International Cancer Research Partnership

COVID-19: survey of impact on cancer research funders

Results of June-July 2020 survey

Key messages – the survey results indicated that:

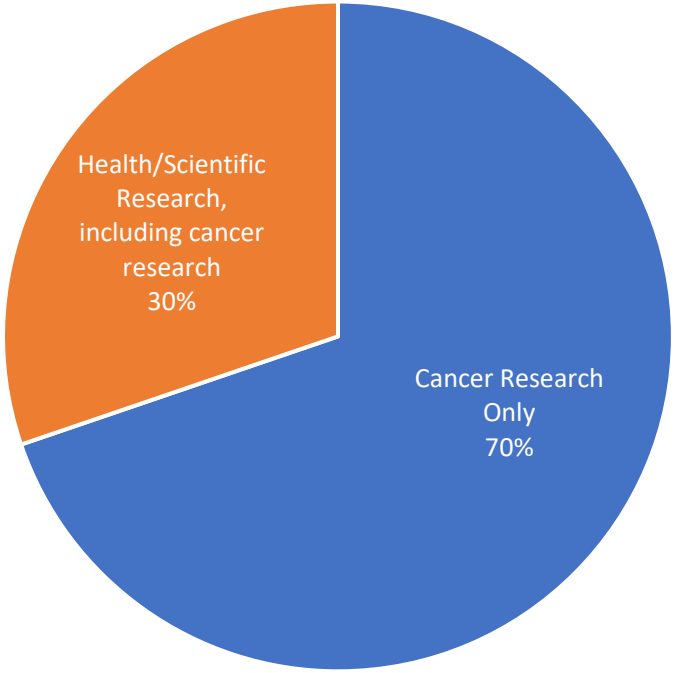
- Funding for cancer research was likely to decrease substantially due to COVID-19, primarily in the charity/private sector
- 66% of charity/private organizations who responded to the survey expected their funds available for cancer research to decrease
- Funders are looking for ways to work together and innovate during the pandemic

v. 23 Sept 2020

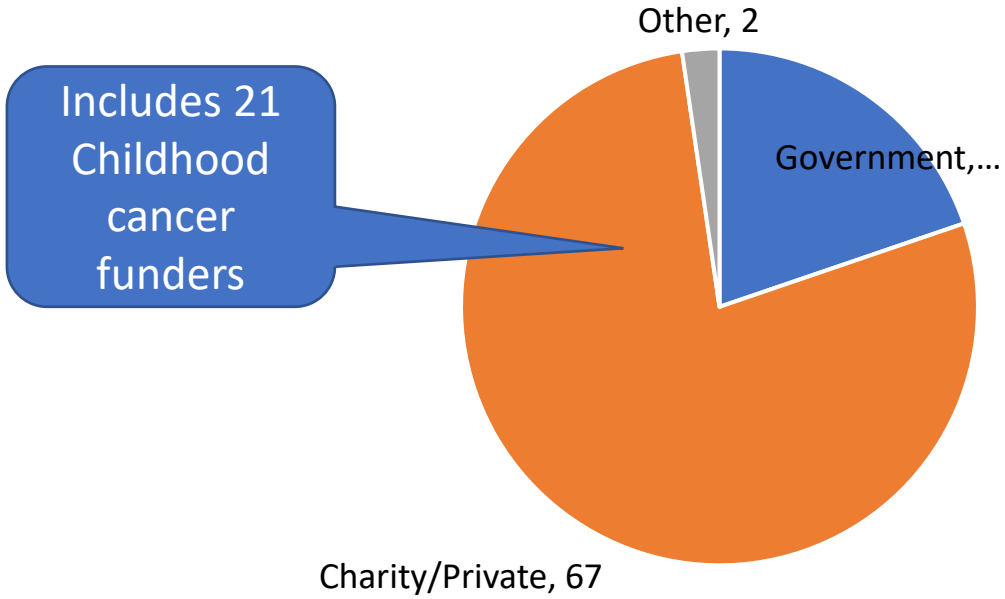
Profile of survey respondents

Survey respondents

- 86 organizations responded to the survey, from 9 countries
- Most (n=60) funded cancer research only
- Most (n=67) were charity/private funders
- 21 organizations funded childhood cancer research exclusively
- Most organizations (68%) employed under 100 staff



Country	#
Australia	8
Belgium	1
Canada	35
France	1
Italy	1
Netherlands	1
Spain	1
UK	14
USA	23
UK-International	2



