



Impact of COVID-19 on UICC's Membership: Pulse Survey Preliminary Report

Quantifying the financial impact of the COVID-19 pandemic on UICC's membership and assessing consequences for future sustainability.

Aims of the Survey

COVID-19 is placing huge pressure on health systems and cancer patients, who have increased susceptibility to COVID-19 and face reduced access to care, and forcing competition for finite resources (Al-Quteimat & Amer, 2020; Young et al., 2020). Evidence of the impact on civil society cancer organisations' ability to deliver services and their future sustainability has received less attention. A recent survey indicated that many cancer organisations were seeing increased demand for supportive services when they expected an average decrease in income of 46% during the next 12 months (Nelson, 2020). In June 2020, the Union for International Cancer Control (UICC) led a series of virtual dialogues with its global membership that highlighted similar concerns.

As a membership organisation, UICC has a responsibility to support its members through this crisis and this pulse survey is intended to fill the information gap. As health systems become more pluralistic, civil society is a key stakeholder alongside public and private sectors (Wirtz et al., 2017). Through its work with members and partners, UICC has gained a growing understanding of the consequences of COVID-19 on the international cancer community. There has already been a significant impact on cancer care, including major disruptions and delays in delivering cancer screening, diagnosis, treatment, and care. Together with its members, UICC will continue to pursue and track evidence of the clinical impact of COVID-19.

What has not yet been fully captured is the financial toll of the coronavirus pandemic on UICC members and cancer organisations. Whilst the full extent of the impact may take some time to become clear, UICC conducted a preliminary global analysis to assess the implications of the COVID-19 pandemic for UICC members in terms of their operations and services.

Findings will be used to inform future support for members as they respond to the impact of the COVID-19 pandemic and to represent needs and concerns at a global level.

Survey Objectives

The survey had three key objectives:

1. To understand the financial impact of COVID-19 on UICC's membership.
2. To understand how UICC members are addressing the financial impact in 2020.
3. Assess the impact of COVID-19 on the future sustainability of UICC's membership and the services that they provide.

A "pulse" questionnaire survey comprising 10 questions was undertaken using SurveyMonkey. Responses were anonymous unless indicated by the respondent. The questions used are set out in appendix 1.

The survey was issued in English to all 1,200 UICC members, segmented by region and organisation type. The survey was issued on 27 July, with responses due by Friday 21 August. The deadline was further extended to Friday 4 September.

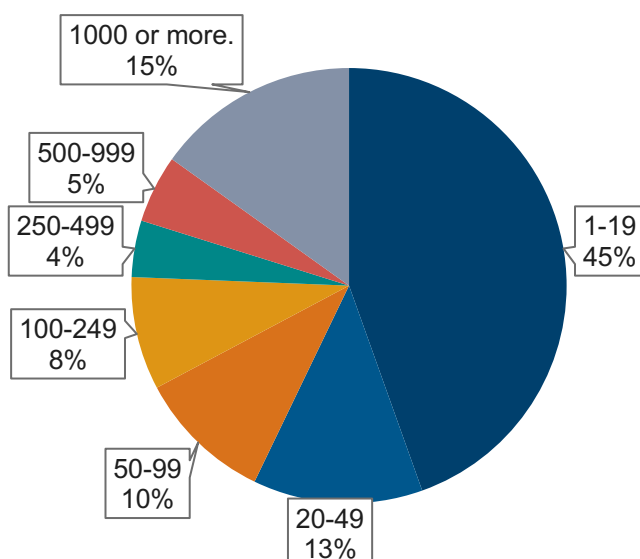
Results

“This pandemic has forced the Society to become leaner, more efficient and more adaptable in terms of fiscal, volunteer and staff resources. We have seen an increase in member engagement in terms of participation in educational offerings and their roles in volunteer positions in committees.” (Survey Respondent).

Survey Profile

The response rate was 9% (108 from a sample of 1,200) across 55 countries. The largest single group of respondents came from smaller organisations (<20 employees) and medium organisations (20-99 employees) accounted for just under 23% of responses. Very large organisations (>1000 employees) were well represented, making up 15% of all responses. Other large organisations accounted for 17.6% of responses.

Figure 1: Responses by Organisation Size: Number of Full-Time Equivalent (FTE)



One third of responses came from Asia Pacific based organisations, just under a fifth from Europe and Latin America respectively, 15% from Africa, 8% North America and 7% from the Eastern Mediterranean.

