

Oil & Gas Midstream Services

Customer Satisfaction



RATINGS & ANALYSIS REPORT

ENERGYPOINT
RESEARCH

E&P companies, industrials and marketing professionals rated domestic suppliers in EnergyPoint's latest Oil & Gas Midstream Services Customer Satisfaction Survey. Respondents have significant and industry-wide impact on the selection and utilization of midstream service providers. In aggregate, results in this closely watched report offer insights and impactful information regarding the current state of customer satisfaction in the oil and gas midstream sector.

EnergyPoint conducts the only truly independent surveys in the energy industry that reveal the comprehensive and ongoing opinions of purchasing decision-makers, influencers and users concerning industry suppliers. This particular report offers highly relevant detail, timely information, and unique analysis regarding how customers rate major oil and gas midstream service providers across 30+ attributes, services, and regions. It is a "must have" for those seeking to understand how their, or their competitors', offerings align with the needs of customers.

Incorporating results from more than 3,000 evaluations by qualified respondents at E&P companies, industrials and other midstream customers, the report provides a strong framework for identifying and tracking the relative strengths and weaknesses of midstream providers.

VALUE OF THIS REPORT

- Understand the current state of customer satisfaction in the oil and gas midstream services segment
- Obtain detailed information on individual midstream service provider customer ratings and rankings
- Identify and track strengths and weaknesses among today's major midstream providers
- Know the key satisfaction drivers for customers of midstream services suppliers

PROFILE OF SURVEY RESPONDENTS

All indicated having "significant experience" in selecting or utilizing midstream service providers.

Over 90% indicated having primary decision-making responsibility or involvement in the supplier-selection process.

More than 85% indicated having 10+ years of upstream experience; over 70% indicated 20+ years of experience.

Titles and functions include:

- Executive/VP
- Director
- Manager
- Supervisor/Team Leader
- Engineer/Specialist
- Scheduler/Other

Participation from a range of customer types, including: supermajors, majors, independents, industrials, and marketers.



Some of the Attributes Rated

- Overall satisfaction
- Willingness to recommend
- General price levels and contract terms
- Prices and contract terms vs. competitors
- Prices paid vs. quality received (value)
- Commercial personnel
- Engineering and operations personnel
- Quality, reliability and condition of assets
- Flexibility and responsiveness to customer's needs
- Accountability in resolving problems and disputes
- Integrity and ethical behavior
- Ability to develop value-adding projects and solutions
- Ability to manage and complete new projects
- Ease and accuracy of nomination and scheduling processes and systems
- Quality, availability and timeliness of measurement and field data
- Technical soundness and sophistication of developed projects
- Health, safety and environmental practices
- + Other attributes and sub-attributes

Midstream Services Providers Rated

- Anadarko Midstream/WGP
- Andeavor Logistics
- Boardwalk Pipeline
- Buckeye Partners
- Crestwood Midstream
- CSI Compressco
- DCP Midstream
- Enable Midstream
- Enbridge
- Energy Transfer
- EnLink Midstream
- Enterprise Products
- Exterran
- Inter Pipeline
- Kinder Morgan
- Lucid Energy
- Magellan
- MPLX/MarkWest Energy
- NuStar
- ONEOK
- Phillips 66
- Plains All American
- Targa Resources
- USA Compression
- Valero Energy Partners
- Williams

DETAILED RATINGS

EnergyPoint's Oil & Gas Midstream Services Report is designed for midstream service providers and other industry stakeholders interested in understanding, in specific terms, how major midstream providers rate across 30+ attributes, service categories and regions.

The detailed [ratings](#) portion of the 80+ page report contains data, tables, graphs, background and other specifics from EnergyPoint's Oil & Gas Midstream Services Survey. Contents include 1-to-10 point ratings, top-to-bottom rankings, evaluation counts, category means and medians, for multiple attributes, categories and regions. The report's methodologies are those used to determine official category winners for EnergyPoint's annual Customer Satisfaction Awards.



DETAILED ANALYSIS

The detailed [analysis](#) portion of the report provides strategic analysis and recommendations related to customer satisfaction in the midstream sector. Considered a "roadmap" by many in the industry, this report provides insights as to how suppliers can better manage their performance and understand how organizational resources can be more effectively allocated to optimize results.

The report also contains insightful and actionable analyses, and identifies the importance customers of products suppliers place on various attributes, including: pricing, performance and reliability engineering and design, availability and delivery, post-sale support, corporate resources, etc. Customized reports for individual suppliers or segments are available upon request.

