

**2004  
CUSTOMER  
SATISFACTION  
SURVEY**

**WELLSITE  
CONTRACTORS**

*Market Partners*<sup>SM</sup>  
Report

# 2004 CUSTOMER SATISFACTION SURVEY

## WELLSITE CONTRACTORS

### SURVEY DESCRIPTION

This report summarizes results from one of the most unique customer satisfaction surveys on wellsite contractors ever conducted. It is based on opinions collected through more than 1,000 evaluations completed from September 2003 through January 2004 by 191 respondents at over 80 exploration and production (E&P) companies worldwide. All respondents indicated having “significant experience” in selecting, managing or working with wellsite contractors from the perspective of an oil and gas producer. A total of 24 contractors received the minimum number of evaluations required to be included in the various sections of this report.

### SERVICE CATEGORIES

For purposes of the survey, a company is considered a wellsite contractor if it provides contracting services in any of the survey’s six service categories. These categories, which are further defined on page 6, include:

- Contract Drilling — Land
- Contract Drilling — Offshore
- Drilling-related
- Formation & Well Evaluation
- Well Completion
- Workovers & Well Servicing

### AREAS OF EVALUATION

Survey respondents rated contractors on an overall basis as a wellsite contractor as well as by individual service category, global region and well type (see page 3 for additional details regarding survey content). Contractors were also rated on each of the following attributes:

- Pricing
- Reliability
- Technological Capabilities
- Job Quality
- Safety & Environmental
- Service & Professionalism
- Corporate Capabilities

### SATISFACTION SCORES

All satisfaction scores in this report, unless otherwise noted, are derived from 1-to-10 point rating scales used in the survey, with 1 indicating respondents are “Very Dissatisfied” with a contractor’s performance and 10 indicating they are “Very Satisfied.” After the data were reviewed and sorted, ratings were totaled and rescaled such that the top-rated contractor in a category received a score of 100 and all other contractors received their percentage of the top score.

### SERVICE ATTRIBUTE GRADES

The letter grade applied to each service attribute on page 5 corresponds to the quartile into which the contractor falls versus its listed peers for that particular attribute. An “A” indicates the contractor is in the top quartile for that attribute, while a “D” indicates the contractor is in the bottom quartile. Each attribute grade is based on results from three underlying attribute-related questions. See item 7 on page 3 for specific attribute-related questions.

## BEHIND THE RESULTS

### CONTRACTORS & RESPONDENTS

Respondents chose from a list of 49 companies identified by industry participants and EnergyPoint Research as major wellsite contractors and selected other contractors not included in this list through a “write-in” feature of the survey. Based upon information provided by respondents, a breakdown of the resulting pool of evaluations is provided below.

<u>Producer Type</u>	<u>No. of Evaluations</u>	<u>% of Evaluations</u>
Supermajor	273	26.6%
Major	233	22.7%
Large Independent	109	10.6%
Independent	218	21.3%
Small Independent	124	12.1%
National Oil Company (NOC)	65	6.3%
Upstream Consultant	4	0.4%
<u>Role in Selection of Contractors</u>		
Primary Decision-maker	562	54.8%
Contributor to Process	405	39.5%
User of Services Only	59	5.7%
<u>Years of Upstream Experience</u>		
0 – 4	43	4.2%
5 – 9	43	4.2%
10 – 19	221	21.5%
20 – 29	523	51.0%
30 +	196	19.1%
<u>Headquarters of Respondent’s Company</u>		
U.S. & Canada	665	64.8%
Outside of U.S. & Canada	361	35.2%
<b>TOTAL</b>	<b>1,026<sup>1</sup></b>	<b>100.0%</b>

### SAMPLE SIZES

Results for contractors that received 12 or more evaluations in the area of overall satisfaction as a wellsite contractor are included in this report. This minimum, and the corresponding minimum of seven evaluations for service category, customer type, global region and well type, was set in an effort to help reduce uncertainty in scores and rankings due to sampling error. EnergyPoint does not maintain that the survey or this report includes all contractors that could be viewed as major wellsite contractors. Inclusion in or exclusion from the survey or this report is not intended to reflect a company’s market share or prominence in any category of oilfield services.

