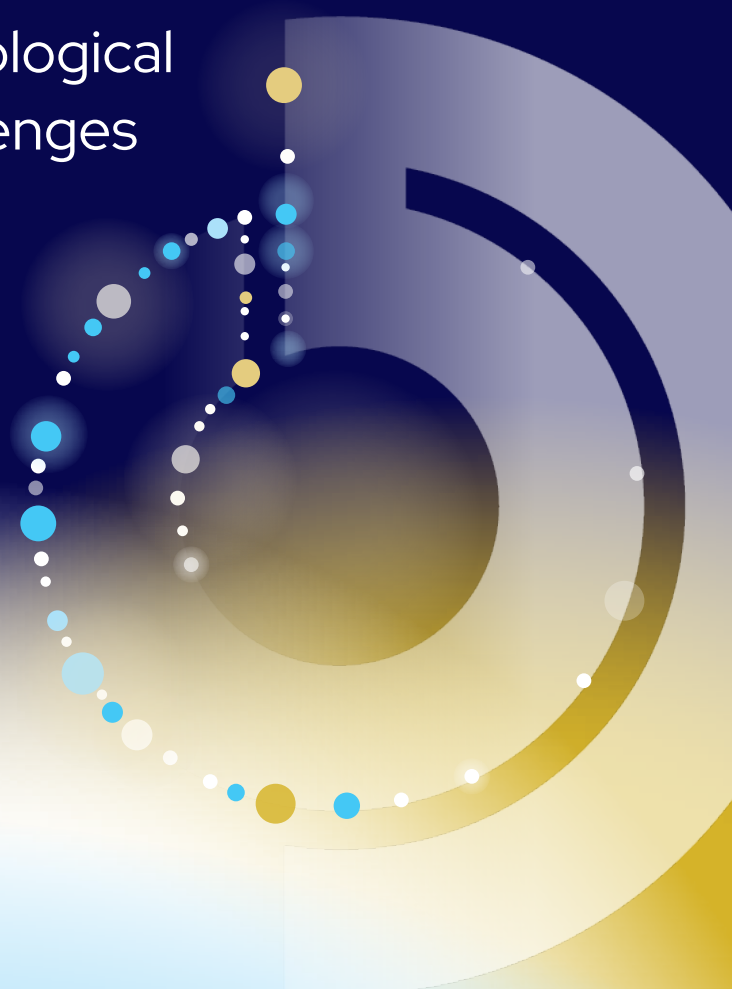




Irreplaceable Data Under Pressure

2026 Poll Findings on Geological
& Geophysical Data Challenges



Contents

Summary	3
About the LinkedIn poll	5
What the findings reveal about your industry	6
Your industry's global perspective	15
What this means for your organization	16
Your next steps	17
Your path forward	17
About Ovation Data	18

Summary

Nine months on from our first LinkedIn poll on geological and geophysical (G&G) data challenges, the global environment has shifted in ways that bring new focus to legacy data recovery. Energy security concerns, recent conflicts, and supply chain disruption are pushing operators to move faster on exploration and licensing decisions. Our 2026 poll suggests the industry's underlying data foundation has not kept pace, and the gap between external pressure and internal capability is a question of resilience. In the words of one respondent, "Legacy data is increasingly becoming a strategic exploration asset, not just an archival issue, with major impact on competitiveness and decision-making."

This year's findings point to a widening gap between what is being asked of the sector and the state of the data needed to deliver. More respondents report significant volumes of non-digitized data than in 2025. Budget has grown in prominence as a business reason preventing digitization, and two-thirds of respondents say that the current geopolitical environment has increased the importance of accessing legacy G&G data. At the same time, around 59% report that inaccessible legacy data is moderately or severely limiting their ability to respond to new opportunities.

Key themes from poll responses

External pressure has reframed the issue

- Two-thirds of respondents (66%) say the current geopolitical environment has increased the importance of accessing legacy G&G data, with 40% describing this as a strategic priority.
- Nearly 60% report that inaccessible legacy data is limiting their ability to respond to new exploration or licensing opportunities.
- Free-text responses cite the impact of conflict on data preservation and call for international cooperation to protect at-risk records.

Risk intensity is sharpening

- 45% of respondents are now extremely concerned about permanent loss of legacy data, up from 41% in 2025.
- The share saying they are not concerned has fallen from 12% to 8%.
- Overall concern (moderate or extreme) is essentially unchanged, at 66% in 2025 and 67% in 2026, but the distribution has shifted toward higher urgency.

Blockers are becoming more financial

- Budget constraints rose from 22% to 29% as the primary business reason preventing digitization, while the lack of clear ROI fell from 14% to 7%.
- Among the factors cited as a barrier to digitization, the cost of third-party digitization services represented 18% of the responses (compared to 15% in 2025).
- Difficulty getting internal buy-in fell from 10% to 6%, suggesting belief in the case for action is improving, while funding remains the tighter constraint.

