

Mastio & Company's

Natural Gas Pipeline Customer Value & Loyalty Benchmarking Study

29th Edition 2025

Metrics to Manage the “Shipper Experience”



Natural Gas Pipeline Shipper Experience Study - 2025

OVERVIEW

MASTIO is pleased to announce the publication of the 2025, 29th Edition of the industry-wide Natural Gas Pipeline Customer Value & Loyalty Benchmarking Study. The study, released to subscribers in late February, provides comprehensive insights into interstate, intrastate, and Canadian pipelines.

Based on 745 in-depth interviews with industrial customers, local distribution companies (LDCs), independent power producers, producers, and marketers, this study evaluates pipeline performance across 29 key attributes. These include responsiveness, after-hours support, reliability of firm gas transportation, problem resolution, overall company performance, and likelihood of recommending a pipeline.

In addition to quantitative metrics, the study captures qualitative insights through multiple open-ended questions.

Respondents share their perspectives on critical decision-making factors, including:

Access to available storage.	Flexibility of gas pooling and aggregation services.
Accuracy of gas metering systems.	Flexibility of physical gas flow delivery.
Accuracy of invoices.	Flexible transport options.
Accurate operational information is readily available.	How likely would you be to recommend this company to a friend or colleague?
Ample access to diverse supply and/or markets	Independent of costs, how would you rate each pipeline on Overall Performance.
Communicates in an honest and forthright manner.	Management of pipeline-initiated restrictions.
Competitive rates and/or discounts.	Pipeline staff provides prompt and accurate responses to questions and requests and issues.
Effective after-hours support.	Quality of pipeline initiated communications.
Effectiveness of contract negotiations.	Representatives are accessible when needed.
Effectiveness of pipeline's capacity release and contract systems and procedures.	Representatives understand the needs and challenges of your business.
Effectiveness of pipeline's system training. (i.e. their proprietary EBB)	Representatives use creativity and innovation to help address your business needs.
Effectiveness of the pipeline's system for nominating, confirming and scheduling.	Representatives who listen well.
Expertise of the representatives to help solve your business needs.	Scheduled gas volumes are accurate.
Financial stability of the pipeline.	Value received for the money paid to the pipeline.
Firm gas transportation is highly reliable.	

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The following pipelines are included in the published version of the 2025 Mastio Study.

Pipeline	Pipeline
ANR Pipeline Co.	Natural Gas Pipeline Co. of America
BC Pipeline	Northern Border Pipeline Co.
California Gas Transmission	Northern Natural Gas Co.
Canadian Mainline	Nova Gas Transmission Line
Carolina Gas Transmission	ONEOK Gas Transportation Co.
Colorado Interstate Gas Co.	Panhandle Eastern Pipe Line Co.
Columbia Gas Transmission Corp.	Rockies Express Pipeline
Columbia Gulf Transmission Co.	Southern California Gas Co.
East Tennessee Natural Gas Co.	Southern Natural Gas Co.
Eastern Gas Trans. & Storage	Southern Star Central
El Paso Natural Gas Co.	Tallgrass Interstate Gas Trans.
Enable Gas Transmission	Tennessee Gas Pipeline Co.
Enbridge Gas	Texas Eastern Transmission Corp.
Florida Gas Transmission Co.	Texas Gas Transmission
Gas Transmission Northwest	Trailblazer Pipeline Co.
Great Lakes Gas Transmission	Transwestern Pipeline Co.
Gulf South Pipeline Co.	Vector Pipeline
Iroquois Gas Transmission System	Viking Gas Transmission Co.
Kern River Gas Transmission Co.	WBI Energy Transmission
Midwestern Gas Transmission Co.	Williams Gas Pipeline-Northwest
MountainWest Overthrust Pipeline	Williams Gas Pipeline-Transco
MountainWest Pipeline	Wyoming Interstate Co. Ltd.
National Fuel Gas Supply Corp.	

Natural Gas Pipeline Shipper Experience Study - 2025

STUDY ANSWERS

Subscribers to **MASTIO's Natural Gas Pipeline Shipper Experience Study** learn customer perceptions of Performance, Value, and Loyalty by a multitude of data segmentations that will specifically answer questions such as,

1. How do customers make their purchase decisions? What factors are the most important drivers of customers' perceptions of overall value and loyalty? What key buying factors (attributes) customers consider to be the most important when selecting between suppliers both from a **stated** and **derived** basis? The key buying factors will be classified as a *Baseline Requirement*, *Conscious Differentiator*, *Latent Differentiator* or *Low Impact Factor* to make it easier to understand what is really most important to customers.
2. What are the factors that lead to **defection**? What are the factors that result in **retention** – a greater share of the wallet? I.
3. How do customers perceive your overall value and loyalty relative to **key competitors**? How competitive is your position in the marketplace? Where do you and your competitors fall on a value map - *inferior*, *economy*, *superior*, or *premium position*? Who should be losing or gaining market share? What are the biggest drivers of you and your competitors' position? What is required to change your position?
4. How do customers perceive your performance on the key buying factors? What do customers perceive as **strengths** and **weaknesses** relative to key competitors? Which factors should you target for improvement? Which factors will have the greatest impact on your ability to win and retain more business? What factors should be emphasized in marketing communications that will resonate with customers?
5. How large a role does price play in the purchasing decision? What performance factors will allow a premium?
6. Which competitors are the most vulnerable and which are strongest in their ability to gain and retain customers? How do customers perceive the performance of competitors on the key buying factors? How do you use this knowledge to have a direct impact on your growth and profits?

In short, the study will identify improvements and marketing actions that will make customers choose a specific Natural Gas Pipeline more than its competitors.

DELIVERABLES

The comprehensive study will come with a printed report, a Microsoft Excel version of the raw data, custom tagging features of the data, and a proprietary segmentation software package that includes tools to conduct your own detailed analysis including a head-to-head comparison with key competitors. The segmentation software also allows subscribers to segment the data by demographics selected by you such as state, volume, strategic importance, etc. to see where you stand vs. the competition and thus be quickly underway with actions to improve performance.

MASTIO's software also provides clients with a custom tagging feature. The custom tagging is proprietary for each client. This feature allows the grouping of your customers, for example, by the key person responsible for each customer interaction, customer service teams, profitability, strategic importance, volume, etc. These options are virtually unlimited. This powerful feature allows additional in-depth analysis and customization of the data.

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METHODOLOGY

A Data-Driven Approach to Customer Success

Unlike conventional customer satisfaction strategies, our approach is built on solid empirical evidence, delivering actionable insights that drive business profitability. At MASTIO, we focus on two key metrics—Customer Value and Customer Loyalty—which have a proven, direct impact on a company's growth, market share, and overall profitability.

These powerful indicators provide business leaders with a clear, data-backed way to track customer relationship success—just as financial reports measure profit performance. The results speak for themselves: companies that lead in Customer Loyalty (measured by Net Promoter Score) consistently achieve growth rates more than twice as high as their competitors.

By leveraging these insights, you gain a competitive edge, ensuring stronger customer relationships and sustained business success.

BACKGROUND

Unbiased Market Intelligence, Proven Results

For over 35 years, MASTIO has been a trusted partner, providing clients with an impartial, third-party perspective to help them gain a deeper understanding of their corporate identity and market position. We specialize in uncovering how customers perceive value, expanding client bases, analyzing the competitive landscape, and delivering data-driven market intelligence that fuels growth.

Our expertise lies in challenging conventional thinking, eliminating internal biases, and transforming research into strategic action. Through rigorous data collection and analysis, we help businesses make informed decisions, sharpen their competitive edge, and drive measurable success.

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