

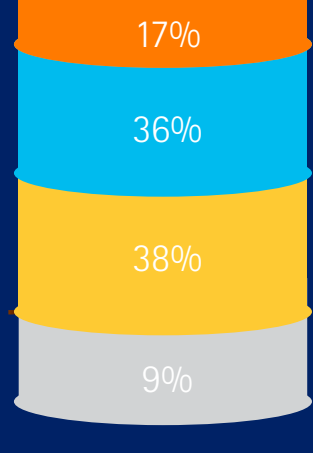
Upstream Oil and Gas Companies Spend Smarter on Digital Technologies to Drive Value, Reduce Costs

The 2016 Upstream Oil and Gas Digital Trends Survey

1 Digital technologies are recognized as adding value to upstream oil and gas companies by helping **reduce costs, make faster and better decisions and increase workforce productivity**

91% of respondents are already seeing value from digital today and more than half of all respondent believe digital technologies have added **high (36%)** to **significantly high value (17%)**

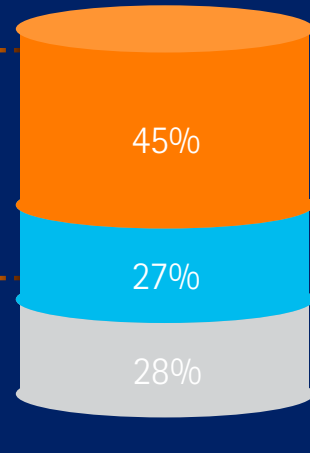
91%



Some
Low or None

72% of respondents believe cost reduction is an important (27%) or the most important (45%) challenge digital can help address.

72%

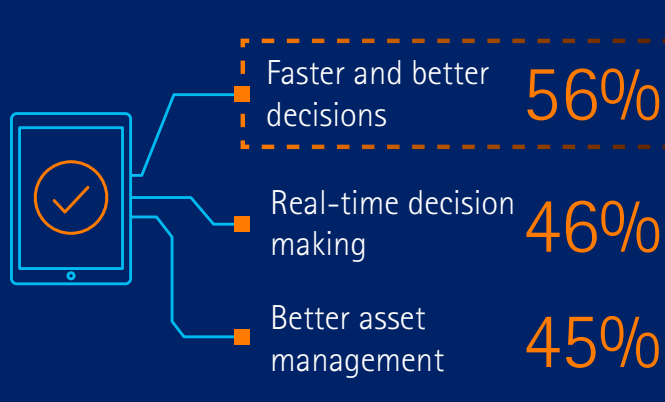


Average or below

Business benefits:

Top three areas where digital most benefits companies

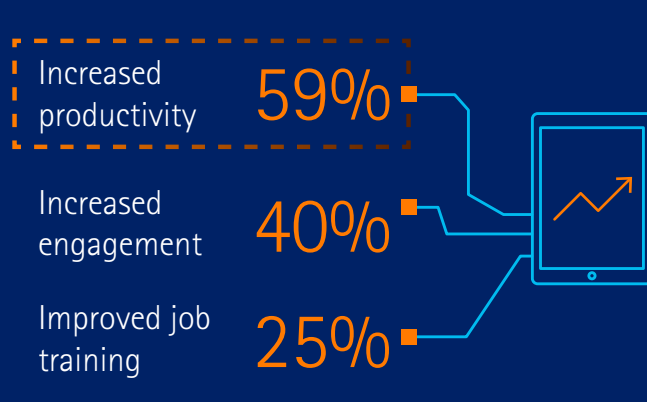
Respondents indicated the biggest benefit from digital is improved decision making.



