the previous UHERO-PAAC survey that rolled out pre-mandates and focused on understanding businesses' willingness to adopt workplace restrictions for employees and customers, the new survey post-mandates concentrates on the impact mandates had on Hawaii businesses and to increase vaccination.

In total, 1987 Hawaii businesses participated in the survey, with over 80% located in Oahu, about 8% in Hawaii county, 8% in Maui county, and 3% in Kauai county. Over 90% of businesses had 100 or fewer employees, a business group where information is more scarce about their likelihood to adopt mandates. Over 20 sectors in the survey were represented, ranging from food and beverage (22.7%), health services (15.4%), tourism (12.9%), to retail (12.6%), and non-profit organizations (10.9%).

The main survey findings include:

- **Mandate Uptake:** Over 60.5% of businesses have imposed a mandate for their employees to get tested or be vaccinated for COVID-19, with 22% of businesses requiring vaccination or regular COVID-19 testing or mandating the vaccine for all employees (28.3%), among other protocols.
- **Cost of Testing:** When testing is elected, the employer pays for the test in 20.4% of the cases, whereas the cost is the responsibility of the employees in 37.6% of the cases and relies on other sources (such as state and city free testing) in 42.1% of the cases.
- **Effect on Vaccination Uptake:** The mandates have had a significant impact on vaccination uptake. Before mandates were announced, businesses with a mandate reported an 84.4% of vaccination among employees. After mandates were announced, an additional 8% of employees are estimated to have been vaccinated, 5.9% of employees are estimated to elect regular testing, and 1.7% are estimated to have been dismissed or resigned. In contrast to businesses with a mandate, businesses without a mandate have achieved a significantly lower vaccination rate of 76.1%, providing opportunities for the government to expand vaccination rates by targeting those businesses.
- **Effect of vaccination uptake across counties:** In the County of Honolulu, 85.1% of employees were vaccinated before a mandate, an additional 8.2% are estimated to have been vaccinated after the mandate, and 4.9% are estimated to be doing regular testing. In contrast, in Maui County, 69.3% of employees at businesses with a mandate were vaccinated, 10.4% are estimated to have been vaccinated after the mandates, and 13% are estimated to have elected regular testing.
- Businesses that adopted a mandate have been affected in a variety of ways. 35.1% of businesses report a decrease in the number of customers while only 8.2% report an increase in number of customers. 39.5% of businesses had a decrease in revenue while only 7% had an increase in revenue. 25.2% of businesses saw an increase in customer resistance and complaints while 7.8% saw a decrease in customer complaints.
- For all the businesses in the survey, 70.5% of businesses support the mandate for employees, 17.5% of businesses do not support it and 11.8% are unsure. The overwhelming reasons businesses support the

mandate are to protect the community, decrease the spread of COVID-19, protect employees, safety at work and to protect customers. The reasons or barriers why businesses do not support the mandate include the belief that it is not legal and/or constitutional, due to employee resistance and personal preference of the employer.

- Almost 2 in 3 businesses (61.75%) support vaccine passports for customers, 22.2% of businesses do not support vaccine passports, while 15.9% are unsure. The reasons why businesses support vaccine passports for customers mirror those from mandates for employees. The main reasons or barriers why businesses do not support the mandate for customers include customer resistance, it is not their companies' responsibility, in addition to the ones for vaccine mandates for employees.
- Business needs remain: 54.48% of businesses indicated that they would like to receive funding to provide take-home tests for employees. 48.5% indicated need for technical support for checking vaccination or testing status. 36.9% and 38.77% requested educational resources for employees and customers, respectively. In addition, around 40% indicated their willingness to learn more about COVID-19 vaccination and testing events.

Based on the survey results and the recent increase in vaccination, we concluded that vaccine mandates have been effective in increasing COVID-19 vaccination in Hawaii.

## BACKGROUND

During summer 2021, Hawaii became a national infection hotspot, with COVID-19 infections and hospitalizations at all-time highs and peaking on and around September 2, 2021, with a 7-day moving average of over 900 cases per day. At that time, over 72% of eligible individuals 12+ years or older had received a dose of the COVID-19 vaccine, and over 82% of individuals had received at least one dose. Although geographic and ethnic disparities compounded the complexity of this crisis in the vaccination rates in Hawaii. While some regions in Hawaii reached over 70% completed vaccinations, other regions such as Waianae or Wahiawa had reached less than 35% among eligible individuals.

Although there was significant undervaccination, results of the Pacific Alliance Against COVID-19 ([www.paac.info](http://www.paac.info)), which primarily serves the Waianae community, clearly indicate that *vaccine access* is not a significant contributor to these disparities. Instead, differences between vaccinated and unvaccinated individuals are primarily driven by trust and sources of information. Compared to vaccinated individuals, those unvaccinated are far less likely to *trust institutions (e.g., government or COVID-19 taskforce)* far less yet consume/use social media as their primary source of news information. These data implicate deep-seated issues that are systemic and will take a long time to be addressed even with the extensive education and media campaigns already in place. Given the dire situation in the state, more effective public health policies were considered, including the implementation of mandates for certain businesses.

In order to look at the willingness of businesses to impose a mandate, in August 2021, the UHERO and PAAC surveyed over 800 managers and owners of organizations and businesses primarily in Oahu reflected strong support for businesses to adopt a testing or vaccination mandate, with almost two-thirds of businesses reporting that they *already do or likely will require employees to be vaccinated or conduct regular testing*, and over one-third of the businesses already have one in place.

Since then, significant events have occurred to try to curve the spread of COVID-19. Including:

- On August 23, 2021, the FDA granted full approval to the Pfizer vaccine.

- On August 30, 2021, Honolulu Mayor Rick Blangiardi announced the implementation of the Safe Access Oahu program to require proof of vaccination or a recent negative COVID test to work or to enter many establishments, including restaurants, gyms, and entertainment.
- On September 9, 2021, President Biden issued a sweeping new vaccine or testing mandate that would affect all businesses with 100+ employees, covering over 100 million Americans. This is in addition to already existing mandates for federal contractors.
- On September 9, 2021, Maui Mayor Michael Victorino announced the Safer Outside program, which requires proof of vaccination for indoor dining and limits gathering sizes.
- On September 13, 2021, the Safe Access Oahu program started.
- On September 15, 2021, the Safer Outside program started in Maui.

These mandates are a good step in the right direction to increase COVID-19 vaccination and will collectively cover over 85% of the Hawaii workforce if left intact. However, the effectiveness of these mandates to increase vaccination coverage has not been quantified. In addition, information about the effect of the mandates on businesses remains elusive and anecdotal until now.

## **SURVEY ON BUSINESS MANDATES**

Conducted in the second half of September, after Oahu and Maui mandates were implemented, this survey provides the first effects of the mandates on businesses and organizations in Hawaii. The survey focuses on evaluating the increased vaccination at workplaces and the effects on the business sector. For the first time in Hawaii, we provide a quantification of the effect of the mandates to encourage vaccination combined with regular COVID-19 testing.

The brief 10-minute survey to managers and owners of businesses and organizations in the state of Hawaii focused on five topics: (1) whether businesses are imposing a mandate for employees, (2) vaccination rate before mandates were announced, and (3) increased numbers of employees who got vaccinated, are conducted regular testing and others (e.g., dismissed, resigned, put on leave, etc.) after a mandate was implemented (4) other impacts on businesses who imposed a mandate. In addition, for all businesses, regardless of whether they have a mandate, we looked at whether or not they support mandates for employees and customers, why they support or not mandates, and any needs and barriers for implementing mandates at their workplaces.

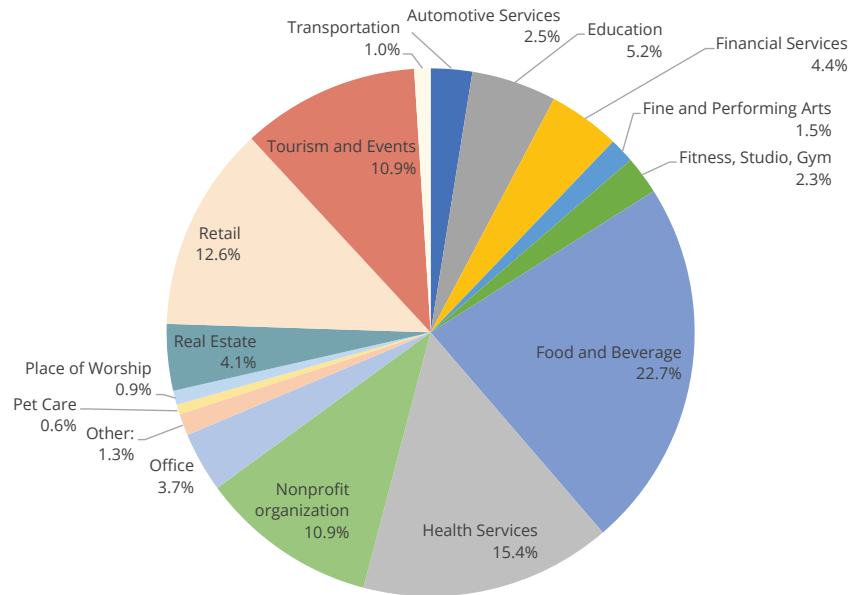
## **SURVEY RESULTS**

### **DESCRIPTION OF BUSINESSES AND ORGANIZATIONS COMPLETING THE SURVEY**

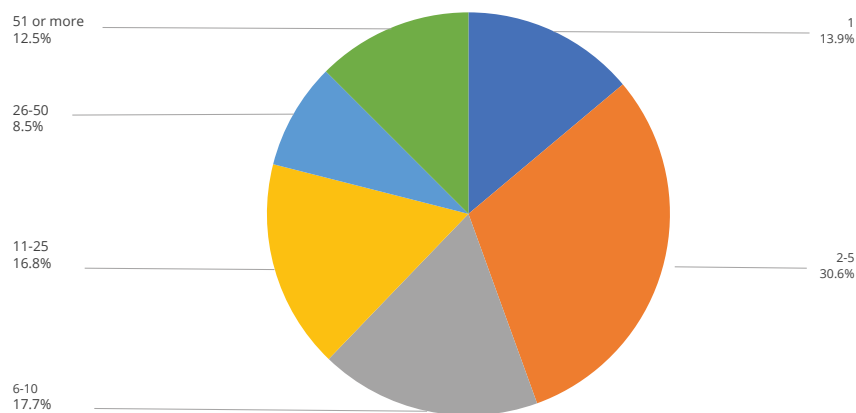
1987 Hawaii businesses participated in the survey. 1622 (81.6%) businesses were located in Honolulu County, 154 (7.8%) businesses had a principal location in Maui County, 147 (7.4%) businesses operate from Hawaii County, and 64 (3.2%) operate from Kauai County. We note that our sample also included about 4% of businesses that did not report a location.

