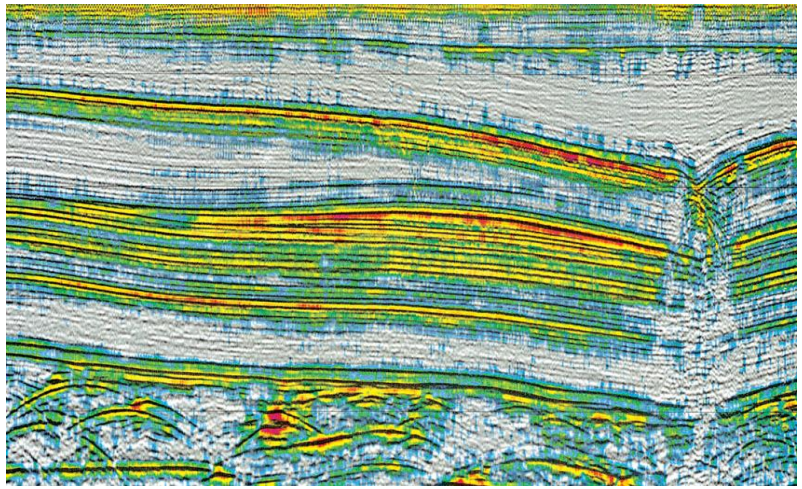
2018 G&G Software
- Supplier Performance Report-



Kimberlite
International Oilfield Research

This report presents the results of in-depth, personal interviews with decision makers within oil and gas exploration & production companies operating in 46 countries around the world.

A total of 289 interviews were conducted for the project and the interviews lasted approximately 30 minutes.
The interviews were conducted in January through March, 2018.

If you have any questions or a need for additional information regarding the contents of this summary please contact a Kimberlite representative at the number or email address listed below.

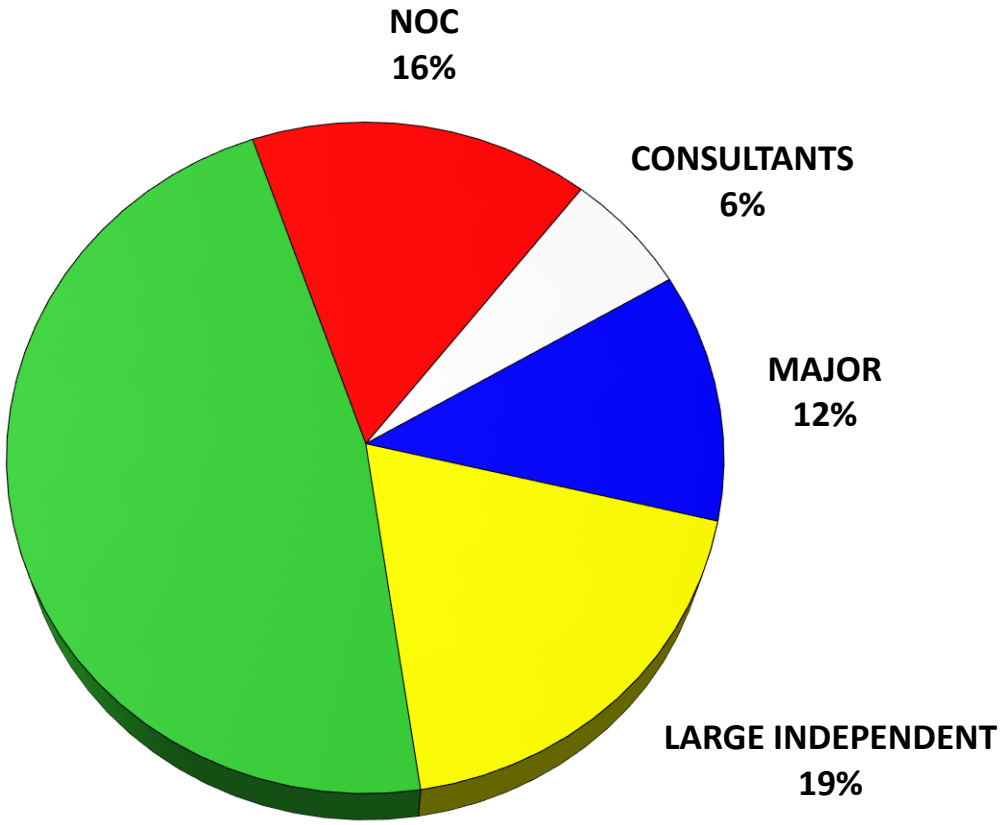
Kimberlite International Oilfield Research
460 Wildwood Forest Drive, Suite 125s
The Woodlands, Texas 77380
281-771-3800 www.kimberliteresearch.com

David Bat
Direct: 281-771-3801
Mobile: 713-304-4946
david.bat@kimberliteresearch.com

Mike Stovall
Direct: 281-771-3802
Mobile: 713-269-0356
mike.stovall@kimberliteresearch.com