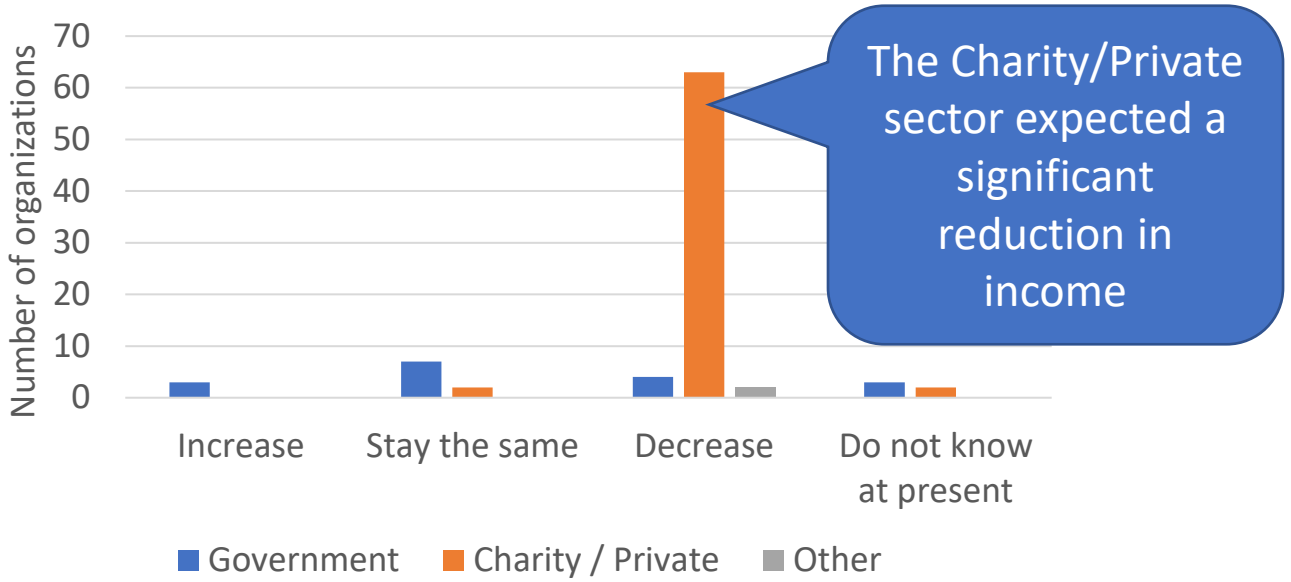
Size of organization (# Employees)	Under 100	100-1000	1000-5000
Government	10%	9%	2%
Charity / Private	54%	18%	5%
Other	3%	0%	0%
Grand Total	66%	27%	7%

COVID-19: effect on income

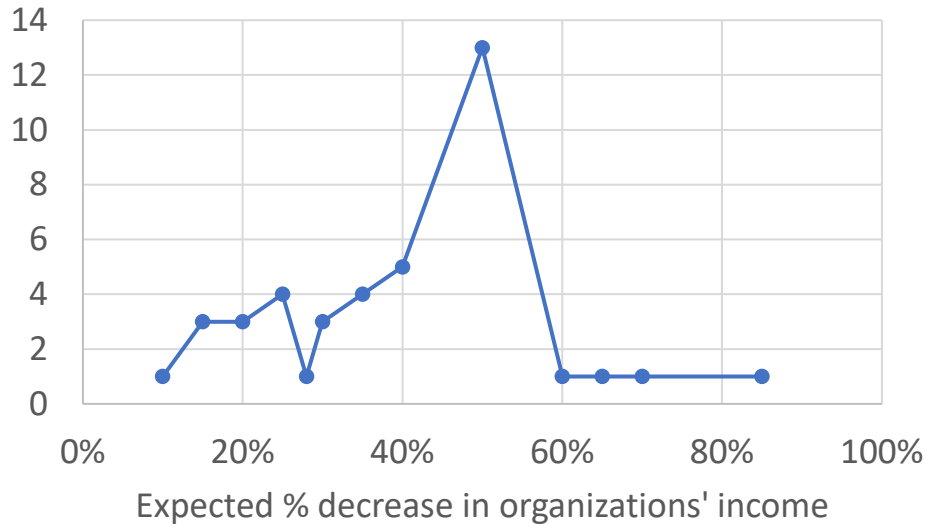
Headline figures

- 69 organizations (80% of respondents) expected **income to decrease this year**
- 3 organizations reported an expected increase (government relief): these were all health research funders (it was unknown at this point what percent increase would be allocated to cancer research)
- 41 respondents were able to estimate a loss in income of between 10% and 85% in this year
  The majority of these **expected income to decrease by 35-50%**
- Several commented that decreased income was also likely to continue into next year and the **full impact was not yet known**

Predicted effect of Covid-19 on organizations' income (n=86)



Anticipated % decrease in income (n=41)