Workforce impact:

Top three areas where digital most impacts the workforce

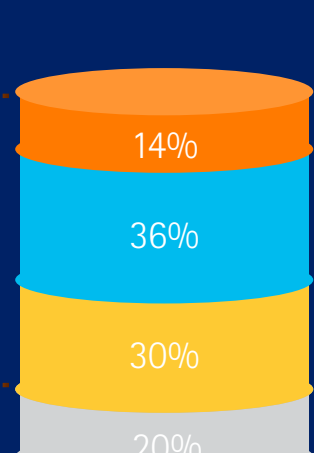
Respondents said digital's biggest impact to date on the oil and gas workforce has been increased employee productivity.



2 Despite the low oil price environment, the majority of oil and gas companies will **continue to invest at least the same amount or more in digital technologies** over the next 3-5 years

80% of respondents plan to invest the same amount (30%), more (36%), or significantly more (14%) in digital technologies over the next 3-5 years.

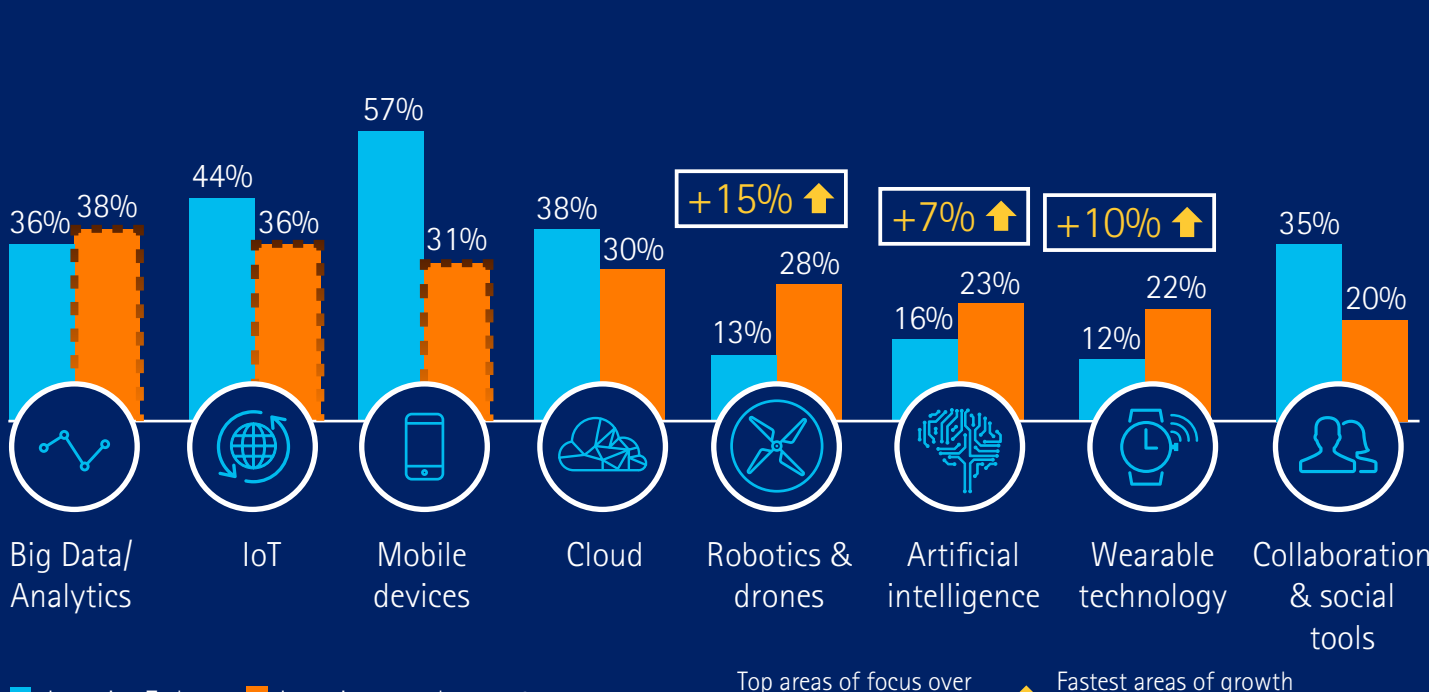
80%



Less or Don't know

3 Digital investment today is focused on mobility and the Internet of Things (IoT) – with **analytics and IoT predicted to lead the way over the next 3-5 years**