CHARACTERISTICS OF THE SAMPLE

COMPANY TYPE

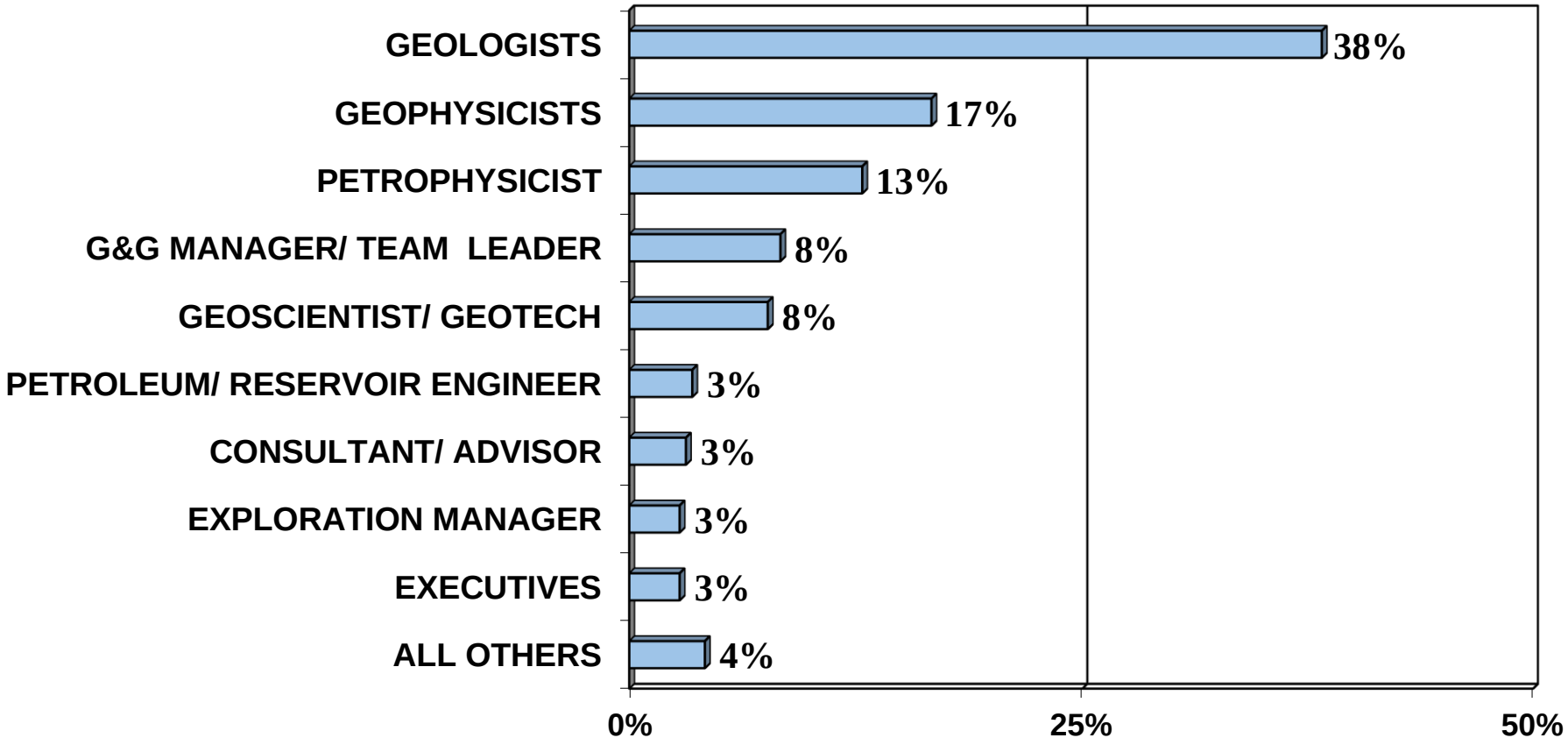


TOTAL RESPONDENTS:
289
NORTH AMERICA - 55%
INTERNATIONAL - 45%

PERCENT OF TOTAL SAMPLE

CHARACTERISTICS OF THE SAMPLE

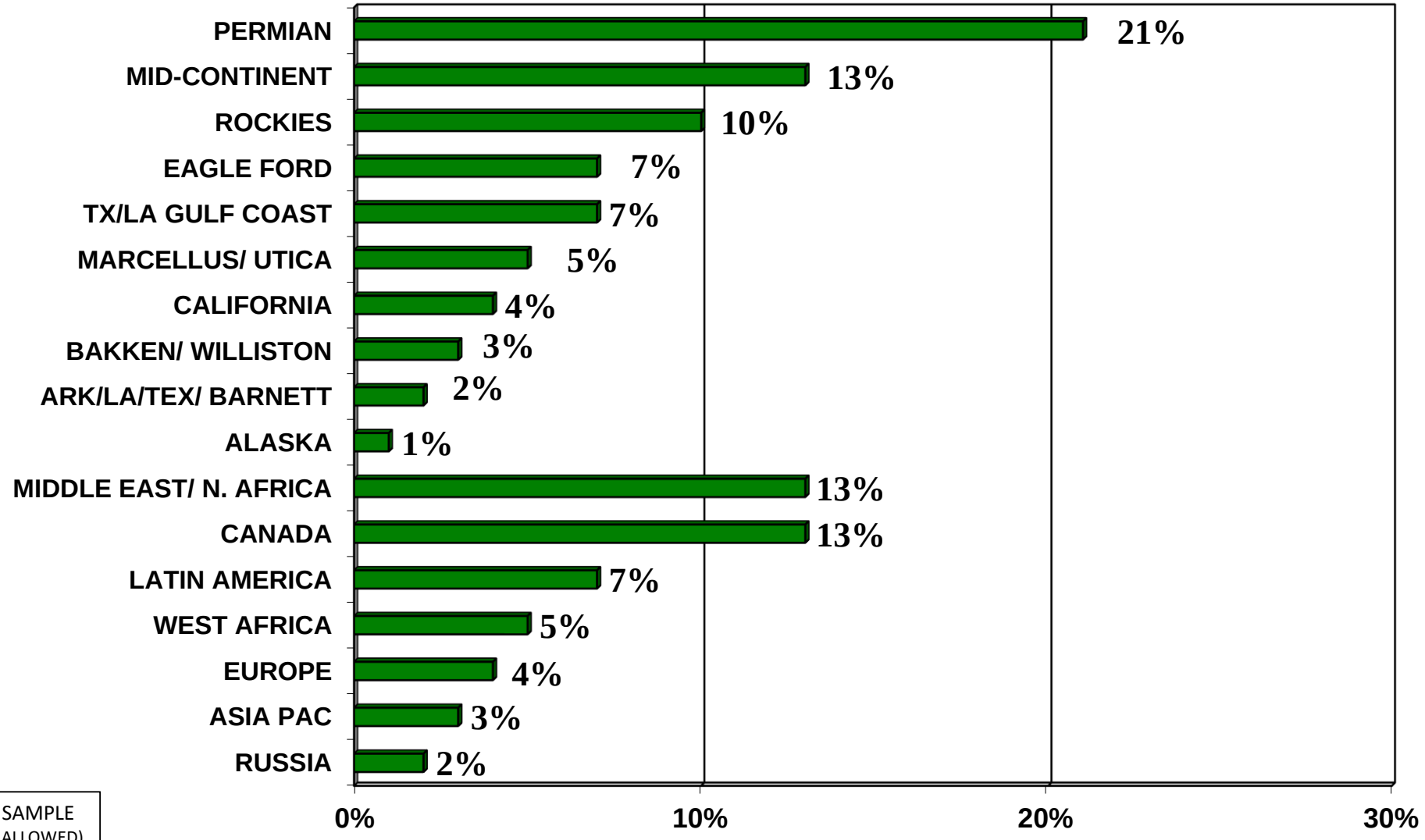
TITLE OF RESPONDENT



PERCENT OF TOTAL SAMPLE

CHARACTERISTICS OF THE SAMPLE

GEOGRAPHIC REGIONS OF ACTIVITY - LAND

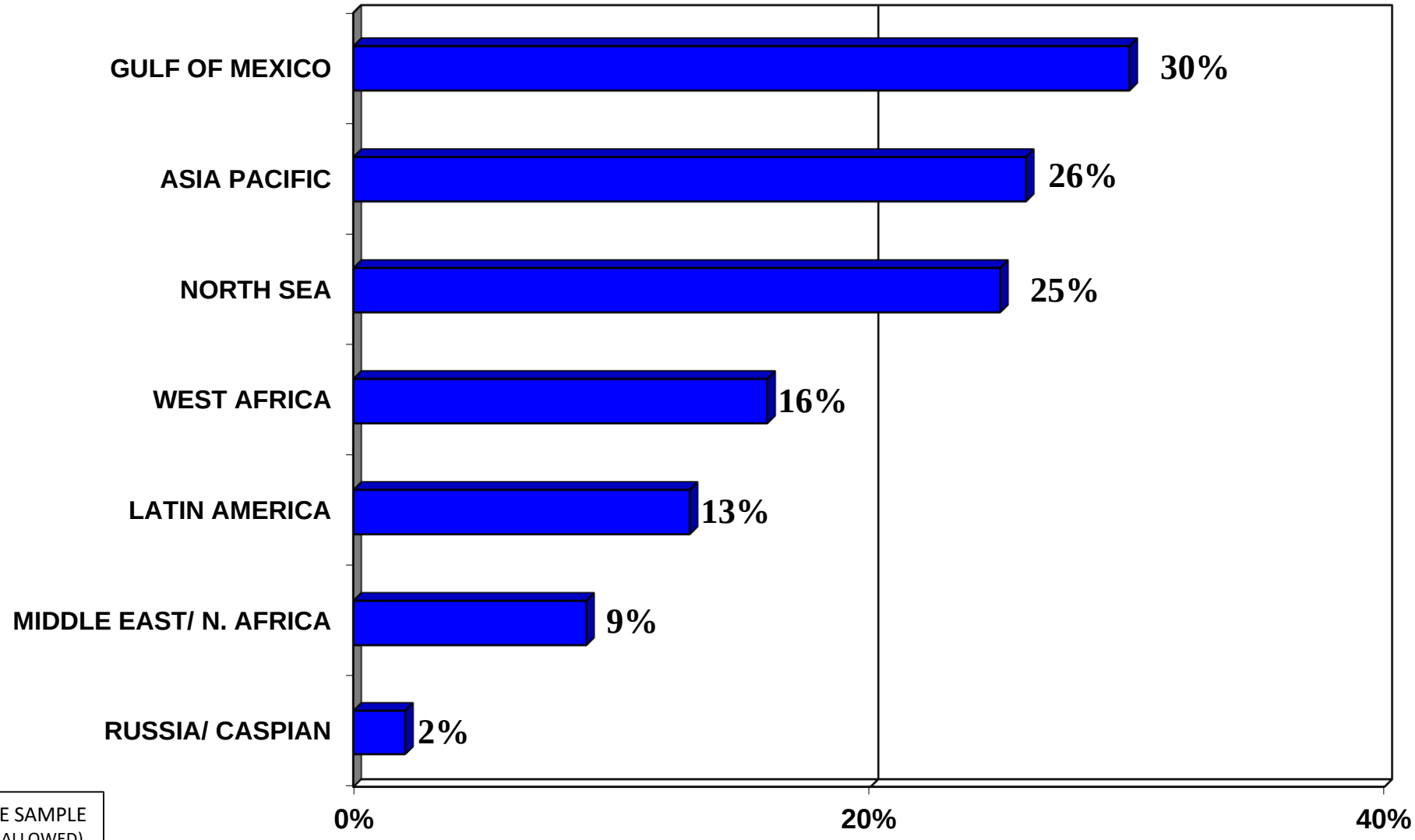


208 RESPONDENTS

PERCENT OF LAND SAMPLE
(MULTIPLE RESPONSES ALLOWED)

CHARACTERISTICS OF THE SAMPLE

GEOGRAPHIC REGIONS OF ACTIVITY - MARINE



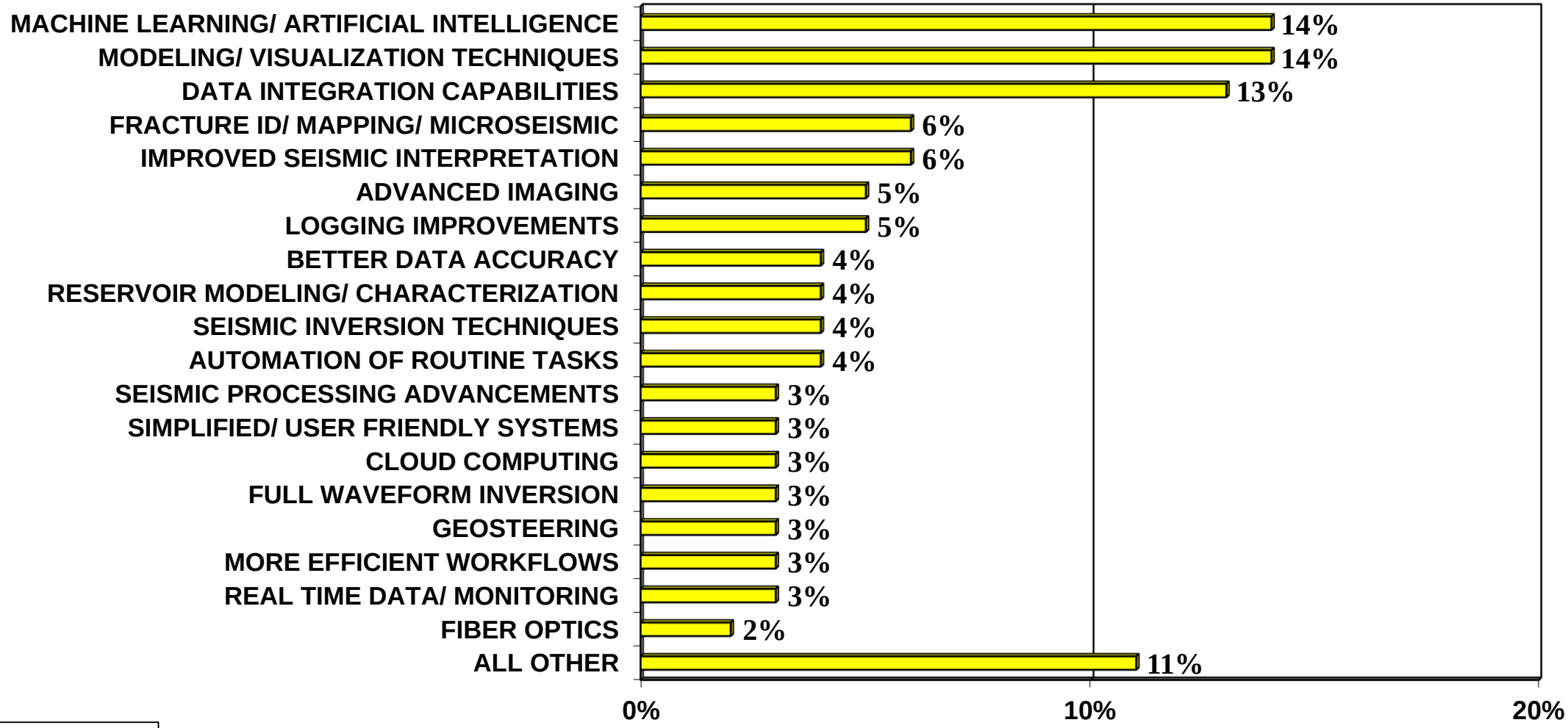
89 RESPONDENTS

PERCENT OF MARINE SAMPLE
(MULTIPLE RESPONSES ALLOWED)

