

**FOR IMMEDIATE RELEASE FOR FURTHER INFORMATION CONTACT:  
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**Press Release: MASTIO publishes the 25<sup>th</sup> Edition Natural Gas Pipeline Report.**

MASTIO recently published the 2021, 25th Edition of the industry wide Natural Gas Pipeline Customer Value / Loyalty Benchmarking Study and is pleased to present its findings. The study was released to subscribers in early March. This new study provides results concerning interstate, intrastate and Canadian pipelines.

The 2021 study is based on 666 interviews with industrials, LDC's, independent power producers, producers and marketers. Each respondent rated pipelines on 29 attributes such as: representatives who listen well, effective after-hours support, firm gas transportation is highly reliable, timely resolution of problems plus overall company performance and how likely would you be to recommend your pipeline. The study also asks several open-ended questions. For example, all respondents are asked "Besides price, what is the most important factor that you use to select one transportation provider over another". Respondents are also asked "What was the biggest disappointment you have experienced with each of your pipelines over the last 12 months".

The most important issue to transporters of natural gas in the latest study is firm gas transportation is highly reliable.

**Top 5 Customer Needs**

1. Firm gas transportation is highly reliable.
2. Communicates in an honest and forthright manner.
3. Scheduled gas volumes are accurate.
4. Accuracy of invoices.
5. Representatives are accessible when needed.

Source: MASTIO 2021 Natural Gas Transportation Customer Value Study

The study findings are divided into the following 4 groups located on the proceeding pages:

- **Mega Pipelines**
- **Major Pipelines**
- **Regional Pipelines**
- **Major Organizational Groups**

# MASTIO QUALITY AWARDS

The criterion MASTIO uses to recognize the best pipelines are:

- 1) Determined by the pipelines with the highest overall Customer Value Weighted Quality (Benefit) Score that have also met a minimum of 30 ratings.

Please note that companies need to meet the above criteria to be considered for the Mastio Quality Award.

## **MEGA PIPELINE GROUP**

The following is an alphabetical listing of the pipelines included in the Mega Pipeline Group.

ANR Pipeline Co.	Southern Natural Gas Co.
Columbia Gas Transmission Corp.	Tallgrass Interstate Gas Trans.
Dominion Transmission, Inc.	Tennessee Gas Pipeline Co.
El Paso Natural Gas Co.	Texas Eastern Transmission Corp.
Gulf South Pipeline Co.	Texas Gas Transmission
Natural Gas Pipeline Co. of America	TransCanada Pipelines - Mainline System
Northern Natural Gas Co.	Williams Gas Pipeline-Northwest
Panhandle Eastern Pipe Line Co.	Williams Gas Pipeline-Transco

**Mega Pipeline Group** – The Mega Pipeline Group consists of pipelines with at least 3,500 miles of transportation pipe and deliveries of at least 1 trillion CF (TCF).

*The following Mega pipelines met the requirements to receive the Mastio Quality Award.*

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
<b>Mega Pipeline Group</b>	<b>Northern Natural Gas Co.</b>	ANR Pipeline Co. El Paso Natural Gas Co. Northern Natural Gas Co. Williams Gas Pipeline-Northwest

## **MAJOR PIPELINE GROUP**

The following is an alphabetical listing of the pipelines included in the Major Pipeline Group.

ANR Pipeline Co.	Panhandle Eastern Pipe Line Co.
Colorado Interstate Gas Co.	Southern Natural Gas Co.
Columbia Gas Transmission Corp.	Southern Star Central
Columbia Gulf Transmission Co.	Tallgrass Interstate Gas Trans.
Dominion Transmission, Inc.	Tennessee Gas Pipeline Co.
El Paso Natural Gas Co.	Texas Eastern Transmission Corp.
Enable Gas Transmission	Texas Gas Transmission
Florida Gas Transmission Co.	TransCanada Pipelines - Alberta System
Gulf South Pipeline Co.	TransCanada Pipelines - Mainline System
Natural Gas Pipeline Co. of America	Williams Gas Pipeline-Northwest
Northern Natural Gas Co.	Williams Gas Pipeline-Transco

**Major Pipeline Index** - The Major Pipeline Index consists of pipelines with at least 3,500 miles of transportation pipe and serves at least 3 states.

*The following Major pipelines met the requirements to receive the Mastio Quality Award.*

<b>Category</b>	<b>Overall Winner / Highest Score</b>	<b>Suppliers Who Exceed the Industry Benchmark</b>
<b>Major Pipeline Group</b>	<b>Northern Natural Gas Co.</b>	ANR Pipeline Co. El Paso Natural Gas Co. Northern Natural Gas Co. Southern Star Central Williams Gas Pipeline-Northwest

## **REGIONAL PIPELINE GROUP**

The following is an alphabetical listing of the pipelines included in the Regional Pipeline Group.