The types of organisations broadly correlated with UICC’s membership profile. However, there were two variations: Cancer Societies represented 42% of responses, versus 24% of total membership, and patient associations accounted for 24% of responses, versus 37.9% of the total membership.

Given the sample size, geographical spread and types of organisations that took part, the data gives us an informative snapshot of the situation across the global cancer community.

Figure 2: Responses by Region

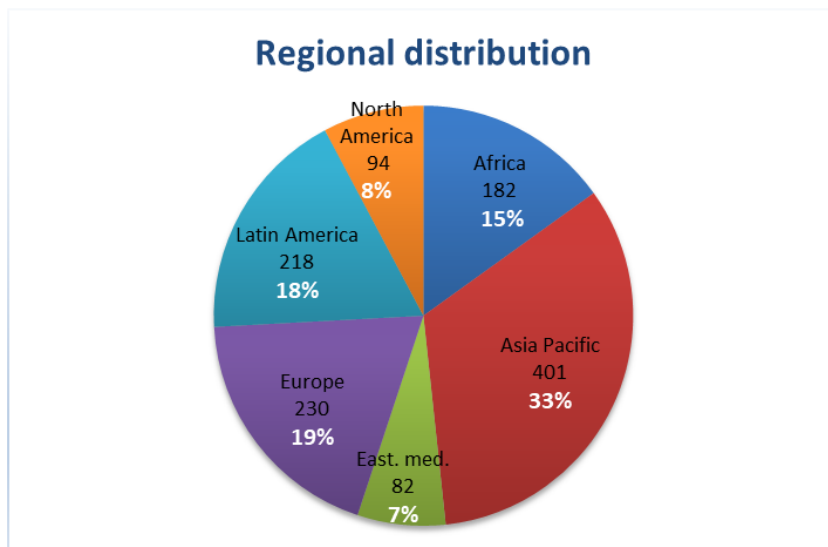
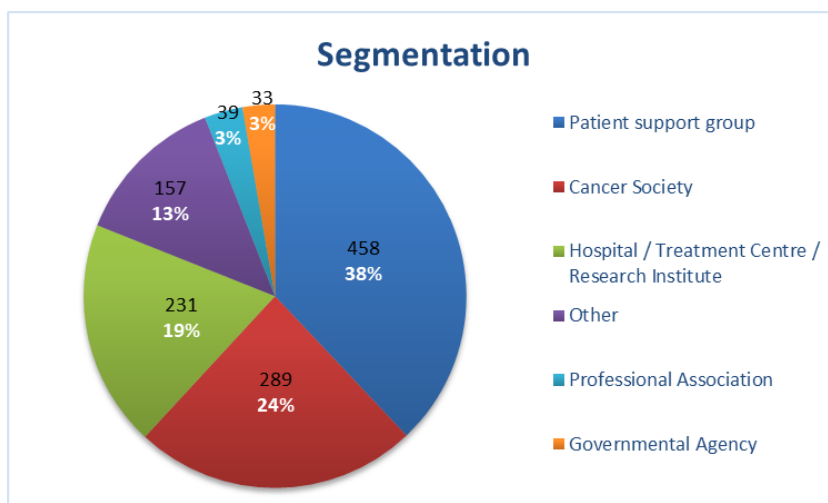


Figure 3: Responses by Organisation Type*



*2 Palliative care & 1 No response.

Impact of the COVID-19 pandemic on income and activities

The pandemic has had a significant effect on income for organisations in 2020, with 76.8% reporting reductions in income of varying degrees. One third anticipated a reduction of up to 25%, a quarter reported a reduction of up to 50%, 14.8% were expecting a reduction of up to 75% and 3.7% projected that up to 100% of their income. Only 19.4% said there had been no change in income and 2.8% reported an increase in income.

For 2021, the picture is only slightly better, with 66.7% of all organisations forecasting falls in income. Most organisations (52.8%) forecast reductions of up to 50%, 11.1% up to 75% and 2.8% up to 100%. Across all organisations reporting reductions, the differences between 2020 and 2021 are marginal. A small number of organisations (5.6%) forecast an increase in income for 2021.