## BUSINESS SECTORS.

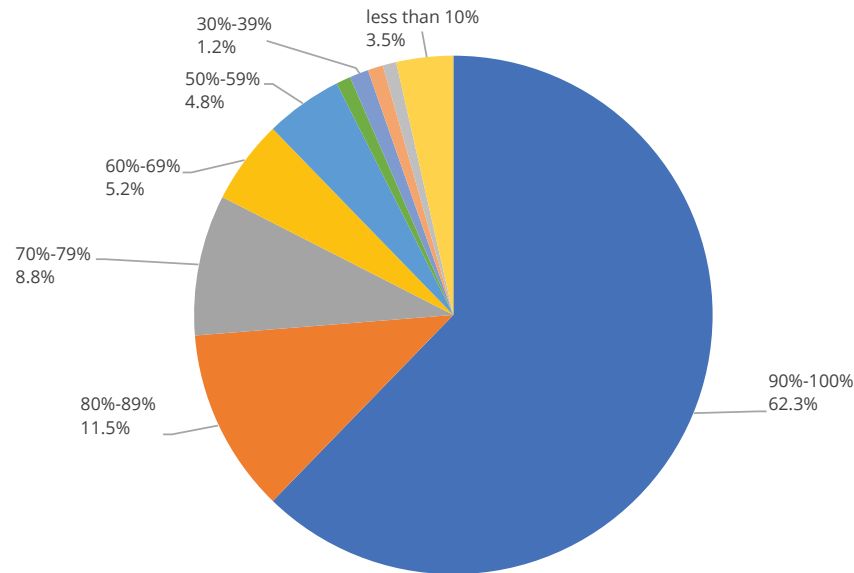
Over 20 business sectors were represented in the survey. The largest categories were food and beverage (22.7%), Health Services (15.4%), retail (12.6%), tourism (10.9%), and non-profit organizations (10.9%). The graph below shows most sectors in the survey.



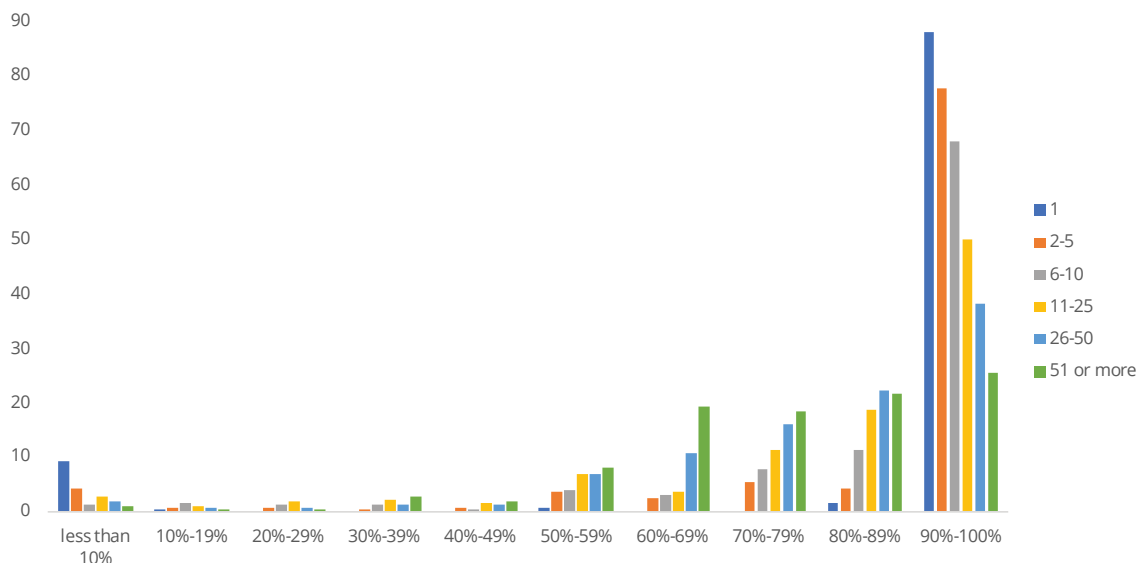
**Size of businesses.** Most businesses in the survey had ten or fewer employees (62.2%), with just under a third of the respondents having 2-5 employees. While businesses with 51 or more employees accounted for a small portion of the survey respondents, they may represent a fairly large number of employees that will be impacted by the policy decisions made. These proportions are similar to the report in August with an expanded number of businesses.



**Vaccination rates among businesses participating in the study.** Just under two-thirds of the surveyed businesses reported that 90-100% of their employees were vaccinated before the mandates. 73.8% reported that 80% or more of their employees were vaccinated. This represents a decrease in the lower categories under 70% and a higher overall increase in vaccination relative to the UHERO-PAAC survey on August 1.

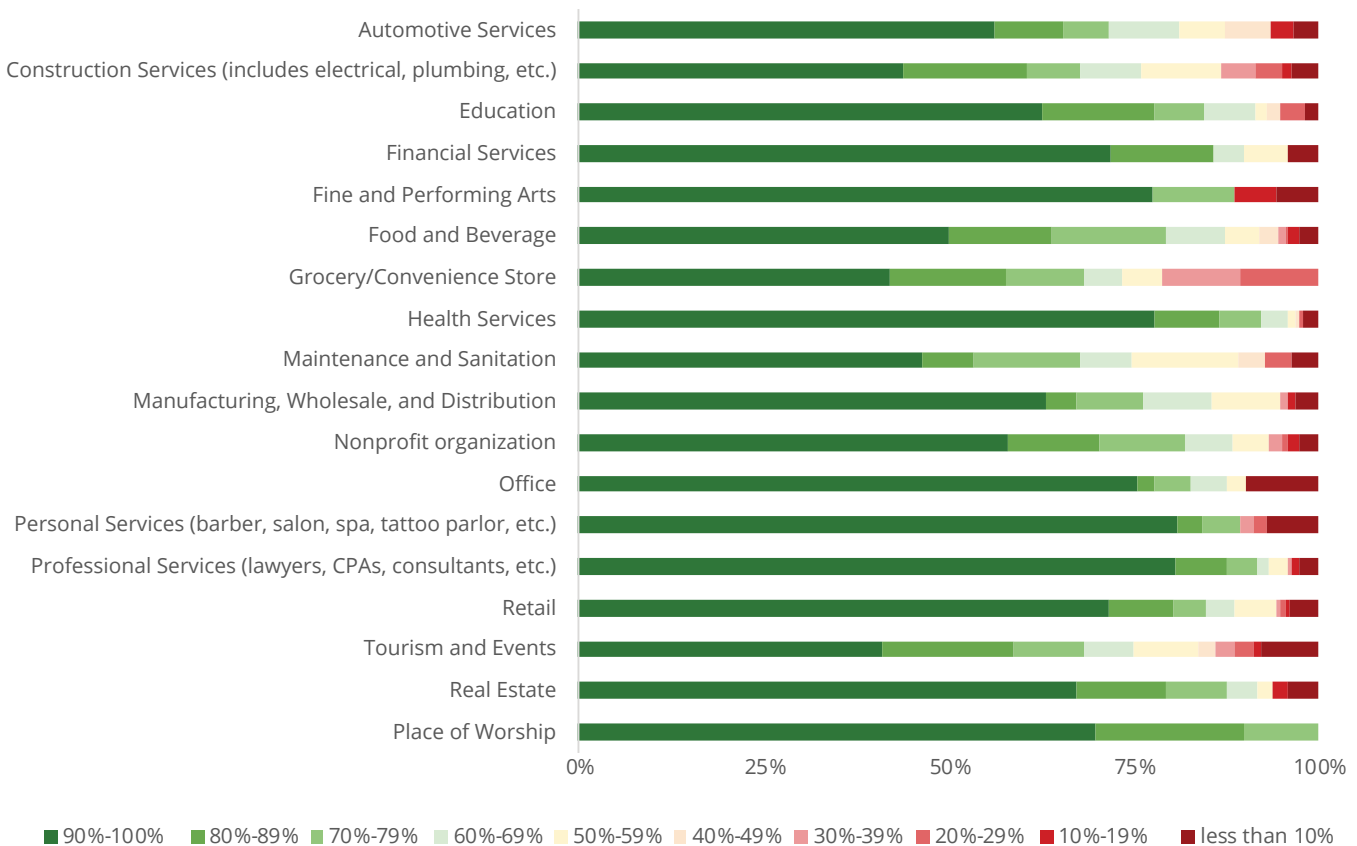


For every business-size category, the majority reported 90-100% of their employees were vaccinated. Smaller businesses achieve higher vaccination rates than larger businesses. Businesses with 51 or more employees had the lowest reported proportion in this category, with only 25.6% reporting 90-100% vaccination. In addition, the median of businesses with 50 or more employees is in the 70-79% category, whereas every other business is in the 80-89% or 90-100% category.



