

# **The State of the Oil, Gas and Energy Industry in 2021: Research Recap**

ASUG Research

August 4<sup>th</sup>, 2021



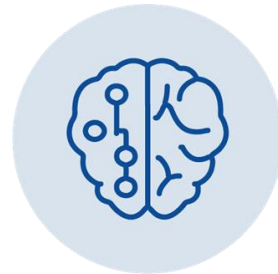
# About ASUG Research

The ASUG research team uses quantitative and qualitative research methods to capture a unique view of what the largest group of SAP users in North America is thinking, doing, and planning for their road maps.

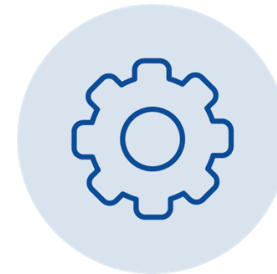
## Examples of Topics We Cover



cloud strategies



emerging  
technologies



SAP S/4HANA  
myths and ROI



industry tech  
trends

# Oil, Gas and Energy Insights for 2021

1

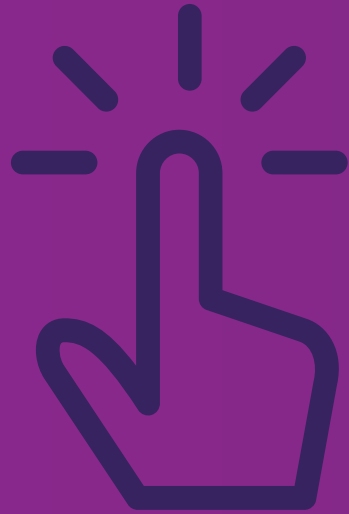
Key Trends and Pressures for SAP Oil, Gas and Energy Customers

2

The Secrets Behind Satisfaction for SAP Oil, Gas and Energy Customers

3

What Does it All Mean?



## **Key Trends and Pressures for SAP Oil, Gas and Energy Customers**

# What's on the Minds of SAP Oil, Gas and Energy Customers

## Customer Trends



Digital transformations.  
Updating systems to  
use the most innovative  
technologies



Low profit margins.  
Higher costs for  
organizations while  
providing customers with  
competitive pricing



Move to renewable  
energy sources, zero  
emission energies and  
alternative fuel options



Environmental friendliness  
that supports  
sustainability and  
maintaining positive  
customer appeal

**Source:** ASUG State of the Industry research (April 2021; n=81)  
Size of icon indicates amount trend was noted by respondents

# Data Management Is a Critical Factor and Expected to Affect Daily Work

**41%**

of participants predict data analytics/dashboards will significantly affect their work within the next 12 months



**48%**

of participants note master data management as a critical factor relating to their job

Source: ASUG State of the Industry research (April 2021; n=81)

# Pain Points for SAP Oil, Gas, and Energy Customers

## Pressures They're Feeling



Making updates to outdated systems (like data storage, infrastructure, etc.) to maintain competitiveness