The impact of the pandemic on activities and services has also been significant. Only 13% expected no change, 80.4% expected reductions with 6.5% reporting an increase. The levels of reduction expected were significant; 32.4% of up to 25%, 31.5% up to 50%, 15.7% up to 75%, and 0.9% up to 100%.

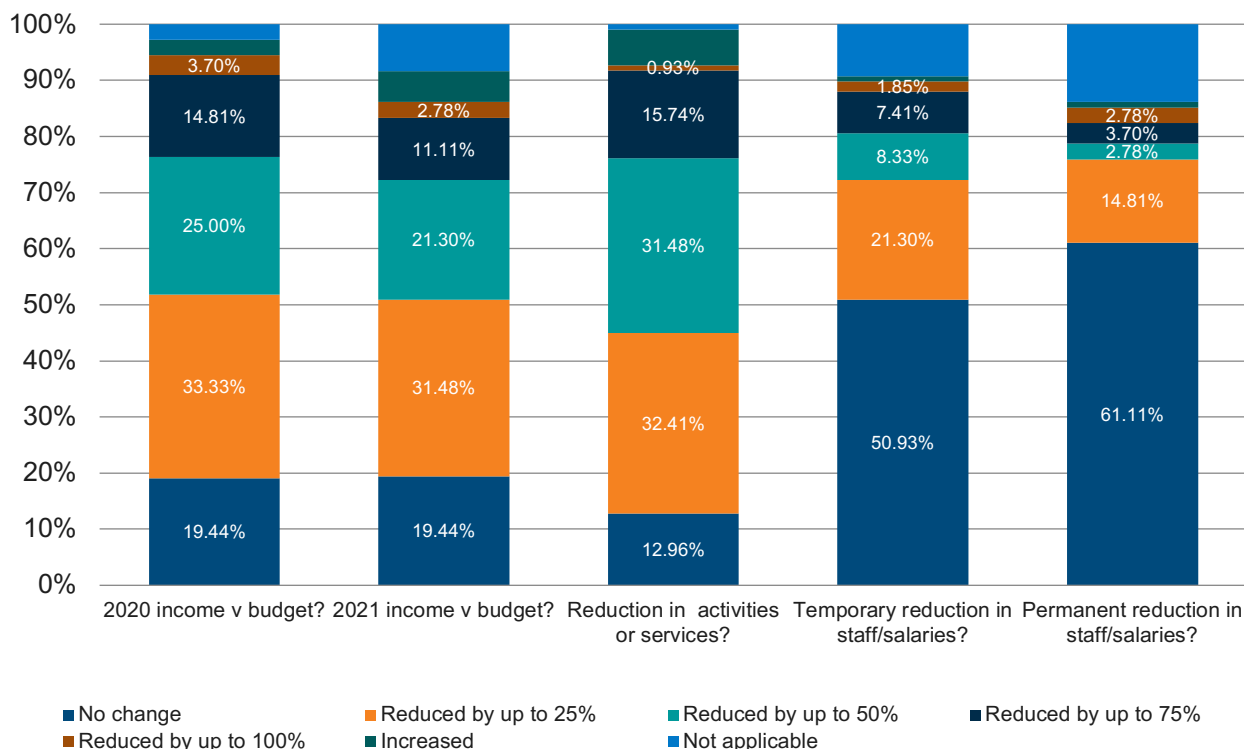
The data on the impact on staff numbers and salaries suggest that organisations have tried hard to mitigate the impact on staff, with 50.9% reporting no temporary reductions and 61.1% reporting no permanent reductions. However, this means that 48.1% have experienced temporary reductions, and permanent reductions were reported by just under a quarter of respondents. Only one respondent reported increases in staff.

A key issue that UICC wanted to assess was whether governments were stepping in to provide financial support to the sector. Overall, 27.8% had received some form of support. The type of support varied, but from those who provided details (16), 60% received some form of salary or tax relief, 26.6% had service agreements/contracts or grants and 1 had received a loan.