California Gas Transmission	Northern Border Pipeline Co.
Carolina Gas Transmission	ONEOK Gas Transportation Co.
Dominion Energy Questar Pipeline	ONEOK WesTex
East Tennessee Natural Gas Co.	Southern California Gas Co.
Enbridge Gas	Transwestern Pipeline Co.
Gas Transmission Northwest	Vector Pipeline
Great Lakes Gas Transmission, Inc.	Viking Gas Transmission Co.
Iroquois Gas Transmission System L.P.	WBI Energy Transmission
Kern River Gas Transmission Co.	Wyoming Interstate Co. Ltd.
National Fuel Gas Supply Corp.	

**Regional Pipeline Index** - The Regional Pipeline Index consists of pipelines with less than 3,500 miles of transportation pipe and/or serves less than 3 states.

*The following Regional pipelines met the requirements to receive the Mastio Quality Award.*

<b>Category</b>	<b>Overall Winner / Highest Score</b>	<b>Suppliers Who Exceed the Industry Benchmark</b>
<b>Regional Pipeline Group</b>	<b>Kern River Gas Transmission Co.</b>	California Gas Transmission Carolina Gas Transmission Dominion Energy Questar Pipeline Kern River Gas Transmission Co.

**MAJOR ORGANIZATIONAL PIPELINE GROUP**

The following is an alphabetical listing of the pipelines included in the Major Organization Group.

Berkshire Hathaway Energy Pipeline Group
Boardwalk Pipeline Group
Enable Group
Enbridge Group
Energy Transfer Group
Kinder Morgan Group
ONEOK Partners Group
Tallgrass Energy Group
TransCanada Group
Williams Group

**Major Pipeline Group Index** – Includes the pipelines that the parent company owns and operates.

The following Major Organizational pipelines groups met the requirements to receive the Mastio Quality Award.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Major Organizational Groups	Berkshire Hathaway Energy Pipeline Group	Berkshire Hathaway Energy Pipeline Group Boardwalk Pipeline Group Williams Group

## Legacy Indexes

The following MASTIO Customer Satisfaction Indexes are included for legacy purposes. MASTIO realizes many companies have relied on these indexes to benchmark their performance over the years. In light of the migration to Customer Value Analysis from the traditional Customer Satisfaction, we feel the Customer Value Indexes provide a clearer picture of a company's performance relative to other companies. The Customer Value Index places a higher level of importance on price than the legacy Customer Satisfaction Index. Also, please note that awards are presented based on a company's performance on the CV Index.

### Customer Satisfaction Index Customer Satisfaction Index Mega Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	96.22
2	Williams Gas Pipeline-Northwest	90.75
3	ANR Pipeline Co.	87.07
4	El Paso Natural Gas Co.	84.88
5	Tennessee Gas Pipeline Co.	84.29
6	Eastern Gas Trans. & Storage	82.38
7	Williams Gas Pipeline-Transco	81.37
8	Columbia Gas Transmission Corp.	80.84
9	Texas Eastern Transmission Corp.	76.97
10	Natural Gas Pipeline Co. of America	75.02

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
Southern Natural Gas Co.	86.61
Texas Gas Transmission	86.60
Gulf South Pipeline Co.	84.65
TransCanada Pipelines - Mainline System	80.68
Panhandle Eastern Pipe Line Co.	77.85
Tallgrass Interstate Gas Trans.	73.63

The *Mega Pipeline Index* consists of pipelines with at least 3,500 miles of transportation pipe, serves at least 3 states, and deliveries of at least 1 trillion CF (TCF). See Chapter 4 (pages 4-3 through 4-31) for complete results of the *Mega Pipeline* group.

Source: MASTIO 25th Edition Natural Gas Transportation Customer Value Study – 2021

## Legacy Indexes

### Customer Satisfaction Index Major Pipelines (Formerly the Long Haul Pipelines)

Rank	Pipeline	Score
1	Northern Natural Gas Co.	96.22
2	Williams Gas Pipeline-Northwest	90.75
3	ANR Pipeline Co.	87.07
4	Southern Star Central	86.10
5	El Paso Natural Gas Co.	84.88
6	Tennessee Gas Pipeline Co.	84.29
7	Eastern Gas Trans. & Storage	82.38
8	Williams Gas Pipeline-Transco	81.37
9	Columbia Gas Transmission Corp.	80.84
10	Texas Eastern Transmission Corp.	76.97
11	Natural Gas Pipeline Co. of America	75.02

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
Southern Natural Gas Co.	86.61
Texas Gas Transmission	86.60
Colorado Interstate Gas Co.	86.33
Gulf South Pipeline Co.	84.65
Florida Gas Transmission Co.	84.20
TransCanada Pipelines - Mainline System	80.68
Panhandle Eastern Pipe Line Co.	77.85
TransCanada Pipelines - Alberta System	75.19
Tallgrass Interstate Gas Trans.	73.63

The *Major Pipeline Index* consists of pipelines with at least 3,500 miles of transportation pipe and serves at least 3 states. See Chapter 4 (pages 4-33 through 4-61) for complete results of the *Major Pipeline* group.