ANALYZE RATINGS ACROSS MULTIPLE SEGMENTS:

Service Categories

- Onshore Gas Gathering
- Offshore Gathering & Transportation
- Gas Compression
- Gas Processing & Treating
- Gas Transportation
- Gas & NGL Purchasing
- Gas Storage
- NGL Transportation & Storage
- NGL Fractionation
- Onshore Crude Gathering
- Crude Storage & Terminaling
- Crude Transportation

Geographic Regions

- Appalachian Basin - Marcellus
- Ark-La-Tex
- Bakken - Dakotas
- Onshore Gulf Coast
- Mid-continent
- Permian Basin
- U.S. Rockies
- San Juan Basin
- Texas Intrastate
- Gulf of Mexico

Shouldn't you and your organization be aware of the information industry participants have provided through EnergyPoint's unmatched independent research?

Knowing what is important to customers can help both long-term decision-making and resource allocation. Accordingly, the report includes the following:

- Ratings and rankings of midstream service providers across 30+ attributes, service categories and regions.
- Identification and discussion of satisfaction drivers as determined by statistical analysis performed by EnergyPoint.
- Recommendations for resource allocation strategies for enhancing, optimizing and maximizing customer satisfaction over the long term.
- Other actionable analyses and recommendations to assist those looking to develop superior customer satisfaction strategies and solutions.

The report provides the information, insights and analyses needed to support important decisions addressing customer needs. It is simply the best information available for knowing and understanding the factors that are important to today's customers of midstream services providers.

"If you don't measure it, you can't manage it."

ENERGYPOINT RESEARCH

OUR FOCUS

EnergyPoint Research provides independent research regarding the global energy industry's satisfaction with the products and services it purchases and utilizes. We offer industry professionals and their employers opportunities to provide, gather and access comprehensive ratings of industry suppliers through independent and objective evaluation processes. In return for participating in our surveys, respondents and their employers receive complimentary survey results in the form of EnergyPoint's reports and updates.

MARKETPARTNERS® PROGRAM

Through its MarketPartners® Program, EnergyPoint regularly surveys significant cross-sections of experienced industry participants involved in the selection and utilization of various products and services. Survey participants range from decision-makers and managers at some of the world's largest energy companies to operational and field personnel at independents and regionals. For more information regarding the MarketPartners® Program, go to www.energypointresearch.com.

CONFIDENTIALITY

EnergyPoint takes care to maintain confidentiality and anonymity related to the data it collects and publishes. While respondent demographics are included in our various published reports and data sets, the names of survey respondents and their employers are not divulged.

INDUSTRY RECOGNITION

EnergyPoint and its customer satisfaction data have been cited by many leading business and industry resources including:

- *Wall Street Journal*
- *New York Times*
- *Barrons*
- *Fortune*
- *The Sunday Times*
- *Harts E&P*
- *Oil & Gas Journal*
- *Oil and Gas Investor*

SURVEYS & REPORTS

To help ensure that our research is both relevant and timely, EnergyPoint's industry-leading surveys focus on the topics industry participants tell us are most important. We design our surveys to measure satisfaction by:

- Organizational attribute
- Performance attribute
- Customer and provider type
- Respondent title
- Product and service category
- Geographic region
- Application type

We provide survey results in three primary formats:

EnergyPoint's Online Portal is the most detailed and comprehensive tool available for understanding customer satisfaction in the global energy industry. It allows subscribers to generate, view, analyze and download via the web results from EnergyPoint's independent surveys.

Detailed Ratings & Analysis Reports

offer relevant detail, timely information and insightful analysis regarding how customers rate major industry suppliers across 80+ attributes, categories, regions and segments. These reports provide unprecedented frameworks for identifying and tracking the relative strengths and weaknesses of more than 100 companies.

EnergyPoint Summaries & Updates

are complimentary survey results and commentary available to subscribers, participants and their employers. These popular pieces have become a standard in the energy industry, providing insight and perspective regarding the performance of a range of suppliers and industry segments.

MANAGEMENT

Doug Sheridan is Managing Director and founder of EnergyPoint Research, Inc. Prior to starting the firm in 2003, Sheridan held commercial and corporate positions in the U.S. midstream segment. He has



been active in a number of industry associations, including the National Petroleum Council, and is regularly sourced for his analysis and opinions concerning

the oil and gas industry, particularly in the area of customer satisfaction. Sheridan holds a B.A. from Vanderbilt University and an M.B.A. from the University of Michigan's Ross School of Business. He lives in and is a native of Houston, Texas.

CATEGORY WINNER RECOGNITION

The EnergyPoint Research Seal of Excellence™ and Customer Satisfaction Award™ is available annually to those suppliers receiving the top rating in specific survey categories. Backed by EnergyPoint's acknowledged objectivity and expertise, the Seal of Excellence is the recognized symbol of performance in the global energy industry. Visit the EnergyPoint Research website at www.energypointresearch.com for a current list of companies eligible for recognition.

Contact us at info@energypointresearch.com or call us at **+1.713.529.9450**.

To learn more about EnergyPoint and our independent research, visit the company's website at www.energypointresearch.com