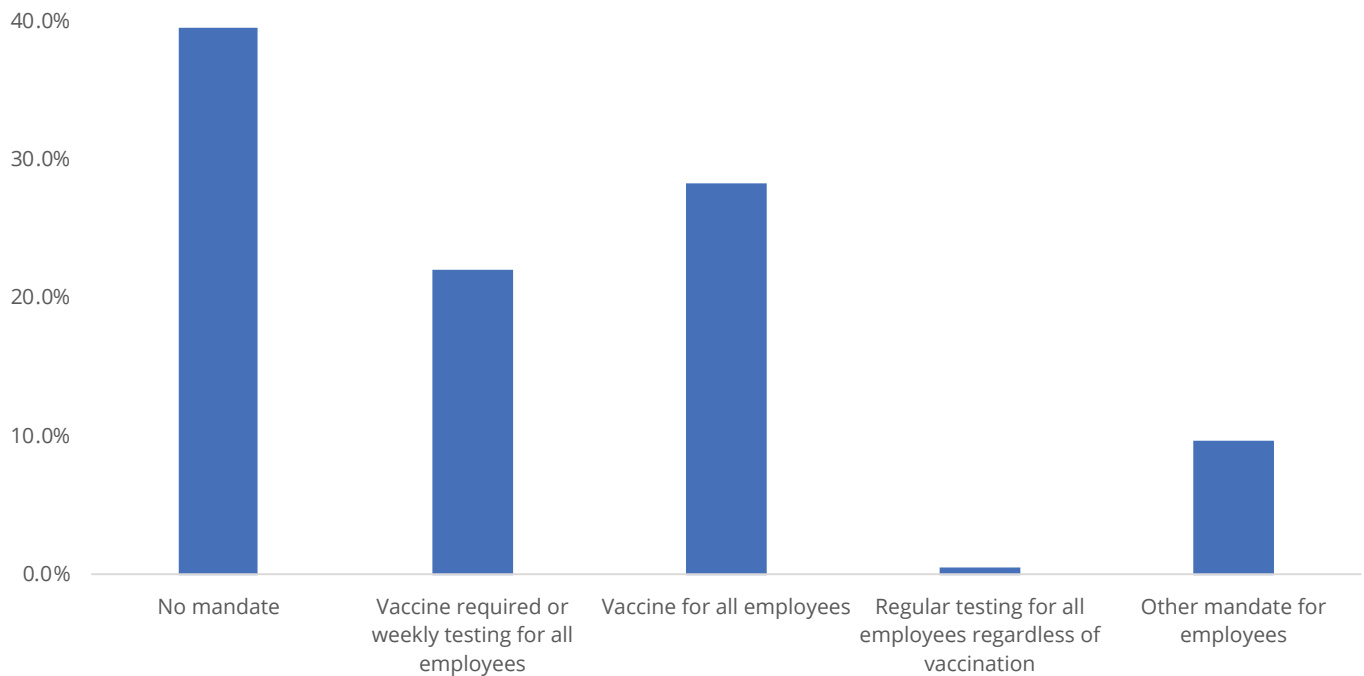


**Vaccination rates across sectors.** Heterogeneity of vaccination rates across sectors was observed. The sectors with the largest shares of vaccinated individuals, in the 90-100% vaccinated employees, were Personal and Professional Services (81% and 80.7%, respectively). Every sector group had a majority reporting the highest vaccination level. The categories with the lowest vaccination amount in this level were Tourism and Events, with only 41% reporting 90-100% vaccination, and Grocery/Convenience Stores with 42%. However, 68% of those in Tourism and Events and Grocery/Convenience Stores reported 70% and above vaccination rates.

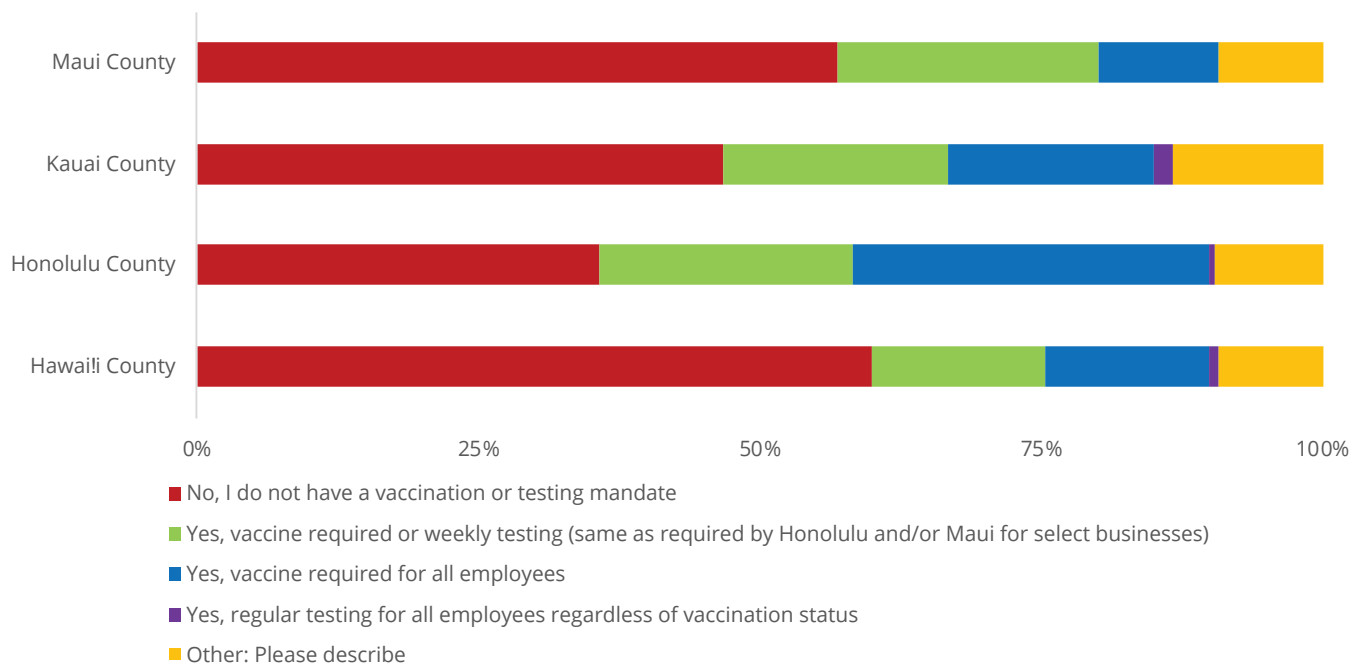


## MANDATE FOR EMPLOYEES TO BE VACCINATED

In our survey, 60.5% of businesses have imposed a mandate for their employees. This is a substantial increase from the 35.9% of businesses that had imposed a mandate in the UHERO/PAAC survey in August. Employers differ on the type of mandate for employees, including vaccine required or weekly testing for all employees (same as required by the City and County of Honolulu or Maui county), with 22% of businesses mandating the vaccine for all employees (28.3%), mandating regular testing for all employees regardless of vaccination status (0.5%), and other types of mandates for employees or already having achieved 100% vaccination so a mandate was not required (9.7%).

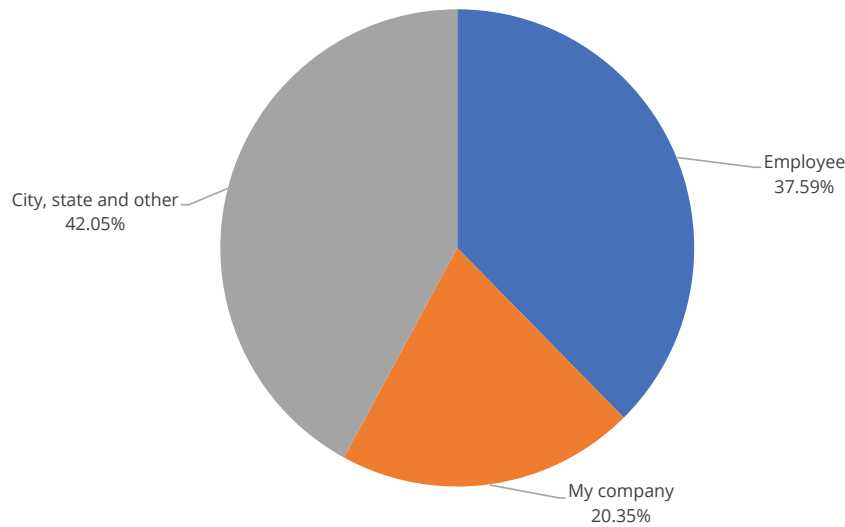


We note that the mandate uptake differs across islands. Oahu businesses report the largest percentage of mandates for employees (62.9%). Kauai (48.4%), Maui (42.5%) and Hawaii Island (39%) businesses trailing Oahu.