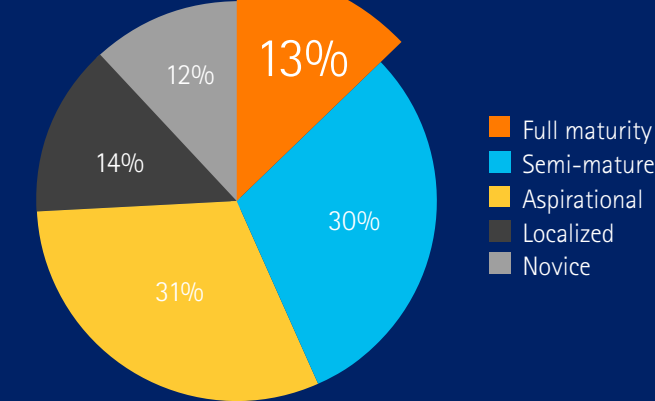
The fastest growth areas are predicted to be in artificial intelligence, robotics/drones, and wearables. Investment in mobile devices looks to be peaking.



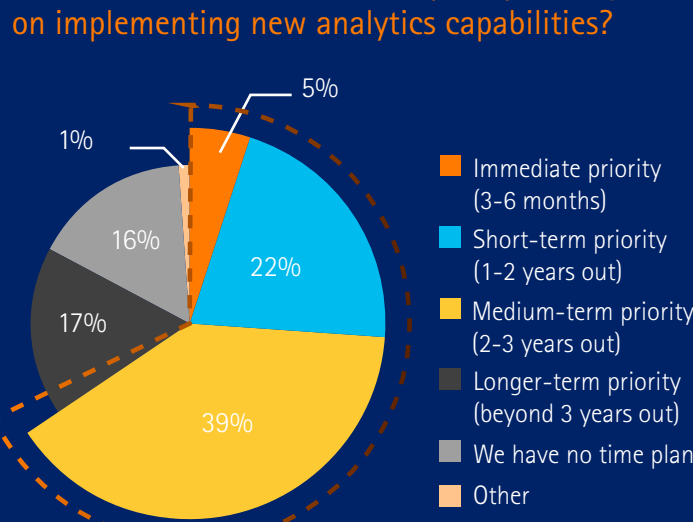
4 To realize the maximum benefits of digital, companies will need to **rapidly improve their capabilities, including maturity in analytics**

While more than a third (36%) are investing in Big Data and analytics today, **only 13% feel that their company's analytics capabilities are fully mature.** Almost two-thirds (66%) have as an objective, to resolve this within three years.

How mature is the use of analytics within your business?