Incorporating the right emerging technologies to improve business

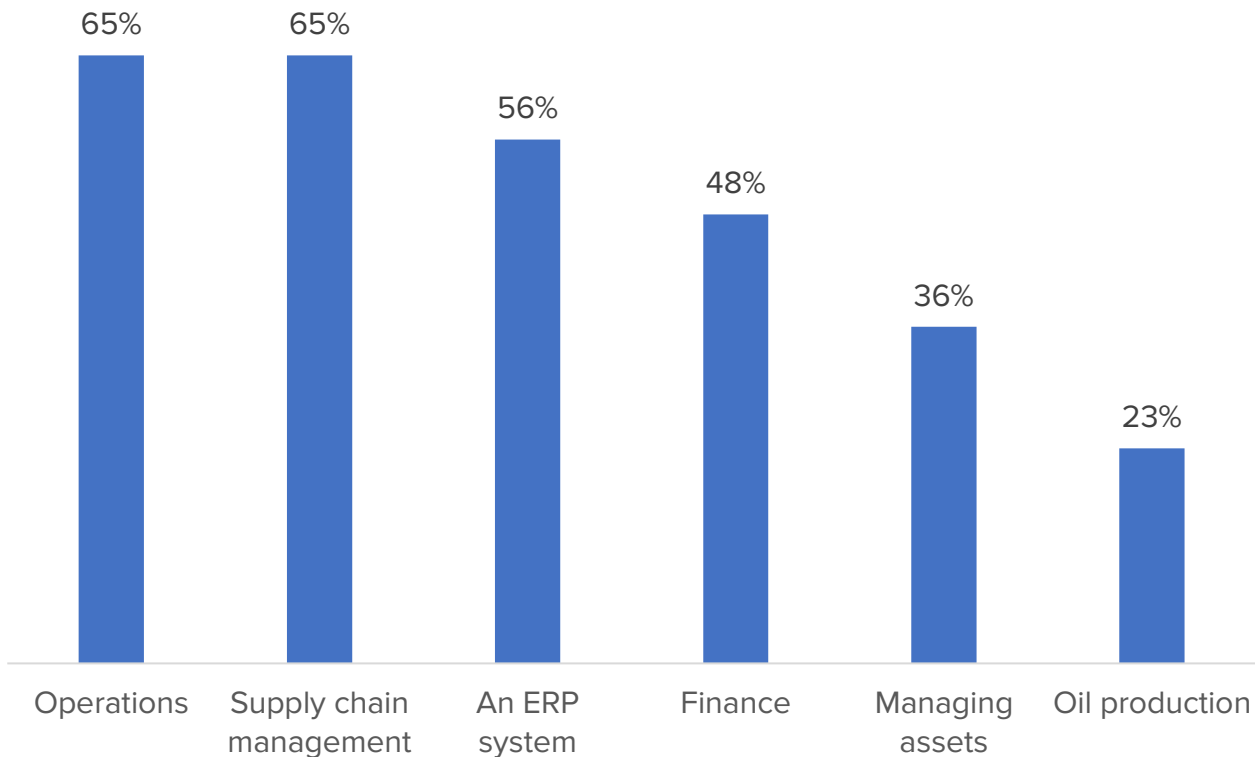


Maintaining a knowledgeable staff. Finding skilled employees and training new employees.

**Source:** ASUG State of the Industry research (April 2021; n=81)  
Size of icon indicates amount trend was noted by respondents

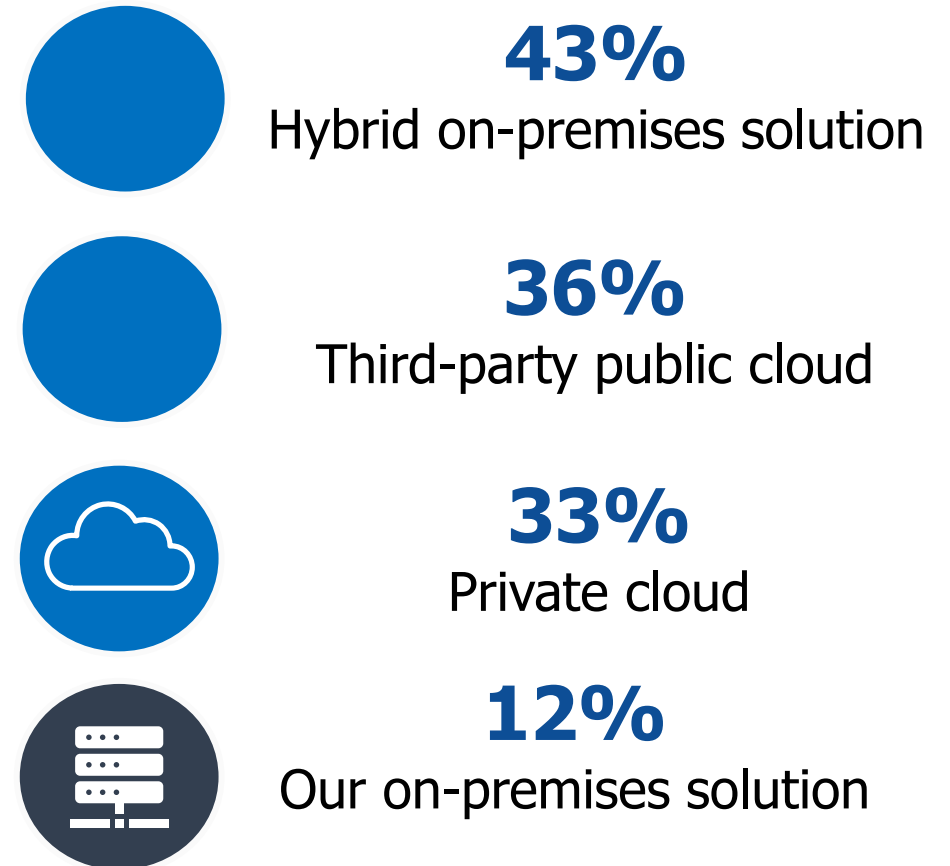
# Key Uses for SAP Products by Oil, Gas, and Energy Customers