### DESIGN & DEVELOPMENT

The survey was designed, managed and funded on an independent basis by EnergyPoint Research to facilitate the collection of producers’ opinions regarding wellsite contracting services. EnergyPoint was not hired to perform the survey or publish this report by any provider or purchaser of oilfield services. In developing the survey, EnergyPoint worked closely with E&P professionals to develop questions focused on the attributes believed to impact producers’ satisfaction with wellsite contracting services. To help ensure high levels of participation and confidentiality, the survey was conducted through a secure, state-of-the-art web-based platform.

### PURPOSE & SCOPE

This report is intended to provide readers with useful information regarding producers’ satisfaction with the wellsite contracting services they purchase. The scores and ratings contained in this report reflect only the opinions of those individuals who chose to complete the survey.

<sup>1</sup>A total of 932 evaluations were completed on the 24 contractors included in this report.

## SURVEY CONTENT

Below is a summary outline of the survey upon which the results in this report are based.

1. Confirm your **name, company, title, job function** and **years of upstream experience**.
2. Indicate your **role in the selection of wellsite contractors** within your company (Primary Decision-maker, Contributor to Process, or User of Services Only).
3. Indicate the **type of E&P company** for which you work (Supermajor, Major, Large Independent, Independent, Small Independent, National Oil Company, Upstream Consultant, or Other).
4. Indicate where your company is **headquartered**.
5. On a 1-to-10 scale, where 1 = "Least Important" and 10 = "Most Important," indicate the **level of importance** you assign to each of the following when selecting or evaluating wellsite contractors: Pricing, Reliability, Technological Capabilities, Job Quality, Safety & Environmental, Service & Professionalism, and Corporate Capabilities.
6. Indicate the **wellsite contractors** with whom you have *significant experience* and would like to evaluate (companies in **bold** are those contractors included in this report).

*Akita Drilling*

*Atwood Oceanics*

**Baker Hughes**

*Basic Energy Services*

**BJ Services**

*Crosco Drilling & Well Services*

**Diamond Offshore**

*Dolphin (Fred Olson Energy)*

**ENSCO International**

*Enserco Energy Services*

*Ensign Resources*

**Expro International**

**Frank's Casing Crews**

**Frank's International**

**Geoservices**

**GlobalSantaFe**

**Grey Wolf**

**Halliburton**

**Helmerich & Payne**

*KCA DUETAG*

**Key Energy Services**

*Maersk Contractors*

**M-I**

*MB Petroleum Services*

**Nabors Industries**

**Noble Drilling Services**

**Parker Drilling Company**

**Patterson-UTI Energy**

**Precision Drilling**

*Pride International*

*Prosafe Drilling Services*

*Q Services*

*Rowan*

*RPC*

*Sanjel Services*

*Saipem*

**Schlumberger**

*Smedvig*

**Smith International**

*Superior Energy Services*

*Tesco*

*Tetra Technologies*

**Transocean Sedco Forex**

*Trican Well Service*

*Unit Corporation*

*Varco International*

**Weatherford**

*W-H Energy Services*

**Wood Group**

*Other (specify) \_\_\_\_\_*

7. Using a 1-to-10 scale, where 1 = "Very Dissatisfied" and 10 = "Very Satisfied," indicate **your satisfaction** with each contractor you selected in the following areas:
  - a. **Pricing:** i) general price levels, ii) price competitiveness versus competitors, iii) prices paid for quality received.
  - b. **Reliability:** i) quality and reliability of field personnel, ii) quality and reliability of office personnel, iii) quality, reliability and condition of field equipment.
  - c. **Technological Capabilities:** i) responsiveness to requests for new technologies, ii) ability to develop value-creating technologies and processes, iii) ability to apply both in-house and third-party technologies.
  - d. **Job Quality:** i) ability to complete jobs on schedule and as specified, ii) quality of pre-job planning and design and post-job reporting and review, iii) ability to apply lessons learned and continually improve.
  - e. **Safety & Environmental:** i) application of in-house safety & environmental policies and procedures, ii) respect for other companies' safety & environmental policies and procedures, iii) perceived safety & environmental performance record.
  - f. **Service & Professionalism:** i) flexibility and responsiveness to customer needs, ii) accountability in resolving problems and disputes, iii) perceived level of integrity and ethical behavior.
  - g. **Corporate Capabilities:** i) ability to provide necessary expertise, personnel and equipment, ii) size and scope to meet geographic and technical requirements, iii) general corporate capabilities to meet job requirements.
8. Indicate your **overall satisfaction** with each contractor you selected. Also, indicate your satisfaction with these contractors for the specific **global regions, service categories** and **well types** for which you utilize their services.
9. How likely would you be to **recommend this contractor** to others as a wellsite contractor (1 = "Very Unlikely" and 10 = "Very Likely")?
10. Please provide any **additional comments** you have regarding the contractor or this survey.