Table 1: Impact of the COVID-19 Pandemic Organisation's Income and Activities

	No change	Reduced by up to 25%	Reduced by up to 50%	Reduced by up to 75%	Reduced by up to 100%	Increased
2020 income v. budget	19.44%	33.33%	25.00%	14.81%	3.70%	2.78%
2021 income v. budget	19.44%	31.48%	21.30%	11.11%	2.78%	5.56%
Reduction in activities or services	12.96%	32.41%	31.48%	15.74%	0.93%	6.48%
Temporary reduction in staff/salaries	50.93%	21.30%	8.33%	7.41%	1.85%	0.93%
Permanent reduction in staff/salaries	61.11%	14.81%	2.78%	3.70%	2.78%	0.93%

Figure 4: Impact on Income and Activities



Managing the Consequences of the Pandemic

The next questions focused on identifying what actions had been taken to manage the effects of the pandemic by UICC's membership and what other actions were being considered and/or implemented.

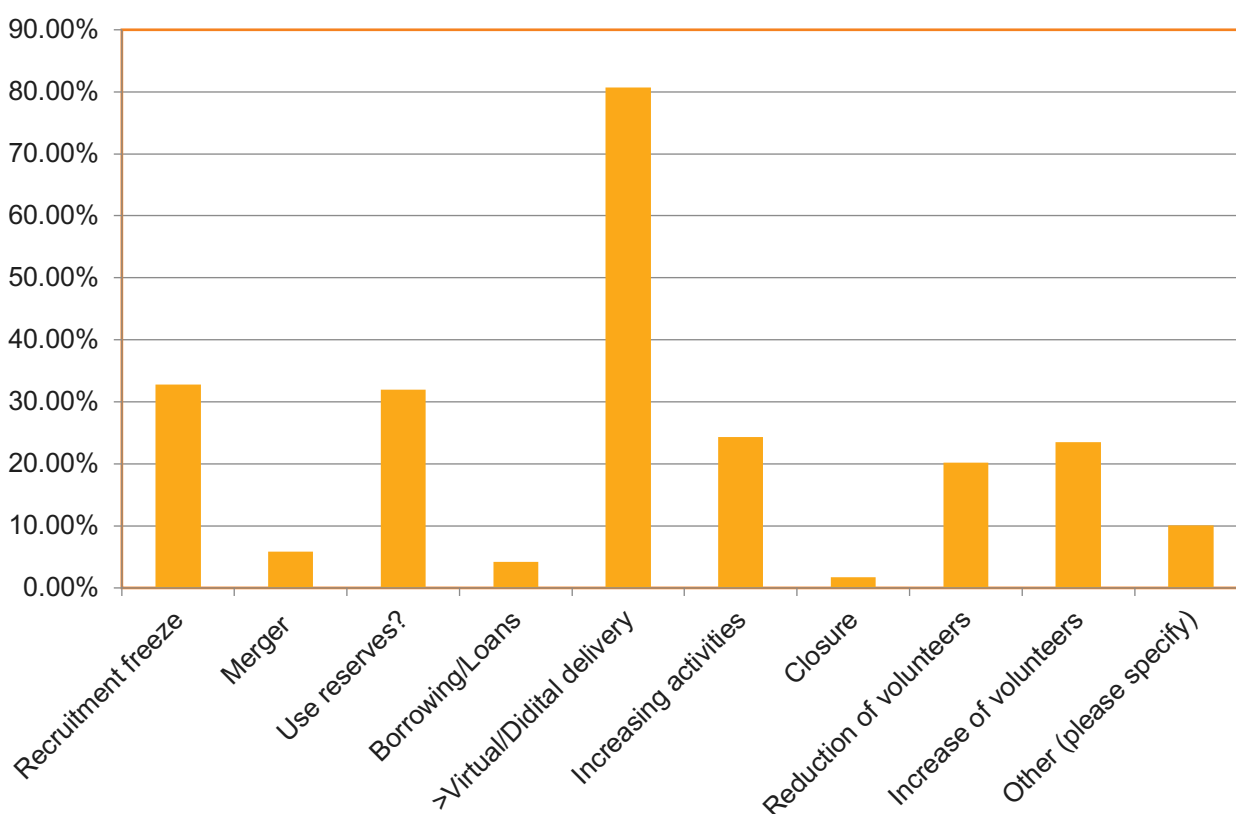
Given the national lockdowns that swept across the globe, it is not surprising that 80.7% of members had adopted remote working or greater use of digital delivery of activities. Almost a third (32.8%) had introduced recruitment freezes, and 31.9% were making use of financial reserves. Smaller numbers were considering a merger with another organisation (5.9%), making use of loans (4.2%) and two organisations were considering closure. Just under a quarter (24.4%) reported that they were increasing activities.