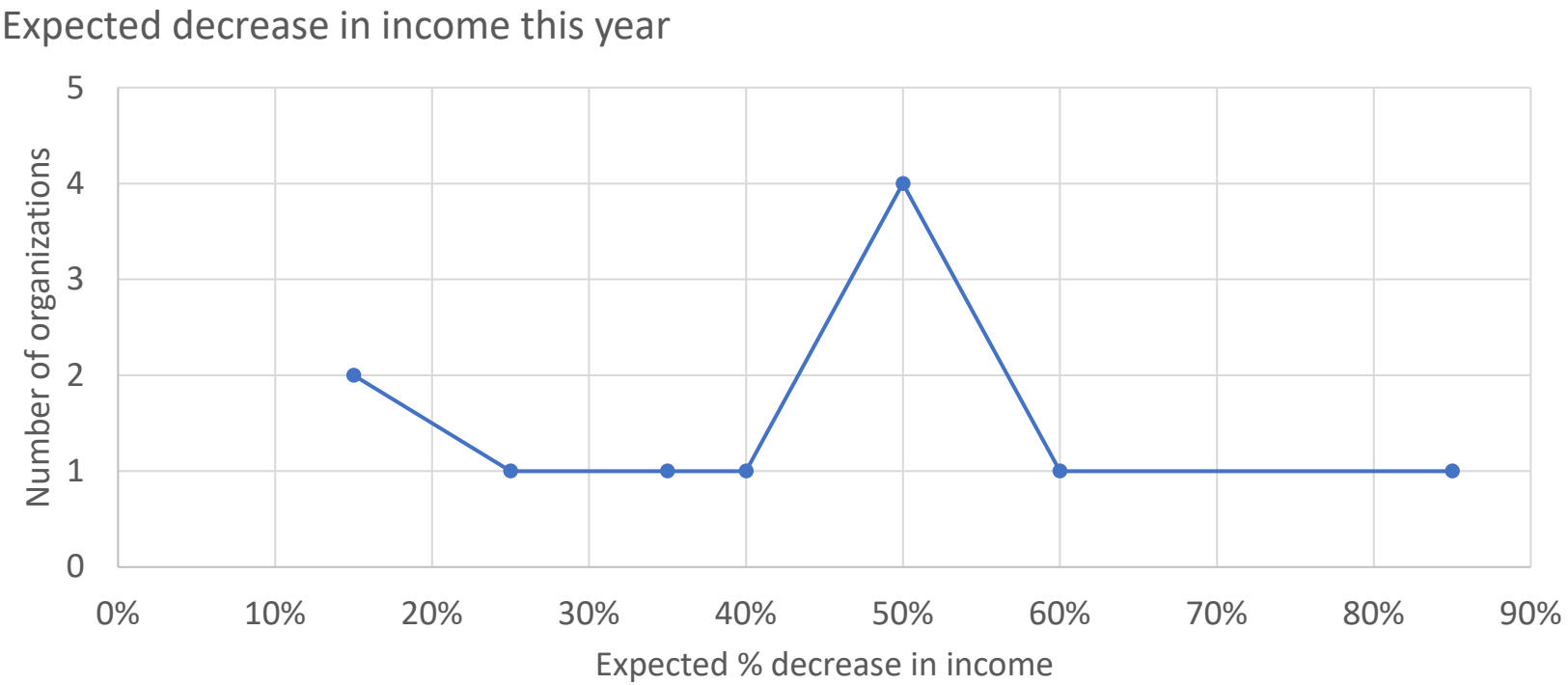


Effect on income: childhood cancer organizations

Survey respondents

- 21 organizations funded childhood cancer research exclusively
- All organizations employed under 100 staff
- All were in the charity / private sector
- All (100%) reported that income had decreased due to COVID-19
  - Where organizations could quantify the decrease, most expected a decrease of up to 50% in income

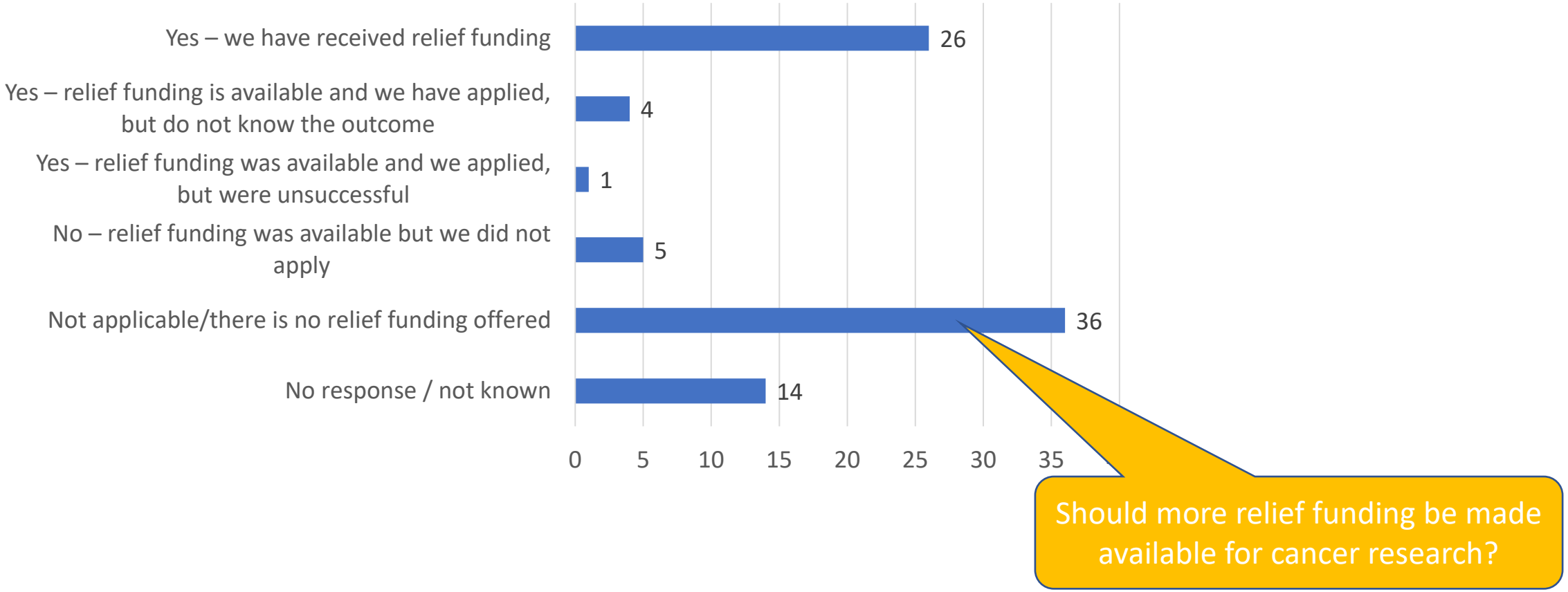
Country	# Organizations
Australia	2
Canada	3
UK	1
USA	15
Grand Total	**21**



Income & Relief funding

We asked if as a result of COVID-19, organizations had received any government emergency relief funding

- 26 organizations had received relief funding (in most instances, it was unclear if this is furlough/wage subsidy funding or support for research funding)
- 1 Health funder reported receiving government funding for COVID-19 research