# 2004 Customer Satisfaction Survey

## WELLSITE CONTRACTORS

### Scores & Rankings

Overall Rank	Company (Headquarters)	No. of Evaluations	Overall Score <sup>1</sup>	RANK BY Global Region <sup>2</sup>		RANK BY Customer Type		RANK BY Well Type	
				U.S. & Canada	Other Global Regions	Multinationals & Large NOCs	Independents <sup>3</sup>	Onshore	Offshore
1	Precision Drilling (Calgary, Alberta)	17	100.0	2	1	1	1	1	-
2	Grey Wolf (Houston, Tx)	15	95.7	3	-	-	3	2	-
3	Helmerich & Payne (Tulsa, Ok)	18	95.4	5	-	3	2	4	4
4	Transocean Sedco Forex (Houston, Tx)	21	95.2	1	8	4	-	-	6
5	Smith International (Houston, Tx)	34	93.2	6	3	2	9	3	4
6	Frank's International (Houston, Tx)	13	93.1	3	7	12	-	-	3
7	M-I (Houston, Tx)	41	92.6	7	2	5	11	10	2
8	Frank's Casing Crew (Lafayette, La)	26	91.3	8	-	6	5	5	8
9	BJ Services (Houston, Tx)	90	90.9 <sup>4</sup>	10	6	7	7	5	10
9	Noble (Sugar Land, Tx)	13	90.9	16	-	-	6	-	1
11	Baker Hughes (Houston, Tx)	104	89.6	12	9	9	10	7	15
12	Wood Group (Aberdeen, Scotland)	26	89.1	9	-	15	7	8	7
13	Diamond Offshore (Houston, Tx)	15	88.7	11	-	13	-	-	9
14	Parker Drilling (Houston, Tx)	13	88.2	-	5	10	-	11	-
15	GlobalSantaFe (Houston, Tx)	17	87.8	17	4	8	13	-	11
<b>AVERAGE</b>			<b>87.8</b>						
16	Schlumberger (New York, NY)	132	86.3	14	10	11	14	9	12
17	Halliburton (Houston, Tx)	128	85.9	15	12	14	12	12	13
18	Expro Group (Reading, U.K.)	15	82.6	-	11	21	4	-	14
19	Weatherford International (Houston, Tx)	87	82.3	13	14	16	16	14	17
20	Patterson-UTI (Snyder, Tx)	15	81.1	20	-	-	15	16	-
21	Nabors Industries (Houston, Tx)	28	80.1	18	-	17	17	15	18
22	Geoservices (La Blanc - Mesnil, France)	18	78.8	-	13	18	-	13	15
23	ENSCO International (Dallas, Tx)	14	75.7	18	15	19	-	-	19
24	Key Energy Services (Midland, Tx)	32	73.1	21	-	20	18	17	-

<sup>1</sup> Derived from the average ratings received in the areas of "Overall Satisfaction" and "Willingness to Recommend." <sup>2</sup>By location of wellsite. <sup>3</sup>Independents (includes four engineering consultants) and national oil companies with estimated annual production of 150,000 BBOE/d or less. <sup>4</sup>In the case of ties, companies are listed alphabetically. A dash indicates a contractor does not provide services in the category or did not receive the minimum number of evaluations needed to be included in the report.