WORLDWIDE

EMERGING TECHNOLOGIES WITH GREATEST POTENTIAL

TO INCREASE PRODUCTIVITY, REDUCE RISK AND PROVIDE COST SAVING BENEFITS

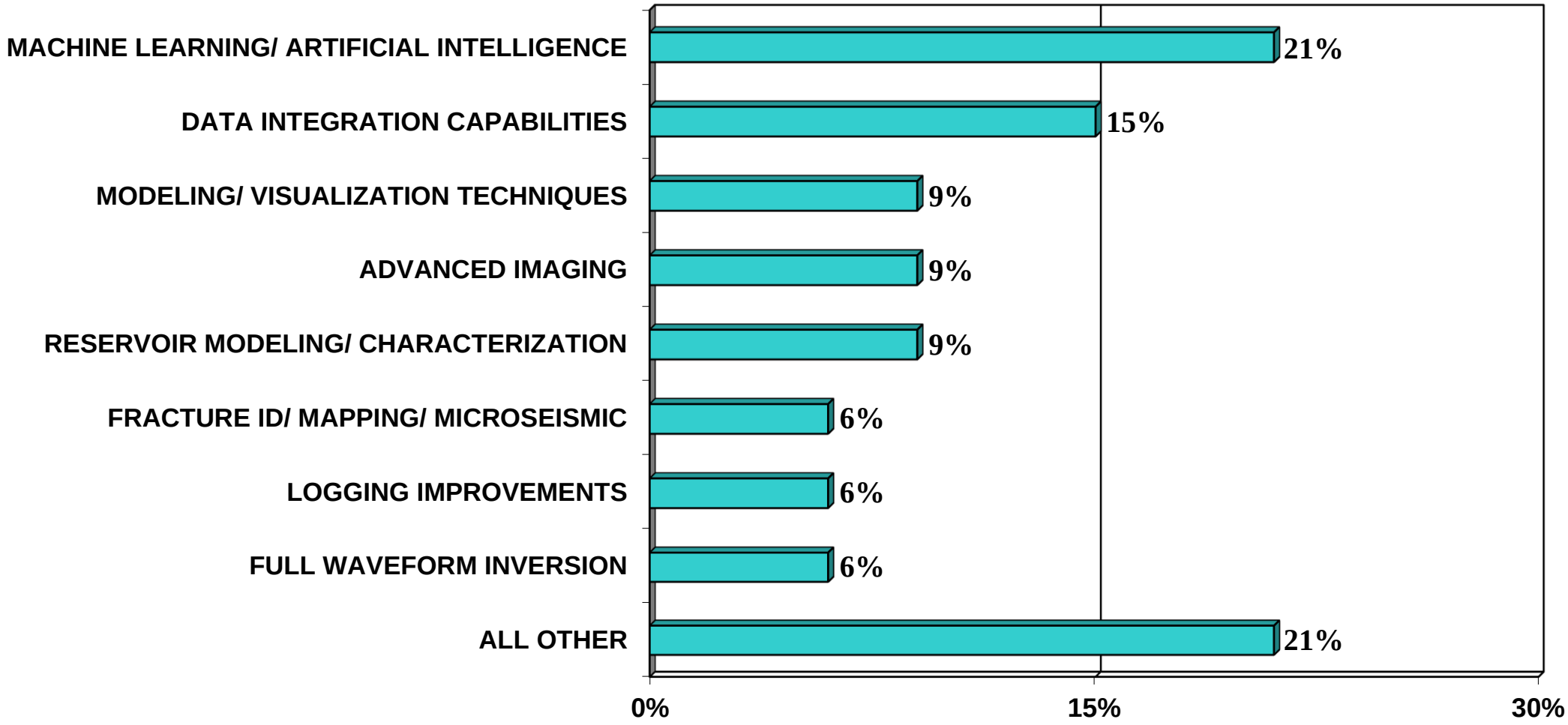


PERCENT OF TOTAL SAMPLE

MAJORS

EMERGING TECHNOLOGIES WITH GREATEST POTENTIAL

TO INCREASE PRODUCTIVITY, REDUCE RISK AND PROVIDE COST SAVING BENEFITS

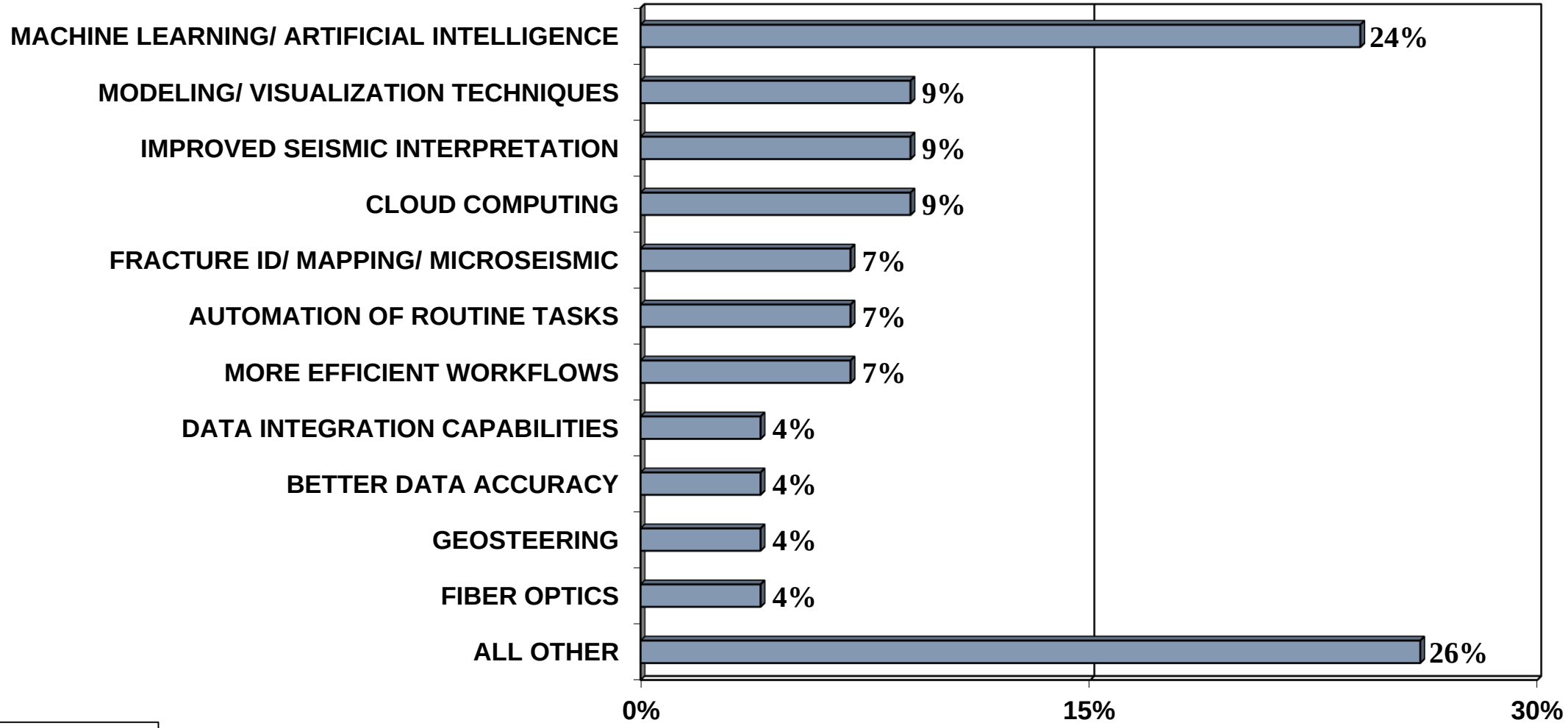


PERCENT OF TOTAL SAMPLE

LARGE INDEPENDENTS

EMERGING TECHNOLOGIES WITH GREATEST POTENTIAL

TO INCREASE PRODUCTIVITY, REDUCE RISK AND PROVIDE COST SAVING BENEFITS

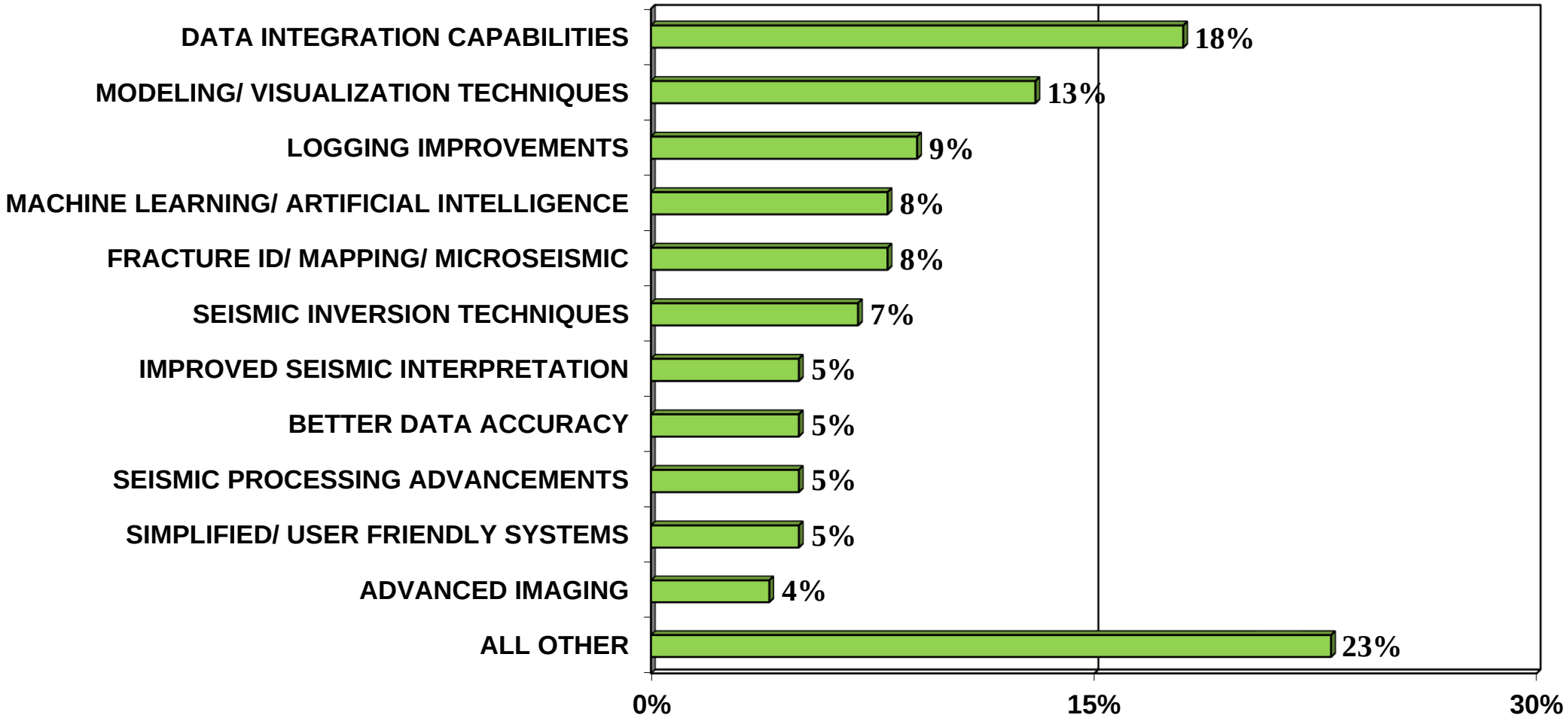


PERCENT OF TOTAL SAMPLE

MED/ SMALL INDEPENDENTS

EMERGING TECHNOLOGIES WITH GREATEST POTENTIAL

TO INCREASE PRODUCTIVITY, REDUCE RISK AND PROVIDE COST SAVING BENEFITS

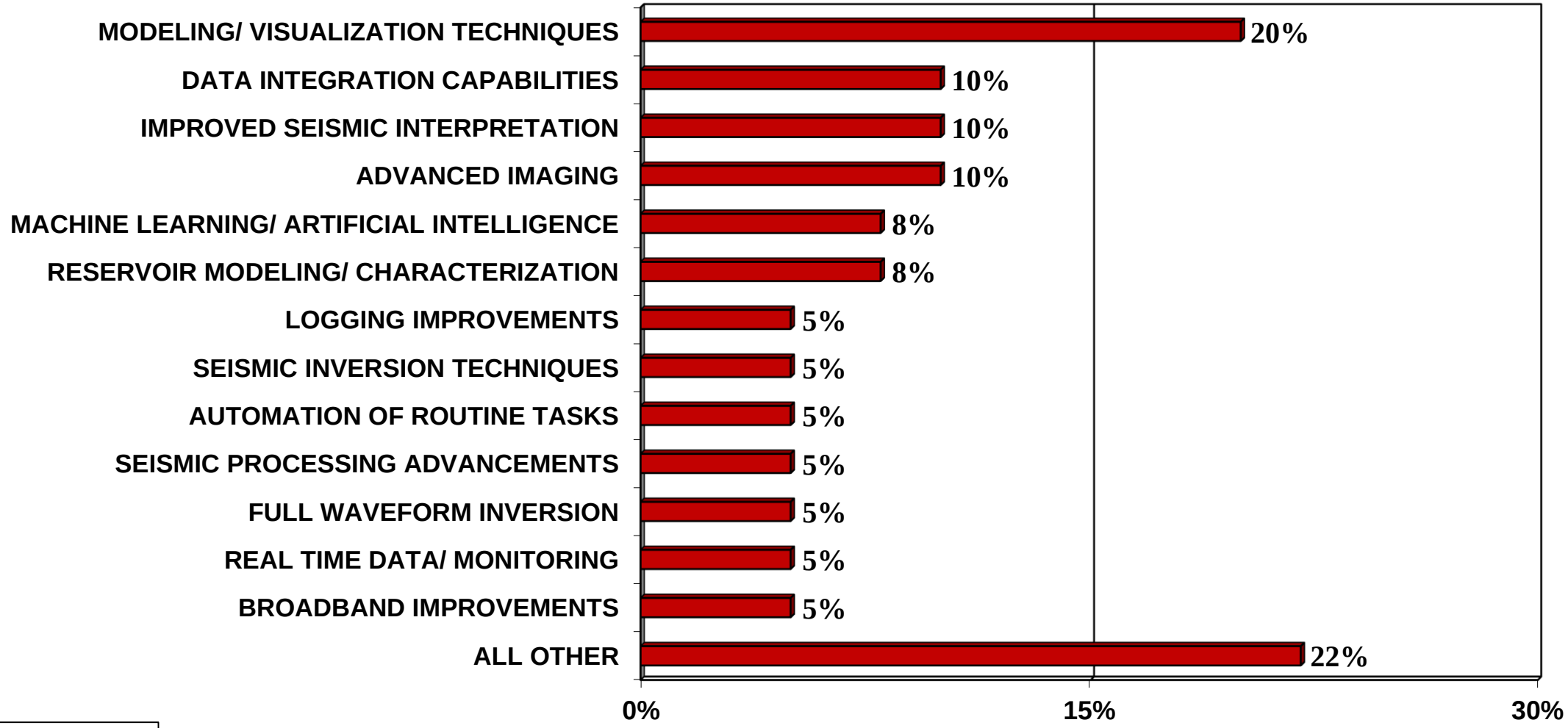


PERCENT OF TOTAL SAMPLE

NOC

EMERGING TECHNOLOGIES WITH GREATEST POTENTIAL

TO INCREASE PRODUCTIVITY, REDUCE RISK AND PROVIDE COST SAVING BENEFITS



PERCENT OF TOTAL SAMPLE

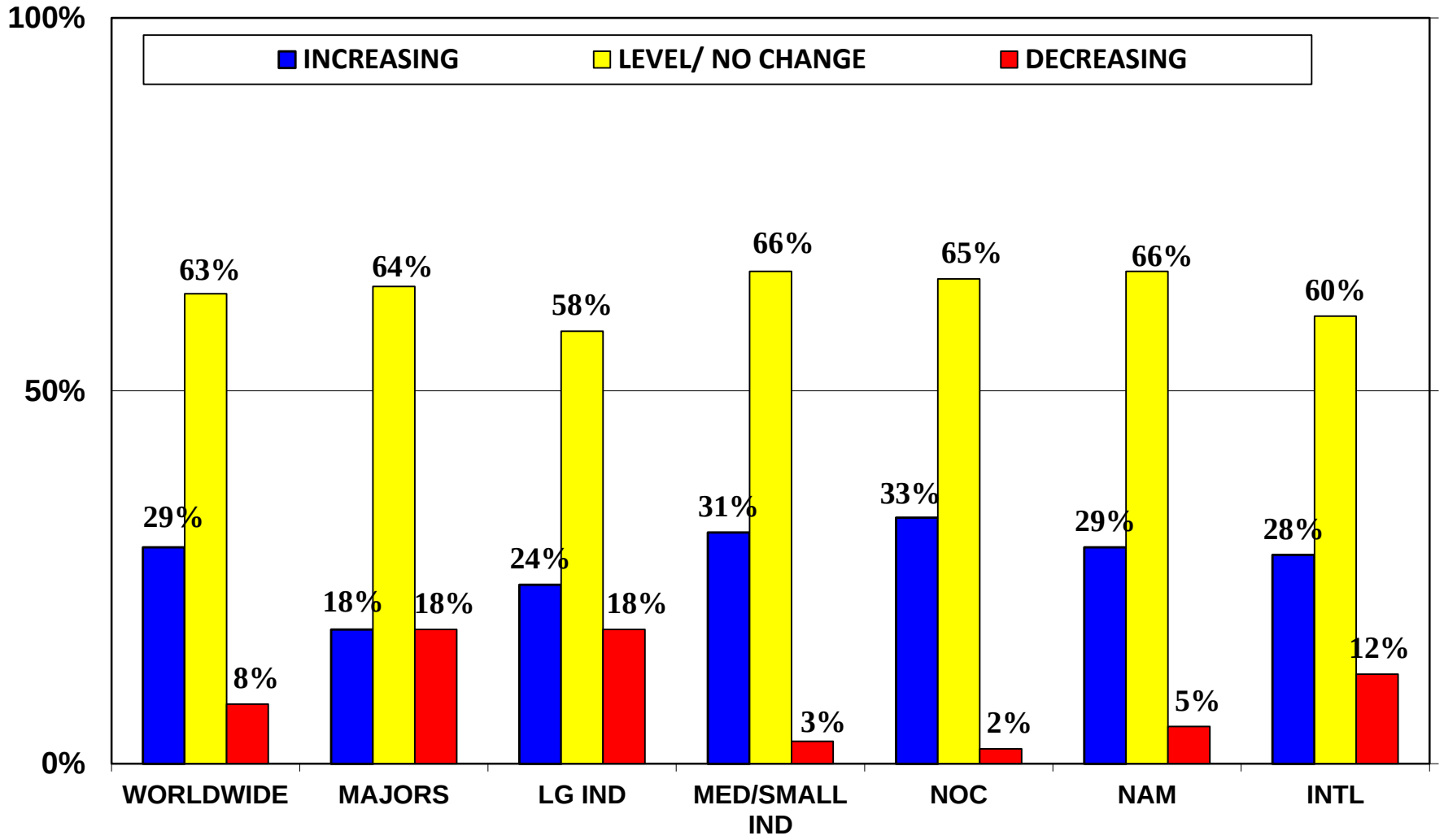
TREND IN G&G SOFTWARE EXPENDITURES OVER NEXT 12 MONTHS
vs PAST 12 MONTHS

Respondent sentiment is presented in the form of a diffusion index.

The calculation is:
*(% Increasing*1) +*
*(% No Change*0.5)*

If 100% of the respondents reported an increase, the index would be 100.0. If 100% reported a decrease, the index would be zero. If 100% saw no change, the index would be 50.0

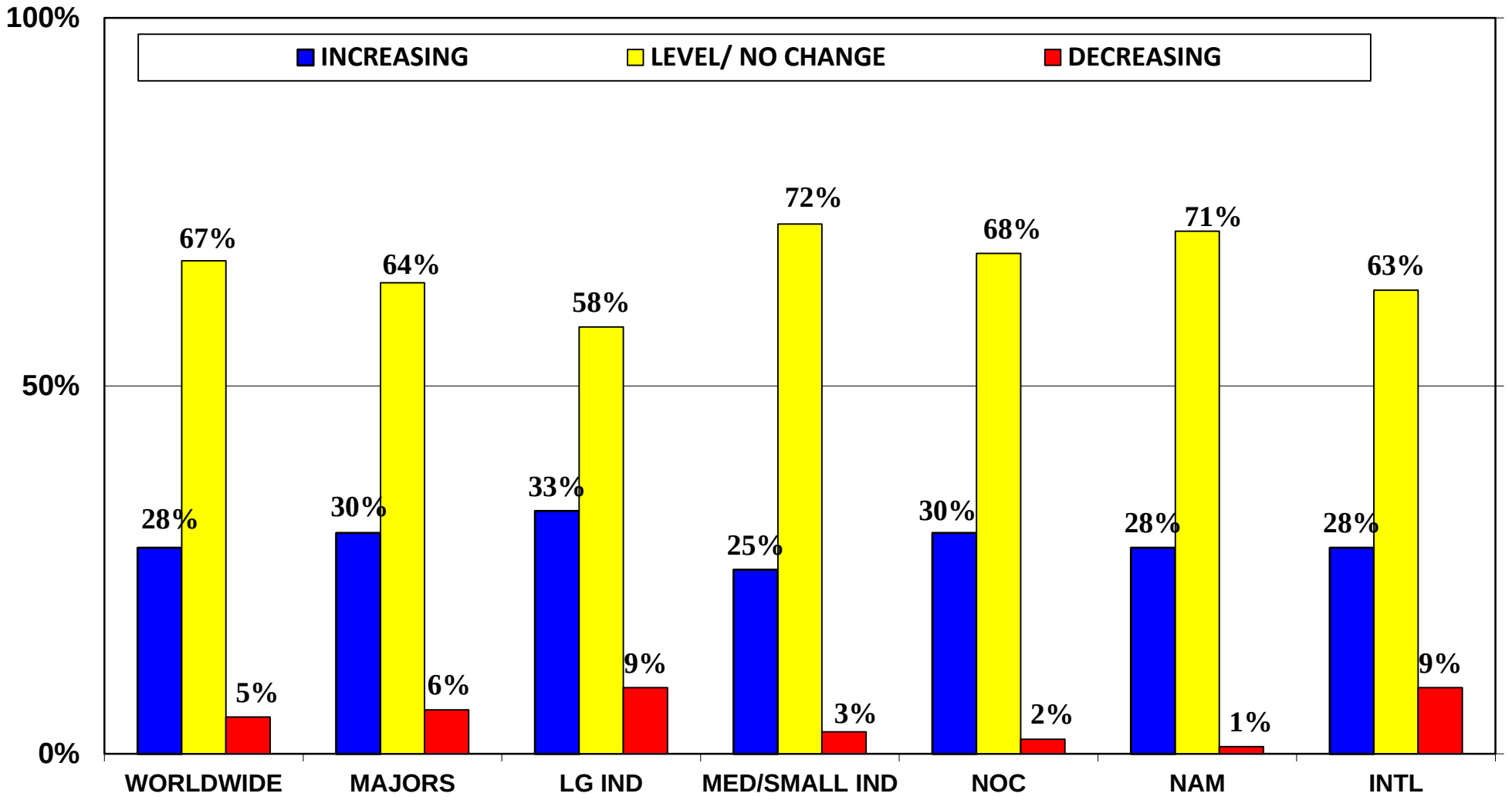
Therefore, a number over 50.0 indicates an improvement, while anything below 50.0 suggests a decline.