The situation in relation to the use of volunteers was less clear; 23.5% were increasing the use of volunteers, whilst 20.2% were reducing their use.

Those who provided comments highlighted some interesting insights as to how organisations were adapting. One research organisation reported diverting some activities to the COVID-19 pandemic, including tracking, sequencing circulating strains, anti-COVID drug discovery and clinical trials for COVID-19 control in cancer patients. Other issues reported were greater collaboration with other organisations to deliver cancer control activities, adopting a narrower strategic focus, reductions in working hours, greater use of virtual meetings, and a shift from face-to-face to online advocacy.

“Organisations need to innovate to find smart solutions within their limited resources of both human and financial. This might be a great opportunity to optimise resources and be more productive.” (Survey Respondent)

Figure 5: Responses to Manage the Impact of the Pandemic



“During the pandemic we made a new innovation, namely a simple hand-washing tool made from recycled plastic, which accustoms our people to have hand-washing as a new cultural adaptation. And we cooperate with private companies and universities, 10% of sales, is a donation to our organisation.” (Survey Respondent)

We also asked members to indicate whether they had adopted any of the key measures that had been identified during the member dialogues in June. This gave some additional insights into service delivery, staff support, governance, and fundraising. As was evident earlier, many reported remote working as a key measure (67.2%), 60.5% had adopted a short-term strategy, 44.5% had implemented faster decision-making processes and 41.2% were increasing collaboration and partnership working. At a service level, 55.5% had introduced remote patient support and 32.8% were using telemedicine. Emergency fundraising appeals had been launched by 29.4%, and 41.2% had also introduced more staff support, such a mental health, personal protective equipment, and staff welfare.

Members were asked what their current financial concerns were. Many were concerned about fundraising and philanthropic funding (63% & 47.9% respectively) and 21.9% had concerns about government funding. Cash-flow and ability to pay costs, such as salaries, was a concern for 30% and 16% had concerns about delayed or non-payment of service fees.

Of those who commented on this question, a key issue was the impact on patients and funding, and several asked for UICC’s support in this regard. Positive comments related to how the crisis was driving innovation and collaboration, and leading to more efficient and leaner organisations.