# 2004 Customer Satisfaction Survey

## WELLSITE CONTRACTORS

### Service Attributes & Commentary

Overall Rank	Company	Service Attribute Grades <sup>1,2</sup>							Commentary and Analysis
		Pricing	Reliability	Technology	Job Quality	Safety & Environmental	Service & Professionalism	Corporate Capabilities	
1	Precision Drilling	A	A	A	A	A	A	A	Acquisitions and expansion into markets outside of North America have not hurt this company's ability to stay focused on the customer. Rated number one in all but two service attributes.
2	Grey Wolf	A	A	C	A	C	B	C	Attractive pricing and an ability to complete jobs on schedule and as specified point to this drilling contractor as a strong value. Top honors are within reach if certain areas can be shored up.
3	Helmerich & Payne	B	A	A	A	A	A	B	Its field people and equipment were rated as best in reliability. Received rousing scores for its ability to develop value-creating technologies. Ranks equally well offshore as it does onshore.
4	Transocean Sedco Forex	C	C	B	B	B	C	A	Although pricing and responsiveness ratings could be improved, respondents seem willing to credit the company as having the capabilities needed to help them succeed in the offshore.
5	Smith International	A	A	A	A	B	A	A	Strong ratings across multiple segments resulted in Smith receiving the highest overall score for any non-drilling contractor. Well regarded for its flexibility and responsiveness to customer needs.
6	Frank's International	A	A	A	A	C	A	B	Respondents covet its "rock solid" performance in the offshore. Lauded for its fair pricing and accountability in resolving problems, this company scored well among E&P decision-makers.
7	M-I	C	A	B	B	A	A	A	M-I's strengths offshore and in international markets helped it stand out with respondents from larger operators. Received higher marks for drilling-related services than for completion services.
8	Frank's Casing Crew	D	C	B	A	B	B	B	Strong ratings in the deepwater helped boost the company's standings. Field ratings underpinned by solid performance of crew supervisors. Services rated as relatively expensive, however.
9	BJ Services	A	B	B	C	B	A	B	Completions and workovers emerged as BJ's core strengths, and a new R&D center should improve its ability to apply technology in the field. Gathers high marks for its competitive pricing.
9	Noble	A	B	A	A	B	B	A	Driven by strong performance on the shelf, Noble received top honors in the offshore. Ratings outside of its core offshore drilling services weighed on its overall standing, however.
11	Baker Hughes	B	B	C	C	C	B	C	Rated best overall of the "big three" integrated providers, aided by the strength of its formation and well evaluation services. Is there room for improvement in technology and the offshore?
12	Wood Group	B	B	B	B	D	B	C	Garnered solid ratings in many areas, especially from respondents at independent producers. Respondents at larger operators gave WG higher ratings in the offshore than on land.
13	Diamond Offshore	B	C	C	B	A	C	C	The company received strong ratings for its in-house safety & environmental practices. Respondents more satisfied with Diamond's performance on the shelf than in the deepwater.
14	Parker Drilling	B	B	B	B	B	B	C	Respondents from large producers seem pleased with its ability to continually improve and respond to their requests for new technologies. Scores primarily reflect onshore drilling outside the U.S.
15	GlobalSantaFe	C	C	C	C	C	C	B	Relatively strong ratings outside of North America were offset by somewhat lackluster scores in the area of technology development and in the quality and reliability of its field equipment.
16	Schlumberger	D	B	A	C	A	C	A	Received lower ratings than many of its peers in the area of pricing. However, strong scores in the areas of technology and corporate capabilities helped lift the company's standing overall.
17	Halliburton	D	C	C	C	A	C	B	Other than in the area of safety and environmental, Halliburton seems to be missing some opportunities to set itself apart from its competition. Ratings suggest consistency of services could be improved.
18	Expro Group	B	C	D	C	D	D	D	Although rated favorably by respondents at independents, respondents at larger operators seemed less enthusiastic. Some respondents say staffing levels could be improved in certain locations.
19	Weatherford International	C	D	D	D	D	D	C	Is Weatherford fulfilling its potential as one of the industry's full-service providers? Scores in many areas suggest some respondents believe the company can do more to meet their needs.
20	Patterson-UTI	B	D	D	D	D	C	D	Its pricing is a relative strength, while the quality and reliability of field personnel and equipment received lower marks. Delivering more effective technologies could help improve its standings.
21	Nabors Industries	C	D	D	D	C	D	D	Reliability and quality ratings suggest Nabors might be not be living up to its potential in certain areas. Some decision-makers give the company low marks for flexibility and responsiveness.
22	Geoservices	D	D	C	D	D	D	D	Respondents were especially tough on providers of formation & well evaluation services, including Geoservices. The company's ratings mostly reflect opinions of respondents from larger operators.
23	ENSCO International	D	D	D	D	C	D	D	Ratings suggest there's significant room for improvement in the areas of developing and applying technology. The company is currently undertaking efforts to renew its aging fleet of jackups.
24	Key Energy Services	D	D	D	D	D	D	D	Survey respondents ranked Key at or near the bottom in multiple service attributes. The company's ongoing program to upgrade equipment should benefit its future performance.