The exposure gap may be widening

- The share of respondents reporting that more than 50% of their G&G data is not digitized or easily accessible rose from 27% in 2025 to 36% in 2026.
- The share reporting 25% or less has fallen from 43% to 36%.
- This shift may partly reflect a different sample composition, with more responses from African countries this year. We describe our poll and how we calculated our figures in the 'About the LinkedIn Poll' section.

Need help assessing the risks and opportunities in your data? We can help you take stock of your data assets and turn them into valuable resources. [Get in touch](#) with our team today.

Potential business implications for your organization

The 2025 poll findings aligned with a body of industry research showing that successful digital transformation depends on clean, structured, accessible data. This year's findings extend that picture in two clear directions.

First, what was once a question of internal efficiency is now a question of external responsiveness. When geopolitical conditions move quickly and licensing windows open and close at a pace, the cost of not being able to access legacy data is no longer measured only in delayed projects, but also in opportunities the organization cannot pursue.

Second, the issue is not only about data that has yet to be digitized. As one respondent put it:



“In many cases, valuable historical seismic, well logs, and reports technically exist, but are stored in fragmented formats (paper archives, scanned PDFs, legacy media) that make them effectively inaccessible for modern workflows. This creates a compounding effect: teams spend significant time searching for data, validating its quality, or attempting to reconstruct datasets. Overall, the issue is not just digitization, but standardization, indexing, and integration. Without these, even digitized data fails to deliver value. Addressing this gap would significantly improve efficiency, reduce costs, and enhance the quality of subsurface interpretation and decision-making.”

For organizations whose strategic plans depend on rapid decision-making, scenario modeling, or AI-supported analysis, the gap between data that exists and usable data can be business-critical.

**Want to talk through what these findings might mean for your organization?
Get in touch with our team to start the conversation.**

About the LinkedIn poll

We conducted this LinkedIn poll targeting geoscientists, geophysicists, geologists, and related professionals between April 8 and April 24, 2026. As in 2025, we aimed to gauge industry attitudes toward data preparedness and digitization challenges and to track how those attitudes change over time.

Poll profile

- **We had 208 total responses** from self-selecting LinkedIn users who chose to participate, broadly comparable to last year's 213.
- **The poll had global reach**, with responses from those based in Africa, the Middle East, North America, Europe, Asia, and South America.
- **Respondents came from diverse professional backgrounds**, including geoscientists (128), engineers (32), and managers or directors (29), with the balance broadly similar to last year.
- **The first five questions were repeated from the 2025 poll to support year-on-year comparison.** Two new questions were added in 2026, covering the geopolitical environment and responsiveness to market opportunities.
- **This LinkedIn poll provides an indicative snapshot of opinions** among those who responded over the poll's active period. It is not a statistically representative sample of the broader energy sector, and the findings should be read as directional signals rather than empirical conclusions.