Figure 6: Other Actions/Measures Taken in Response to the Impact of the Pandemic

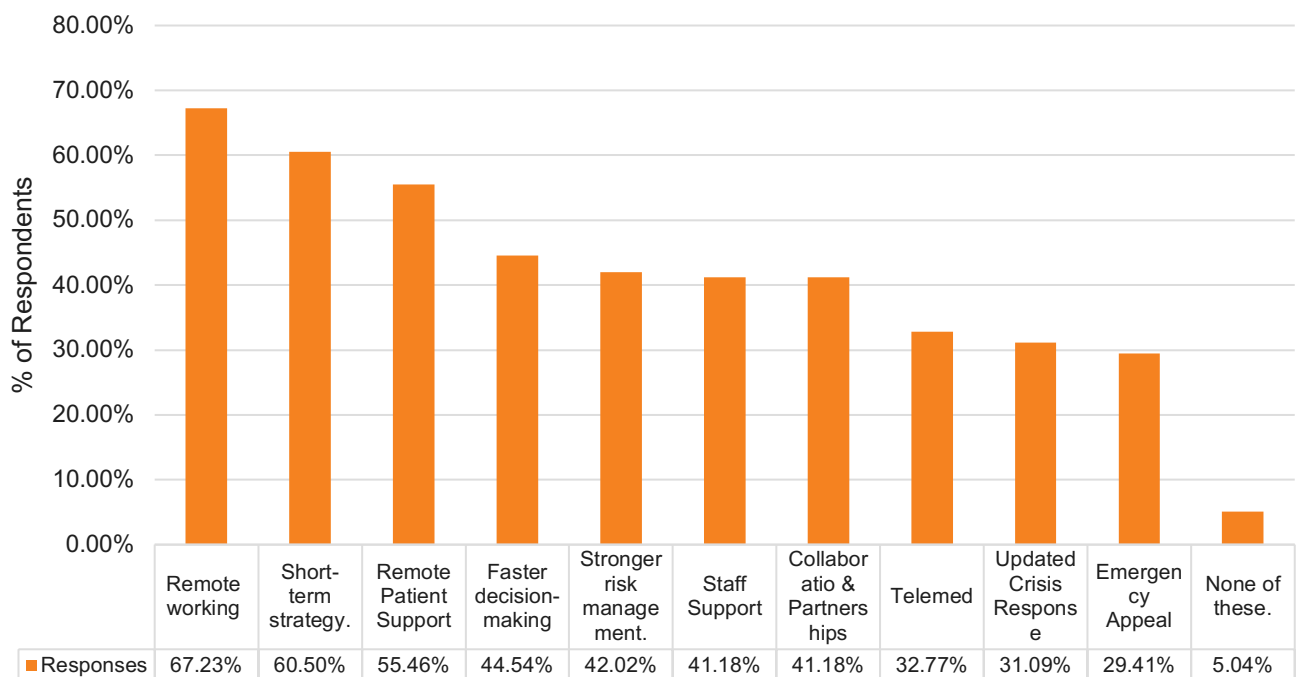
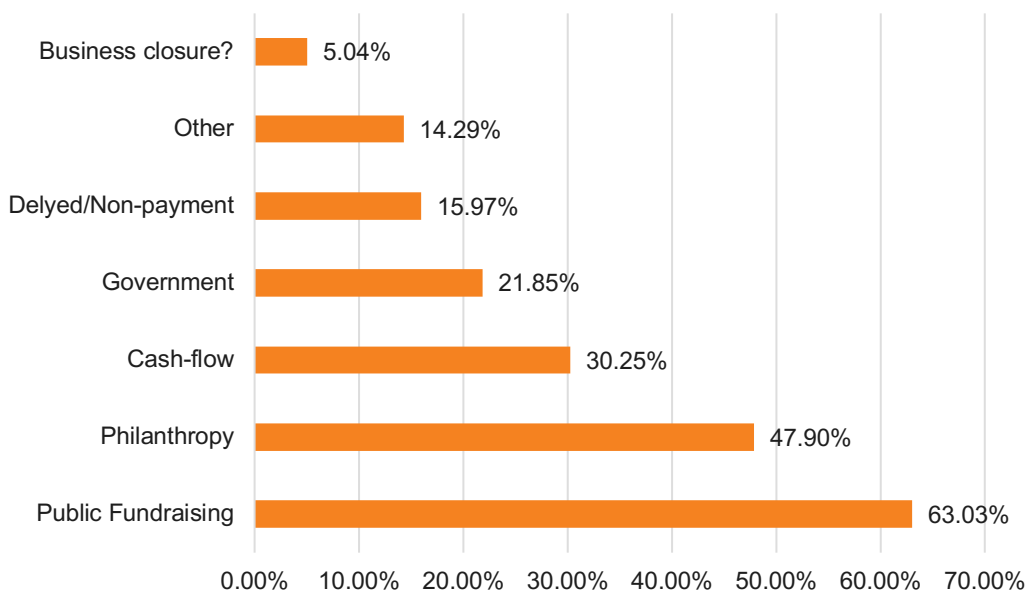


Figure 7: Current Financial Concerns



Discussion:

The results of this pulse analysis reflect previous findings that COVID-19 is placing huge pressure on income and organisational activities across the global cancer community. The survey shows that 80% of UICC's membership are forecasting significant reductions in 2020 and around 70% in 2021, partly driven by a perfect storm of significant reductions in public fundraising income, philanthropic giving tilting towards the pandemic, and a lack of targeted support for cancer from governments.

In many ways, the pandemic has underlined the resilience of the cancer community and the pioneering spirit of UICC's members. It has driven innovation and collaboration, as well as the need to run more efficient organisations. Many have adapted business operations, provided remote support to patients, strengthened governance arrangements, adopted remote working, and invested in the health and wellbeing of staff. However, the financial toll of the pandemic on members has been substantial and will continue into 2021 and beyond.

UICC members are crucial to the fight against cancer, and together with governments, wider civil society, and the public and private sectors are joint stakeholders in reducing the impact of cancer globally. However, it is crucial that governments show their commitment to cancer organisations and people living with cancer by providing additional financial support to ensure that the significant progress in cancer control is not pushed backwards and that the significant impact of UICC members and other stakeholders is sustained.

