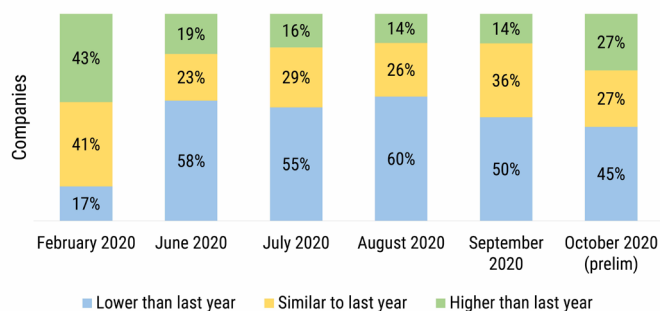


COVID-19 Impacts to Geoscience Businesses (Summer – Fall 2020)

Throughout the summer, over half of geoscience employers reported expectations of lower financial performance relative to 2019. In September, this percentage improved to 50% and preliminary data from October indicates continued improvement in financial performance with only 45% of companies expecting lower performance relative to 2019. Over the same period, the percentage of companies reporting either similar or better financial performance relative to 2019 steadily increased from 42% in June to 55% in October.

Expectations for financial performance: current calendar year relative to last year



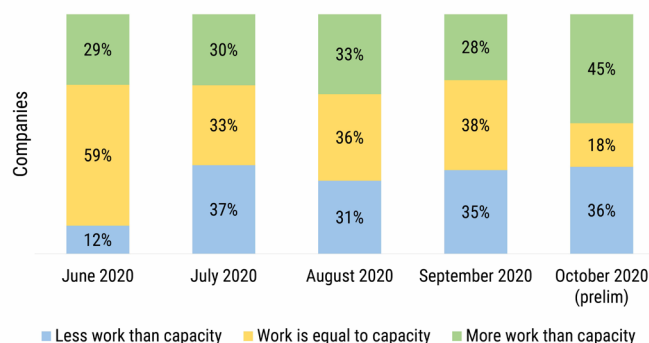
Credit: AGI; data from AGI's Geoscience COVID-19 Survey

Since June, approximately 30% of companies reported increased workloads relative to staffing, and preliminary data from October indicates this percentage has increased to 45%. Meanwhile, the percentage of companies reporting decreased workloads relative to staffing has remained relatively steady since July despite the uptick in productivity in October.

Over the summer, just over one-third of companies reported receiving financial assistance, and this percentage dropped to 19% in September. Of those companies specifying the types of financial assistance received, the vast majority reported receiving federal aid such as from the Paycheck Protection Program (PPP), Economic Injury Disaster Loan program

(EIDL) or SBA Loan Forgiveness program. With the end of the PPP in August, we see a concurrent drop in the percentage of businesses receiving financial aid.

Level of work relative to capacity



Credit: AGI; data from AGI's Geoscience COVID-19 Survey

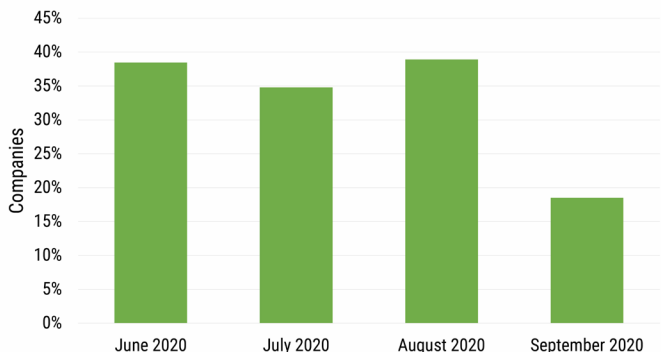
Due to the end of the PPP and the decline in companies reporting financial assistance in September, in October's round of surveying, we did not ask employers if they received financial assistance in the past month, but instead asked if the end of the PPP resulted in a change to business operational strategies. Preliminary data indicates that although federal aid was useful, the end of PPP did not change business operational strategies. This also aligns with the improvements in financial performance and productivity discussed earlier in this data brief.