### WHO PAYS FOR THE COST OF TESTING?

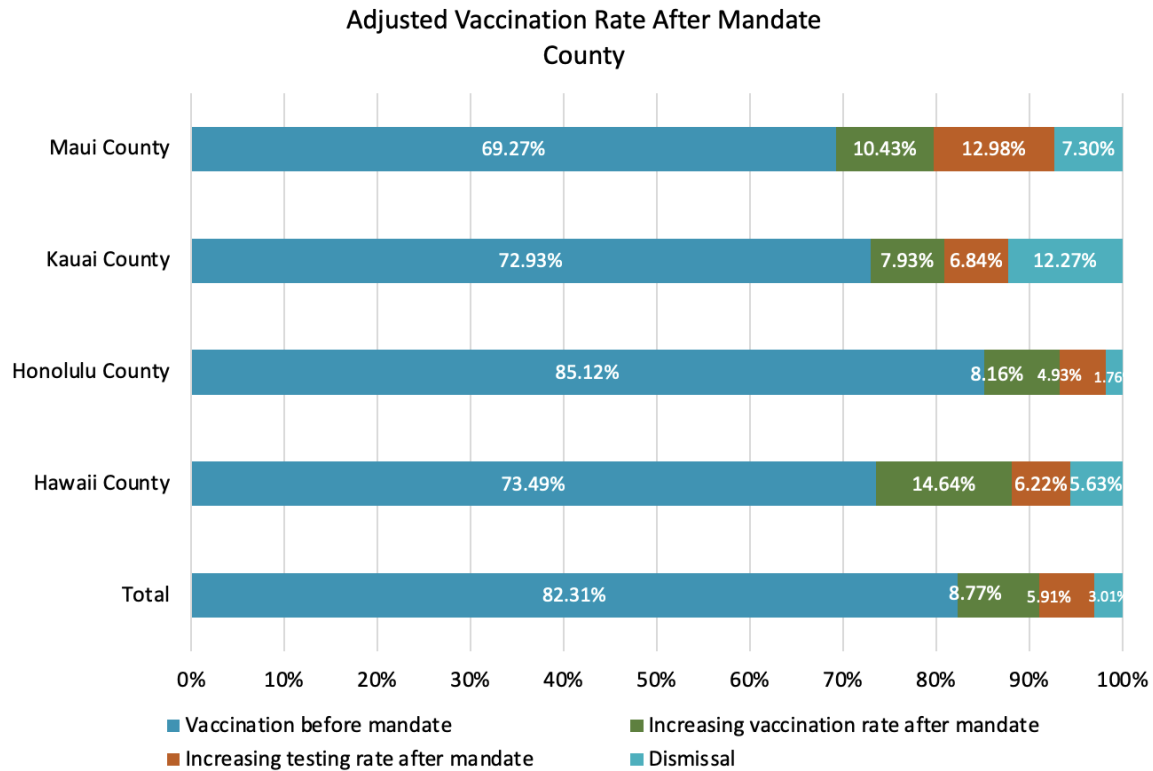
For businesses that imposed a testing mandate for employees, we were able to obtain who pays for the testing of employees. In 37.6% of the cases, the responsibility for cost comes to the employee. In 20.4% of the cases, the employer pays for the test. Notably, in 42.1% of the cases, employees rely on other sources such as free testing from the city and state.



### EFFECT OF MANDATES ON VACCINATION AND REGULAR TESTING

The mandates have had a significant impact on vaccination uptake. Before mandates were announced, businesses with a mandate reported an 84.4% of vaccination among employees (adjusted for business size). After mandates were announced, an additional 8% of employees got vaccinated, 5.9% of employees elected regular testing, and 1.7% were dismissed, resigned, or otherwise not covered by our survey. In contrast, those businesses without a mandate have achieved a lower vaccination rate of 76.1%, providing opportunities for the government to expand vaccination rates by targeting those businesses.

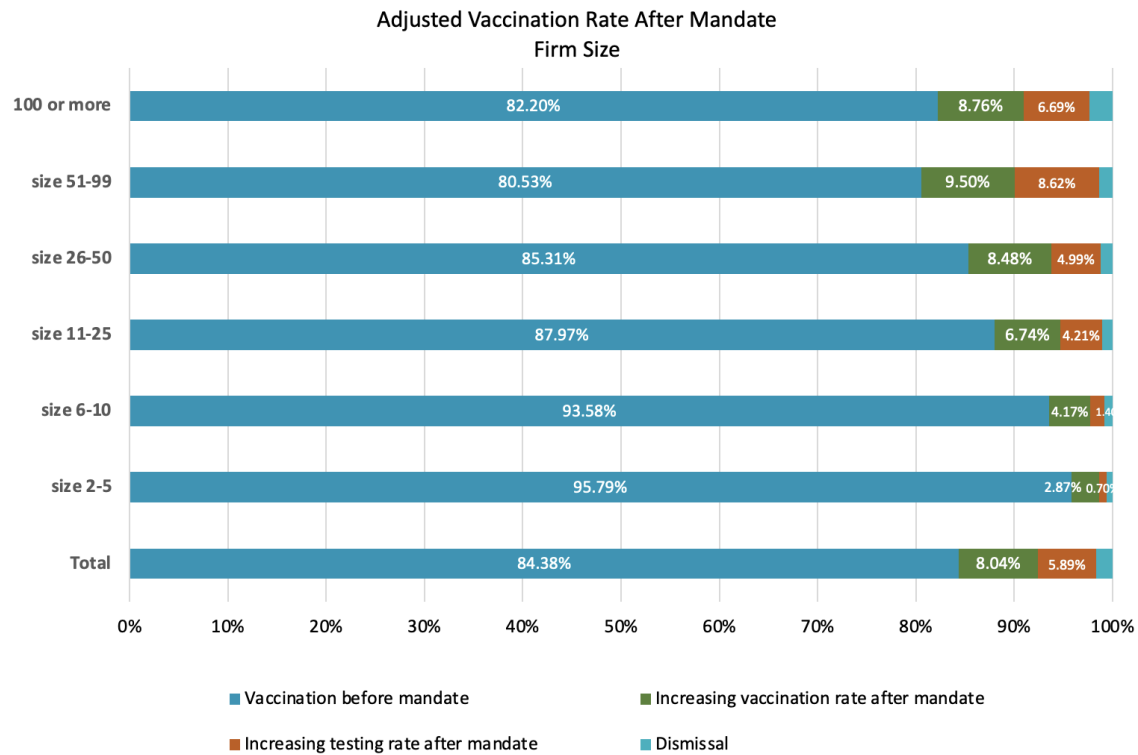
These differences are notable across counties. In Honolulu county, 85.1% of employees were vaccinated before a mandate, 8.16% were vaccinated after the mandate, and 4.9% are doing regular testing. In contrast, in Maui, 69.3% of employees at businesses with a mandate were vaccinated, 10.4% were vaccinated after the mandates, and 13% elected regular testing. The table below further breaks these numbers down.



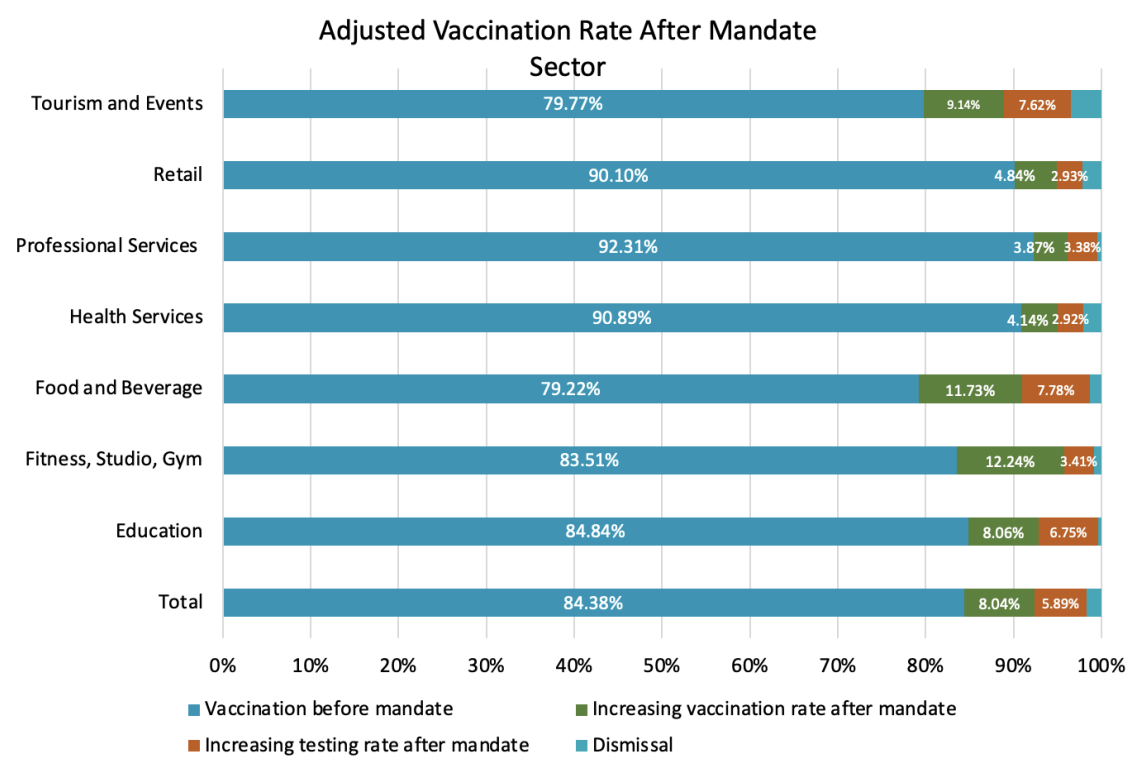
Before the mandates, larger businesses had lower vaccination rates than smaller businesses. Post-mandates, all businesses have over 90% vaccination rate, and the difference in vaccination rates between smaller and larger businesses considerably shrunk.

