



Presentation - Composite Report

Pipeline Safety Program Evaluation Study 2026

Project Overview



Research Objectives

- In 2026, the Northeast Gas Association (hereinafter, “NGA”) Public Awareness Working Group, engaged the services of GreatBlue Research, Inc. (GreatBlue) to conduct its Pipeline Public Awareness Program Evaluations Study. This sixth survey acts as the 4-year tracking study to the surveys conducted in 2006, 2010, 2014, 2018, and 2022 in accordance with the American Petroleum Institute (hereinafter, “API”) RP 1162.
- The primary goal of this research study was to assess the effectiveness of NGA’s current member pipeline safety programs, identify areas for improvement, and isolate methods that may increase engagement.
- The outcome of this research will enable NGA personnel to a) more clearly understand stakeholder pipeline safety comprehension, b) act on near-term opportunities for improvement and, c) create a strategic roadmap to increase stakeholder awareness of natural gas pipeline safety messages and best practices.

Areas of Investigation

The NGA Pipeline Safety Program Evaluation Study leveraged a quantitative research methodology to address the following areas of investigation:

- Overall awareness of natural gas pipelines
- Perceptions of, and concerns over pipeline safety
- Knowledge and understanding of pipeline leaks
- Behavior in reaction to detected gas leaks
- Awareness of the NGA natural gas pipeline safety campaign
- Sources for information regarding pipeline safety
- Demographic profiles of respondents



Project Overview



Background

- In accordance with API RP 1162, NGA elected to perform its Pipeline Public Awareness Program Evaluations Study as an industry trade association. This industry trade association conducted the survey and segmented results by both region and operator to allow application of results to each operator.
- Prior to the benchmark 2006 study, GreatBlue pre-tested safety materials in a series of two in-depth focus groups (one among natural gas customers and a second among non-customers). As part of the Northeast Gas Association Public Awareness Working Group, initial communications messaging and materials for the original Public Awareness bill insert, brochure, newspaper advertising, radio public service announcements and website were all tested during these focus groups. These focus groups took place on September 20, 2006.
 - In 2014, additional focus groups were conducted throughout New York to measure any potential gaps in the Pipeline Public Awareness Program and test new messaging materials developed since the benchmark study in 2006. A total of ten in-depth focus groups (among natural gas customers and non-customers) were conducted from November 19 through December 10, 2014.
- Survey input was provided by NGA and GreatBlue officials. Four survey instruments were used to elicit information from all respondents. Survey design at GreatBlue is a careful, deliberative process to ensure fair, objective and balanced surveys. Staff members, with years of survey design experience, edit out any bias.

Audiences Surveyed

- In accordance with API RP 1162, GreatBlue performed this evaluation within the four (4) year timeframe. All study deliverables, including reporting, were to be completed within four years of the prior completed study in 2022.
- Using a quantitative research design, GreatBlue completed interviews among each of the four (4) stakeholder audiences outlined by API RP 1162.
 - **Affected Public** qualified for the survey if they confirmed they were heads of household, at least eighteen years of age and were current residents of the service territory included.
 - **Public Officials** qualified to complete the survey if they reported to be Mayors, Councilmen and Council Members.
 - **Emergency Management Services Officials** qualified to complete the survey if they reported working within a Fire, Police or Sheriff's Department, in Local Emergency Planning, Emergency Management Services, Planning/Zoning/Licensing/Permitting/Building Departments, Enforcement Departments, Engineering Departments/DPW or within a Governing Council.
 - **Excavators** qualified to complete the survey if they were one of the owners, managers, operators or individuals responsible for assigning excavation projects.

Regions/Territories Surveyed



Region	State(s)	Gas Utilities Represented
Region One	Connecticut	Connecticut Natural Gas, Eversource CT, Norwich Public Utilities and Southern Connecticut Gas
Region Two	Maine, New Hampshire, Vermont	Unitil (formerly Bangor Gas), Maine Natural Gas, Unitil ME, Unitil NH and VGS
Region Three	New York (Northeast)	Liberty NY, NAES Corporation, National Grid Upstate NY and New York State Electric & Gas
Region Four	New York (West), Pennsylvania	Corning Gas, Leatherstocking Gas Company, National Fuel Gas NY, National Fuel Gas PA, Pike County Light and Power, Rochester Gas & Electric, UGI Utilities, Inc., Valley Energy NY and Valley Energy PA
Region Five	New York (Southeast)	Central Hudson Gas & Electric, Consolidated Edison, National Grid Downstate NY and Orange & Rockland Utilities
Region Six	Massachusetts	Berkshire Gas, Eversource MA (formerly Columbia), Holyoke Gas & Electric, Unitil MA, and Westfield Gas & Electric
Region Seven	Massachusetts (Southeast), Rhode Island	Eversource MA/NStar, Liberty MA, Middleborough Gas & Electric, National Grid MA, Rhode Island Energy and Wakefield Municipal Gas & Light Department
Region Eight	New Jersey	Elizabethtown Gas, New Jersey Natural Gas Company, Public Service Electric & Gas and South Jersey Gas