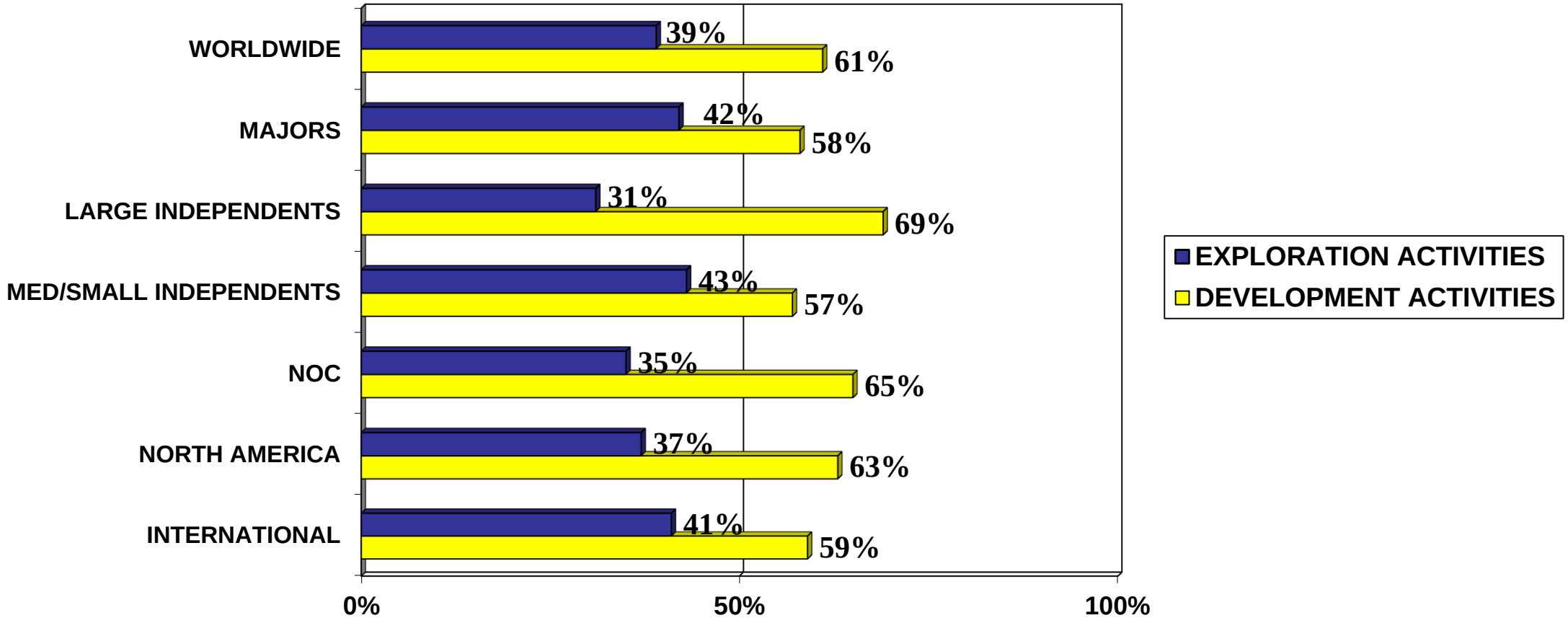
RESPONDENT SENTIMENT (DIFFUSION INDEX)	60.5	50.0	53.0	64.0	65.5	62.0	58.0

TREND IN USE OF LATEST G&G SOFTWARE TECHNOLOGY

NEXT 12 MONTHS vs PAST 12 MONTHS

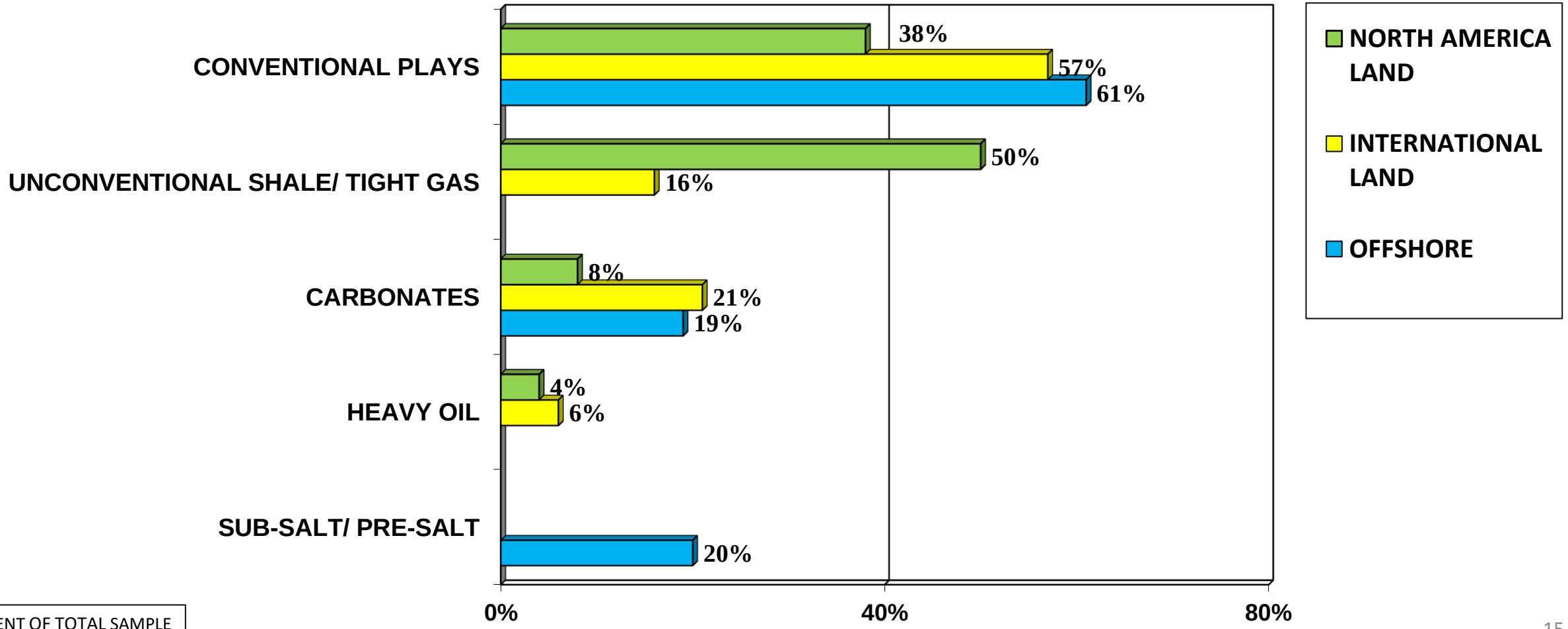


EXPLORATION vs DEVELOPMENT ACTIVITIES
WHERE IS GEOSCIENCE TEAM'S TIME SPENT



AVERAGE PER COMPANY

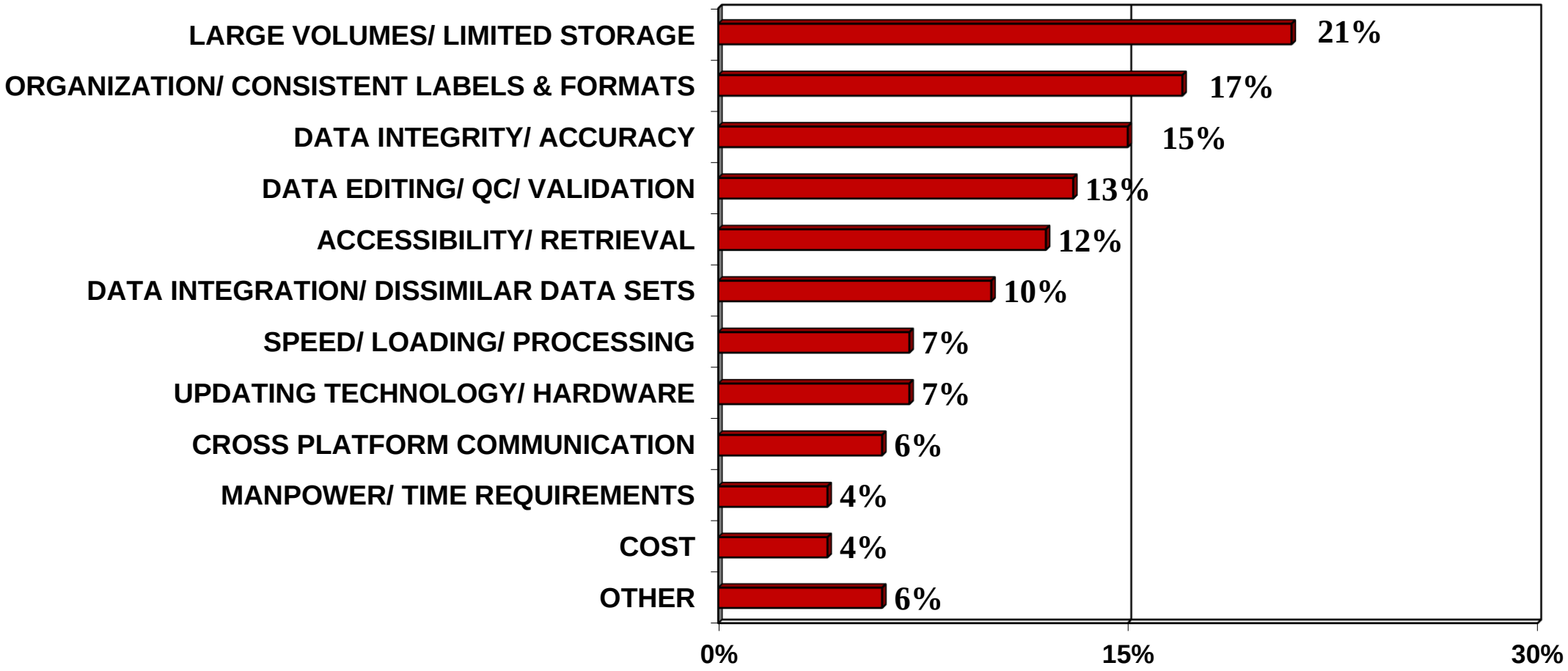
SHARE OF G&G EVALUATIONS TARGETING SELECTED FORMATIONS