## Organizations use SAP for...



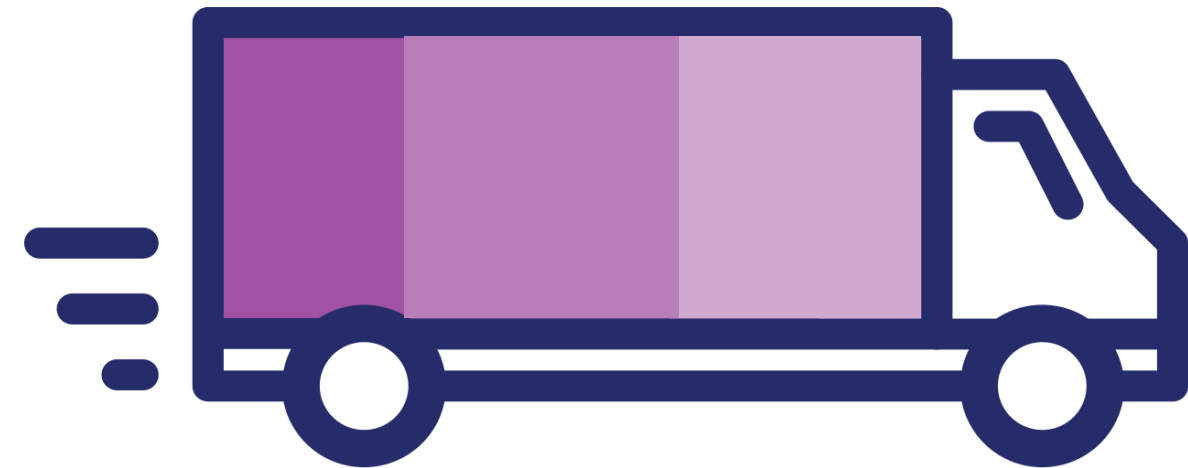
Source: ASUG State of the Industry research (April 2021; n=81)

## Organizations Run SAP Instances...





## SAP S/4HANA Is On Their Road Map



19%

have plans  
to move

35%

have  
started to  
move

32%

are live

2% currently have **no** plans to move



Source: ASUG State of the Industry research (April 2021; n=81)

# Cloud Strategy Developments



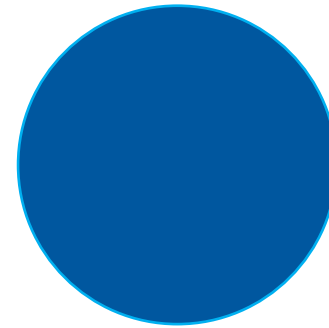
We have a cloud strategy in place.

43%



We have a cloud strategy in place, but we are in the early stages.

38%



We do not have a cloud strategy in place yet but are exploring it.

14%



We do not have a cloud strategy in place and are not exploring it.