<sup>1</sup>First Quartile = "A," Second Quartile = "B," Third Quartile = "C," Fourth Quartile = "D." See page 3 for questions underlying attribute grades. <sup>2</sup>The ratings and other information included in this report should not be deemed as making any assertions or conclusions regarding any company's financial condition or compliance with any applicable laws or regulations.

# 2004 WELLSITE CONTRACTORS SURVEY

## SATISFACTION SCORES BY SERVICE CATEGORY<sup>1</sup>

Number of evaluations shown in parentheses

### CONTRACT DRILLING – LAND

1	Precision Drilling (7)	100.0
2	Grey Wolf (14)	93.4
2	Helmerich & Payne (14)	93.4
	<b>Average</b>	<b>88.2</b>
4	Parker Drilling (8)	83.2
5	Nabors Industries (20)	79.8
6	Patterson-UTI (14)	79.5

### CONTRACT DRILLING – OFFSHORE<sup>2</sup>

1	Noble (11)	100.0
2	Transocean Sedco Forex (20)	96.1
3	GlobalSantaFe (15)	91.9
	<b>Average</b>	<b>89.6</b>
4	Diamond Offshore (12)	88.6
5	Nabors Industries (8)	81.6
6	ENSCO International (14)	79.4

### DRILLING-RELATED

1	Wood Group (9)	100.0
2	Frank's International (9)	96.1
3	Smith International (27)	95.2
4	M-I (33)	93.3
5	Frank's Casing Crew (15)	92.4
6	BJ Services (33)	92.2
	<b>Average</b>	<b>91.1</b>
7	Baker Hughes (49)	89.4
8	Halliburton (49)	88.2
9	Geoservices (7)	86.3
10	Schlumberger (45)	85.0
11	Weatherford (43)	83.7

### WELL COMPLETION

1	Frank's Casing Crew (9)	100.0
2	BJ Services (54)	99.1
3	Wood Group (15)	97.2
4	Halliburton (81)	95.8
5	Baker Hughes (58)	95.3
6	Expro Group (7)	94.2
	<b>Average</b>	<b>94.1</b>
7	Weatherford International (42)	93.6
8	M-I (9)	93.0
9	Schlumberger (70)	90.4
10	Key Energy Services (12)	82.4

### FORMATION & WELL EVALUATION

1	Schlumberger (85)	100.0
1	Baker Hughes (41)	100.0
	<b>Average</b>	<b>95.1</b>
3	Halliburton (46)	90.3
4	Geoservices (10)	90.1

### WORKOVERS & WELL SERVICING

1	BJ Services (48)	100.0
2	Schlumberger (48)	98.9
3	Halliburton (53)	98.6
	<b>Average</b>	<b>91.3</b>
4	Baker Hughes (38)	90.9
5	Wood Group (9)	88.4
6	Weatherford International (32)	85.4
7	Key Energy Services (24)	77.0

## SERVICE CATEGORY DEFINITIONS

<b>Contract Drilling – Land</b>	Includes rigs and rig personnel.
<b>Contract Drilling – Offshore</b>	Includes rigs and rig personnel.
<b>Drilling-related</b>	Includes casing and cementing, drilling muds and fluids, underbalanced drilling, directional and horizontal drilling, specialty drilling, drill bit services, coring, open-hole fishing, and related services.
<b>Formation &amp; Well Evaluation</b>	Includes mud logging, wireline logging, measurement-while-drilling, cased-hole logging, drill-stem testing, and related services.
<b>Well Completion</b>	Includes production tubing installation, fracturing and acidizing, completion fluids, perforation, sand control, and related services.
<b>Workovers &amp; Well Servicing</b>	Includes fracturing and acidizing, coiled tubing, production chemicals, sand control, re-entry and re-completions, cased-hole fishing, artificial lift, and related services.

