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# Energy Survey 2019: The latest trends in the oil and gas sector

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# Speakers



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# Learning objectives

1

Identify capital investment trends in the oil and gas sector

2

Explain the impact of public policy changes on the sector

3

Articulate future focus areas for many energy companies

# Agenda



- 1 Energy Survey overview and trends
- 2 Summary of survey results
- 3 Trends in talent and staffing
- 4 A&D
- 5 Technology trends
- 6 Regulatory and geo-political issues

# About the survey

- Collected through October 2018
- 450+ companies
- C-suite and senior executives
  - U.S. independent producers
  - Midstream operators
  - Oilfield service companies
  - Financial companies



# Survey observations and trends

- Economic improvement of the sector
- Focus on cost management and profitability
- Disciplined approach to growth
- Regulatory hurdles a key risk

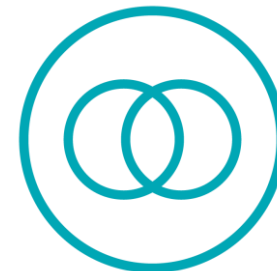


# Trends in talent and staffing

- More partnerships, joint ventures and outsourcing
- Looking for new forms of talent
  - Mathematics and science
  - Analytic skills
- Attract a new generation of innovative talent

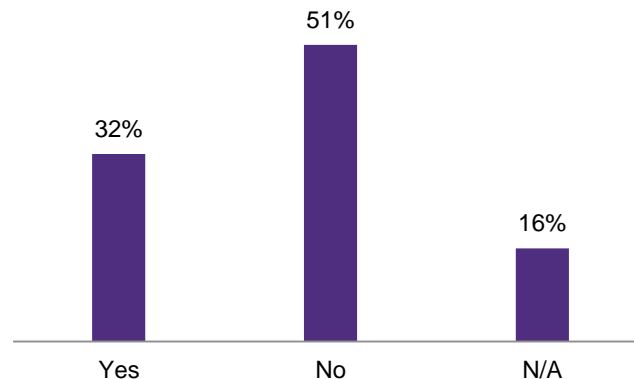


# A&D



- Energy transaction market observations
- A&D concerns
  - Commodity pricing
  - Buyer and seller expectations

Have you found buyer/seller prices stabilizing?



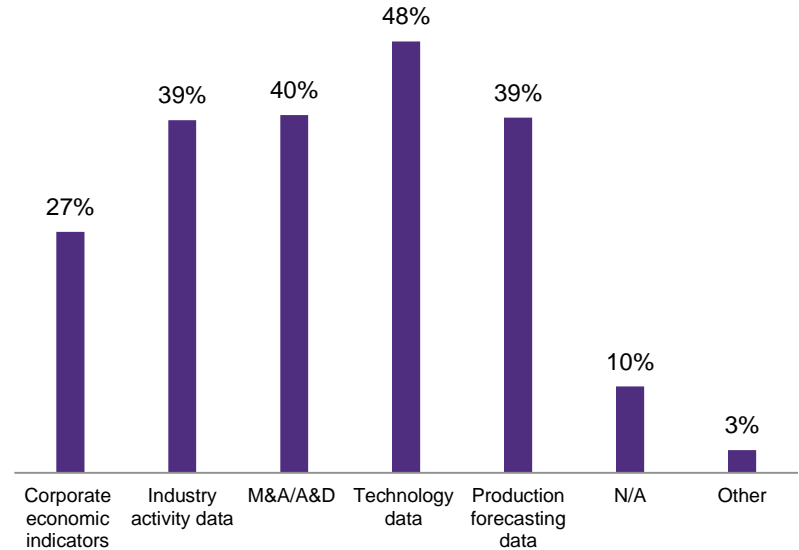


# Technology trends



- Applying artificial intelligence (AI)
- Big data
- Competitor performance metrics

Relevant “big data” and data analytics



# Regulatory and geopolitical issues

- Federal, state and local impacts
- Trade policies
- Geopolitical issues



# Any final questions?



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