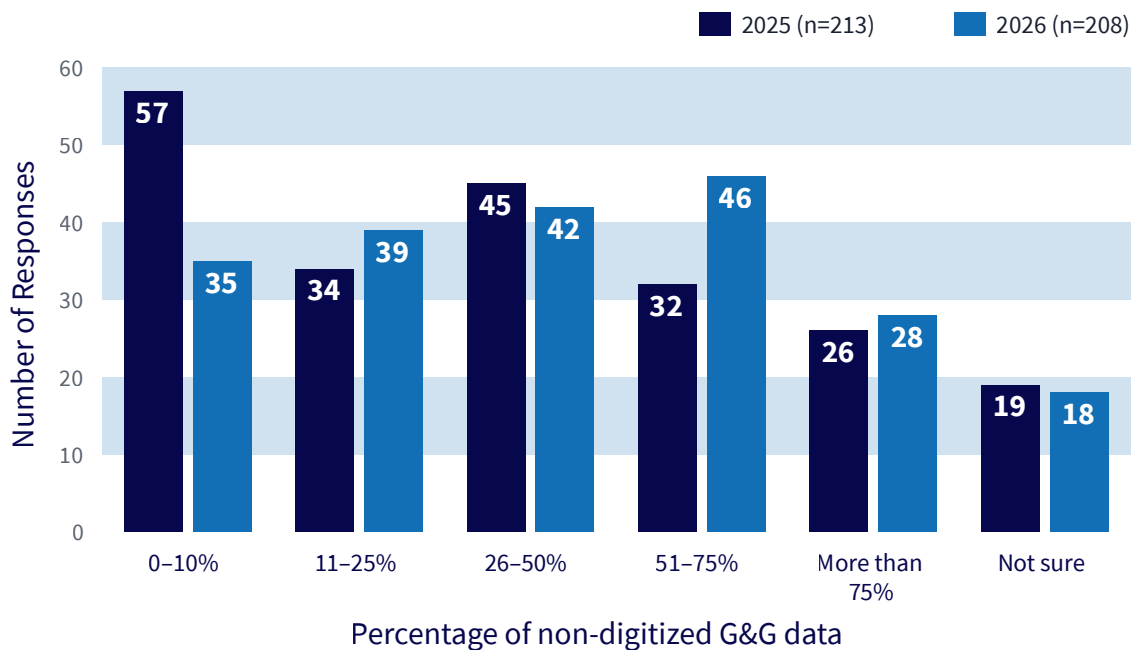
A note on year-on-year comparisons

One caveat is particularly important when comparing this year's findings with last year's. The geographic mix of respondents has shifted, with those from African countries accounting for a larger share of responses in 2026 than in 2025. As a result, some of the year-on-year movements observed in this report may partly reflect who answered rather than a change in industry conditions. Where this is most likely to apply, we flag it inline.

What the findings reveal about your industry

1. The digitization gap – is your data accessible?

Volume of G&G data not digitized or easily accessible – 2025 vs 2026 response counts



What's changed since 2025

The share reporting more than 50% non-digitized rose from 27% to 36%, while the share reporting 10% or less non-digitized fell from 27% to 17%. The number of respondents in the highest-exposure categories increased: 46 individuals reported 51-75% non-digitized this year (up from 32), and 28 reported more than 75% non-digitized (up slightly from 26). Whether this reflects a real worsening of digitization levels, a shift in the respondent base toward markets with greater legacy exposure, or both, is uncertain.

Response	2025%	2026%	Change (pp)
0-10%	26.8%	16.8%	-9.9
11-25%	16.0%	18.8%	+2.8
26-50%	21.1%	20.2%	-0.9
51-75%	15.0%	22.1%	+7.1
More than 75%	12.2%	13.5%	+1.3
Not sure	8.9%	8.7%	-0.3



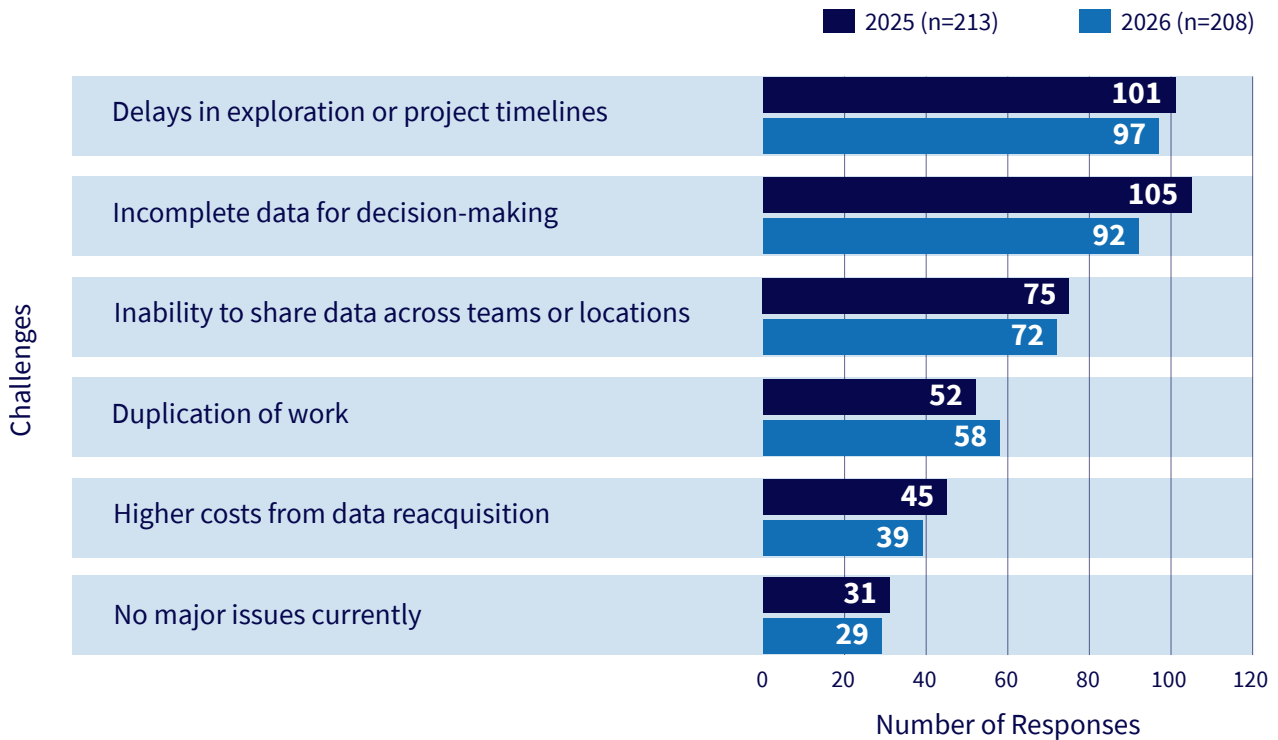
“In my experience working in exploration and mine geology, a significant portion of legacy data still exists in non-digitized formats such as paper logs, handwritten field notes, and physical core records. This often leads to inefficiencies, delays in accessing historical information, and sometimes duplication of work when data cannot be easily found. A key challenge is that older data is not always well indexed, making it difficult to understand what is available or relevant. Additionally, the volume of historical data can be overwhelming, and without proper tools or dedicated resources, digitization is often postponed. From an operational perspective, losing access to legacy data represents a major risk, as it contains valuable geological insights that can influence future exploration decisions and reduce uncertainty.”