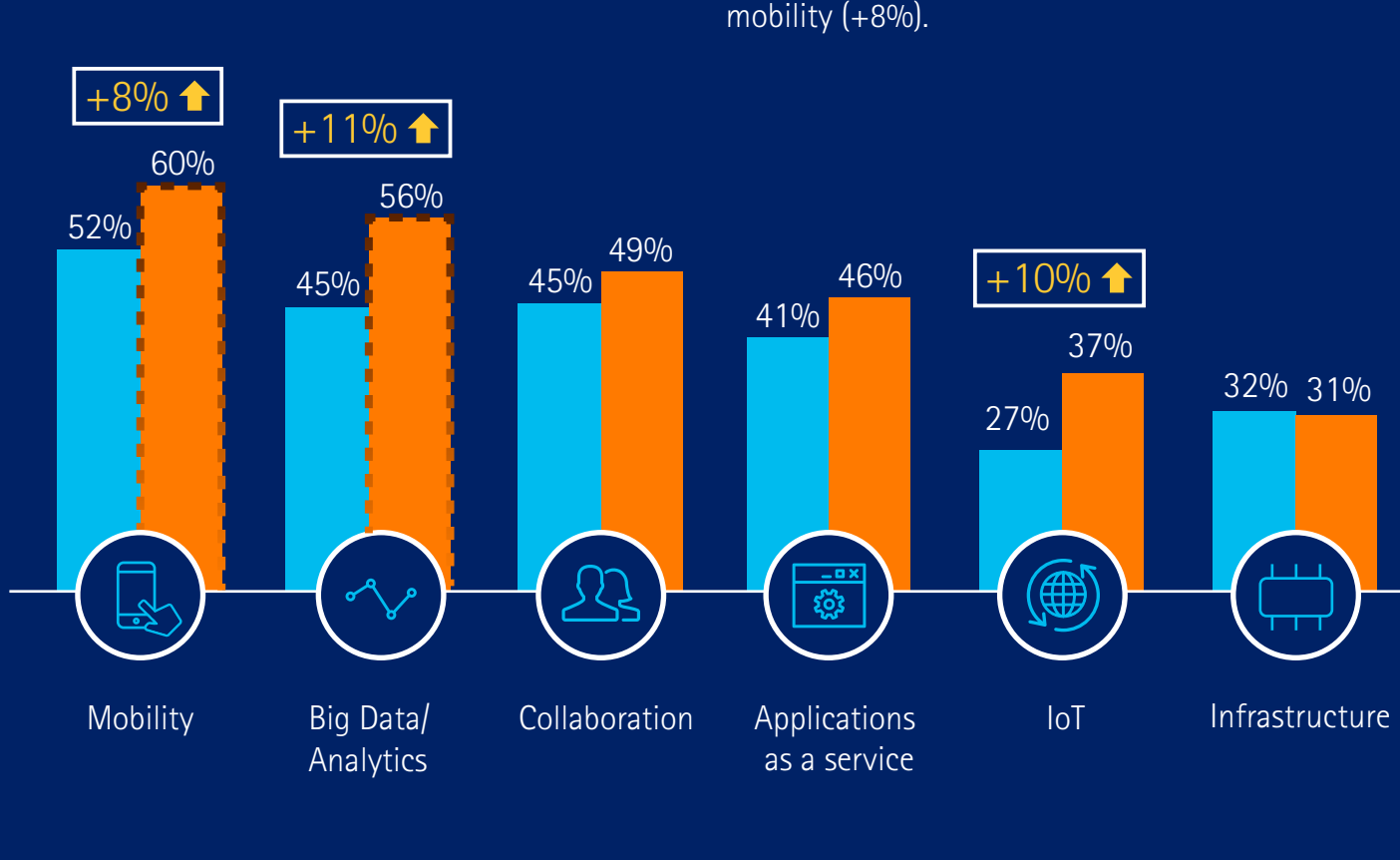


In what timeframe is your company planning on implementing new analytics capabilities?



5 Oil and gas companies are **increasingly leveraging the cloud** to more rapidly unlock the value of other digital technologies

Which capabilities do you expect your company will be using the cloud to enable today/over the next 3-5 years?



Oil and gas companies expect to use more cloud enabled capabilities over the next 3-5 years, especially for analytics (+11%), IoT (+10%) and mobility (+8%).

Leading companies are using digital to drive leaner, smarter organizations.

Is your company ready to leverage digital to maximize business value?

Who do we contact for more information about the survey?

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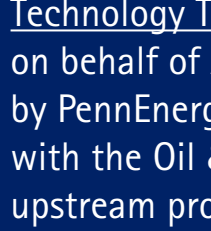
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Accenture Energy Showcase

The "2016 Upstream Oil and Gas Digital Technology Trends Survey," conducted on behalf of Accenture and Microsoft by PennEnergy Research in partnership with the Oil & Gas Journal, surveyed upstream professionals worldwide.



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