



Pipeline Services Survey Results 2018

1. Introduction

The National Energy Board (Board) strives to support efficient markets, where the services that shippers receive from pipeline companies meet shippers' needs.

In 2018, the Board conducted a Pipeline Services Survey (Survey). The Survey was last conducted in 2016. The Survey is a means to obtain direct feedback from the shippers of NEB-regulated pipeline companies on the quality of service provided by those pipelines and on the Board's processes with respect to tolls and tariffs. The Board also considers the survey results as an input when deciding which pipeline companies to audit as part of its financial regulatory audit program and in focusing the audit objectives and scope. The Board's objective is to facilitate continuous improvement in pipeline services and the 2018 Survey is in keeping with this objective.

The Survey results now feed into one of the measures in the Board's Departmental Results Framework (DRF). The DRF indicator measures the percentage of shippers that rate the Overall Quality of Service of pipeline services offering and delivery at three or higher on a five-point scale.

Every three years, the full survey of approximately 20 questions will be performed. In the intervening years, a short survey of five questions will be conducted. The Overall Quality of Service question required for the DRF will be included in both the long and short surveys. The short survey was conducted for the current year.

This Report is a summary of the results in aggregate for all the companies surveyed. In addition, the Board will provide each pipeline company and its shippers with detailed company-specific results including the verbatim anonymous comments received from shippers.

2. Surveys Issued and Response Rate

In total, 827 surveys were issued. Shippers who utilize multiple pipeline systems received a separate survey for each pipeline. The overall response rate was approximately twenty per cent (20%), down slightly from the 2016 rate of twenty-two per cent (22%).

Survey Responses

Company	2016 Surveys Issued	2018 Surveys Issued	2016 Response Rate	2018 Response Rate
Alliance	35	40	34.3%	32.5%
AltaGas	11	4	45.5%	25.0%
Enbridge Bakken	15	18	6.7%	5.6%
Enbridge Mainline	107	47	15.0%	25.5%
Enbridge Southern Lights	9	6	22.2%	33.3%
Express	16	59	50.0%	16.7%
Foothills	63	56	22.2%	10.7%
Kinder Morgan Cochin	10	4	10.0%	50.0%
Maritimes & Northeast	15	15	46.7%	60.0%
NOVA Gas Transmission	206	236	26.2%	19.5%
Plains Midstream	15	14	40.0%	28.6%
Trans Mountain	10	14	70.0%	50.0%
TransCanada Keystone	23	23	39.1%	21.7%
TransCanada Mainline	310	136	11.6%	13.2%
Vector	44	33	18.2%	15.2%
Westcoast Field Services	15	38	33.3%	21.1%
Westcoast Transmission	59	57	32.2%	26.3%
Westspur	43	27	23.3%	3.7%
Total	1006	827	21.9%	20.0%

3. Survey Results and Comparison to 2016 Survey

This section summarizes the aggregate results and comments for all of the pipelines for each question in the Survey.

On questions one and two, in addition to providing comments, respondents were asked to rate their satisfaction with the services they receive on a scale of 1 to 5, where:

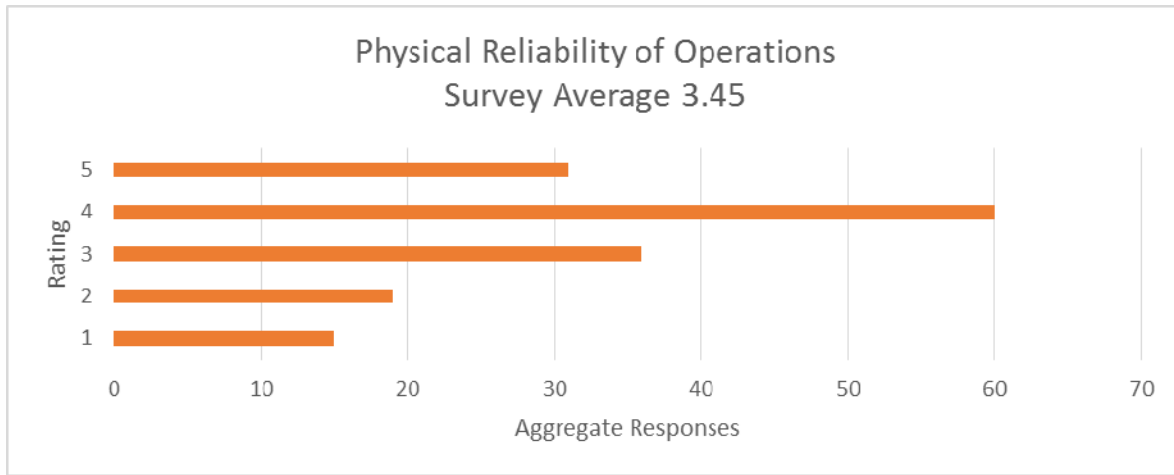
- 1 indicates "Very dissatisfied",
- 2 indicates "Dissatisfied",
- 3 indicates "Neither satisfied nor dissatisfied",
- 4 indicates "Satisfied", and
- 5 indicates "Very satisfied".