- Anonymous poll respondent

Wondering where your organization stands? We can help you assess your current digitization levels and identify priority areas for improvement. [Drop us a line](#) to find out more.

2. Operational impacts you might be experiencing

Operational challenges from working with non-digitized data – 2025 vs 2026 response counts¹



What's changed since 2025

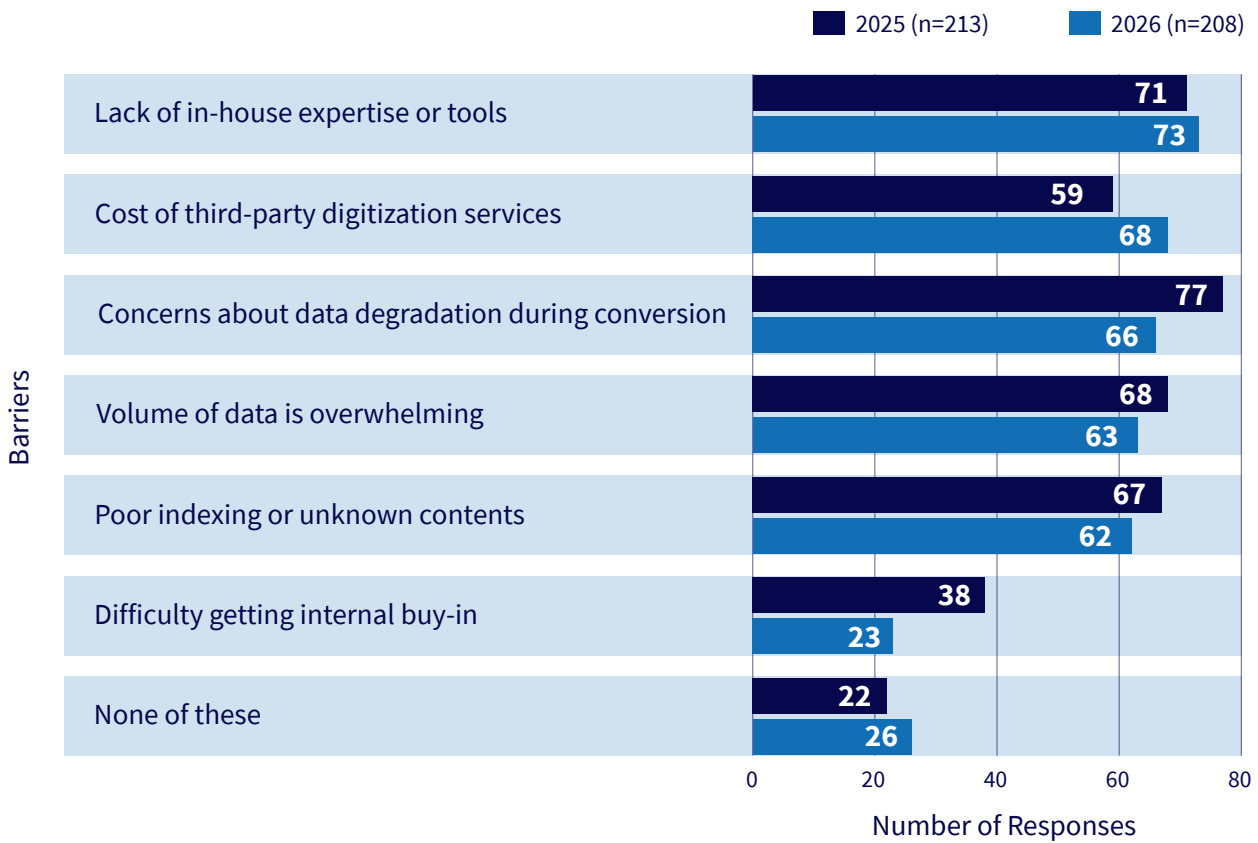
The top three pain points are unchanged in rank order, but the number of respondents citing incomplete data for decision-making fell from 105 to 92, the largest absolute decline. Duplication of work moved in the opposite direction, rising from 52 to 58 respondents, suggesting that the shape of the pain has moved slightly from decision uncertainty toward operational inefficiency.

