

**FOR IMMEDIATE RELEASE FOR FURTHER INFORMATION CONTACT:  
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**Press Release: MASTIO publishes the 24<sup>th</sup> Edition Natural Gas Pipeline Report.**

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MASTIO recently published the 2020, 24<sup>th</sup> 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 late February. This new study provides results concerning interstate, intrastate and Canadian pipelines.

The 2020 study is based on 736 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 2020 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>	Northern Natural Gas Co. Southern 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. Northern Natural Gas Co. Southern 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.

Algonquin Gas Transmission Co.	Kern River Gas Transmission Co.
BC Pipeline	National Fuel Gas Supply Corp.
California Gas Transmission	Northern Border Pipeline Co.
Dominion Carolina Gas Transmission	ONEOK Gas Transportation Co.
Dominion Energy Questar Pipeline	ONEOK WesTex
East Tennessee Natural Gas Co.	Rockies Express Pipeline
Enable Mississippi River Trans (MRT)	Ruby Pipeline
Enable Oklahoma Intrastate Trans.	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

**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>	Dominion Energy Questar Pipeline Enbridge Gas Kern River Gas Transmission Co. Northern Border Pipeline 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
Dominion 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 Dominion Pipeline Group Tallgrass Energy 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 Mega Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	93.52
2	Williams Gas Pipeline-Northwest	92.44
3	Southern Natural Gas Co.	85.99
4	ANR Pipeline Co.	82.72
5	TransCanada Pipelines - Mainline System	81.49
6	Columbia Gas Transmission Corp.	81.31
7	Tennessee Gas Pipeline Co.	81.00
8	El Paso Natural Gas Co.	80.56
9	Dominion Transmission, Inc.	79.56
10	Williams Gas Pipeline-Transco	78.79
11	Panhandle Eastern Pipe Line Co.	78.71
12	Natural Gas Pipeline Co. of America	74.49
13	Texas Eastern Transmission Corp.	74.47

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.	
Gulf South Pipeline Co.	88.42
Texas Gas Transmission	83.87
Tallgrass Interstate Gas Trans.	82.81

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).

## Legacy Indexes

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

Rank	Pipeline	Score
1	Northern Natural Gas Co.	93.52
2	Williams Gas Pipeline-Northwest	92.44
3	Southern Natural Gas Co.	85.99
4	Southern Star Central	83.87
5	ANR Pipeline Co.	82.72
6	TransCanada Pipelines - Mainline System	81.49
7	Columbia Gas Transmission Corp.	81.31
8	Tennessee Gas Pipeline Co.	81.00
9	El Paso Natural Gas Co.	80.56
10	Colorado Interstate Gas Co.	80.13
11	Dominion Transmission, Inc.	79.56
12	Williams Gas Pipeline-Transco	78.79
13	Panhandle Eastern Pipe Line Co.	78.71
14	Natural Gas Pipeline Co. of America	74.49
15	Texas Eastern Transmission Corp.	74.47
16	TransCanada Pipelines - Alberta System	69.72

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.	
Gulf South Pipeline Co.	88.42
Florida Gas Transmission Co.	85.10
Texas Gas Transmission	83.87
Columbia Gulf Transmission Co.	83.49
Tallgrass Interstate Gas Trans.	82.81
Trunkline Gas Co.	78.46
Enable Gas Transmission	71.78

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

## Legacy Indexes

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

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	96.64
2	Dominion Energy Questar Pipeline	87.83
3	Northern Border Pipeline Co.	84.20
4	Vector Pipeline	83.23
5	Enbridge Gas	82.54
6	Southern California Gas Co.	69.98
7	ONEOK Gas Transportation Co.	68.42

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.	
Enable Mississippi River Trans (MRT)	89.51
Dominion Carolina Gas Transmission	88.28
California Gas Transmission	85.23
Rockies Express Pipeline	84.45
Transwestern Pipeline Co.	84.35
WBI Energy Transmission	82.24
Viking Gas Transmission Co.	81.89
National Fuel Gas Supply Corp.	81.72
Ruby Pipeline	81.31
Iroquois Gas Transmission System L.P.	80.86
Great Lakes Gas Transmission, Inc.	78.84
East Tennessee Natural Gas Co.	78.28
ONEOK WesTex	75.29
Enable Oklahoma Intrastate Trans.	74.35
Gas Transmission Northwest	73.07
BC Pipeline	71.91
Algonquin Gas Transmission Co.	66.43