Strategies used by geoscience employers for dealing with COVID-19 impacts have predominantly focused on investment in remote work technologies followed by implementation of health and safety protocols for those working in facilities, offices, and at field sites. Some companies noted increased communication, cooperation and cohesiveness as a result of the switch to online technologies, and others noted more frequent and focused internal and external communication

with colleagues and clients. In addition, some companies noted that they may be considering a shift towards more permanent telework with limited in-office attendance even after the end of the COVID-19 pandemic.

employees were not travelling or conducting field work due to either institutional / departmental policies or due to their own personal decisions – the latter an increasing trend since August.

Received financial assistance in the past month



Credit: AGI; data from AGI's Geoscience COVID-19 Survey

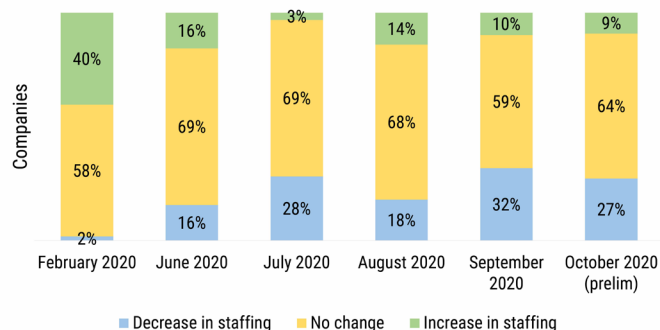
Most of the health and safety protocols implemented by companies includes standard COVID-19 protocols for social distancing, disinfection of surfaces and shared equipment, mask wearing, reduced staffing and/or cohorts, etc., in addition to guidelines on vehicle usage. Some companies noted that they are taking the time to increase marketing and networking activities, including re-establishing connections with former clients and prospecting for new work with existing clients, and others have noted that they are taking advantage of contracting opportunities that would otherwise be taken by seasonal staff. Additionally, maintaining budgetary discipline is another strategy mentioned by some companies.

Staffing

While most companies expect no change in permanent staffing this year, the percentage of companies reporting expected decreases in permanent staffing has fluctuated between 16% and 32% since June. Similarly, while most companies reported no expected changes in temporary or contract staffing, the percentage of companies expecting decreases in temporary and contract staffing declined from 35% in June to 18% in October.

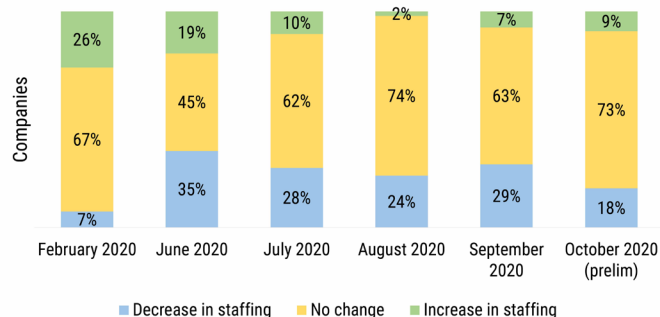
In June, half of businesses reported that they had employees that were either on travel or working in the field and this increased to 56% in September, there after dropping to 45% in October. Preliminary data from October also indicates an increase in the percentage of businesses reporting that

Expectation for 2020 permanent staffing



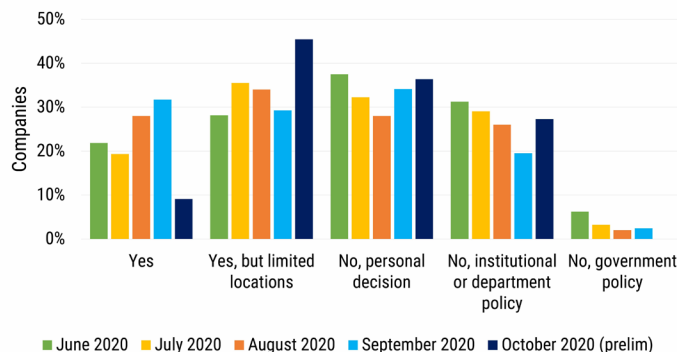
Credit: AGI; data from AGI's Geoscience COVID-19 Survey