Response (n=total all factors selected by respondents)	2025%	2026%	Change (pp)
Delays in exploration or project timelines	24.7%	25.1%	+0.4
Incomplete data for decision-making	25.7%	23.8%	-1.9
Inability to share data across teams or locations	18.3%	18.6%	+0.3
Duplication of work	12.7%	15.0%	+2.3
Higher costs from data reacquisition	11.0%	10.1%	-0.9
No major issues currently	7.6%	7.5%	-0.1

If you're experiencing similar challenges, you're not alone - many professionals in our network face operational difficulties related to legacy data access.
[Get in touch](#) to find out how we can help.

3. Barriers that might sound familiar

Barriers to digitizing legacy G&G media – 2025 vs 2026 response counts¹



What’s changed since 2025

The cost of third-party services was the second most cited barrier to digitization, cited by 68 respondents (vs 59 in 2025). At the same time, the difficulty in getting internal buy-in fell from 38 respondents to 23. If this reflects a real trend rather than sample composition, the implication is that organizations are increasingly persuaded of the case for digitization but are finding the procurement cost harder to absorb. Free-text comments from respondents suggested that the costs attached to digitization are often less expensive than redoing surveys, and can often be recovered quickly.

Response (n=total all factors selected by respondents)	2025%	2026%	Change (pp)
Lack of in-house expertise or tools	17.7%	19.2%	+1.5
Cost of third-party digitization services	14.7%	17.8%	+3.1
Concerns about data degradation during conversion	19.2%	17.3%	-1.9
Volume of data is overwhelming	16.9%	16.5%	-0.4
Poor indexing or unknown contents	16.7%	16.3%	-0.4
Difficulty getting internal buy-in	9.5%	6.0%	-3.5
None of these	5.5%	6.8%	+1.3

1 Respondents were asked to select all that apply

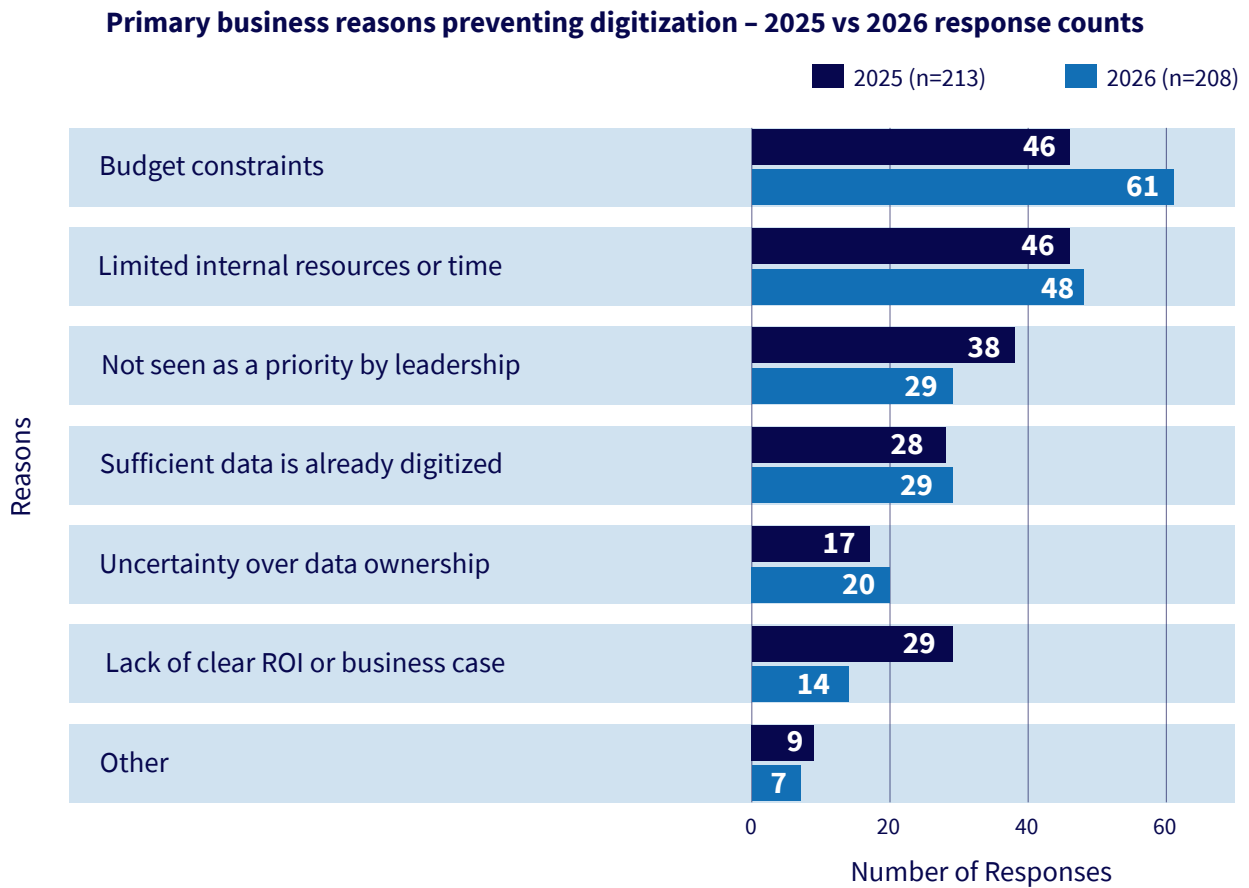


“At my last project, 40+ years of well logs were only on paper or scanned as low-res PDFs. Coordinates were in a local grid with no metadata, so digitizing took 3x longer than modeling. We lost weeks just figuring out datums... We once spent \$15k re-running a gravity survey because the legacy data was in an obsolete format and the original software license expired in 2022. The raw numbers existed on tape, but no one could read them. That cost alone would’ve funded proper archiving for 10 years of data.”

