

# Mastio & Company's Natural Gas Pipeline Customer Value & Loyalty Benchmarking Study

29<sup>th</sup> Edition 2025

Metrics to Manage the “Shipper Experience”



# Natural Gas Marketer Customer Experience Study - 2025

## OVERVIEW

MASTIO published its 29th Edition Natural Gas Marketer Carrier Customer Value & Loyalty Study in November 2025. This study identifies and quantifies the perceptions and needs of buyers of natural gas. The 2025 study is based on findings from 401 detailed telephone interviews with key decision-makers from major buyers of natural gas throughout the U.S. and Canada. Mastio conducts telephone interviews because it offers several advantages over other methodologies, including control over the sample to ensure that it is representative of the population(s) being studied, higher response rates and, therefore, more accurate results, and the ability to screen for the appropriate decision maker at each location. The opportunity for interviewers to probe for complete and meaningful replies to open-ended questions is another key advantage of a telephone interview.

The 2025 study also includes approximately 2,600 qualitative responses to ten open-ended questions about individual marketers/suppliers. The feedback was collected via telephone interviews with key decision-makers beginning in August and ending in early December 2025.

### SAMPLE OF THE ATTRIBUTES MEASURED

- Consistency of account management.
- Sales representatives who listen well.
- Responsiveness of sales representative.
- Knowledge of sales team.
- Easy to contact the sales rep.
- Frequency of communication from the sales rep.
- Open communication.
- Personnel empowered to service your needs.
- Problems are resolved in a timely manner.
- Knowledge of customer service personnel.
- Ease of initiating gas purchases.
- Speed of contract negotiations.
- Flexible contracts.
- Accurate nominations.
- Accuracy of invoices and statements..
- Ease of contacting back-office personnel.
- Capability of back-office personnel.
- Fairness of credit negotiations. Probe if 6 or below.
- Quality of information provided to help make energy decisions on company website.
- Has financial strength to back future commitments.
- Historically dependable in meeting commitments.
- Reliability of gas supply.
- Builds collaborative relationships.
- Supplier is honest and trustworthy. Probe if 6 or below.
- Ease of doing business. Probe if 6 or below.
- Overall customer experience working with each supplier? Probe if 6 or below.
- Overall Performance rating independent of price.

### NATURAL GAS MARKETERS INCLUDED IN THE 2025 PRINTED REPORT

- BP
- Castleton Commodities
- Chevron
- CIMA Energy
- Citadel
- ConocoPhillips
- Constellation
- DTE Energy
- EDF Trading
- Gas South
- IGS Energy
- Koch Energy Services
- Macquarie Energy
- MEICO
- NRG Business Marketing
- Sequent Energy
- Shell Energy North America
- Symmetry Energy Solutions
- Tenaska Marketing Venture
- Texican
- Twin Eagle Resource Management
- Vitol

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## STUDY ANSWERS

Subscribers to **MASTIO's Natural Gas Marketer Customer 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 Marketer 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 grounded in 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 those of 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 36 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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