5%

Source: ASUG State of the Industry research (April 2021; n=81)

# Taking Advantage of Mobile Technology



**80%**

of respondents use mobile  
technology at their organizations

**Source:** ASUG State of the Industry research (April 2021; n=81)

## Where Oil, Gas and Energy Customers Need the Most Help



33%

Integrating current technologies



19%

Exploring new products



16%

Training employees to use SAP products

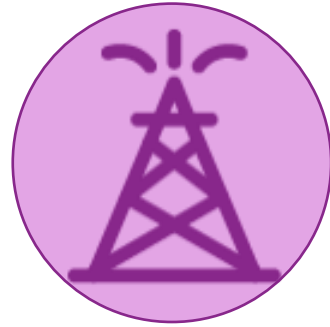
Source: ASUG State of the Industry research (April 2021; n=81)

# A Breakdown of Oil Sectors That Participated



Upstream

44%



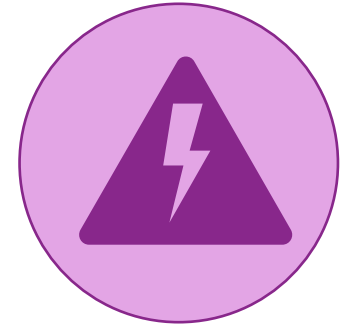
Oil-Field Services

42%



Midstream or Downstream

42%  
(each)



Utilities

9%

Source: ASUG State of the Industry research (April 2021; n=81)

## What Does it All Mean?



## What Does it All Mean?



Unique to the OGE industry is the focus on renewables and environmentally friendly solutions, and the need to digitize to remain competitive.



Innovate using AI/ML, IoT, integration, data/analytics and mobile technologies.



Need for data driven decisions and accessible, accurate, understandable, and secure data.



Finding and maintaining skillsets needed is challenging.