There is still about 6% of the population doing regular testing, providing opportunities to increase vaccination.



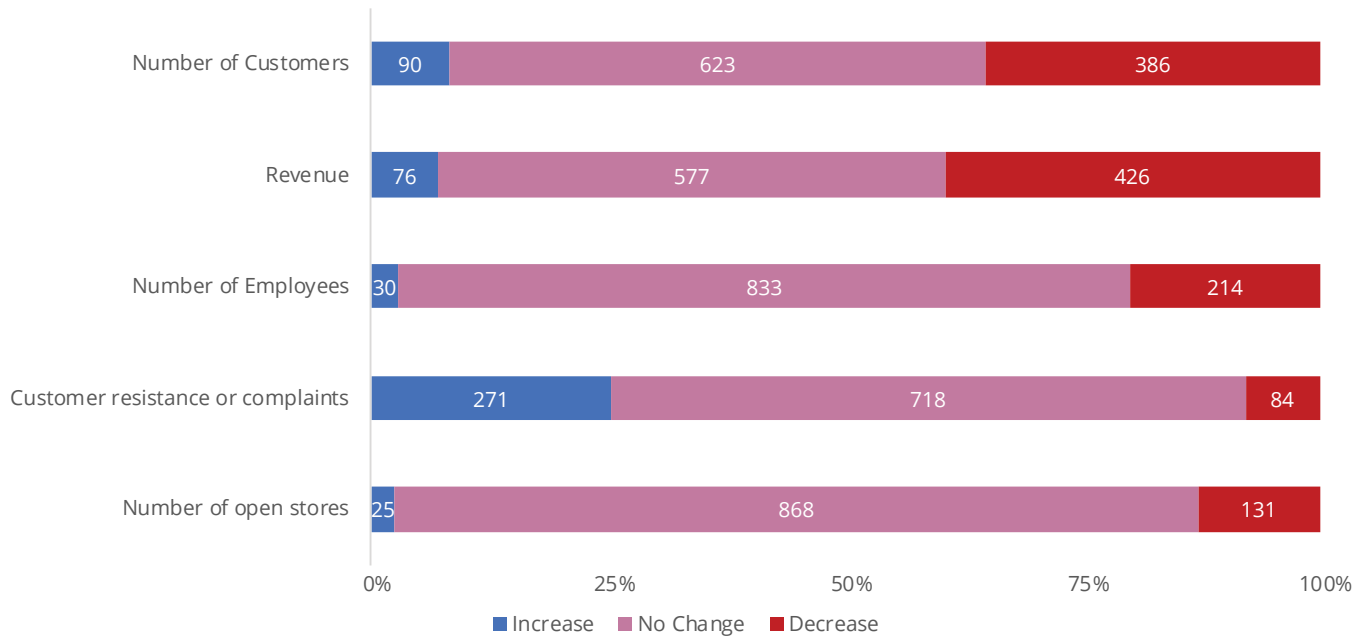


Although there exists some heterogeneity across sectors that have adopted a mandate, on average, businesses that have imposed a mandate have reached a 90% vaccination rate regardless of a sector after the mandates. The largest gains in vaccination were in the Food and beverage, and fitness, studio, and gyms, with increases of 11.73% and 12.24%, respectively, and both exceeding 90% vaccination in that sector.



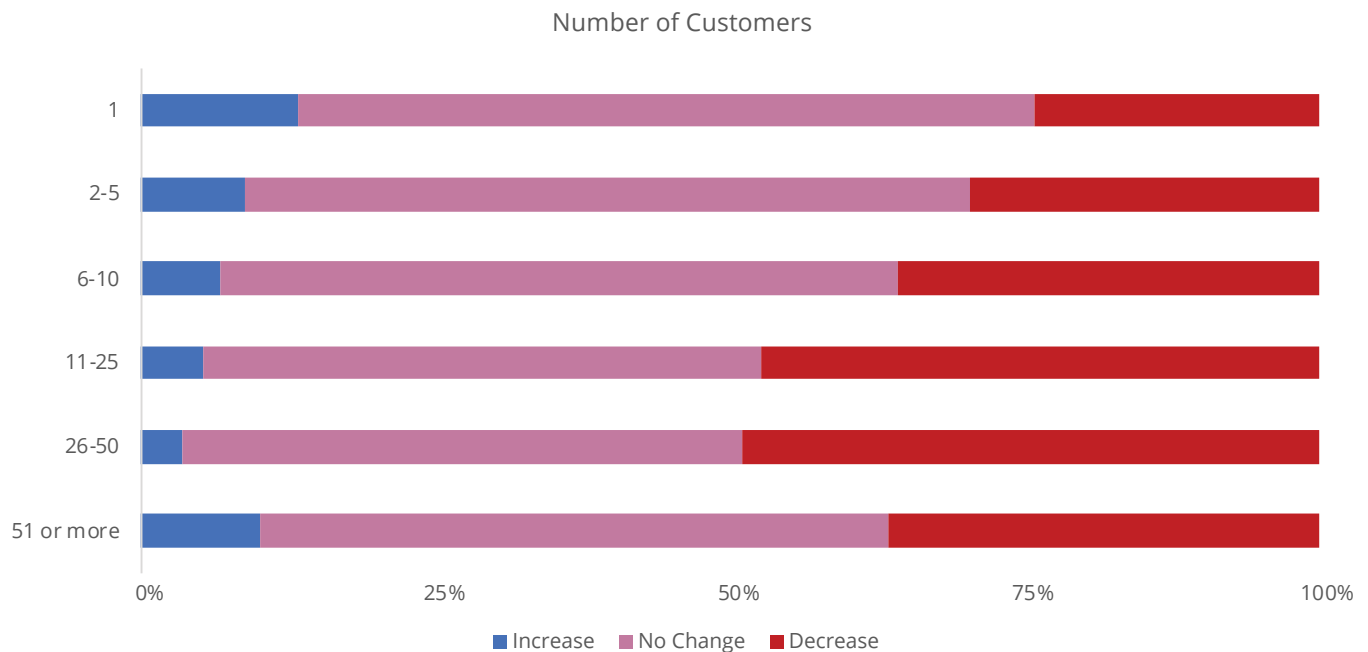
### OTHER EFFECTS OF THE MANDATES ON BUSINESSES

The mandates have affected the number of customers, revenue, the number of employees, customer resistance or complaints, and in some cases, the number of stores open. Although the majority of businesses reported no change in each category measured, a significant 386 (35.12%) businesses that adopted a mandate had a decrease in the number of customers. In comparison, only 90 (8.18%) businesses had an increase. Similarly, 426 (39.5%) businesses that adopted a mandate decreased revenue, while only 76 (7%) increased revenue. The number of customer resistance and complaints increased, primarily as this survey was conducted right after implementing the mandates. Indeed, 271 (25.2%) businesses saw increased customer complaints, while only 84 (7.8%) decreased complaints. The following chart quantifies the values across all categories.

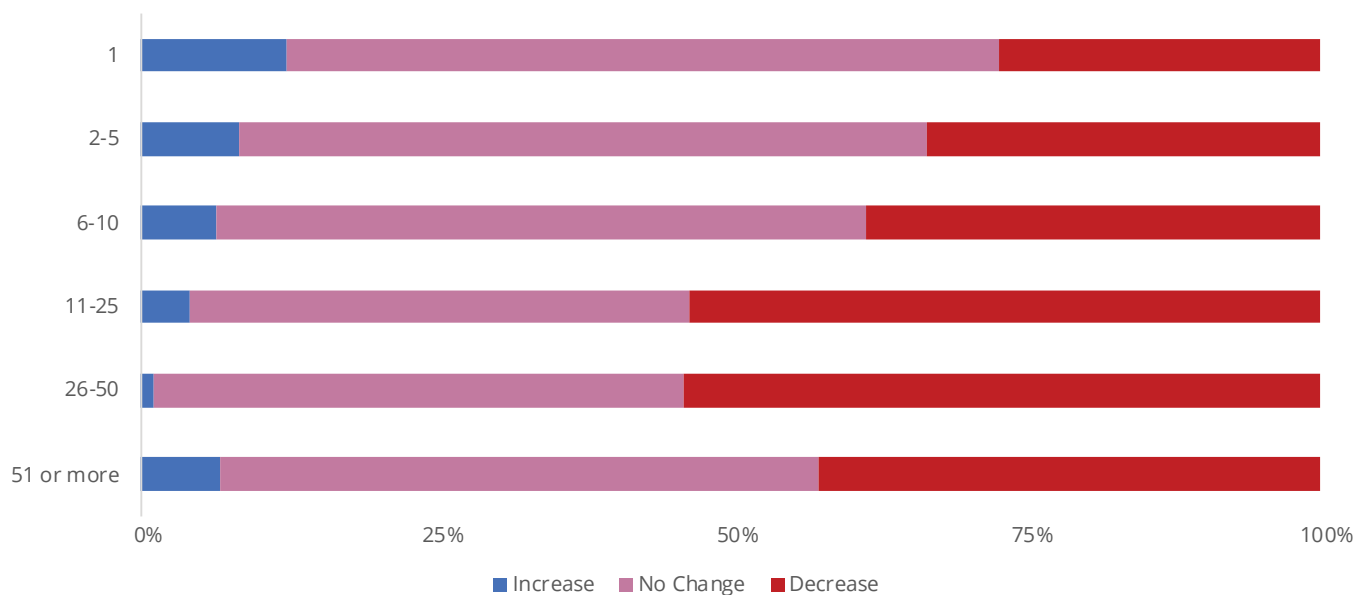


It is important to note that mandates were implemented in mid-September when visitor arrivals fell sharply, and residents curtailed their mobility. Therefore, although businesses reported these numbers, customers and revenue were likely also affected by other factors that this survey cannot disentangle.