PERCENT OF TOTAL SAMPLE

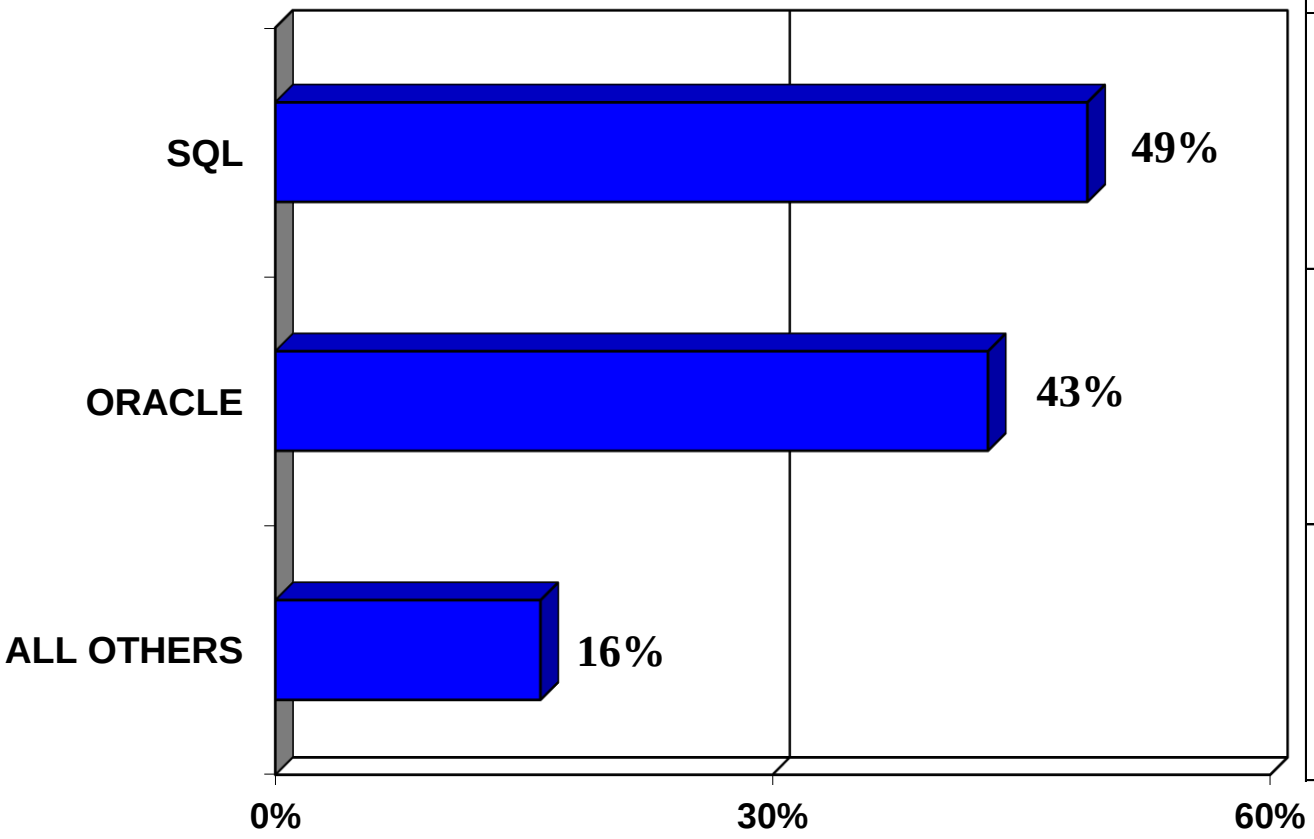
WORLDWIDE

TOP CHALLENGES MANAGING G&G DATA



PERCENT OF TOTAL SAMPLE

DATABASE TECHNOLOGIES USED

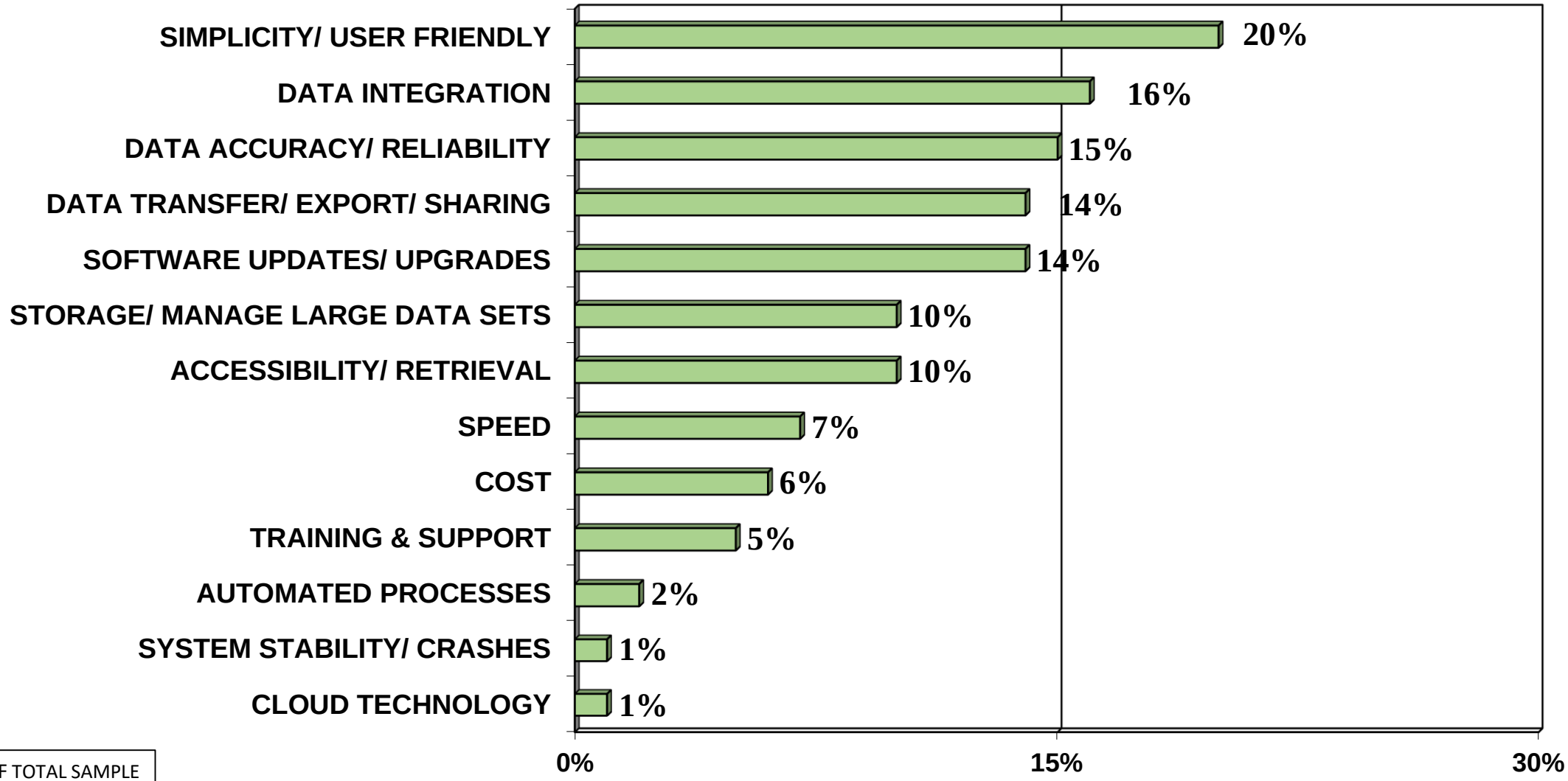


MAJORS	LG. IND	MED/ SMALL IND	NOC	NAM	INTL
46%	51%	55%	29%	58%	42%
58%	46%	33%	65%	31%	53%
8%	13%	21%	10%	18%	14%

PERCENT OF TOTAL SAMPLE
(MULTIPLE RESPONSES ALLOWED)

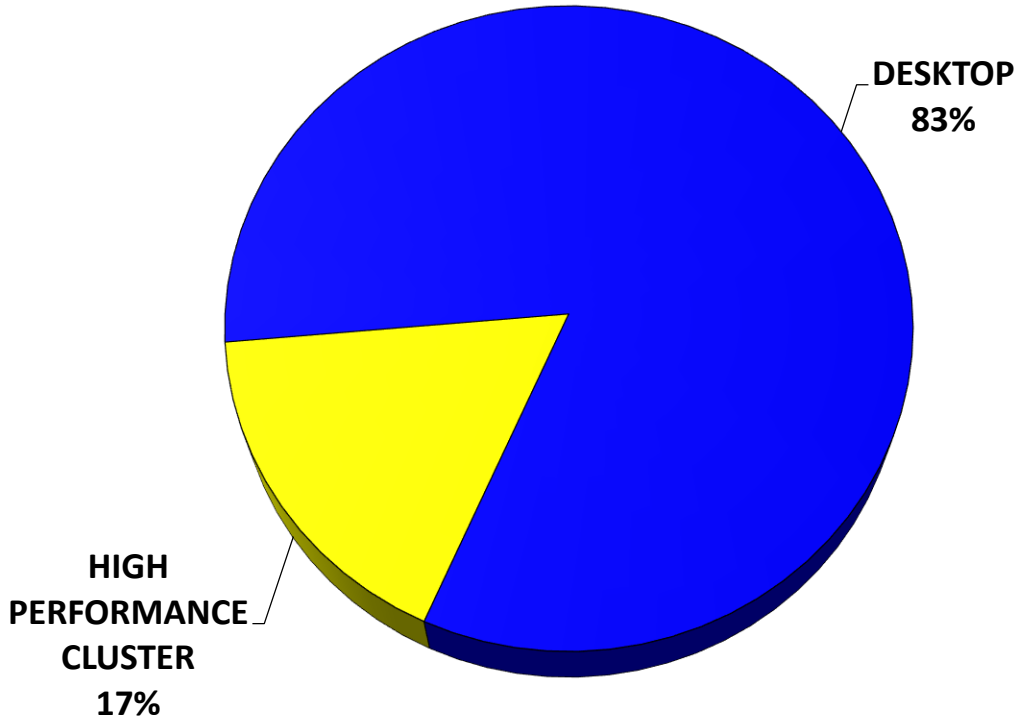
WORLDWIDE

DESIRED IMPROVEMENTS IN DATABASE APPLICATIONS



PERCENT OF TOTAL SAMPLE

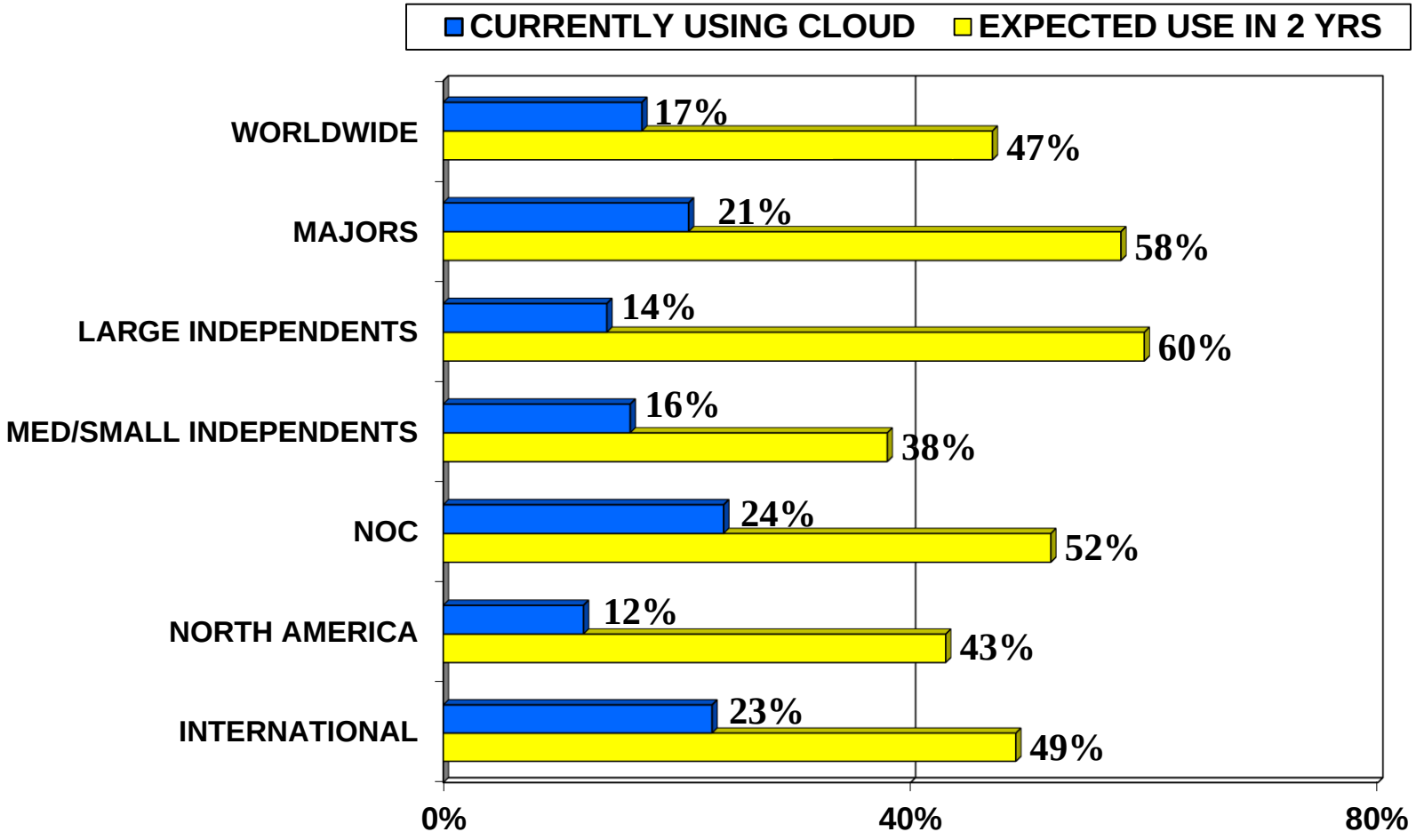
DESKTOP COMPUTING vs HIGH PERFORMANCE CLUSTERS
AVERAGE SHARE OF WORK



	MAJORS	LG. IND	MED/ SMALL IND	NOC	NAM	INTL
DESKTOP	71%	84%	91%	60%	94%	69%
CLUSTER	29%	16%	9%	40%	6%	31%

AVERAGE SHARE OF WORK

PERCENT OF RESPONDENTS USING THE CLOUD FOR G&G SOFTWARE APPLICATIONS



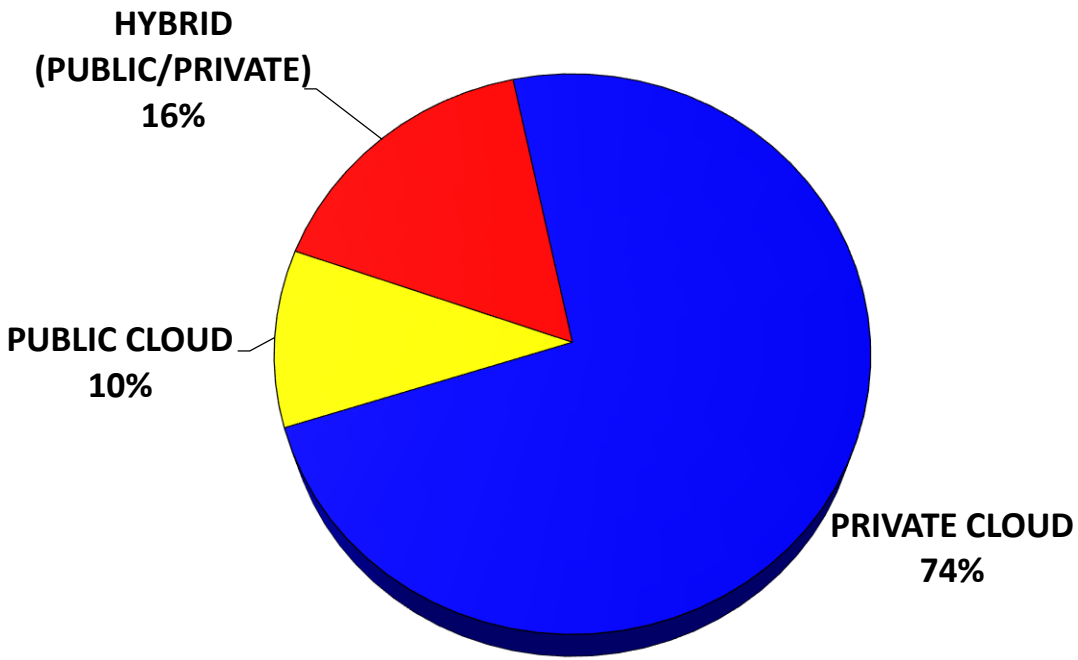
AVERAGE PERCENT OF G&G APPLICATIONS ACCESSED FROM CLOUD	
CURRENT USE	FUTURE (2 YRS)
7%	23%
10%	28%
4%	36%
7%	17%
11%	24%
4%	18%
10%	28%