Questions three through five only requested comments.

Questions and Responses

1. How satisfied are you with the physical reliability of the pipeline company’s operations?

Satisfaction with the physical reliability of pipeline operations decreased from the 2016 Survey from 3.74 to 3.45. Fifty seven per cent (57%) of shippers gave pipelines a rating of Satisfied (4) or Very satisfied (5), compared to seventy-four per cent (74%) in 2016. Many shippers expressed concern with an increase in service restrictions resulting from system maintenance. Some shippers also noted that increased system transparency is needed, particularly on system maintenance matters.

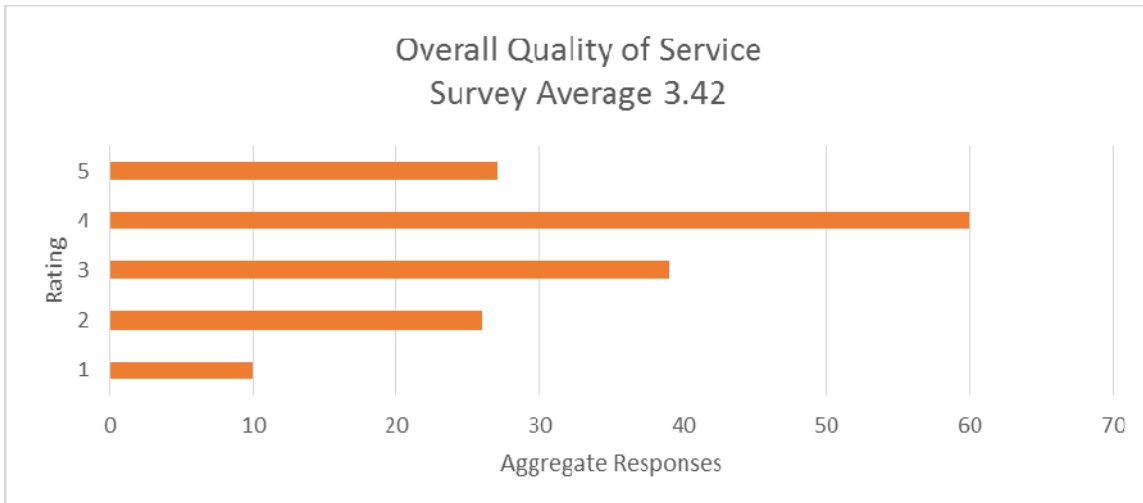


1	2	3	4	5	Average
15	19	36	60	31	3.45

2. How satisfied are you with the OVERALL quality of service provided by the pipeline company over the last calendar year?

The satisfaction rating for overall quality of service was 3.42 this year, which is just below the 3.48 rating from the 2016 Survey. Generally, shippers were satisfied with the overall quality of service. Fifty-four per cent (54%) of shippers gave pipelines a rating of Satisfied (4) or Very satisfied (5). The concerns raised by shippers include:

- Communication,
- Shipper consultation,
- Transparency, and
- Reliability.



1	2	3	4	5	Average
10	26	39	60	27	3.42

3. What are the things that this pipeline company does well?

This question provided shippers with an opportunity to list the things that their particular pipeline company is doing well. Similar to the 2016 Survey, some commonly mentioned areas by shippers include:

- Friendly, responsive, and helpful staff;
- Good communication;
- Willing to resolve shipper's issues;
- Operational Flexibility; and
- Reliability

4. What three areas would need to improve the most for this pipeline company to receive a higher overall customer satisfaction rating from your company?

The most common themes for areas requiring improvement indicated by shippers across all pipelines were:

- Communication with shippers, especially with respect to interruptions of service and apportionment;
- Internal coordination and communication between different units within the pipeline company;
- Transparency of systems and information made available to shippers;
- Nominations systems and procedures;
- Customer service; and
- Ease of use of online systems.

5. What could the Board do to improve its processes through which tolls and tariffs are determined?

A variety of subjects were mentioned by shippers regarding how the Board could improve its handling of toll and tariff matters. Common themes included:

- Faster processes and decisions from the Board;
- Increased scrutiny of the fairness of tolls and tariffs and the associated return earned by the pipeline companies;
- Greater transparency from both the pipeline companies and the Board regarding how tolls are determined;
- Holding companies more accountable for reliability issues;
- Ensuring fair treatment of all companies when apportionment must take place; and
- Removal of barriers for smaller shippers to voice their concerns and be heard in Board proceedings.

4. Conclusions

Feedback on Pipeline Services

In aggregate, it appears that shipper satisfaction has decreased since the previous Survey in 2016, although a direct comparison is difficult to make given that the short version of the survey was issued this year. In the comments provided by shippers, much of this downturn in satisfaction appears to be largely tied to reliability issues and apportionment.

Feedback on the Board

The NEB is grateful for this feedback, and it is captured and considered as part of its continuous improvement process. The NEB recognizes and appreciates the time shippers have invested in responding to the survey.