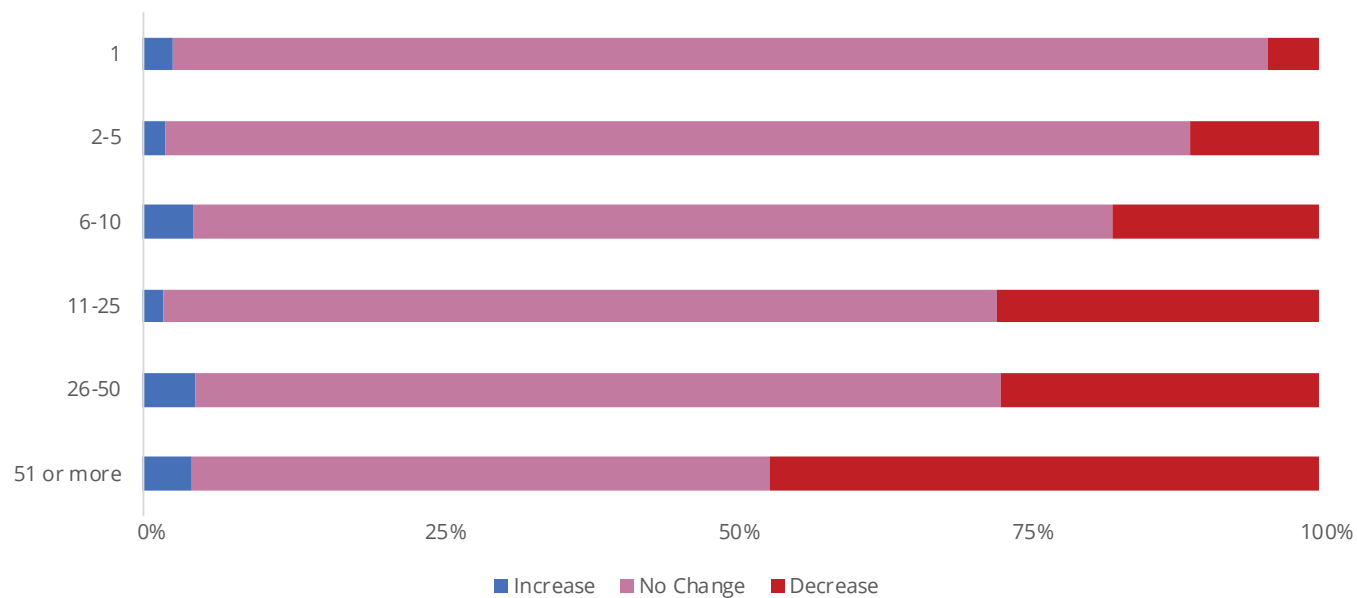
Most of the effects happen on medium to large size businesses rather than the smallest or largest businesses. Businesses with 11-50 employees reported the most significant decreases in the number of customers and revenue. Larger businesses saw the highest increase in customer resistance and complaints. 49.32% of businesses with 51 or more employees reported a decrease in their number of employees, the highest rate.