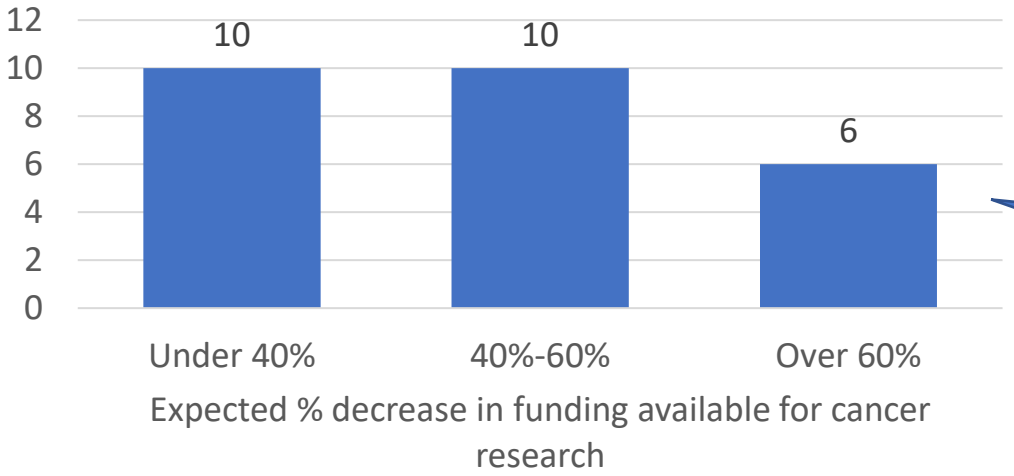


Impact on cancer research expenditure

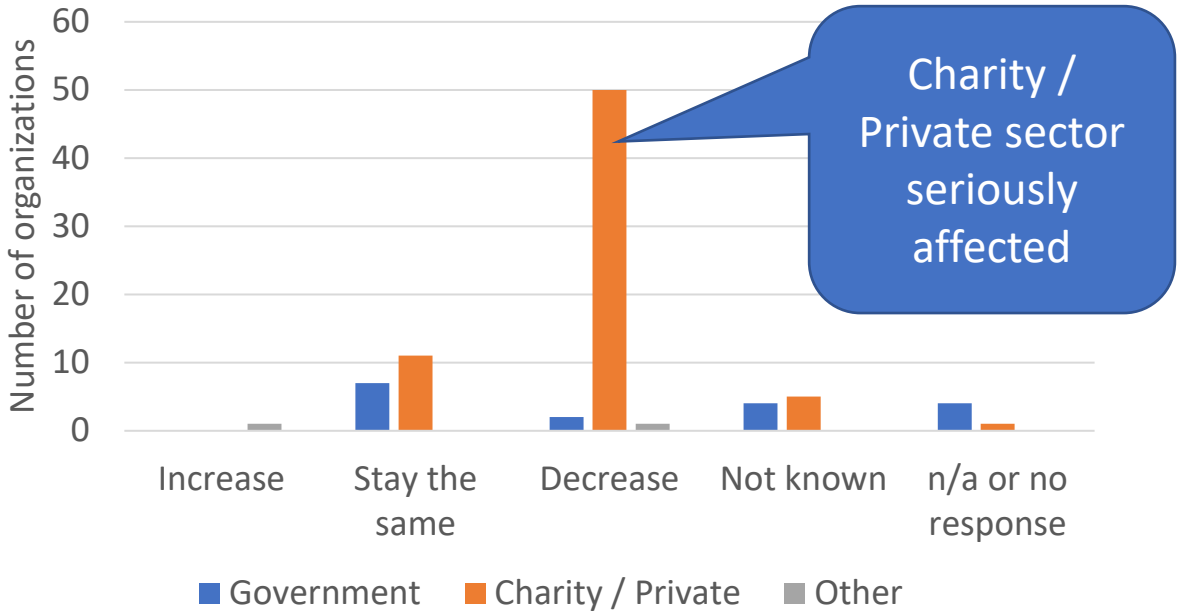
Reduced expenditure on research

- 53 respondents estimated that **funds available for research would decrease**
- Estimates of decreases ranged from 5% to 100% reductions this year. Many had cancelled funding calls altogether.
- Expenditure reduction was also anticipated in future years, given the possible long-term effects on the economy & the knock-on effect on charitable giving

Organizations estimated % reduction in funding for cancer research:



As a result of COVID-19 organizations expected that funding available for cancer research this year would:



Can this be quantified?

Impact on cancer research expenditure

UK Case study

- UK organizations reported an estimated **minimum reduction of over £61m in funds for cancer research**, with a **possible reduction of up to £167m**.
- This would represent a **decrease in funding of between 9% and 24% in the UK** compared to 2019

More work is needed to quantify the full impact internationally:

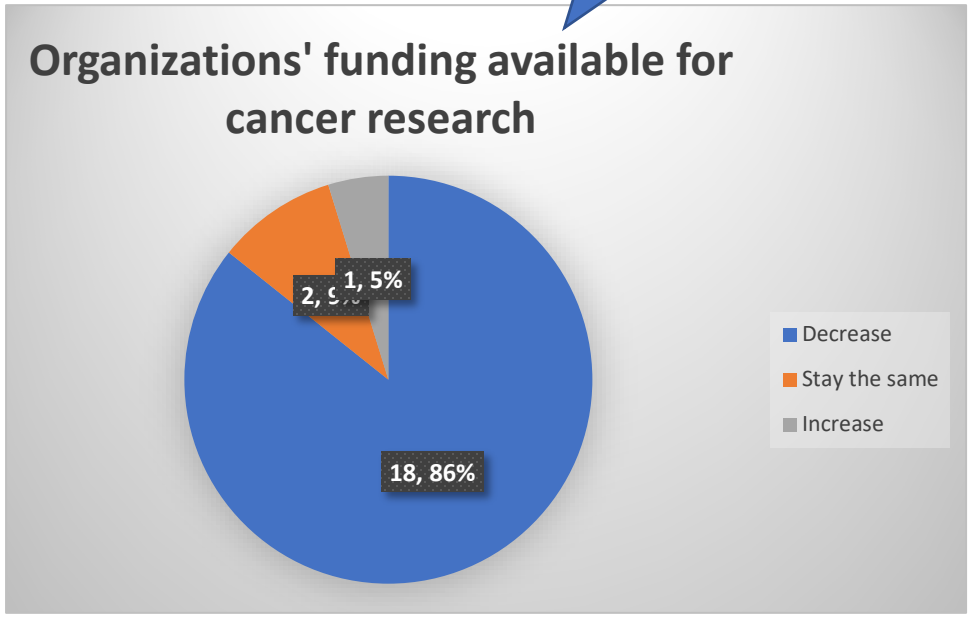
- 3 organizations reported an increase in income due to COVID-19 (health research funders), but reported that spending on cancer research would stay the same or did not know the impact as yet.
- 53 organizations expected a decrease in cancer research expenditure
- For those organizations who could quantify the decrease, **the expected decrease (in USD) was $157m in this year**
- 18 additional organizations cited a % decrease – additional data would be needed to quantify this.

Childhood cancer organizations: impact on expenditure

Decrease in funding available for cancer research

- Most organizations (n=18, 86%) expected funding available for cancer research to decrease this year. On average in the wider survey (all cancers), 77% of charity / private organizations expected funding to decrease.
- Some organizations (7) were able to predict a % decrease in research funding, ranging from 15% - 100% (average 48% decrease)
- It was difficult to quantify as many organizations were not able to predict specific reductions at the time of the survey, but of those that were able to, this would equate to a **minimum reduction of around $8.9m (USD) this year**

86% (18) organizations expect funding available for cancer research to decrease this year

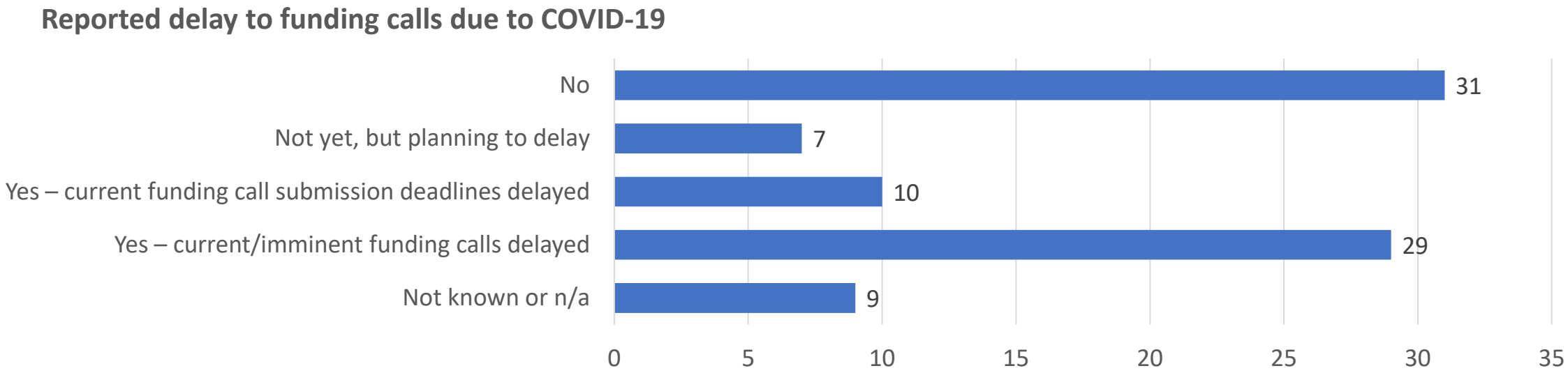


Excerpts of comments on the financial impact of COVID-19:

- *"Dramatically impacted fundraising at historically critical fundraising window."*
- *"We are currently developing alternative [fundraising] options but have no certainty on how these will turn out…"*
- *"In November…we will know better how much COVID has affected our income this year."*
- *"We are not starting any new projects this year…"*
- *"We have a reserve…but uncertain on our ability…to return to or exceed prior fundraising levels."*

Impact on funding calls

We asked if organizations had delayed planned or routine funding calls/calls for proposals