- Anonymous poll respondent

Struggling with complex digitization barriers? [Find out more about how we can help.](#)

4. Investment and resource challenges



What's changed since 2025

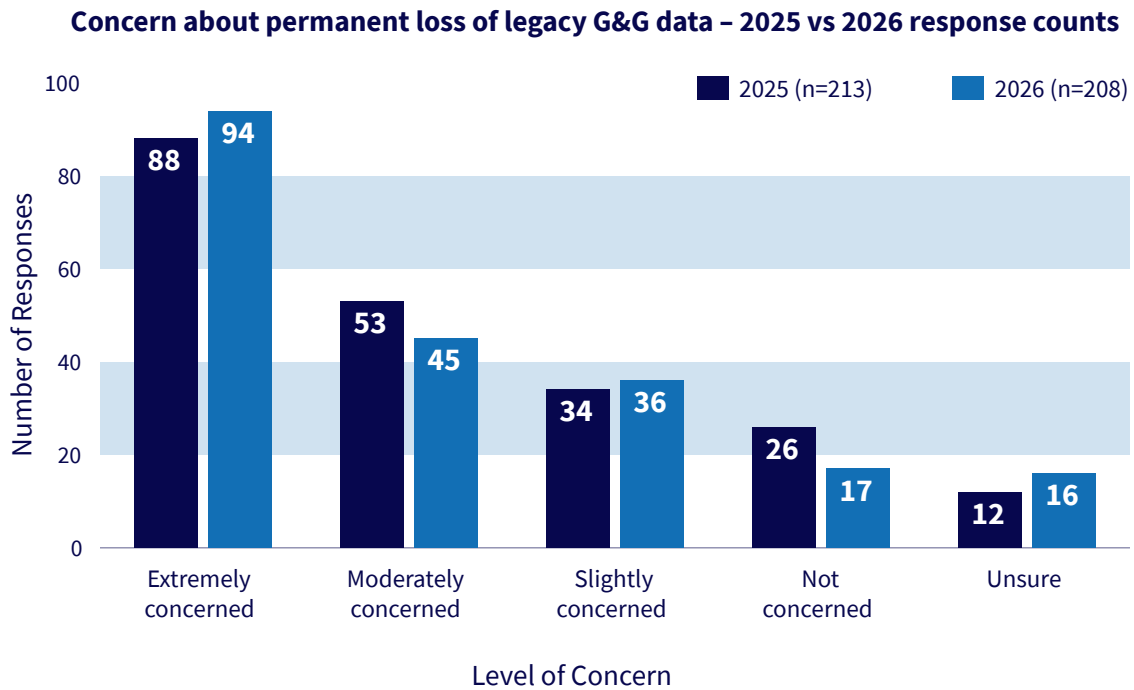
Budget came up again in response to this question on what's stopping digitization. In one of the clearest shifts in the dataset, budget constraints were pinpointed as a barrier by 61 respondents, up from 46 the previous year, while the lack of a clear ROI fell from 29 to 14. The framing of the constraint has moved from a sense that the case is unproven to a sense that the funding is not there.

Free-text responses suggest that while the difficulty getting internal buy-in has fallen as a barrier, the gap between technical understanding of the issue and leadership prioritization has not closed everywhere. As one respondent put it, "The primary issue lies in the fact that our management lacks sufficient awareness of the importance of science, technological advancement, and the preservation and proper handling of geoscientific data. As a result, challenges related to legacy data are not being adequately recognized or addressed."

Response	2025%	2026%	Change (pp)
Budget constraints	21.6%	29.3%	+7.7
Limited internal resources or time	21.6%	23.1%	+1.5
Not seen as a priority by leadership	17.8%	13.9%	-3.9
Sufficient data is already digitized	13.2%	13.9%	+0.8
Uncertainty over data ownership	8.0%	9.6%	+1.6
Lack of clear ROI or business case	13.6%	6.7%	-6.9
Other	4.2%	3.4%	-0.9

Need help building the business case for data investment in your organization? We can help you demonstrate the strategic value of your irreplaceable data assets. [Find out how today.](#)

5. How concerned should you be about data loss?



What's changed since 2025

The number of extremely concerned respondents grew from 88 to 94, and the number reporting no concern fell from 26 to 17. Overall concern levels (moderate or extreme combined) are essentially unchanged at around 67%, but within that total, the distribution has shifted toward higher urgency. Free-text comments from respondents suggested that the costs attached to digitization are often less expensive than redoing surveys, and can often be recovered quickly.