### Revenue

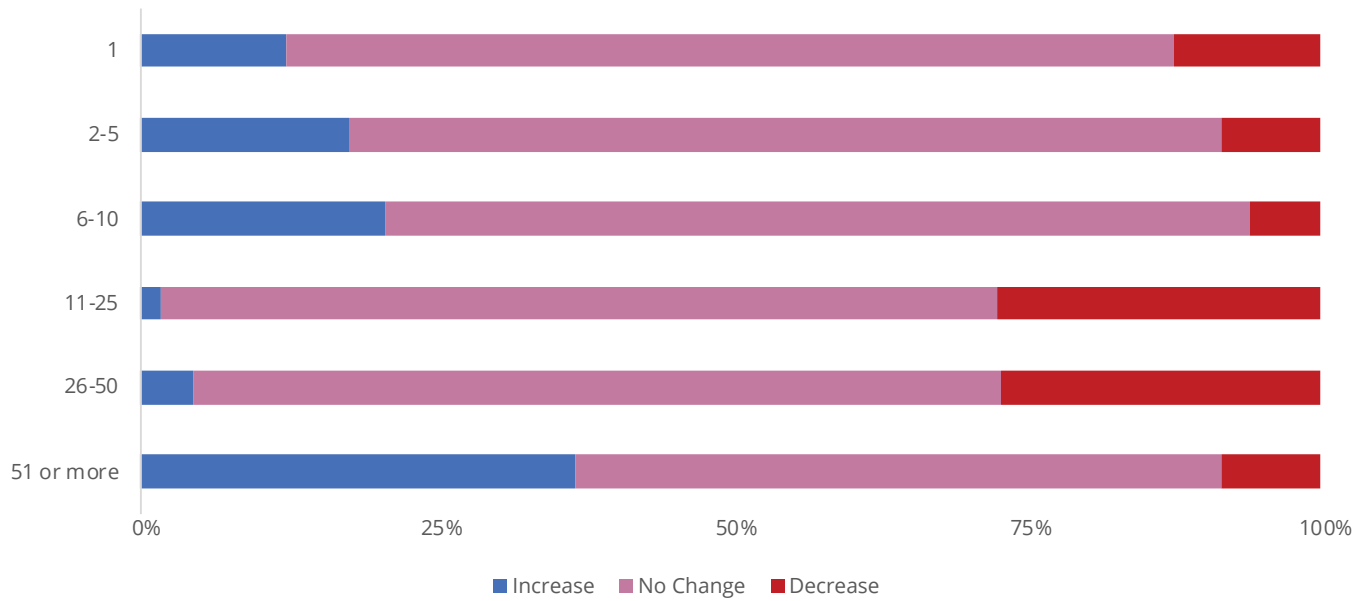


### Number of Employees

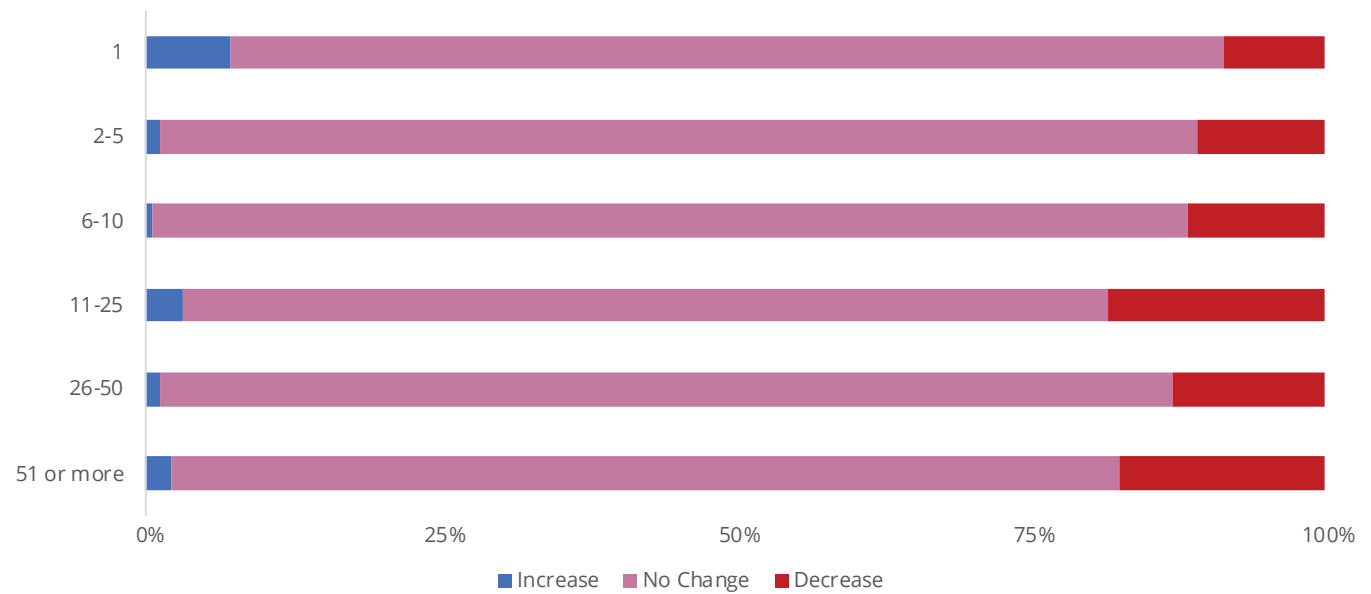




### Customer Resistance or Complaints



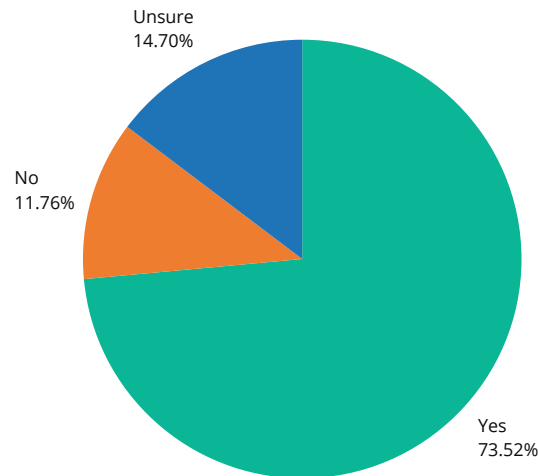
### Number of Open Stores



## SUPPORT OF MANDATES AMONG BUSINESSES

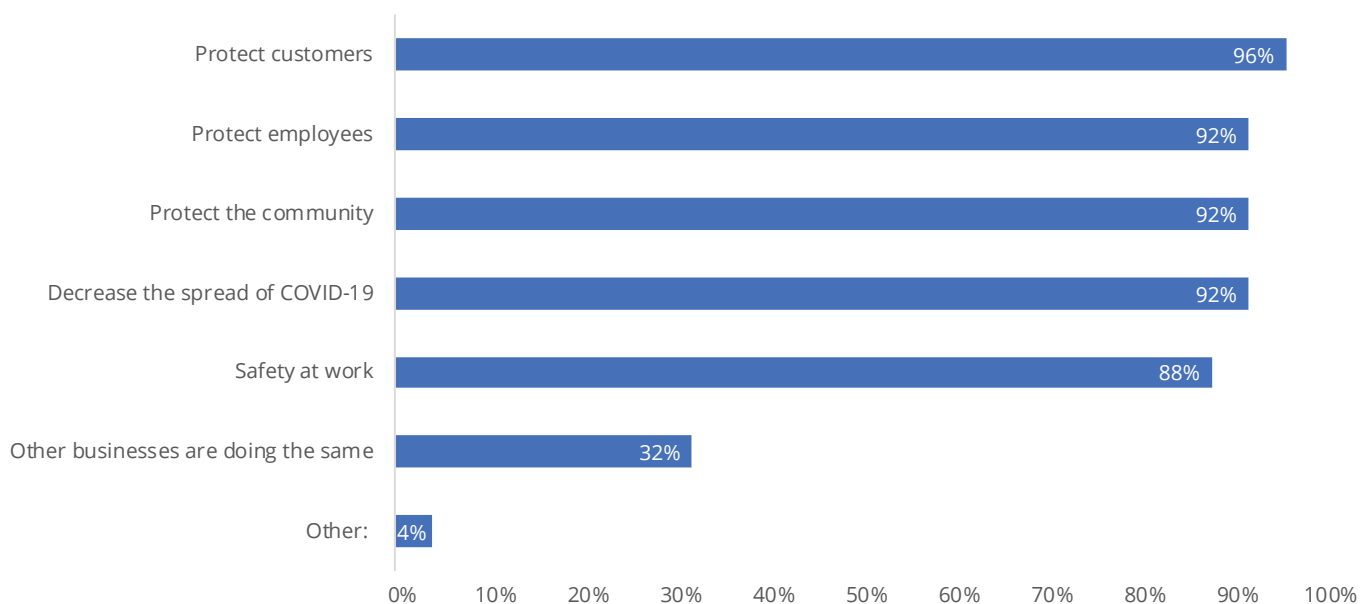
For all the businesses in the survey, we looked at whether they support the new COVID-19 or the testing mandates of employees. Over 70.5% of businesses support the mandate. Only 17.5% of businesses do not support it, while 11.8% are unsure.

Do you support the new COVID-19 vaccination or testing mandates for employees?

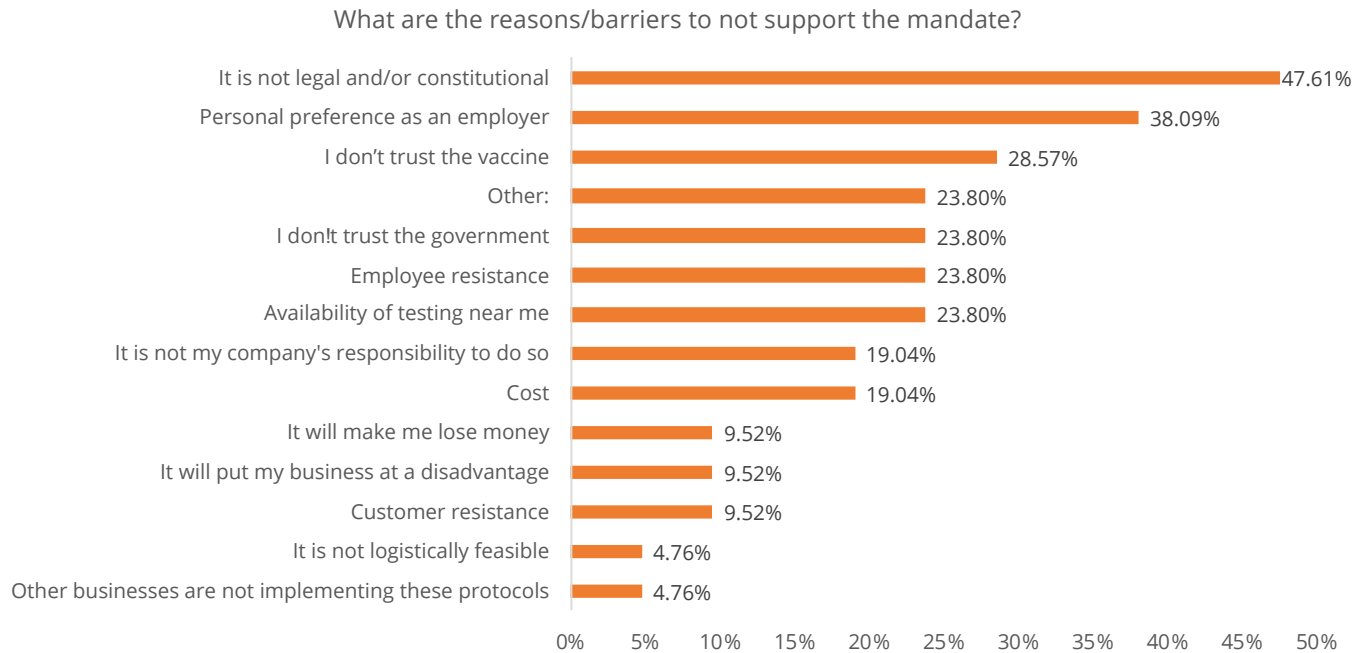


The overwhelming reasons why businesses support the mandate are to protect the community (93%), to decrease the spread of COVID-19 (92.4%), to protect employees (92%), due to safety at work (89%), to protect customers (87%). In comparison to the previous UHERO-PAAC survey in August, similar reasons were reported but the range of the values was around 75%, illustrating the increased support and popularity of the mandates in the business sector.

Why do you support the mandate?

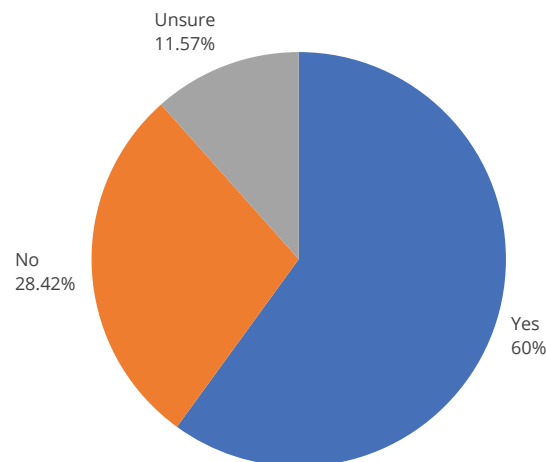


The main reasons or barriers why businesses do not support the mandate include the belief that it is not legal and/or constitutional (41.62%), due to employee resistance (38.4%), personal preference of the employer (33.7%). Other reasons are outlined below.

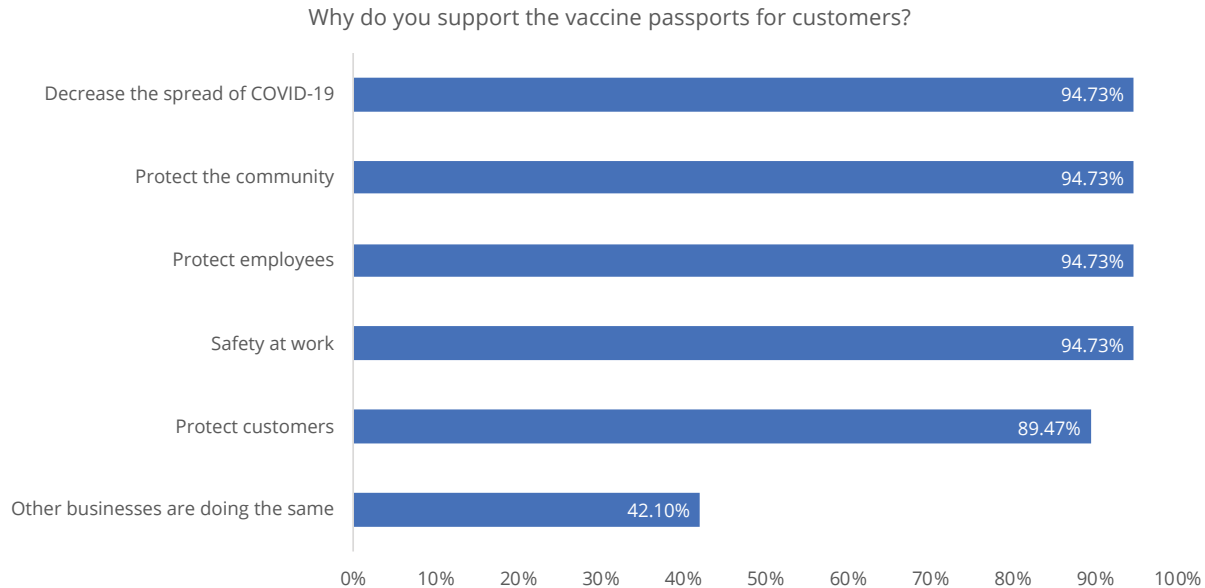


In addition to restrictions for employees, we asked businesses whether they support COVID-19 vaccine or testing mandates for customers (vaccine passports). Almost 2 in 3 businesses support vaccine passports (61.75%). 22.2% of businesses do not support vaccine passports, while 15.9% are unsure. In comparison to the previous UHERO-PAAC survey in August, this is a significant increase, where only 1 in 3 businesses supported the mandates at that time.