Conclusion

The survey provides UICC with important insights, which will enable it to provide better support to its members and the global cancer community during and after the crisis. UICC's membership are experiencing devastating reductions in income, and the survey results give a snapshot of the scale of the challenge facing the community. It is disappointing to note the lack of government support beyond economy-wide interventions, and this highlights the danger that many countries are storing up a "cancer tsunami". It is a global priority that governments must provide medium term support to cancer organisations so that they continue to provide the vast range of services at pre-pandemic levels.

There will be a time beyond COVID-19, but not beyond cancer.

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Appendix 1:

Survey Questions

1. Please indicate the approximate number of employees.
 - 1-19
 - 20-49
 - 50-99
 - 100-249
 - 250-499
 - 500-999
 - 1000 and above
2. What country is your organisation's headquarters based in?
3. Which of the following best describes your organisation's primary purpose?
 - National cancer society
 - Research Institution / Academic institution
 - Ministry of Health /Government department
 - Patient Support Group
 - Other – please state
4. What impact has the COVID-19 pandemic had on your income and your organisation?

Impact	Financial Impact			Organisational Impact		
	2020	Anticipated 2021	Has your government (national, state, province, etc) provided any financial support?	To what extent have you had to reduce activities/work?	Temporary reductions in staff and/or salaries?	Permanent reductions in staff and/or salaries?
No change						
Reduced by up to 25%						
Reduced by up to 50%						
Reduced by up to 75%						
Reduced by up to 100%						
Increased						

5. Please provide details:
6. What other responses are you considering and/or implementing in response to the pandemic (please indicate all that apply)?

- Recruitment freeze
- Merger with another organisation
- Use of financial reserves
- Borrowing/Loans
- Delivering more of your organisation's work virtually and digitally
- Closure
- Increasing activities
- Reduction in use of volunteers
- Other
 - Please provide details:

7. What innovations have you adopted in response to COVID-19 and its impact on your organisation to continue to deliver your mission? Please provide details.

8. What are your current major financial concerns? (Please indicate all that apply).

- Reduced income from public fundraising e.g. donations, events,
- Reduced philanthropic & foundation giving
- Reduced government income
- Business closure
- Inability to pay salaries
- Inability to pay bills
- Cancelled contracts
- Delayed or non-payment from clients / customers

9. Please add any further comments that you feel are relevant.

10. Please indicate if you would be prepared to take part in any follow-up research to develop case studies and/or inform UICC's work.

Appendix 2: Respondents by Country

Country	Responses	
Brazil	5.88%	7
China	5.88%	7
Australia	5.04%	6
India	5.04%	6
Mexico	5.04%	6
Canada	4.20%	5
Nigeria	4.20%	5
United States of America	4.20%	5
Malaysia	3.36%	4
Belgium	2.52%	3
Indonesia	2.52%	3
Kenya	2.52%	3
Republic of Korea	2.52%	3
Argentina	1.68%	2
Colombia	1.68%	2
Croatia	1.68%	2
Egypt	1.68%	2
Iran (Islamic Republic of)	1.68%	2
Iraq	1.68%	2
Myanmar	1.68%	2
Netherlands	1.68%	2
Peru	1.68%	2
Philippines	1.68%	2
Qatar	1.68%	2
Spain	1.68%	2
Sweden	1.68%	2

Tajikistan	1.68%	2
Afghanistan	0.84%	1
Bangladesh	0.84%	1
Barbados	0.84%	1
Cameroon	0.84%	1
Congo	0.84%	1
Costa Rica	0.84%	1
Democratic Republic of the Congo	0.84%	1
Ecuador	0.84%	1
France	0.84%	1
Ghana	0.84%	1
Greece	0.84%	1
Guatemala	0.84%	1
Japan	0.84%	1
Malawi	0.84%	1
Namibia	0.84%	1
Nepal	0.84%	1
New Zealand	0.84%	1
Romania	0.84%	1
Rwanda	0.84%	1
Sierra Leone	0.84%	1
Singapore	0.84%	1
Somalia	0.84%	1
Thailand	0.84%	1
Uganda	0.84%	1
United Kingdom of Great Britain and Northern Ireland	0.84%	1
Venezuela (Bolivarian Republic of)	0.84%	1
Zambia	0.84%	1

Zimbabwe	0.84%	1
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