83% OF RESPONDENTS REPORT NO CURRENT USE OF THE CLOUD TO ACCESS G&G SOFTWARE APPLICATIONS

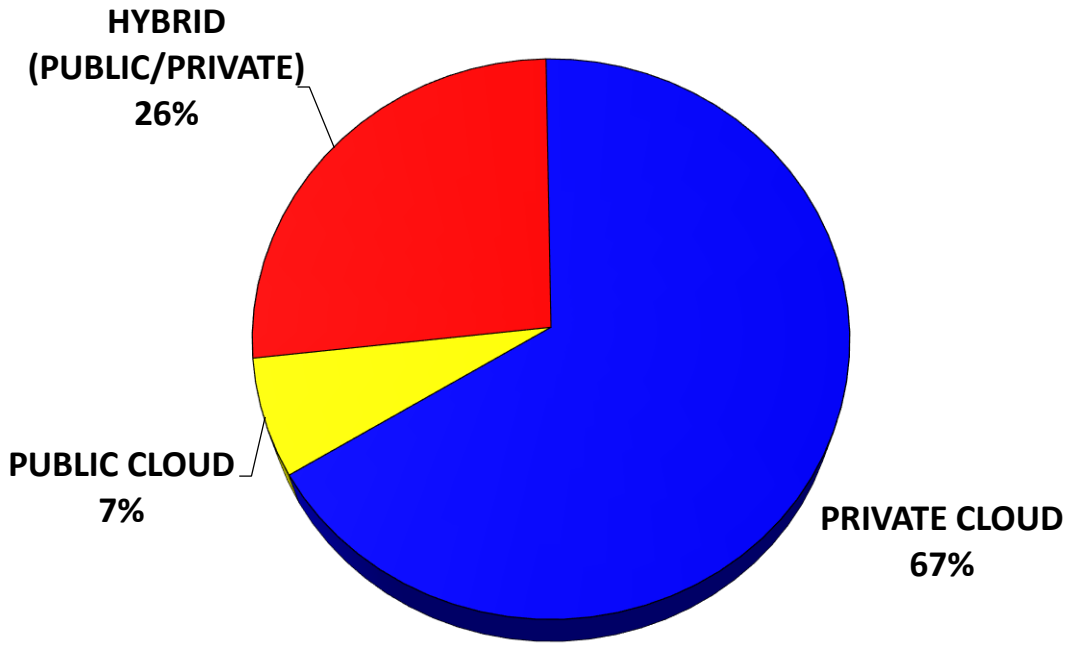
WORLDWIDE

ACCESS TO G&G APPLICATIONS IN THE CLOUD

CURRENT USE



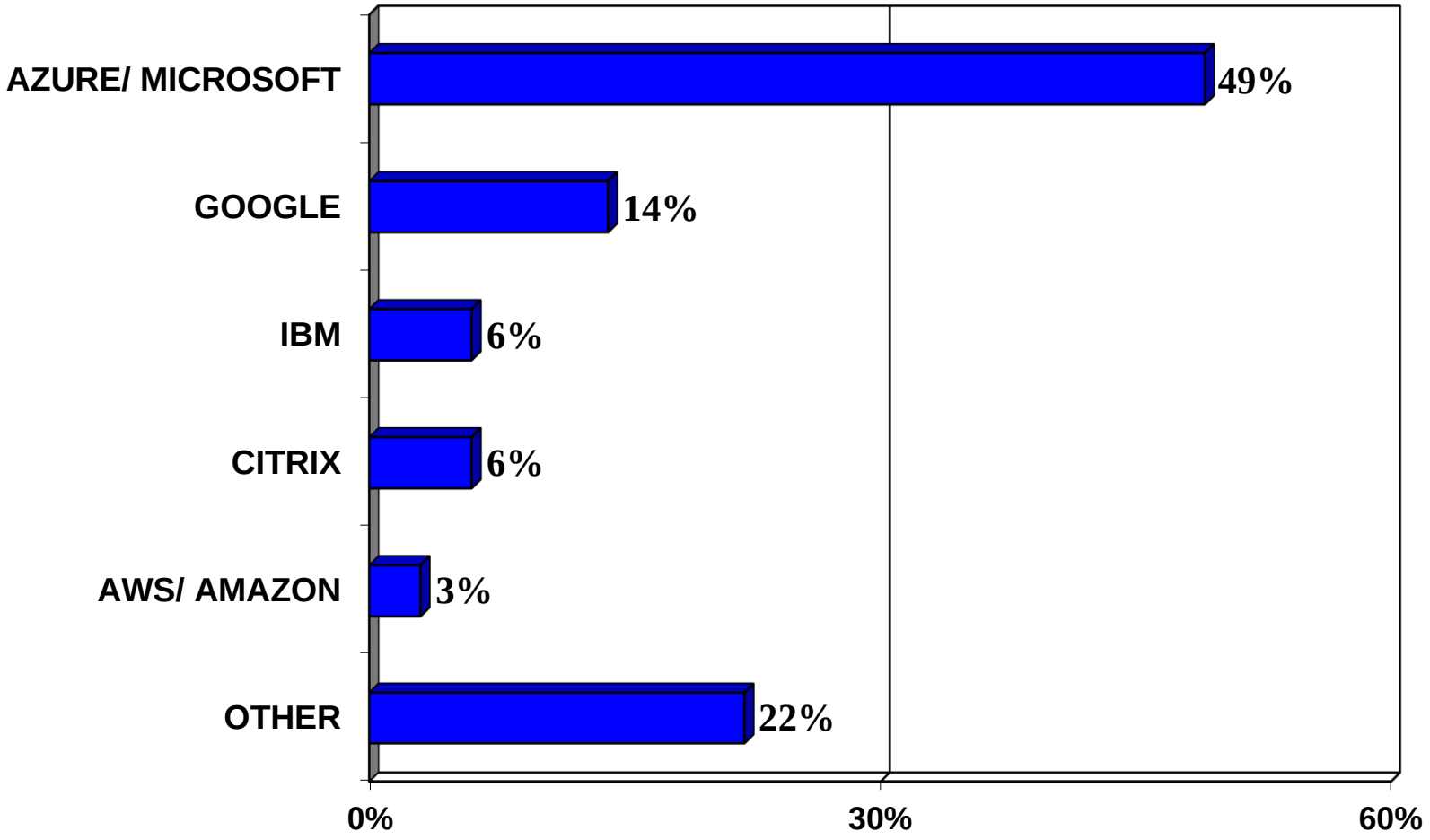
FUTURE (2 YEARS)