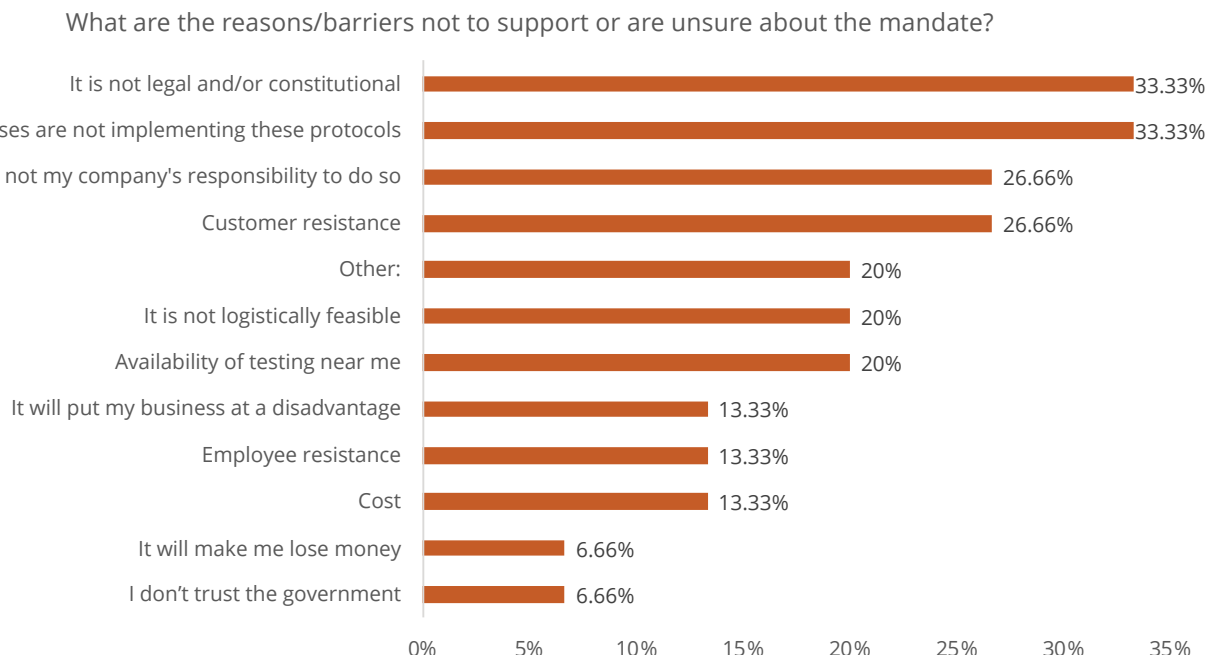
Do you support COVID-19 vaccination or testing mandates for customers (vaccine passports)?



The overwhelming reasons why businesses support the vaccine passport for customers mirror those from mandates for employees. These include protecting the community (93.4%), decreasing the spread of COVID-19 (92.6%), protecting employees (91%), protecting customers (87%), and safety at work (86%). This is an increase of the previous UHERO-PAAC survey in August, with ranges in the 75% range.



The main reasons or barriers why businesses do not support the mandate for customers include customer resistance (44.83%), it is not their companies' responsibility (33.6%), the belief that it is not legal and/or constitutional (32%), personal preference of the employer (28%), it will put businesses at a disadvantage (24.1%), among other reasons discussed in the chart below.







**Although we received hundreds of comments from all spectrums, we included a few dozen comments to provide additional context. These comments do not necessarily reflect the views of the investigators.**

*Our employees are all on the same page about COVID and vaccinations so we haven't really encountered the need to mandate anything. I'm not sure what we would do if we had people in disagreement. But we're just a small company.*

*All companies need to join in on mandating vaccines, then the holdouts will start listening to the science instead of friends and the internet false information*

*A digital passport system can be designed for future proof. Now is the time to create a baseline for how security and public safety can be a seamless process that can preempt any information void and disinformation campaigning.*

*We view mandate as essential requirement in midst of a worldwide pandemic*

*I would encourage ALL private homes, offices, businesses and hotels to mandate contractors send ONLY vaccinated employees. I could continue to show our crew that their hours will be pulled back on this basis along, and an eventual lay off might be pending. Certainly private industry should make more noise about their own safety. Mahalo.*

*Our employees individually decided to take the vaccine(s), but I do not believe in forcing people, whether employees or customers, if there are objections. I feel that more research should be put into better and effective treatments now that there are vaccines for those who want it. Forced vaccinations should not be the only option.*

*We need testing kits even for vaccinated*

*I think it would be great to have test kits then my workers will be able to get tested with out a problem*

*Would be nice to offer downtown business district vax sites employees could access to get vaccinated.*

*State should load proof of COVID vaccinations on lunch cards, school IDs, driver's licenses and state IDs. This would make it very difficult to falsify COVID vaccine immunizations.*

*I agree with the necessity of many of the mandated policies but I believe the early closing hours for bars and restaurants have a tenuous connection with combatting the pandemic at best.*

*I believe in the vaccine, but a lot of my employees are afraid to get because of stories they have heard. More education, especially on the west side, would help.*

*Provide business with capability to scan the Hawaii Safe Travel QR Code to verify customer COVID status and compliance*

*There's been some hostility among staff between vaccinated and unvaccinated staff. There were also two staff who the firm gave exemptions (one medical, one religious). There were issues for each exemption that took a lot of time to resolve and caused a lot of hard feelings.*

*I support the vaccination mandates. They have given people who were reluctant or slow a reason to do what's good for our community at large*

*Why does that burden have to fall on the business owners who are already grappling with enough on their plate?*

*Major issue is the lack of consistent explanation of the science behind the mandates. Many of the mandates/restrictions have a negative impact on the vaccinated and not enough consequences on the unvaccinated. Governor should not send the message that tourism is not wanted.*

*It's difficult for small, private companies to enact any Covid policies unless it's mandated by governments across the board that we do so. We do not have the resources (financially and otherwise) to legally represent ourselves in a court proceeding.*

*We believe the mandate is good to keep everyone safe but the checking for Customers whether their status is valid/legitimate is concerning because of fake cards, etc.*

*The availability of regular testing is the biggest challenge for our employees.*

*There should have been clearer and more thorough guidance from the state before the Gov's mandate was issued. Implementing appropriate procedures and dealing with the resistance/noncompliance of (some) unvaccinated employees is extremely time-consuming and distressing.*

*I think in the future, having a longer window to get prepared and employees to get vaccinated before it started would have done wonders to the effectiveness of this program.*

*Some of my employees will quit if I insist on them getting vaccinated. I can't run my business without them. So I am stuck. Honestly, getting these people to accept the vaccine is like asking them to convert to another religion. Very hard.*

*We decided some time ago that all employees must be vaccinated and no one who is not vaccinated may enter our office. We may have lost a couple of clients, but frankly, it's worth it.*

*Model policies for required vaccines at corporate events for non-employees would be helpful. Standardization for how to check vaccine cards for the public. More free home tests for the public.*

*We're constantly monitoring our sales to see if there is an increase in business, which we are hoping will be true. Prior to the mandate our sales plummeted due to the recent COVID-19 wave.*

*We desperately need extra support of educating the rules and regulations when coming to the islands. Our business get targeted with negative reviews and employee gets verbally attacked by it. this drives the employees not wanting to work.*

*I don't believe there should be any vaccine mandate or vaccine passport.*

*State needs better contact tracing.*

*Legal assistance in protecting our agency from staff's filing suit for mandated policy*

*Because we are independent hairstylist. We only rent a space in the salon. If the state makes it mandatory for salons then other stylists will have to do it too. I am for the vaccine mandates for our customers too.*

*Should have the same policy for all islands in Hawaii. It is confusing for visitors to navigate the different policies among different islands like Maui and Kauai requires you to have vaccination cards but Hawaii is not.*

*We strongly agree with the COVID-19 mandates. However, we would like to see the rationale behind gatherings... for example, group events like farmers markets, concerts, and youth sports continue while outside outreach events are not allowed.*

*More financial, HR, legal, and technology support for small businesses for implementation of new mandates.*

*The reason I am unsure about doing a vaccine mandate in our business is someone in our office is unable to receive a vaccine due to medical reasons. This person did not choose to have this medical issue and would like to get the vaccine, but the adverse reaction outweighs the positive for this person.*

*Appointments for free testing are running about 5-7 day in advance. This is useless for those who have immediate needs and cannot afford to pay for testing*

*I would like to see them expanded to all businesses. I know I would feel safer shopping (as I now do when dining out) if I knew everyone around me was vaccinated or had been tested.*

*All of our employees are in agreement to be vaccinated to protect each other and keep our workplace safe. We do what we can to keep our staff healthy and working.*



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## UHERO THANKS THE FOLLOWING SUPPORTERS:

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Over its more than twenty year history, UHERO research has informed decision making on some of the most important issues facing our community, including the ever-changing economic outlook, challenges to our environment, and policies affecting water, housing, energy, and many other areas.

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