**Source:** ASUG State of the Industry research (June 2020; n=54)

**Questions?**



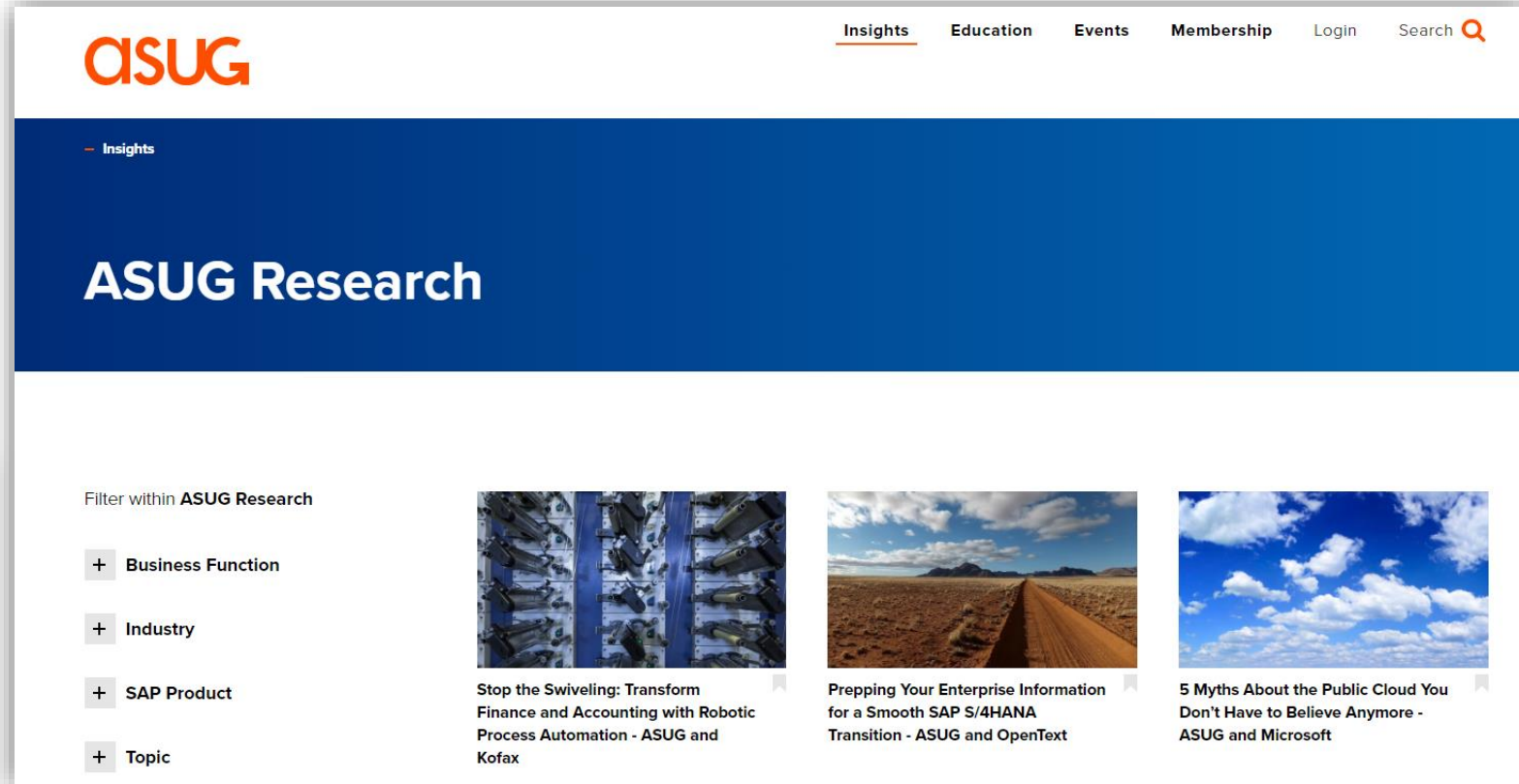
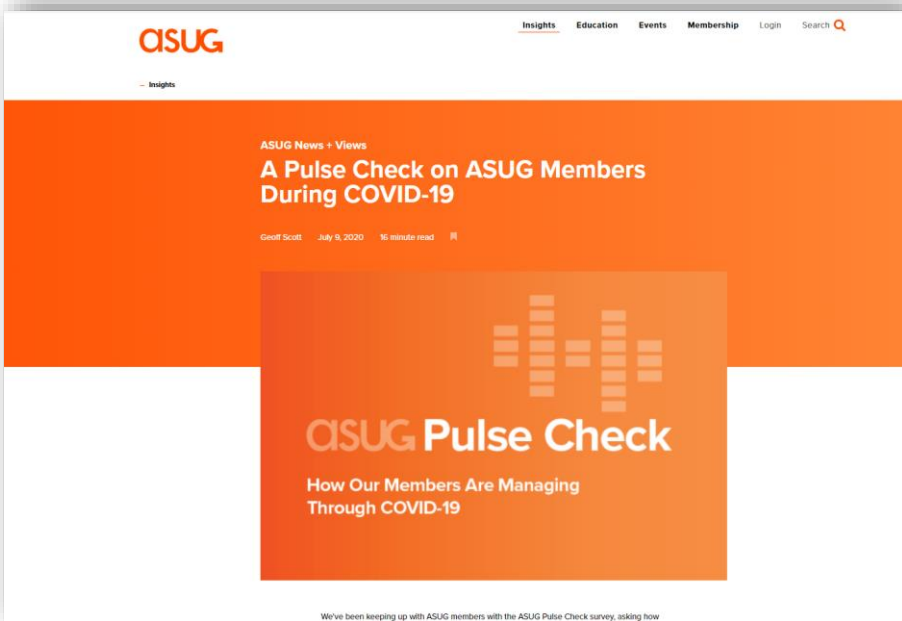
## Top things to do next:

- Create or update your ASUG member profile
- Browse our library of upcoming and on-demand webcasts on ASUG.com
- Sign up for the ASUG First Five
- Join an ASUG Think Tank
- Contact an ASUG Customer Success Manager for more specialized assistance

## Don't miss this upcoming ASUG event:

- ASUG Best Practices: SAP for Oil, Gas and Energy Virtual Conference

# Where to Find ASUG Research



Visit [asug.com/insights/research](https://asug.com/insights/research)

# Thank you.

Stay connected. Share your SAP experiences anytime, anywhere.  
Join the ASUG conversation on social media: **@ASUG365 #ASUG**

