

Oilfield Services Suppliers

Customer Satisfaction



DETAILED RATINGS & ANALYSIS REPORT

ENERGYPOINT
RESEARCH

E&P companies and upstream professionals worldwide rated suppliers in EnergyPoint's most recent Oilfield Services Customer Satisfaction Survey. These respondents have significant and industry-wide impact on the selection and utilization of oilfield services suppliers globally. In aggregate, results in this closely watched report offer insightful and impactful information regarding the current state of customer satisfaction in the global oilfield services sector.

EnergyPoint conducts the only truly independent surveys in the industry that reveal the comprehensive and ongoing opinions of purchasing decision-makers, influencers and users concerning major industry suppliers. This particular report offers highly relevant detail, timely information, and unique analysis regarding how customers rate major oilfield services suppliers across 40+ attributes, categories, regions and well types. It is an acknowledged "must have" for services suppliers seeking to understand how their own, and their competitors', offerings align with the needs of customers across the industry.

Incorporating results from thousands of comprehensive evaluations by qualified respondents at E&P companies and upstream consultants worldwide, the report provides an unprecedented framework for identifying and tracking the relative strengths and weaknesses of individual oilfield services suppliers.

VALUE OF THIS REPORT

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

PROFILE OF SURVEY RESPONDENTS

All indicated having "significant experience" in selecting or utilizing oilfield services suppliers.

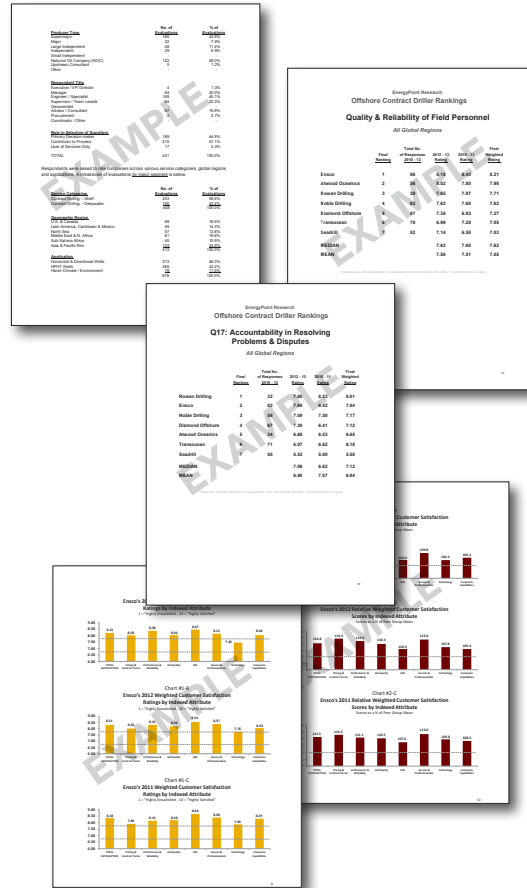
Over 90% indicated having primary decision-making responsibility or involvement in the supplier-selection process.

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
- Engineer/Specialist
- Supervisor/Team Leader
- Advisor/Consultant
- Procurement/SCM
- Coordinator/other

Participation from a range of customer types, including: U.S. and international supermajors, majors, independents, NOCs and upstream consultants.



Some of the Attributes Rated

- Overall satisfaction and as specified
- Willingness to recommend
- Prices and contract terms vs. competitors
- Prices paid vs. quality received (value)
- Quality and reliability of field personnel
- Quality and reliability of office personnel
- Quality, reliability and condition of field equipment
- Ability to develop value-creating technologies and processes
- Ability to apply both in-house and third party technologies
- Ability to complete jobs on schedule
- Quality of post-job reporting and review
- Ability to apply lessons learned and continually approved
- Application of in-house HSE policies & procedures
- Respect for other companies' HSE policies & procedures
- Flexibility and responsiveness to customer's needs
- Accountability in resolving problems and disputes
- Quality of pre-job planning and design
- Perceived HSE record
- + Others

Oilfield Services Suppliers Rated

- Archer
- Baker Hughes
- Basic Energy Services
- BJ Services
- Bourbon Offshore
- C&J Energy Services
- Calfrac Well Services
- CGG
- Core Laboratories
- Delmar Systems
- DistributionNOW
- Expro
- Frank's International
- FTS International
- Halliburton
- InterMoor
- Key Energy Services
- Liberty Oilfield Services
- Mammoth Energy Services
- MRC Global
- Nabors Industries
- Newpark Resources
- Nine Energy Service
- Petroleum Geo-Services (PGS)
- ProPetro
- RPC
- Sanjel
- Schlumberger
- Scientific Drilling
- Superior Energy Services
- TETRA Technologies
- Tidewater
- Weatherford International

DETAILED RATINGS

EnergyPoint's Oilfield Services Suppliers Report is designed for suppliers and other industry participants and stakeholders interested in understanding, in specific terms, how major oilfield services suppliers rate across 40+ attributes, categories, regions and well types.

The detailed ratings portion of the 100+ page report contains data, tables, graphs, background and other specifics from EnergyPoint's Oilfield Services Survey. Contents include 1-to-10 point ratings, top-to-bottom rankings, evaluation counts, category means and medians, for multiple attributes, categories, regions, well types and applications. 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 oilfield services sector. Considered the "roadmap" by many in the industry, the report provides insights as to why customer satisfaction matters, how suppliers can better manage their performance, and understand which organizational resources can be most 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

- Geophysical Services
- Directional Drilling
- MWD
- Drilling Fluids
- Cementing
- Fishing
- Wireline Logging
- LWD
- Core & Fluids Analysis
- Well Testing
- Casing & Tubing Installation
- Perforating
- Hydraulic Fracturing
- Sand Control
- Workovers & Well Servicing
- Mooring Services
- Marine Transport Services

- Oilfield Supply & Distribution
- Plug & Abandonment

International Regions

- Latin America, Caribbean & Mexico
- Western Europe & North Sea
- Middle East & N. Africa
- Sub-Sahara Africa
- Asia & Pacific Rim

U.S. & Canada

- Onshore Gulf Coast
- Gulf of Mexico
- Interior Texas & Mid-continent
- U.S. Rockies & Dakotas
- Ark-La-Tex
- Bakken-Dakotas
- California

- Alaska
- Appalachia & Marcellus
- Canada

Well Types

- Land Wells
- Shelf Wells
- Deepwater Wells
- Ultra-deepwater Wells

Application Types

- Horizontal & Directional Wells
- High-pressure/High-temperature Wells
- Harsh-climate/Harsh-environment Wells
- Under-balanced/Managed-pressure Wells

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 oilfield services suppliers across 40+ attributes, categories, regions and well types.
- Identification 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 suppliers 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 customers of oilfield services suppliers.

"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 hundreds of 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