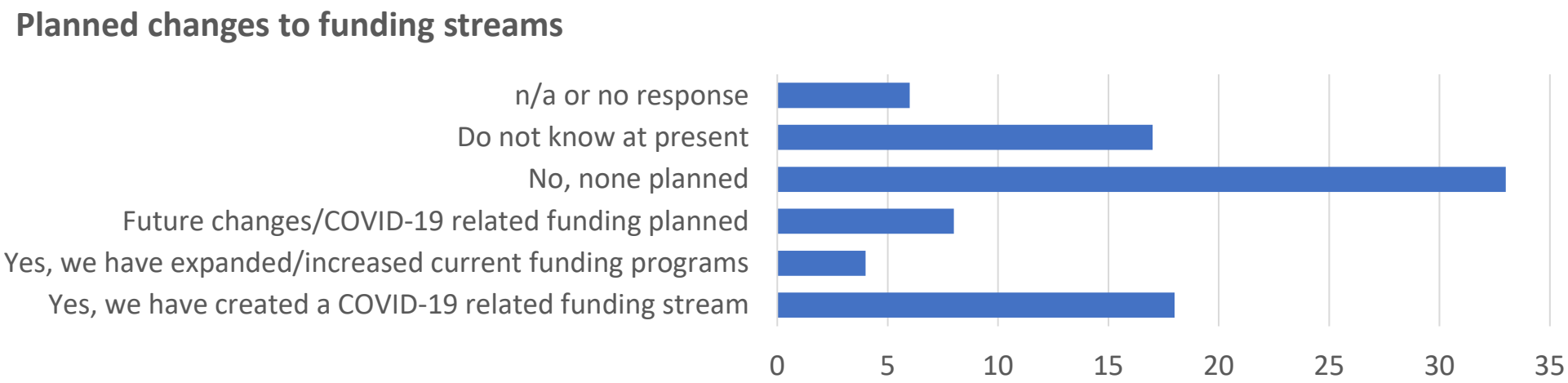
The majority (39) reported some delay to calls. Plans included:

- Putting all new funding calls on hold in 2020
- Extending application deadlines
- Delaying/cancelling 2021 calls
- Delaying funding decisions

Impact on funding streams

We asked if organizations had made any changes to current funding programs due to COVID-19

- Most (50) had not planned any changes or did not know at present



Examples of new streams in Cancer Research:

- Clinical trial on immunity for cancer patients
- Specific funding directed to long term impacts of delayed diagnosis due to pandemic

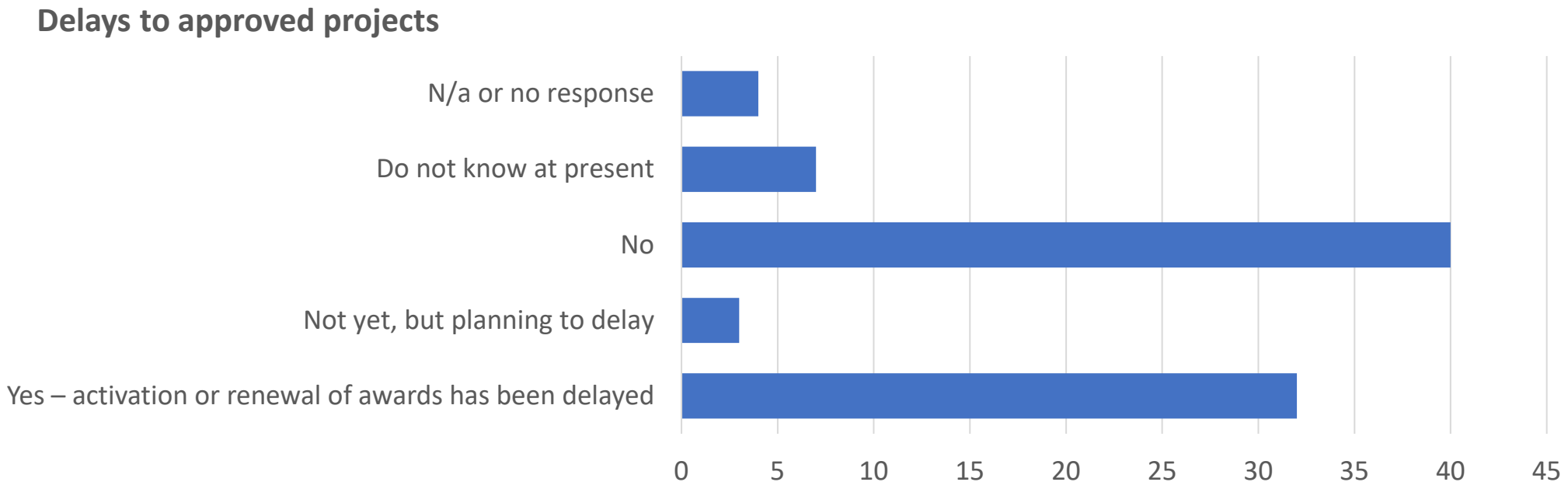
Examples of new streams in Health Research:

- Several COVID-specific calls, primarily from health research funders, e.g. on factors that determine severity of the disease, COVID-19 pandemic response challenge program, GMP vaccine manufacturing, Knowledge translation program committed to COVID-19.