Expectation for 2020 temporary and contract staffing

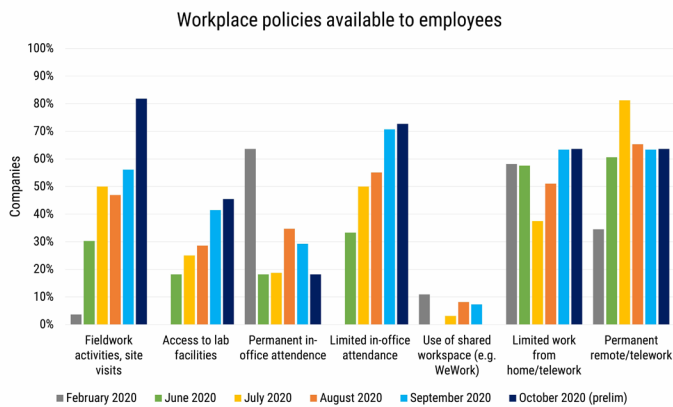


Credit: AGI; data from AGI's Geoscience COVID-19 Survey

Employees on travel or in the field



Credit: AGI; data from AGI's Geoscience COVID-19 Survey

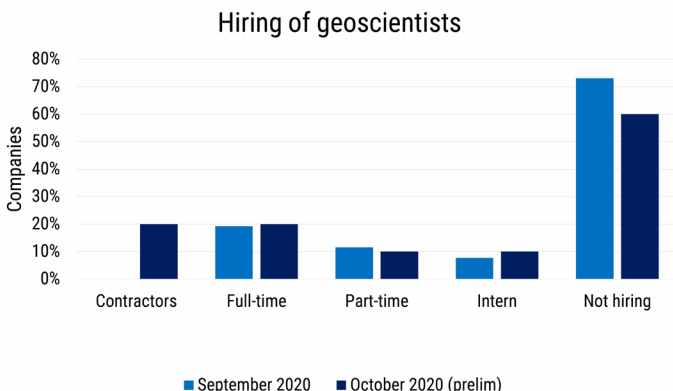


Credit: AGI; data from AGI's Geoscience COVID-19 Survey

Workplace policies available to employees have shifted as companies have adjusted to long-term remote work situations and since June over 90% of companies provided limited and/or permanent telework situations for their employees. The percentage of companies providing employees with the ability for limited work in the office has continued to increase, from 33% in June to 73% in October while the percentage of companies that have provided employees with the ability for permanent in-office work declined from 33% in August to 18% in October. The percentage of companies providing employees with access to lab facilities, fieldwork and site visits have continued to increase since June.

Hiring Trends

Starting in September, we began asking employers questions regarding job openings and hiring trends. While most employers are not hiring, there has been an increase in the percentage of companies reporting job openings since September (27% to 36% in October) in addition to those hiring geoscience employees and contractors.



Credit: AGI; data from AGI's Geoscience COVID-19 Survey

In addition to asking about hiring trends, we also inquired about challenges employers are facing in terms of hiring and recruiting new talent as well as about how the pandemic may have changed what employers are looking for in potential candidates. Some employers reported that budgetary restrictions such as hiring freezes and limited resources affected their ability to hire new talent, while others indicated that there were a lack of qualified candidates for available positions and a decreased ability to network to find new talent. Other employers indicated having to pass up candidates who only wanted work-at-home arrangements and would not consider positions that required onsite work either in the office or lab. Other challenges included issues with online interviewing not being as effective as face-to-face interviews, and challenges with the new hire onboarding process in regards to integration with the company's culture and core values.

Skills and training that employers have stated they are looking for in new hires include the ability and motivation to learn and adapt to new projects and tasks, technical proficiency and experience applicable to specific projects, ability to work independently and in project teams, and the ability to fit into the company's organizational culture. In addition, several employers indicated that although they typically hire master's and bachelor's level graduates, they also hire doctorates.

Most employers indicated that the pandemic has not changed what they are looking for in employees; however, some employers indicated that the pandemic has made them look more closely at candidates that can demonstrate that they can work independently without supervision. Other employers indicated that they have become more selective in their hiring as a result of the pandemic.

We will continue to provide current snapshots on the impacts of COVID-19 on the geoscience enterprise throughout the year. For more information, and to participate in the study, please visit: www.americangeosciences.org/workforce/covid19

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