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



## Legacy Indexes

### Customer Satisfaction Index Interstate Pipelines

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	96.64
2	Northern Natural Gas Co.	93.52
3	Williams Gas Pipeline-Northwest	92.44
4	Dominion Energy Questar Pipeline	87.83
5	Southern Natural Gas Co.	85.99
6	Northern Border Pipeline Co.	84.20
7	Southern Star Central	83.87
8	Vector Pipeline	83.23
9	ANR Pipeline Co.	82.72
10	Columbia Gas Transmission Corp.	81.31
11	Tennessee Gas Pipeline Co.	81.00
12	El Paso Natural Gas Co.	80.56
13	Colorado Interstate Gas Co.	80.13
14	Dominion Transmission, Inc.	79.56
15	Williams Gas Pipeline-Transco	78.79
16	Panhandle Eastern Pipe Line Co.	78.71
17	Natural Gas Pipeline Co. of America	74.49
18	Texas Eastern Transmission Corp.	74.47

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.	
Enable Mississippi River Trans (MRT)	89.51
Gulf South Pipeline Co.	88.42
Dominion Carolina Gas Transmission	88.28
Florida Gas Transmission Co.	85.10
Rockies Express Pipeline	84.45
Transwestern Pipeline Co.	84.35
Texas Gas Transmission	83.87
Columbia Gulf Transmission Co.	83.49
Tallgrass Interstate Gas Trans.	82.81
WBI Energy Transmission	82.24
Viking Gas Transmission Co.	81.89
National Fuel Gas Supply Corp.	81.72
Ruby Pipeline	81.31
Iroquois Gas Transmission System L.P.	80.86
Great Lakes Gas Transmission, Inc.	78.84
Trunkline Gas Co.	78.46
East Tennessee Natural Gas Co.	78.28
Gas Transmission Northwest	73.07
Enable Gas Transmission	71.78
Algonquin Gas Transmission Co.	66.43

## Legacy Indexes

### Customer Satisfaction Index Canadian Pipelines Customer Satisfaction Index Canadian Pipelines

Rank	Pipeline	Score
1	Enbridge Gas	82.54
2	TransCanada Pipelines - Mainline System	81.49
3	TransCanada Pipelines - Alberta System	69.72

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.	
Foothills Pipeline Ltd.	78.94
BC Pipeline	71.91

### Customer Satisfaction Index Intrastate Pipelines

Rank	Pipeline	Score
1	Southern California Gas Co.	69.98
2	ONEOK Gas Transportation Co.	68.42

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.	
California Gas Transmission	85.23
Atmos Pipeline - Texas	76.76
ONEOK WesTex	75.29
Enable Oklahoma Intrastate Trans.	74.35

Source: MASTIO 24<sup>th</sup> Edition Natural Gas Transportation Customer Value Study – 2020

## Legacy Indexes

### Customer Satisfaction Index Major Organizational Groups

Rank	Pipeline	Score
1	Berkshire Hathaway Energy Pipeline Group	94.84
2	Boardwalk Pipeline Group	85.72
3	Dominion Pipeline Group	84.88
4	Williams Group	84.24
5	Tallgrass Energy Group	83.59
6	Kinder Morgan Group	80.11

Rank	Pipeline	Score
7	TransCanada Group	79.89
8	Energy Transfer Group	79.54
9	Enable Group	77.68
10	Enbridge Group	77.18
11	ONEOK Partners Group	75.31

The *Major Organizational Groups Index* consists of organizational scores compiled from the combined scores of their transportation subsidiaries.

Source: MASTIO 24<sup>th</sup> Edition Natural Gas Transportation Customer Value Study – 2020

MASTIO, celebrating 31 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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