Response	2025%	2026%	Change (pp)
Extremely concerned	41.3%	45.2%	+3.9
Moderately concerned	24.9%	21.6%	-3.3
Slightly concerned	16.0%	17.3%	+1.3
Not concerned	12.2%	8.2%	-4.0
Unsure	5.6%	7.7%	+2.1



“One major concern is the brain drain of experienced geoscientists retiring, taking valuable knowledge with them. Digitizing legacy data is crucial not just for accessibility but for preserving institutional knowledge. I’ve seen projects stall because key data was locked away in someone’s notes or outdated systems. Capturing and integrating this data is a strategic imperative, not just a technical task.”

- Anonymous poll respondent

Concerned about your data security and accessibility? We specialize in protecting irreplaceable data assets. [Let's discuss](#) your specific situation.

6. Geopolitics and the strategic importance of legacy data

This question is new for 2026. We asked how the current geopolitical environment, including energy security concerns, shifting supply chains, and regional instability, has impacted the importance of accessing legacy G&G data.

Impact of geopolitical environment on importance of accessing legacy G&G data - 2026 response counts

Response	2026 count (n=176)	2026%
Significantly increased and is now a strategic priority	71	40.3%
Moderately increased	46	26.1%
No real change	43	24.4%
Unsure	12	6.8%
Decreased	4	2.3%

Two-thirds of the 176 respondents who answered this question (117 in total) report that the geopolitical environment has elevated the importance of accessing legacy data, and 40% describe this as a strategic priority. This is the strongest evidence in our findings that the conversation about legacy data has moved beyond internal data quality and into the territory of operational and strategic resilience.



“One of the key issues I’ve personally encountered is the lack of proper documentation and metadata, especially in regions affected by conflict, where valuable geological records have been lost or damaged. This makes reinterpretation and integration with modern datasets very difficult. Additionally, many datasets are stored in outdated formats or scattered across different institutions, making accessibility and consistency a real concern.”

- Anonymous poll respondent

Free-text responses included direct references to conflict in Yemen and elsewhere, as well as to the risk that war poses to the safety and preservation of data archives. The broader implication is that as global supply chains come under pressure, the data needed to support a faster, more flexible exploration response becomes more valuable and more vulnerable at the same time.

**Need help understanding how legacy data preparedness fits into your wider resilience planning?
Get in touch with our team to discuss your situation.**

7. Speed to opportunity: The responsiveness gap

This question is also new for 2026. We asked the same 176 respondents about the extent to which inaccessible legacy G&G data is limiting their organization’s ability to respond quickly to new exploration or licensing opportunities in the current market.

Extent to which inaccessible legacy data limits responsiveness to new opportunities – 2026 response counts

Response	2026 count (n=176)	2026%
Severely limiting, with missed or delayed opportunities	48	27.3%
Moderately limiting	56	31.8%
Slightly limiting	32	18.2%
Not limiting	26	14.8%
Unsure	14	8.0%

104 of the 176 respondents who answered this question (around 59%) report that legacy data inaccessibility is moderately or severely limiting their ability to act on new opportunities, with 48 of those describing the impact as severe.



“In my experience, delayed access to historical logs and reports can impact decision-making speed, especially during field development and workover planning. A structured digital transformation strategy, supported by AI-driven data extraction and quality control, can significantly enhance data usability and unlock hidden insights.”

– Anonymous poll respondent

Read alongside the geopolitical findings above, this inability to be responsive lies at the heart of this year’s story. External pressure on the sector has risen, the importance of legacy data access has been heightened, and a clear majority of respondents report that the current state of their data is constraining their ability to move quickly.

**Wondering whether your organization could move faster with better legacy data access?
Talk to us today about how Ovation Data can help.**