Impact on approved projects & grant activation

We asked if organizations had delayed funding approved projects/programs

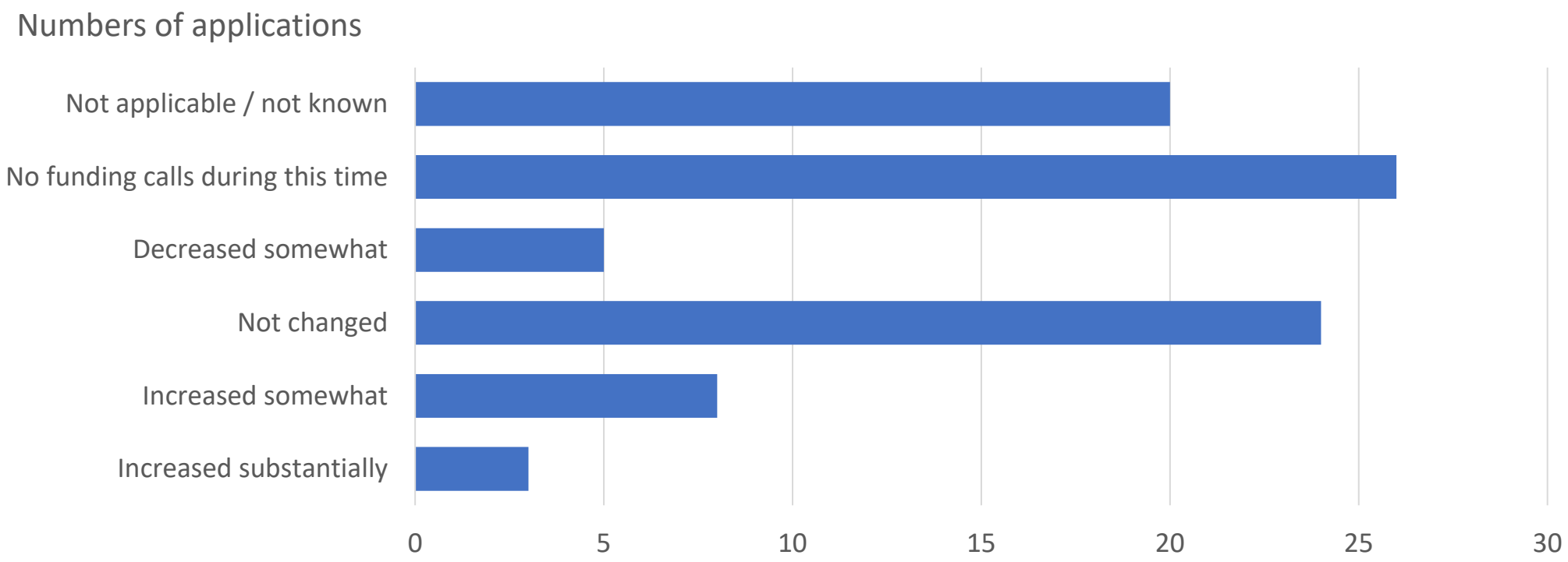
- **41% had delayed funding** for approved projects – reasons included:
  - Primary reason:
    Start dates and contracting delayed (uncertainty about when projects can start, grantholders requested delays).
  - Other reasons:
    Studies not able to recruit patients
    Clinical settings unable to run projects during COVID-19 lockdowns



Impact on application numbers

We asked if the numbers of grant applications had increased

- In general, numbers of applications had not increased substantially by July 2020
- Some organizations reported an increase of around 10-20% for recent funding rounds
- There was an expectation that applications would increase significantly later in the year as funding rounds and laboratories re-opened



Impact on current programs

Effect on programs & projects

- Big impact on research: over 75% reported that many/some research projects were operating at less than 100%
- Clinical trials were impacted also
- Some organizations were surveying awardees to see detailed impact

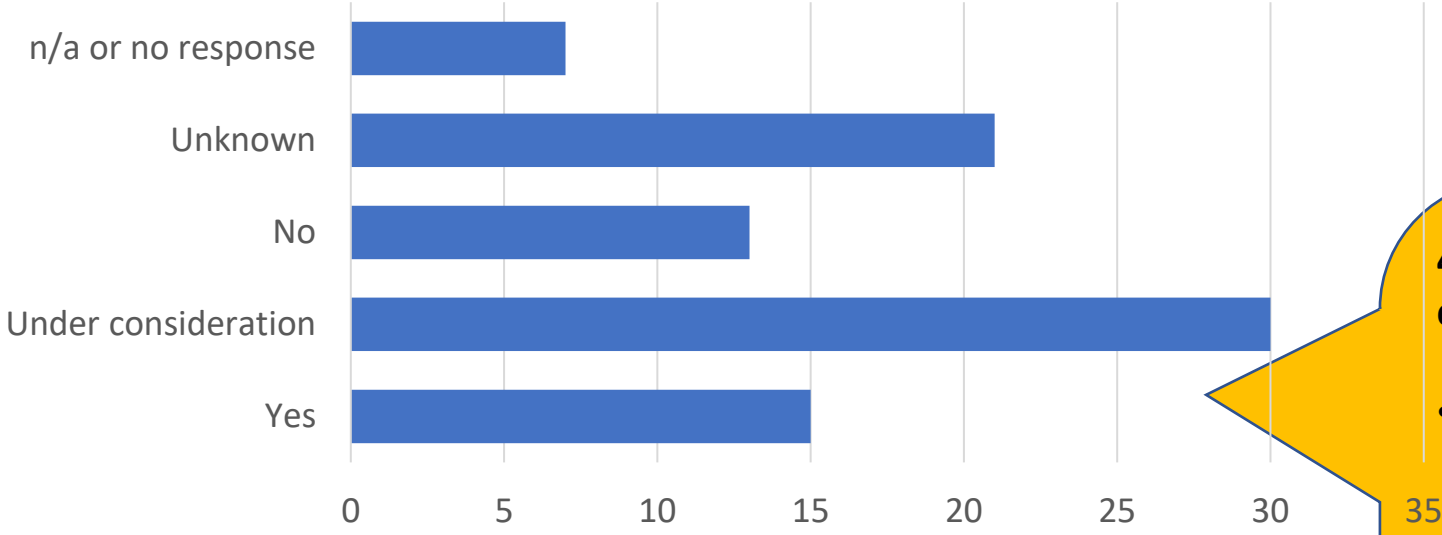
Impact	Many	Some	None	Unknown	N/a or no response
Research projects are operating at less than 100	55%	29%	4%	10%	10%
Research projects have been delayed	43%	46%	1%	9%	9%
Research projects have been entirely suspended	15%	43%	19%	18%	14%
Clinical trials are not being activated	16%	34%	6%	18%	34%
Clinical trials have limited enrolment	23%	28%	3%	21%	34%
Clinical trials are entirely suspended	9%	29%	11%	23%	36%

