

**FOR IMMEDIATE RELEASE FOR FURTHER INFORMATION CONTACT:
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Press Release: MASTIO publishes the 26th Edition Natural Gas Pipeline Report.

MASTIO recently published the 2022, 26th 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 2022 study is based on 689 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 crucial 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 2022 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.
Eastern Gas Trans. & Storage	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
Mega Pipeline Group	Northern 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.
Eastern Gas Trans. & Storage	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.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Major Pipeline Group	Northern Natural Gas Co.	Eastern Gas Trans. & Storage Northern Natural Gas Co. Williams Gas Pipeline-Northwest

REGIONAL PIPELINE GROUP

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

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

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.

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

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
Pipeline 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 Mastio Quality Award requirements.

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 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 Mega Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	97.04
2	Williams Gas Pipeline-Northwest	92.01
3	Eastern Gas Trans. & Storage	84.24
4	Southern Natural Gas Co.	84.13
5	ANR Pipeline Co.	83.81
6	Williams Gas Pipeline-Transco	82.27
7	El Paso Natural Gas Co.	81.38
8	Tennessee Gas Pipeline Co.	80.95
9	TransCanada Pipelines - Mainline System	80.40
10	Columbia Gas Transmission Corp.	80.13
11	Natural Gas Pipeline Co. of America	78.95
12	Texas Eastern Transmission Corp.	75.26

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.	
Texas Gas Transmission	86.89
Gulf South Pipeline Co.	84.29
Panhandle Eastern Pipe Line Co.	81.40
Tallgrass Interstate Gas Trans.	80.12

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 26th Edition Natural Gas Transportation Customer Value Study – 2022

Legacy Indexes

Customer Satisfaction Index Major Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	97.04
2	Williams Gas Pipeline-Northwest	92.01
3	Eastern Gas Trans. & Storage	84.24
4	Southern Natural Gas Co.	84.13
5	ANR Pipeline Co.	83.81
6	Williams Gas Pipeline-Transco	82.27
7	El Paso Natural Gas Co.	81.38
8	Tennessee Gas Pipeline Co.	80.95
9	TransCanada Pipelines - Mainline System	80.40
10	Columbia Gas Transmission Corp.	80.13
11	Natural Gas Pipeline Co. of America	78.95
12	Southern Star Central	78.87
13	Texas Eastern Transmission Corp.	75.26

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.	
Colorado Interstate Gas Co.	88.29
Texas Gas Transmission	86.89
Gulf South Pipeline Co.	84.29
Columbia Gulf Transmission Co.	83.53
Panhandle Eastern Pipe Line Co.	81.40
Florida Gas Transmission Co.	80.26
Tallgrass Interstate Gas Trans.	80.12
Enable Gas Transmission	73.35
TransCanada Pipelines - Alberta System	70.15

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 26th Edition Natural Gas Transportation Customer Value Study – 2022

Legacy Indexes

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

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	97.36
2	Carolina Gas Transmission	92.63
3	Dominion Energy Questar Pipeline	89.96
4	WBI Energy Transmission	87.07
5	Enbridge Gas	79.00
6	Southern California Gas Co.	71.38

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.	
Dominion Energy Overthrust Pipeline	89.55
East Tennessee Natural Gas Co.	87.07
Midwestern Gas Transmission Co.	86.24
Viking Gas Transmission Co.	85.91
National Fuel Gas Supply Corp.	85.32
Transwestern Pipeline Co.	85.21
Northern Border Pipeline Co.	84.82
Iroquois Gas Transmission System L.P.	84.61
California Gas Transmission	84.52
Vector Pipeline	83.62
Gas Transmission Northwest	83.38
Great Lakes Gas Transmission, Inc.	80.84
ONEOK Gas Transportation Co.	79.85
ONEOK WesTex	72.46
Algonquin Gas Transmission Co.	72.39

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 26th Edition Natural Gas Transportation Customer Value Study – 2022

Legacy Indexes

Customer Satisfaction Index Interstate Pipelines

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	97.36
2	Northern Natural Gas Co.	97.04
3	Carolina Gas Transmission	92.63
4	Williams Gas Pipeline-Northwest	92.01
5	Dominion Energy Questar Pipeline	89.96
6	WBI Energy Transmission	87.07
7	Eastern Gas Trans. & Storage	84.24
8	Southern Natural Gas Co.	84.13
9	ANR Pipeline Co.	83.81
10	Williams Gas Pipeline-Transco	82.27
11	El Paso Natural Gas Co.	81.38
12	Tennessee Gas Pipeline Co.	80.95
13	Columbia Gas Transmission Corp.	80.13
14	Natural Gas Pipeline Co. of America	78.95
15	Southern Star Central	78.87
16	Texas Eastern Transmission Corp.	75.26

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.	
Colorado Interstate Gas Co.	88.29
East Tennessee Natural Gas Co.	87.07
Texas Gas Transmission	86.89
Midwestern Gas Transmission Co.	86.24
Viking Gas Transmission Co.	85.91
National Fuel Gas Supply Corp.	85.32
Transwestern Pipeline Co.	85.21
Northern Border Pipeline Co.	84.82
Iroquois Gas Transmission System L.P.	84.61
Gulf South Pipeline Co.	84.29
Vector Pipeline	83.62
Columbia Gulf Transmission Co.	83.53
Gas Transmission Northwest	83.38
Panhandle Eastern Pipe Line Co.	81.40
Great Lakes Gas Transmission, Inc.	80.84
Florida Gas Transmission Co.	80.26
Tallgrass Interstate Gas Trans.	80.12
Enable Gas Transmission	73.35
Algonquin Gas Transmission Co.	72.39

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

Source: MASTIO 26th Edition Natural Gas Transportation Customer Value Study – 2022

Legacy Indexes

Customer Satisfaction Index Canadian Pipelines

Rank	Pipeline	Score
1	TransCanada Pipelines - Mainline System	80.40
2	Enbridge Gas	79.00

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 - Alberta System	70.15

Customer Satisfaction Index Intrastate Pipelines

Rank	Pipeline	Score
1	Southern California Gas Co.	71.38

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.	
Dominion Energy Overthrust Pipeline	89.55
California Gas Transmission	84.52
ONEOK Gas Transportation Co.	79.85
ONEOK WesTex	72.46

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

Source: MASTIO 26th Edition Natural Gas Transportation Customer Value Study – 2022

Legacy Indexes

Customer Satisfaction Index Major Organizational Groups

Rank	Pipeline	Score
1	Berkshire Hathaway Energy Pipeline Group	94.34
2	Williams Group	86.06
3	Boardwalk Pipeline Group	85.76
4	Tallgrass Energy Group	83.34
5	Kinder Morgan Group	82.60
6	TransCanada Group	81.36
7	Energy Transfer Group	81.07
8	ONEOK Partners Group	80.73
9	Enbridge Group	76.79
10	Enable Group	75.69

Source: MASTIO 26th Edition Natural Gas Transportation Customer Value Study – 2022

MASTIO, celebrating 33 years in business, specializes in providing an independent third-party perspective for clients who want to honestly assess their corporate image, discover their perceived level of customer value, find new customers, understand the competition's strengths and weakness, and supplement their market intelligence. Our power 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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