Your industry's global perspective

Global reach of poll responses

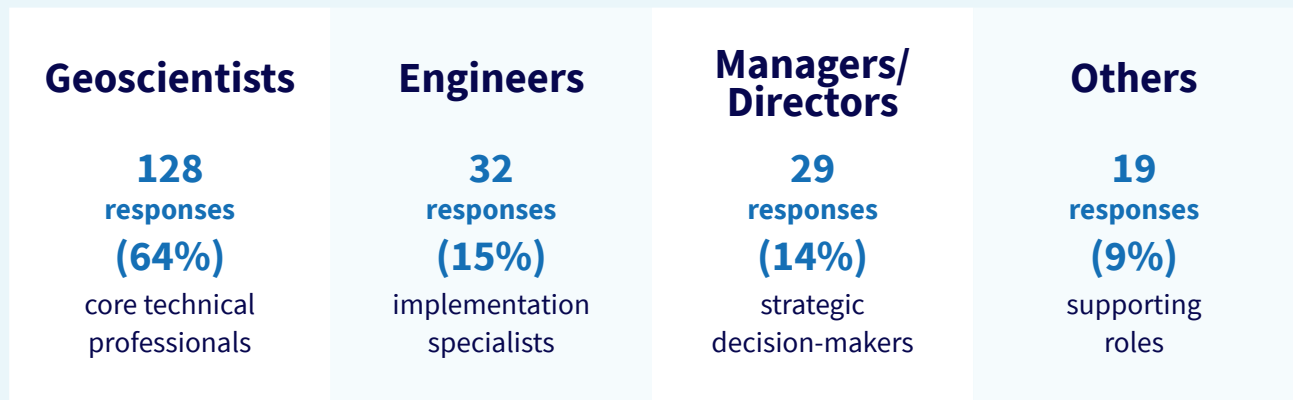
Our 2026 LinkedIn poll attracted responses from across multiple regions. Among the 87 respondents whose location was identified:



The locations of approximately 121 respondents were not identified, so the figures above describe the subset for whom the location is known, rather than the full sample.

Professional background of respondents

The poll attracted respondents from a similar mix of professional backgrounds to last year:



The diversity of respondents suggests that the topic of legacy data continues to resonate across different professional levels and specializations within the participating LinkedIn networks.

What this means for your organization

The 2026 poll responses extend the picture from last year's report and add an external dimension, suggesting that those working in the industry might need to give particular attention to specific areas.

Your readiness for a faster pace of decision-making. With two-thirds of respondents reporting that the geopolitical environment has elevated the importance of legacy data access, and a majority reporting that inaccessibility is limiting their ability to act on new opportunities, the question of how quickly your organization can mobilize its existing data is likely to become a strategic priority.

Your investment posture as a constraint. If your organization is broadly persuaded of the case for digitization but constrained by funding, the conversation about how to make progress is changing. Phased programs, cost-controlled pilots, and clearly scoped projects can help convert intent into action without requiring a single large investment decision.

Your handling of the gap between digitized and usable data. As one of this year's respondents pointed out, data that has been digitized but lacks standardization, indexing, or integration may not deliver value. This is an area where modest, well-targeted work can unlock disproportionate benefits.

Your knowledge management and succession planning. The institutional memory theme that emerged in last year's poll remains present in this year's responses, with several respondents emphasizing the risk of context being lost as experienced staff retire.

Get in touch to discuss how Ovation Data can support you across any of these areas.

Your next steps

Based on the themes emerging from this year's poll, these priorities may warrant consideration. Whether you are a technical professional building the case or a senior leader evaluating priorities, these are areas where the 2026 findings suggest proactive planning could provide a meaningful advantage.

1. Data asset evaluation in light of external pressure

- **For technical teams:** assess current data accessibility against the scenarios in which your organization is most likely to need to respond quickly
- **For leadership:** understand how data accessibility supports or constrains the organization's ability to act on emerging opportunities.
- **For organizations as a whole:** evaluate current data governance practices against business continuity requirements and competitive positioning

2. Investment strategy as funding becomes a tighter constraint

- **For technical teams:** document capability gaps and resource needs in a form that supports phased investment decisions
- **For leadership:** review data-related budget allocation against the strategic technology investments and risk mitigation priorities

most relevant to current market conditions

- **For organizations:** consider the strategic value of data readiness in supporting AI initiatives and operational resilience

3. Knowledge management as strategic infrastructure

- **For technical teams:** develop processes to capture and preserve critical institutional knowledge before it is lost
- **For leadership:** recognize knowledge management as an essential business infrastructure that protects competitive advantages and operational continuity
- **For organizations:** implement systematic approaches to documentation, metadata standards, and knowledge transfer protocols

Ready to understand the true value of your data assets? We offer comprehensive data audits to help you identify risks and opportunities. [Get in touch](#) to find out more.

Your path forward

Nine months ago, our first poll suggested that organizations taking proactive approaches to legacy data challenges could position themselves advantageously for future opportunities. This year's findings suggest that the window of advantage is narrowing. As external pressure rises and the cost of inaction is increasingly measured in missed opportunities, the case for acting deliberately and quickly has strengthened.

Ready to transform your data challenges into competitive advantages? [Get in touch](#) with us today. Our team is here to help.

Your irreplaceable data doesn't have to be irretrievable.

About Ovation Data

Ovation Data is a global leader in data digitization, preservation, and digital transformation. With more than 45 years of experience, we help organizations unlock the full value of their data. From paper archives to legacy media formats, we transform complex, fragmented, and aging data into secure, accessible, and usable digital assets. Our scalable solutions support everything from AI-readiness to regulatory compliance, enabling smarter decisions, accelerated innovation, and long-term data resilience. Whether you're safeguarding irreplaceable history or preparing for the future, Ovation Data delivers trusted, end-to-end data stewardship.