<sup>1</sup>All global regions, customer types and well types. <sup>2</sup>Both shelf and deepwater.



# 2004 WELLSITE CONTRACTORS SURVEY

## SATISFACTION SCORES BY GLOBAL REGION & WELL TYPE<sup>1</sup>

*Number of evaluations shown in parentheses*

### GLOBAL REGIONS

#### U.S. & CANADA

1	Transocean Sedco Forex (11)	100.0
2	Precision Drilling (9)	95.5
3	Frank's International (7)	93.3
3	Grey Wolf (14)	93.3
5	Helmerich & Payne (17)	93.0
6	Smith International (27)	92.5
7	M-I (24)	91.7
8	Frank's Casing Crew (23)	90.7
9	Wood Group (21)	90.0
10	BJ Services (58)	89.5
	<b>Average</b>	<b>87.7</b>
11	Diamond Offshore (14)	87.6
12	Baker Hughes (64)	87.5
13	Weatherford International (52)	86.4
14	Schlumberger (80)	86.1
15	Halliburton (81)	85.6
16	Noble (9)	84.0
17	GlobalSantaFe (7)	83.5
18	ENSCO International (8)	80.2
18	Nabors Industries (26)	80.2
20	Patterson-UTI (15)	79.4
21	Key Energy Services (32)	71.3

#### LATIN AMERICA

1	BJ Services (12)	100.0
2	Schlumberger (16)	99.7
3	Halliburton (11)	97.9
4	Baker Hughes (11)	96.7
	<b>Average</b>	<b>96.3</b>
5	Weatherford International (10)	87.3

#### EUROPE & FSU

1	Baker Hughes (10)	100.0
2	BJ Services (8)	98.4
	<b>Average</b>	<b>91.0</b>
3	Weatherford International (8)	87.5
4	Schlumberger (10)	86.3
5	Halliburton (11)	83.0

#### MIDDLE EAST & AFRICA

1	M-I (8)	100.0
2	Transocean Sedco Forex (7)	93.8
3	BJ Services (11)	91.2
4	Halliburton (25)	90.3
5	GlobalSantaFe (9)	90.2
6	Baker Hughes (22)	89.6
	<b>Average</b>	<b>89.2</b>
7	Schlumberger (28)	85.7
8	Weatherford International (18)	73.0

#### ASIA PACIFIC

1	BJ Services (12)	100.0
2	Schlumberger (18)	98.2
3	Baker Hughes (15)	91.8
	<b>Average</b>	<b>91.8</b>
4	Halliburton (15)	89.3
5	Weatherford International (10)	79.6

### WELL TYPES

#### LAND

1	Precision Drilling (14)	100.0
2	Grey Wolf (14)	94.2
3	Smith International (25)	93.0
4	Helmerich & Payne (14)	92.6
5	BJ Services (66)	90.6
5	Frank's Casing Crew (12)	90.6
7	Baker Hughes (68)	90.2
8	Wood Group (19)	88.3
9	Schlumberger (91)	87.5
	<b>Average</b>	<b>87.5</b>
10	M-I (18)	87.4
11	Parker Drilling (7)	86.0
12	Halliburton (89)	85.9
13	Geoservices (11)	83.1
14	Weatherford International (60)	82.5
15	Nabors Industries (22)	82.0
16	Patterson-UTI (15)	80.2
17	Key Energy Services (32)	73.0