NGA Service Territory



Research Methodology Snapshot



Affected Public

Methodology Digital	No. of Completes 13,050	No. of Questions 46*	Sample Professionally procured, client provided + digital database	
Target Affected Public	Quality Assurance Dual-level**	Margin of Error +/- 0.51%	Confidence Level 95%	Research Dates April 1 - October 1, 2025

* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

Research Methodology Snapshot



Public Officials

Methodology Digital / Telephone	No. of Completes 1,228	No. of Questions 48*	Sample Professionally procured, client provided + digital database	
Target Public Officials	Quality Assurance Dual-level**	Margin of Error +/- 2.71%	Confidence Level 95%	Research Dates April 1, 2025 - January 23, 2026

* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

Research Methodology Snapshot



EMS Personnel

Methodology Digital / Telephone	No. of Completes 1,243	No. of Questions 52*	Sample Professionally procured, client provided + digital database	
Target EMS Personnel	Quality Assurance Dual-level**	Margin of Error +/- 2.69%	Confidence Level 95%	Research Dates April 1, 2025 - January 23, 2026

* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

Research Methodology Snapshot



Excavators

Methodology Digital / Telephone	No. of Completes 1,233	No. of Questions 49*	Sample Professionally procured, client provided + digital database	
Target Excavators	Quality Assurance Dual-level**	Margin of Error +/- 2.70%	Confidence Level 95%	Research Dates April 1, 2025 - January 23, 2026

* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.



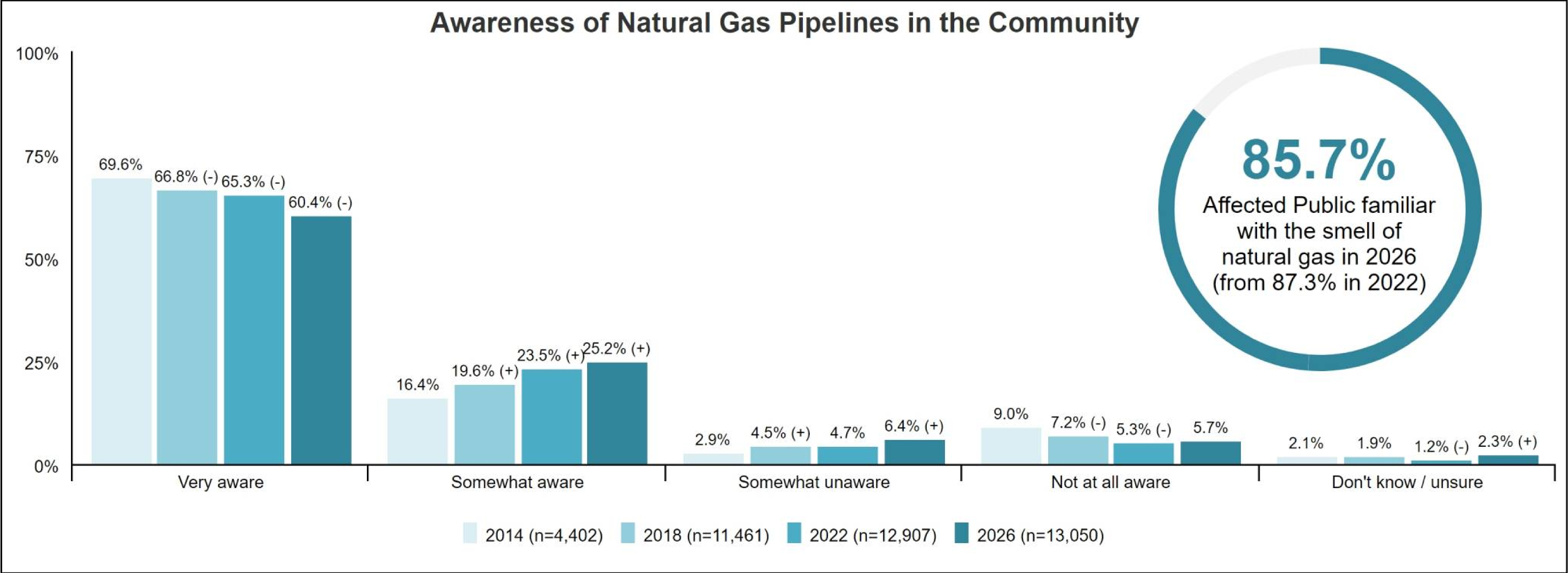
Key Study Findings



AFFECTED PUBLIC

Public Awareness of Pipelines

In 2026, fewer respondents were aware that pipelines run through their community (85.6% from 88.8% in 2022). Notably, significantly fewer respondents have indicated they were "very aware" each period since 2014. In addition, the strong majority of respondents (85.7%) reported a familiarity with the smell of natural gas (from 87.3% in 2022).