PERCENT OF SAMPLE USING/ PLANNING USE OF THE CLOUD

WORLDWIDE

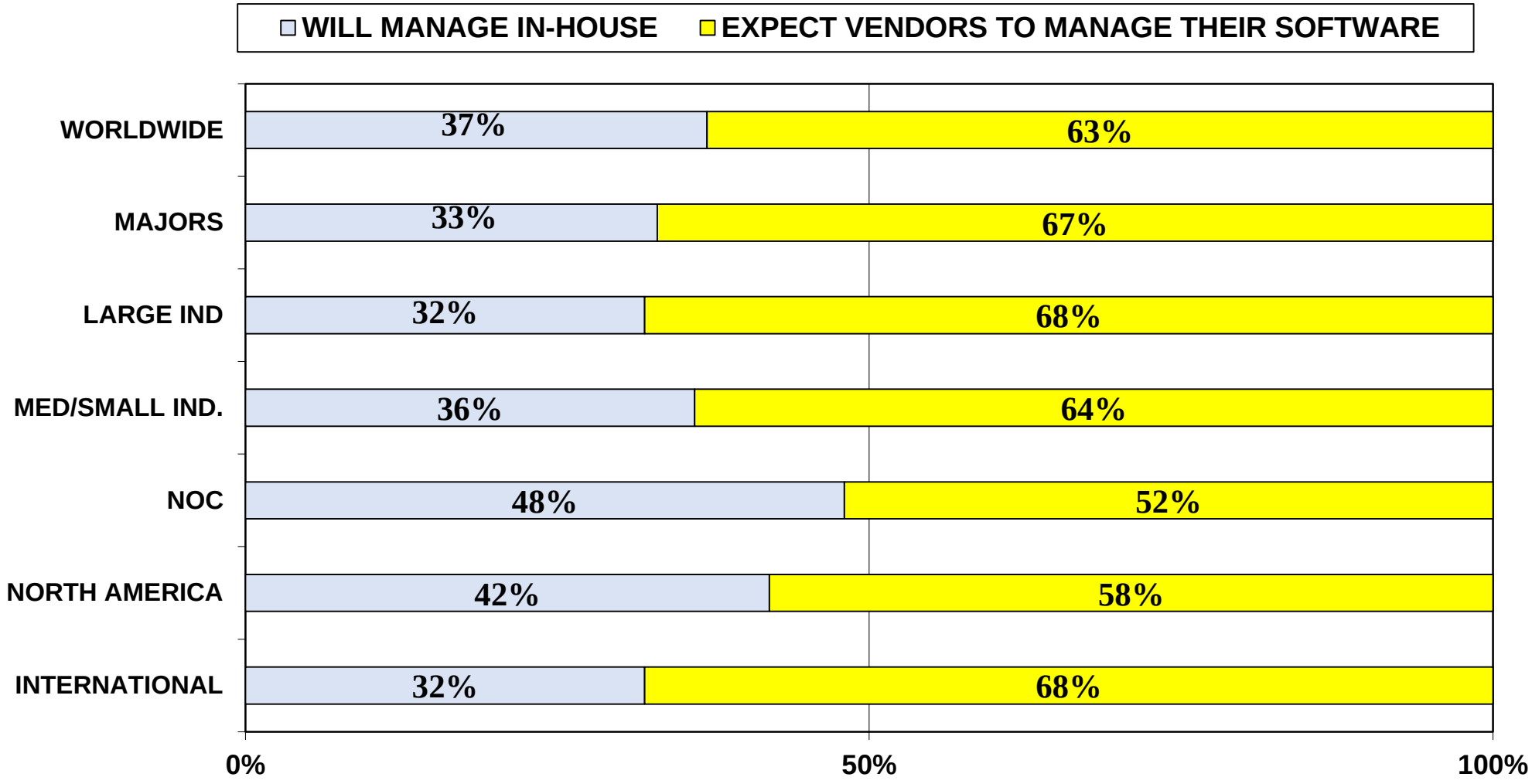
CLOUD VENDORS CURRENTLY USED



PERCENT OF SAMPLE ACCESSING G&G APPLICATIONS FROM CLOUD

WORLDWIDE

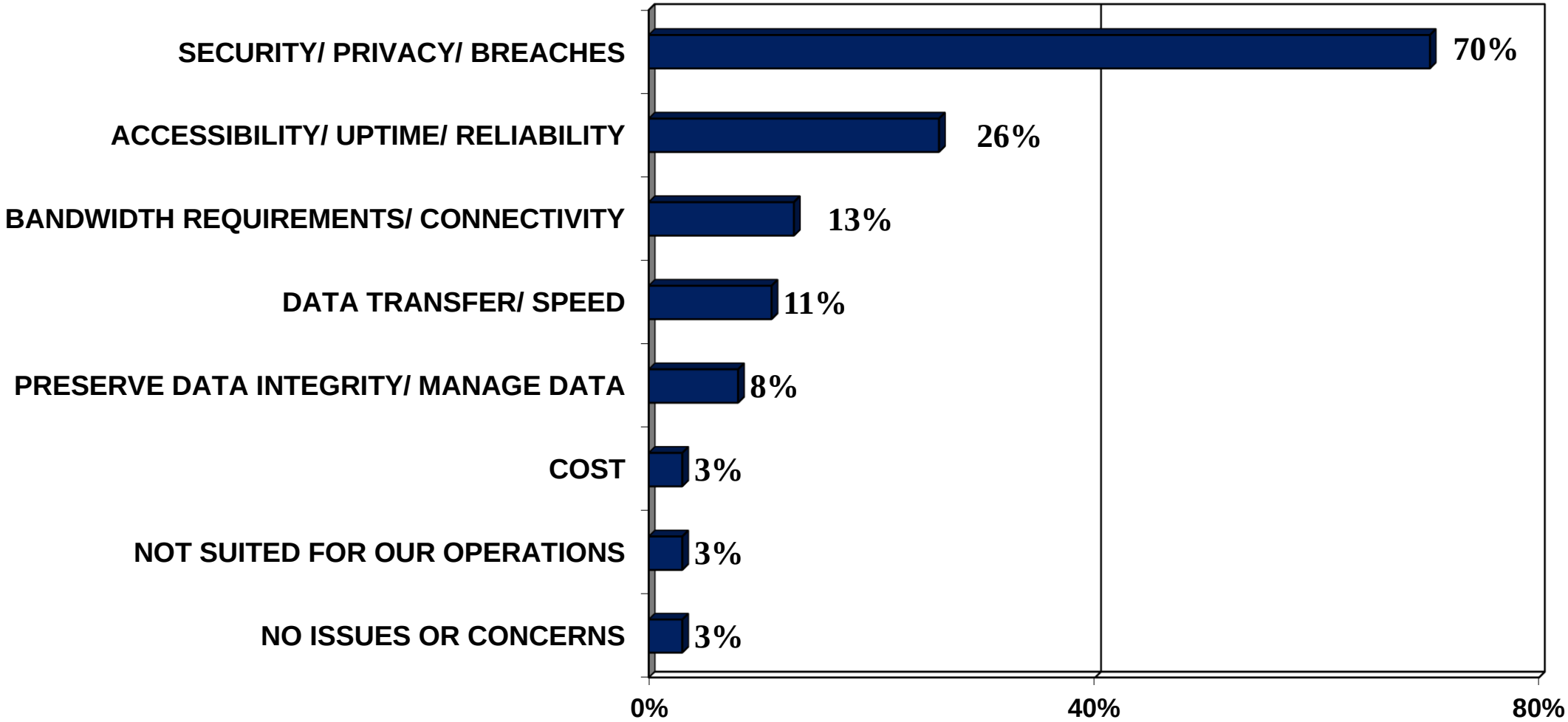
MANAGEMENT OF SOFTWARE IN THE CLOUD



PERCENT OF SAMPLE ACCESSING G&G APPLICATIONS FROM CLOUD

WORLDWIDE

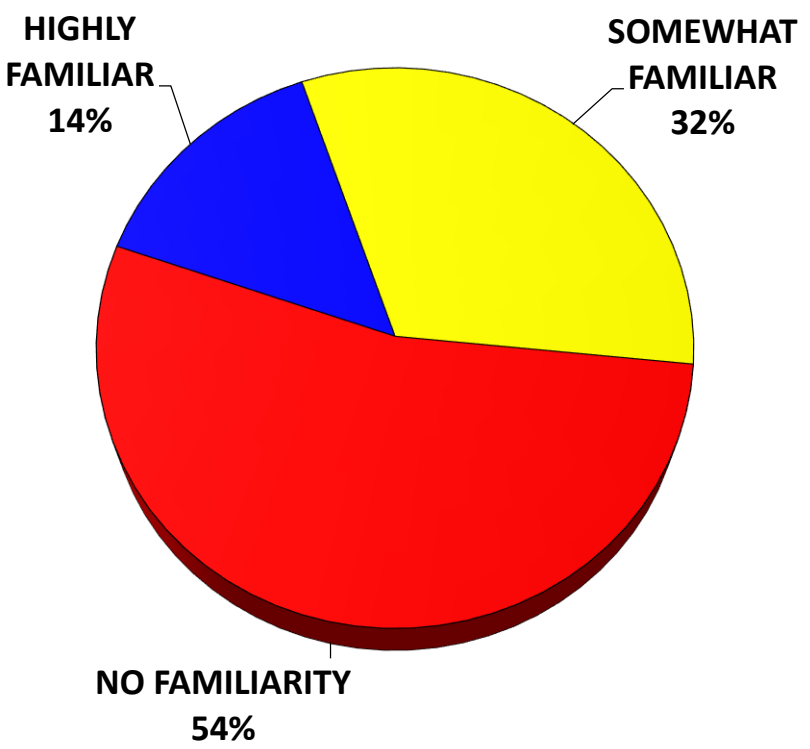
BIGGEST CONCERNS USING THE CLOUD



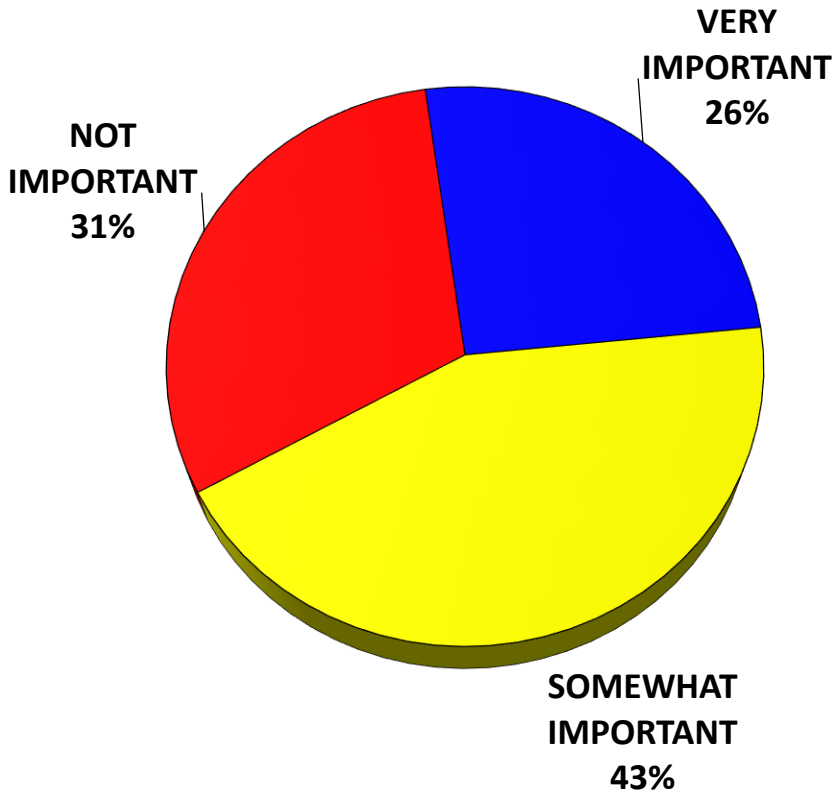
PERCENT OF TOTAL SAMPLE

FAMILIARITY WITH MACHINE LEARNING SOLUTIONS

FAMILIARITY WITH MACHINE LEARNING SOLUTIONS



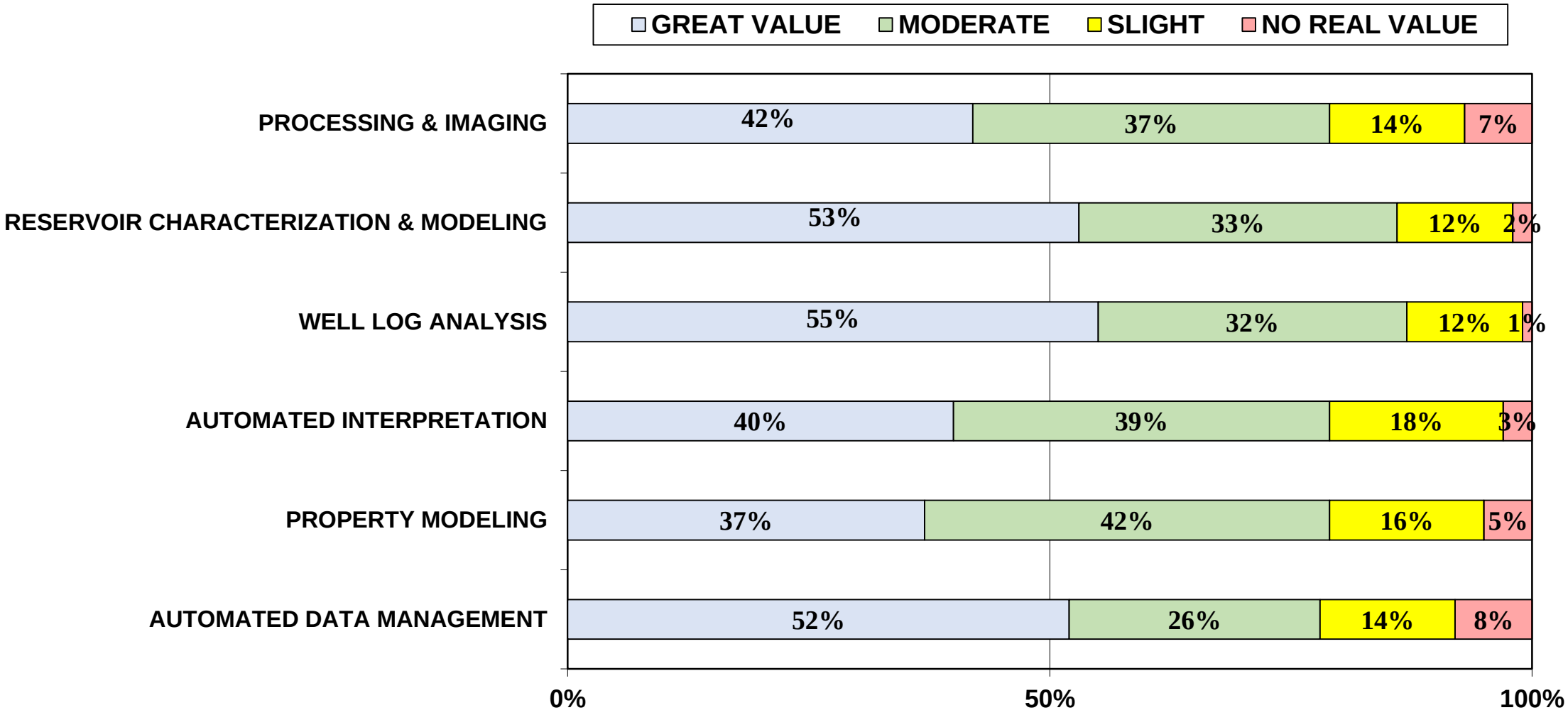
IMPORTANCE OF MACHINE LEARNING AS PART OF COMPANY'S FUTURE STRATEGY



PERCENT OF TOTAL SAMPLE

WORLDWIDE

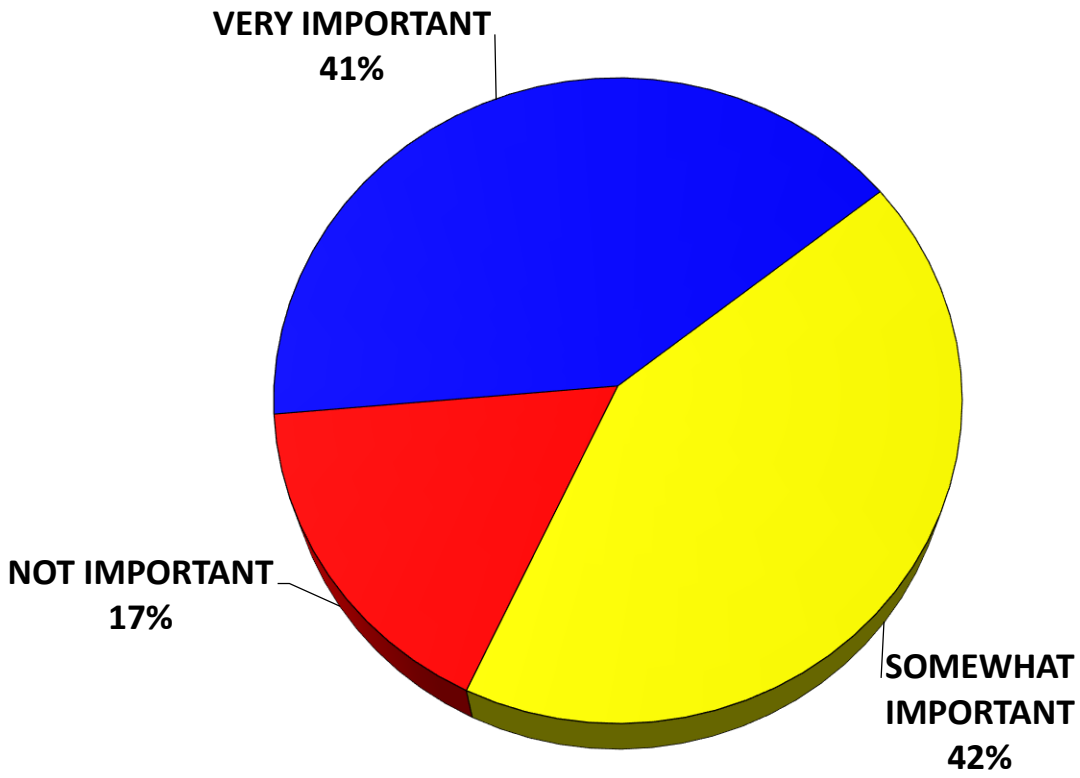
VALUE SEEN IN MACHINE LEARNING SOLUTIONS
TO ASSIST WITH VARIOUS G&G ACTIVITIES



PERCENT OF TOTAL SAMPLE

IMPORTANCE OF PLUG IN COMPATIBILITY

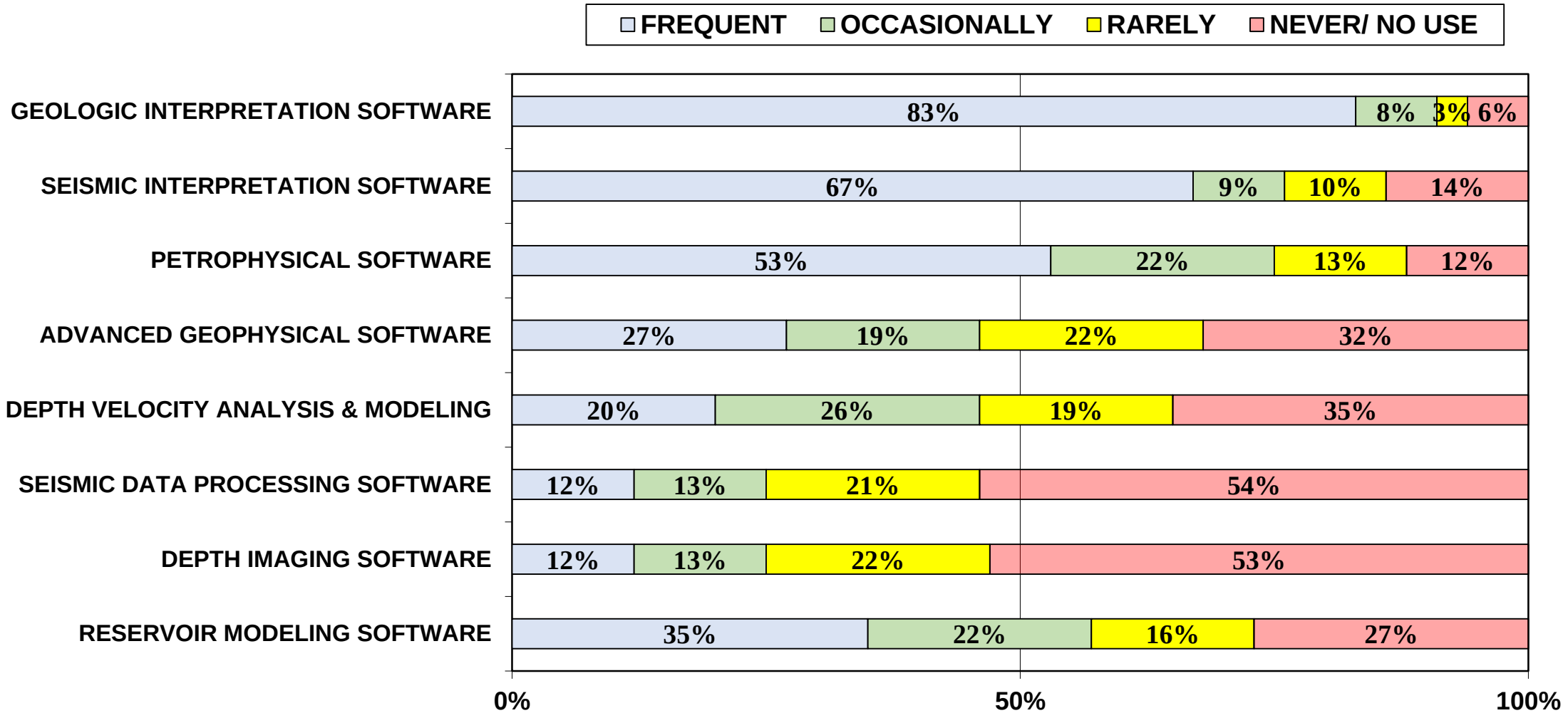
FOR YOUR DATA MANAGEMENT PLATFORM TO BE OPEN TO PLUG IN INTERNAL & OTHER 3RD PARTY APPLICATIONS