Source: MASTIO 25th Edition Natural Gas Transportation Customer Value Study – 2021

## Legacy Indexes

### Customer Satisfaction Index Regional Pipelines (Formerly the Short Haul Pipelines)

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	97.72
2	Carolina Gas Transmission	89.92
3	Dominion Energy Questar Pipeline	89.06
4	California Gas Transmission	86.50
5	WBI Energy Transmission	85.32
6	Enbridge Gas	80.42
7	ONEOK Gas Transportation Co.	72.89
8	Southern California Gas Co.	69.69

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
Vector Pipeline	87.86
Wyoming Interstate Co. Ltd.	87.81
Northern Border Pipeline Co.	86.97
Viking Gas Transmission Co.	85.72
Iroquois Gas Transmission System L.P.	85.35
National Fuel Gas Supply Corp.	84.97
Transwestern Pipeline Co.	83.17
Great Lakes Gas Transmission, Inc.	83.11
Gas Transmission Northwest	77.19
East Tennessee Natural Gas Co.	75.65
ONEOK WesTex	75.02

The *Regional Pipeline Index* consists of pipelines with less than 3,500 miles of transportation pipe or serves less than 3 states. See Chapter 4 (pages 4-63 through 4-91) for complete results of the *Regional Pipeline* group.

Source: MASTIO 25th Edition Natural Gas Transportation Customer Value Study – 2021



## Legacy Indexes

### Customer Satisfaction Index Interstate Pipelines

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	97.72
2	Northern Natural Gas Co.	96.22
3	Williams Gas Pipeline-Northwest	90.75
4	Carolina Gas Transmission	89.92
5	Dominion Energy Questar Pipeline	89.06
6	ANR Pipeline Co.	87.07
7	Southern Star Central	86.10
8	WBI Energy Transmission	85.32
9	El Paso Natural Gas Co.	84.88
10	Tennessee Gas Pipeline Co.	84.29
11	Eastern Gas Trans. & Storage	82.38
12	Williams Gas Pipeline-Transco	81.37
13	Columbia Gas Transmission Corp.	80.84
14	Texas Eastern Transmission Corp.	76.97
15	Natural Gas Pipeline Co. of America	75.02

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
Vector Pipeline	87.86
Wyoming Interstate Co. Ltd.	87.81
Northern Border Pipeline Co.	86.97
Southern Natural Gas Co.	86.61
Texas Gas Transmission	86.60
Colorado Interstate Gas Co.	86.33
Viking Gas Transmission Co.	85.72
Iroquois Gas Transmission System L.P.	85.35
National Fuel Gas Supply Corp.	84.97
Gulf South Pipeline Co.	84.65
Florida Gas Transmission Co.	84.20
Transwestern Pipeline Co.	83.17
Great Lakes Gas Transmission, Inc.	83.11
Panhandle Eastern Pipe Line Co.	77.85
Gas Transmission Northwest	77.19
East Tennessee Natural Gas Co.	75.65
Tallgrass Interstate Gas Trans.	73.63

See Chapter 4 (pages 4-123 through 4-151) for complete results of the *Interstate Pipeline* group.

Source: MASTIO 25th Edition Natural Gas Transportation Customer Value Study – 2021

## Legacy Indexes

### Customer Satisfaction Index Canadian Pipelines

Rank	Pipeline	Score
1	Enbridge Gas	80.42

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
TransCanada Pipelines - Mainline System	80.68
TransCanada Pipelines - Alberta System	75.19

### Customer Satisfaction Index Intrastate Pipelines

Rank	Pipeline	Score
1	California Gas Transmission	86.50
2	ONEOK Gas Transportation Co.	72.89
3	Southern California Gas Co.	69.69

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
ONEOK WesTex	75.02

See Chapter 4 (pages 4-153 through 4-181) for complete results of the *Intrastate and Canadian Pipeline* group.

Source: MASTIO 25th Edition Natural Gas Transportation Customer Value Study – 2021

## Legacy Indexes

### Customer Satisfaction Index Major Organizational Groups

Rank	Pipeline	Score
1	Berkshire Hathaway Energy Pipeline Group	92.96
2	Williams Group	85.80
3	Boardwalk Pipeline Group	85.75
4	Kinder Morgan Group	83.34
5	TransCanada Group	82.42
6	Energy Transfer Group	80.91
7	ONEOK Partners Group	77.80
8	Enbridge Group	76.70

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
Tallgrass Energy Group	77.43
Enable Group	75.03

Source: MASTIO 25th Edition Natural Gas Transportation Customer Value Study – 2021

MASTIO, celebrating 32 years in business, specializes in providing an independent third-party perspective for clients who want to truly assess their corporate image, discover their perceived level of customer value, find new customers, understand the strengths and weakness of the competition, and supplement their market intelligence. Our strength is in helping clients re-think established norms, eliminate internal biases, collect and analyze data and transform market research into actions that achieve superior business results.

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