#### SHELF

1	Noble (7)	100.0
2	Smith International (10)	93.0
3	Diamond Offshore (8)	91.8
4	M-I (19)	90.6
5	Frank's International (10)	88.4
6	BJ Services (30)	87.6
7	Schlumberger (44)	85.5
	<b>Average</b>	<b>84.5</b>
8	Frank's Casing Crew (9)	84.2
9	GlobalSantaFe (16)	83.2
10	Transocean Sedco Forex (9)	82.9
11	Baker Hughes (44)	82.4
12	Halliburton (46)	82.3
13	Expro Group (9)	81.6
14	Weatherford International (29)	79.5
15	Geoservices (7)	75.4
16	ENSCO International (11)	75.1
17	Nabors Industries (7)	73.8

#### DEEPWATER

1	M-I (13)	100.0
2	Transocean Sedco Forex (12)	96.0
3	Frank's Casing Crew (11)	94.3
	<b>Average</b>	<b>88.8</b>
4	Halliburton (15)	88.2
5	Diamond Offshore (9)	87.4
6	Weatherford International (15)	82.9
7	Schlumberger (20)	82.7
8	Baker Hughes (20)	79.3

<sup>1</sup>All service categories, customer types and well types.



## ABOUT ENERGYPOINT RESEARCH

### OUR FOCUS

EnergyPoint's objective is to provide independent and useful research regarding E&P companies' satisfaction with the oilfield services they purchase. We offer E&P professionals and their employers opportunities to provide comprehensive and **confidential** feedback to oilfield service companies through objective and independent evaluation processes. In return for participating in our surveys, respondents and their employers receive **complimentary survey results** in the form of EnergyPoint *MarketPartners*<sup>SM</sup> Reports.

### UPSTREAM *MARKETPARTNERS*<sup>SM</sup> PROGRAM

Through our *MarketPartners*<sup>SM</sup> Program, EnergyPoint regularly surveys significant cross-sections of experienced E&P industry participants involved in the selection and management of oilfield service providers. Survey participants range from managers at some of the world's largest energy companies to field personnel at small regional independents. For more information on EnergyPoint Research and our *MarketPartners*<sup>SM</sup> Program, go to [www.energypointresearch.com](http://www.energypointresearch.com).

### SURVEYS & REPORTS

To help ensure that our research is both relevant and timely, EnergyPoint's surveys focus on the products, services, market segments and geographic regions purchasers of oilfield services tell us are most important. We design our surveys to measure satisfaction by service attribute, customer and provider type/size, service category, geographic region, well type, respondent title/experience and other appropriate measures. We offer survey results to producers and service contractors in two separate forms:

**MARKETPARTNERS**<sup>SM</sup> **REPORTS** — Through our Upstream *MarketPartners*<sup>SM</sup> Program, EnergyPoint provides complimentary survey results to all survey participants and their employers in the form of our *MarketPartners*<sup>SM</sup> Reports. These high-quality reports are designed to **set the standard** for market-based evaluations in the E&P sector and provide a useful tool for understanding the performance of oilfield service providers.

**PROVIDER REPORTS** — EnergyPoint also publishes comprehensive reports designed for use by providers of oilfield services. These proprietary reports, for which EnergyPoint charges a fee, contain **detailed results** from our surveys plus **analysis** designed to assist companies in identifying and responding to the **specific factors** producers consider when assessing their satisfaction with oilfield service providers. By providing information that is comprehensive and consistent with the data presented in our *MarketPartners*<sup>SM</sup> Reports, EnergyPoint hopes to help foster improvements in provider service and performance.

### CONFIDENTIALITY

EnergyPoint takes great care to maintain appropriate levels of **confidentiality** and **anonymity** related to the data it collects. While individuals' and companies' aggregated responses are included in EnergyPoint's various published reports related to the 2004 Wellsite Contractors Survey, the names and the specific responses of individual respondents and their employers are not divulged.

### LEARN MORE

To learn more about EnergyPoint Research and our commitment to the E&P sector, visit the company's website at [www.energypointresearch.com](http://www.energypointresearch.com). You may also e-mail us at [MarketPartners@EPRResearch.com](mailto:MarketPartners@EPRResearch.com) or call us at 713.529.9450.

**... BECAUSE THE RIGHT PARTNERS CAN MAKE ALL THE DIFFERENCE**

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