PERCENT OF TOTAL SAMPLE

WORLDWIDE

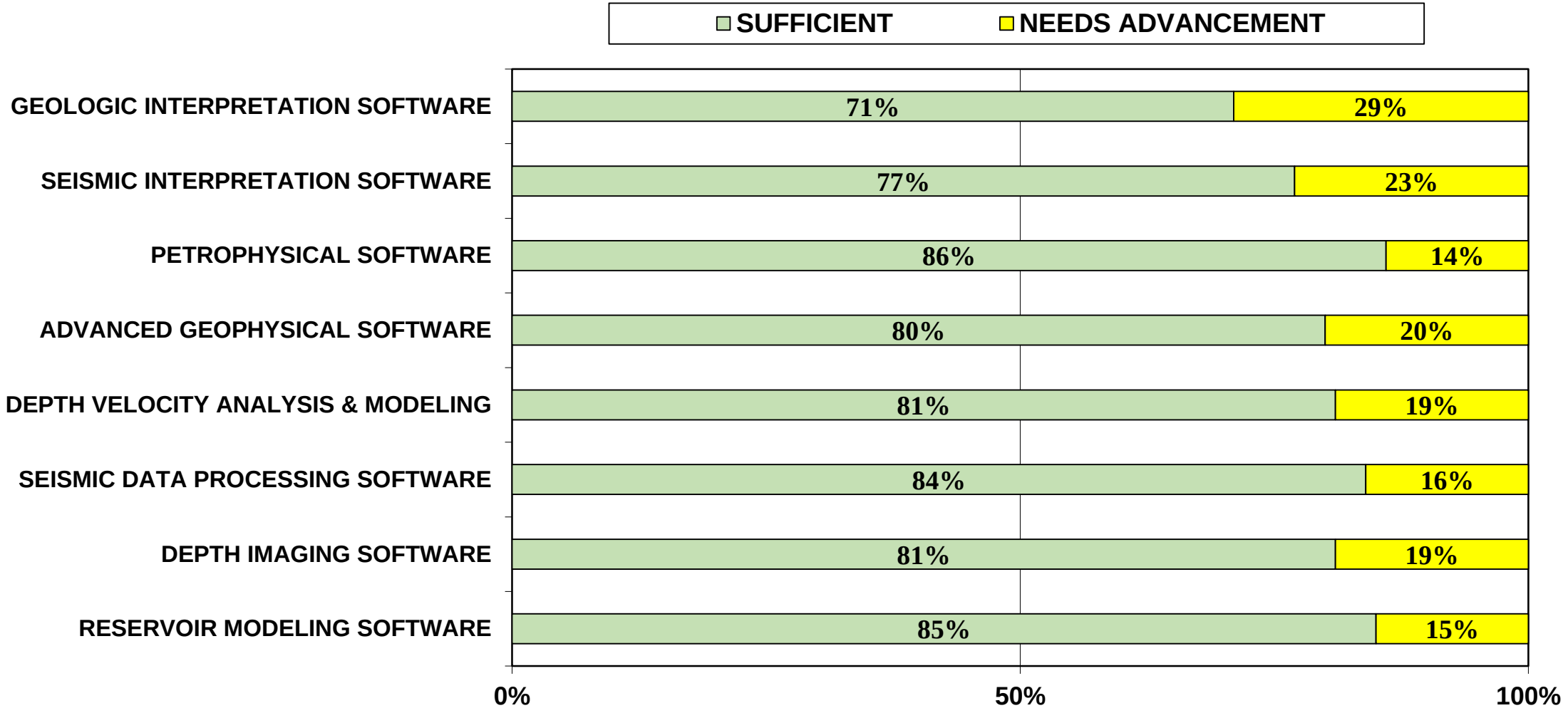
FREQUENCY OF USE OF SELECTED APPLICATIONS



PERCENT OF TOTAL SAMPLE

WORLDWIDE

SUFFICIENCY OF CURRENT TECHNOLOGY
FOR SELECTED APPLICATIONS



PERCENT OF TOTAL SAMPLE

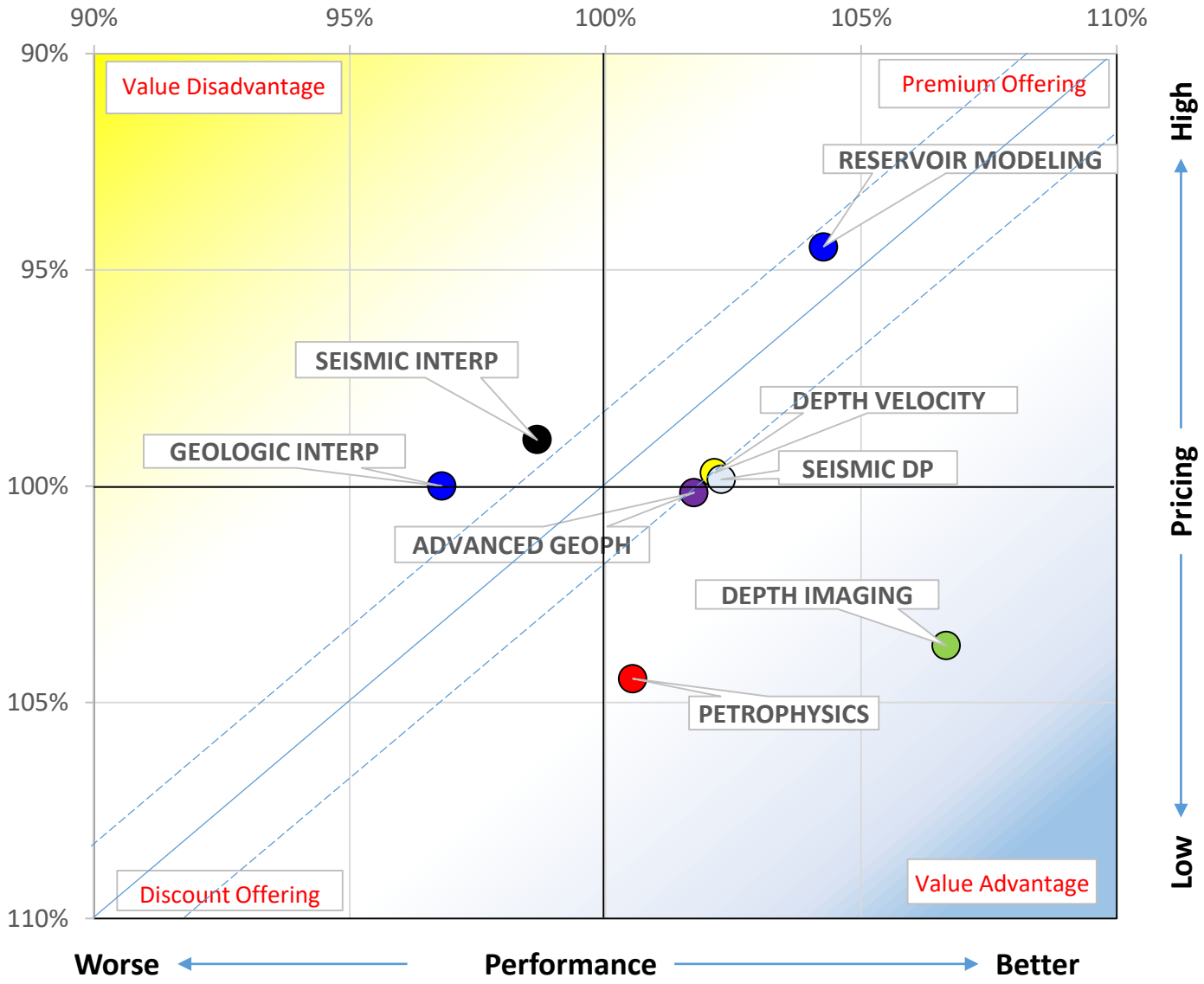
WORLDWIDE

G&G SOFTWARE VALUE MAP
- COMPARISON OF AVERAGE PERFORMANCE & PRICE RATINGS

Performance Factors (Non- Price)

- Speed of Calculations
- Ease of Use
- Technical Support & Training
- Data Integration Capabilities

Percent of Purchase Decision Based on Price 50%



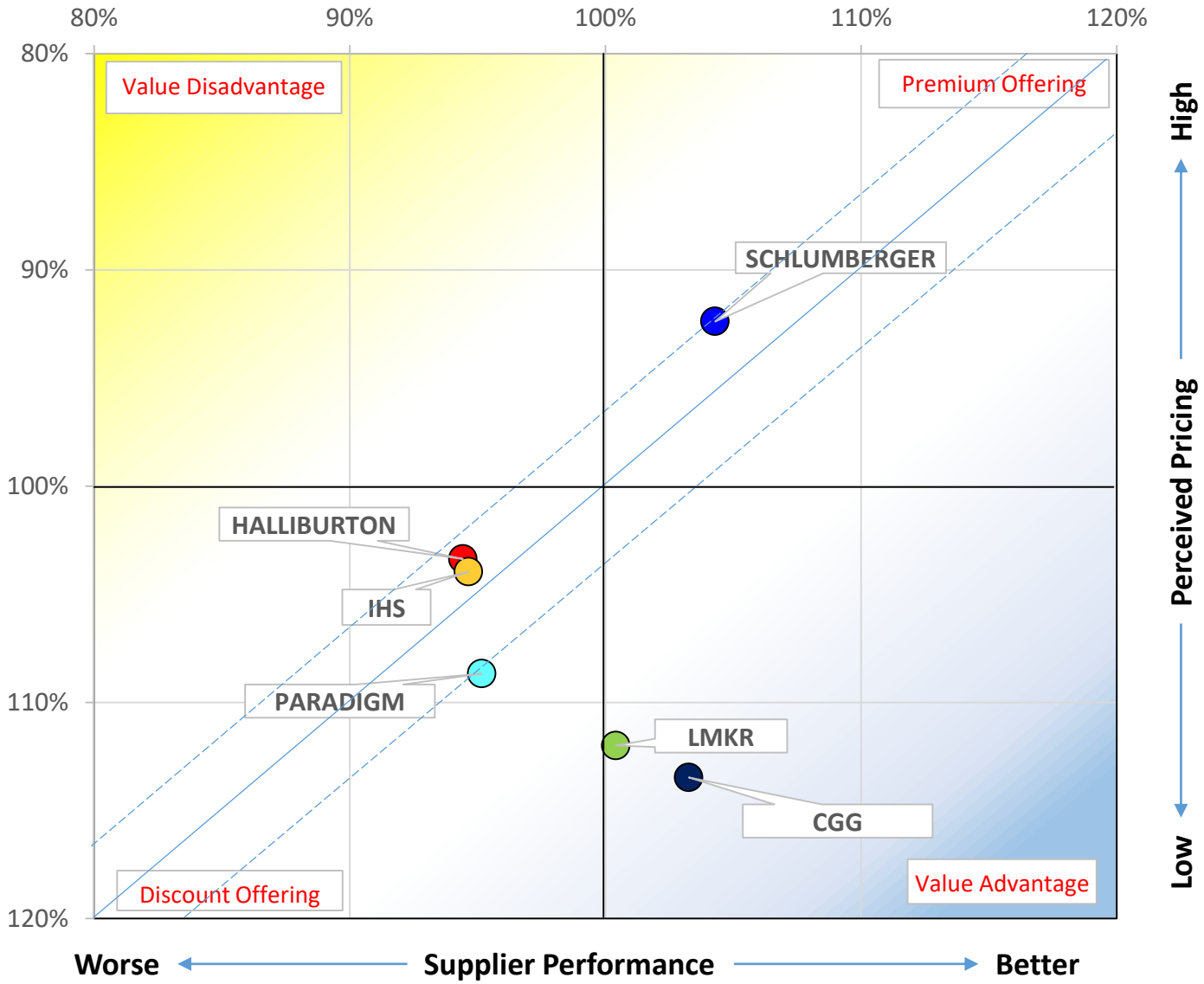
CATEGORY AVERAGE NET PROMOTER SCORE

Geologic Int. – 13.0%
Seismic Int. – 19.6%
Petrophysics – 27.9%
Adv. Geophysical – 36.4%
Depth Velocity – 34.7%
Seismic DP – 26.3%
Depth Imaging – 46.0%
Reservoir Model – 41.7%

WORLDWIDE

G&G SOFTWARE SUPPLIER VALUE MAP
- ALL DOMAINS COMBINED

Performance Factors (Non- Price)

- Speed of Calculations
- Ease of Use
- Technical Support & Training
- Data Integration Capabilities

Percent of Purchase Decision Based on Price 50%