In the narrative responses, organizations reported that

- *"Lab / wet-lab based research….massively disrupted by closures of facilities."*
- *"Clinical trials….pretty much on hold…..expecting significant delays before these studies are up and running again"*
- *"Some seeking amendments to the ethical approvals to complete some of the work remotely"*
- *"Clinicians re-deployed to non-cancer research work"*
- *"Some trials now slowly starting to reopen but huge challenges remain"*
- *"Overall biomedical programs of research have been more impacted than health services/population health programs"*
- *"Non COVID-19 research hit hardest…..especially, research infrastructure"*

Careers & research

We asked if organizations were anticipating changes in the design of future funding opportunities to take into consideration career interruptions created by COVID-19



45 organizations had or were considering changes, commenting that:

- "Career Support awards are greatly affected with individuals reaching key junctions in their careers without certainty of their next step"
- "Fellowships affected, esp. those involving travel abroad"
- "In some institutions, graduate students have not been allowed back"

A future survey could ask for effects on careers, and particularly on early career pathways.

Peer review

Some organizations reported experiencing challenges with peer review

Challenges with peer review*	%	#
Reviewers are unavailable to participate due to other constraints/commitments	14%	12
Review panels are unable to meet in person and virtual panels are unavailable/unsupported	10%	9
Review panels are being conducted virtually, but there are technical challenges and concerns with the quality of the review process	15%	13
No	36%	31

** Many organizations did not respond to this question as panels were not meeting while funding calls were delayed*

We also asked about novel approaches to peer review that organizations have implemented and the success of these approaches. Responses revealed that:

- 7 organizations were already using online review pre-COVID-19 and 8 organizations were moving to online meetings
- Positive experiences were reported where virtual Panel meetings occurred
- The role of the Chair was critical and some training had been needed for effective meetings
- Online meetings made it easy to 'kick' reviewers out of the meeting where there was conflict of interest
- Increased use of internal shortlisting could reduce the peer review burden

Operational impact

Many organizations had experienced operational problems such as:

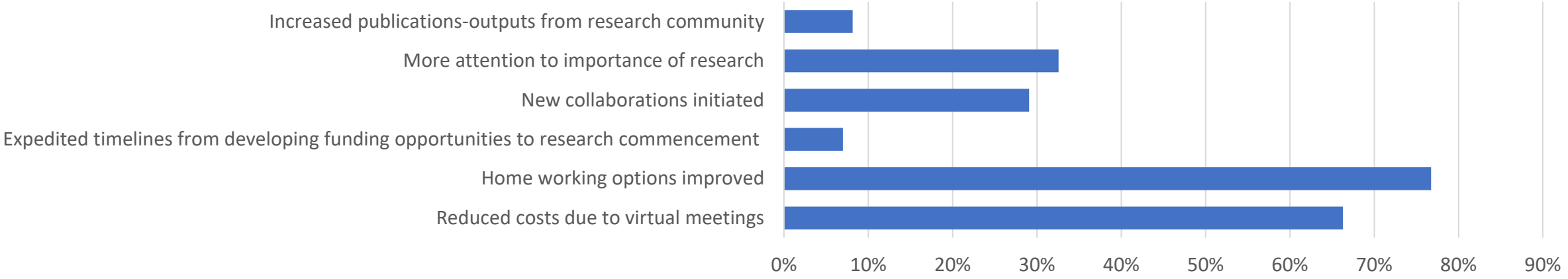
Operational Challenges	Yes	Anticipated	No	Not known/ no response
Reduced workforce or lay-offs	31%	9%	54%	14%
Reduced staff salaries or hours	38%	9%	46%	15%
Staff re-deployments to address COVID-19	40%	4%	49%	15%
IT issues with remote working or virtual meetings	44%	3%	51%	10%
Challenges managing stakeholder communications	38%	8%	50%	13%
Expense to make workplaces safe for staff	38%	26%	26%	18%

Narrative responses raised some common themes:

- There had been significant staff losses in some organizations, others had adapted to date by using furlough schemes, salary sacrifice or freezing recruitment
- Some challenges with remote working were reported, but the situation was generally positive (e.g., doubling AGM attendance by virtual platform)
- Many foresaw remote working as the future ‘normal’.
- Adapting to the ‘new normal’ left less time for traditional research focus and strategic planning.

Positive adaptations during the pandemic

Organizations reported some positive effects, such as:



Operational positives

- *Enhanced communication internally between teams: webinars…more inclusive…broader participation*
- *Webinars take less time to set up than in-person meetings – decisions can be made more quickly*
- *Reduced bureaucracy and red tape*
- *Home-working benefits staff with childcare responsibilities*
- *Stronger team working*

External positives

- *Weekly science webinars have engaged younger donors*
- *Enhanced communication with researchers*
- *Increased engagement with members of the clinical community*
- *Clinical trials…..more studies and centers are working out remote consent/participation solutions and support.*
- *Increased understanding of the fact that time from bench-bedside takes years*

Future Possible Questions

ICRP plans to run a follow up survey in 6-12 months to:

- Identify whether predicted impacts were realized
- See if it is possible to quantify the financial impact – did global funding available for cancer research fall?
- See if any relief/additional emergency funding became available to support cancer research
- Ask any further questions, such as evidence for
  - Impacts on career paths, in particular early careers
  - Impacts or disparities in specific sectors
  - Impacts on specific cancer types

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