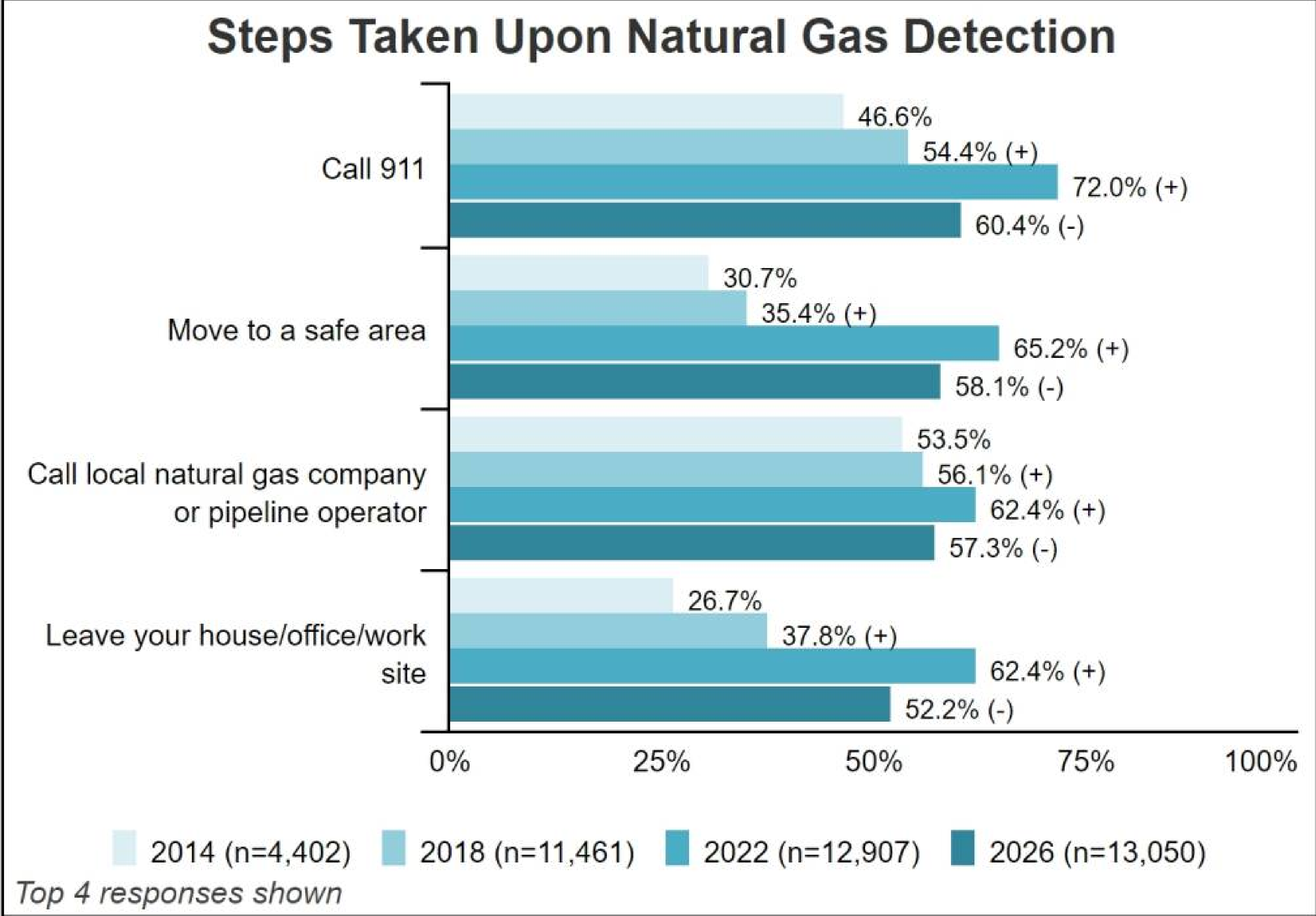
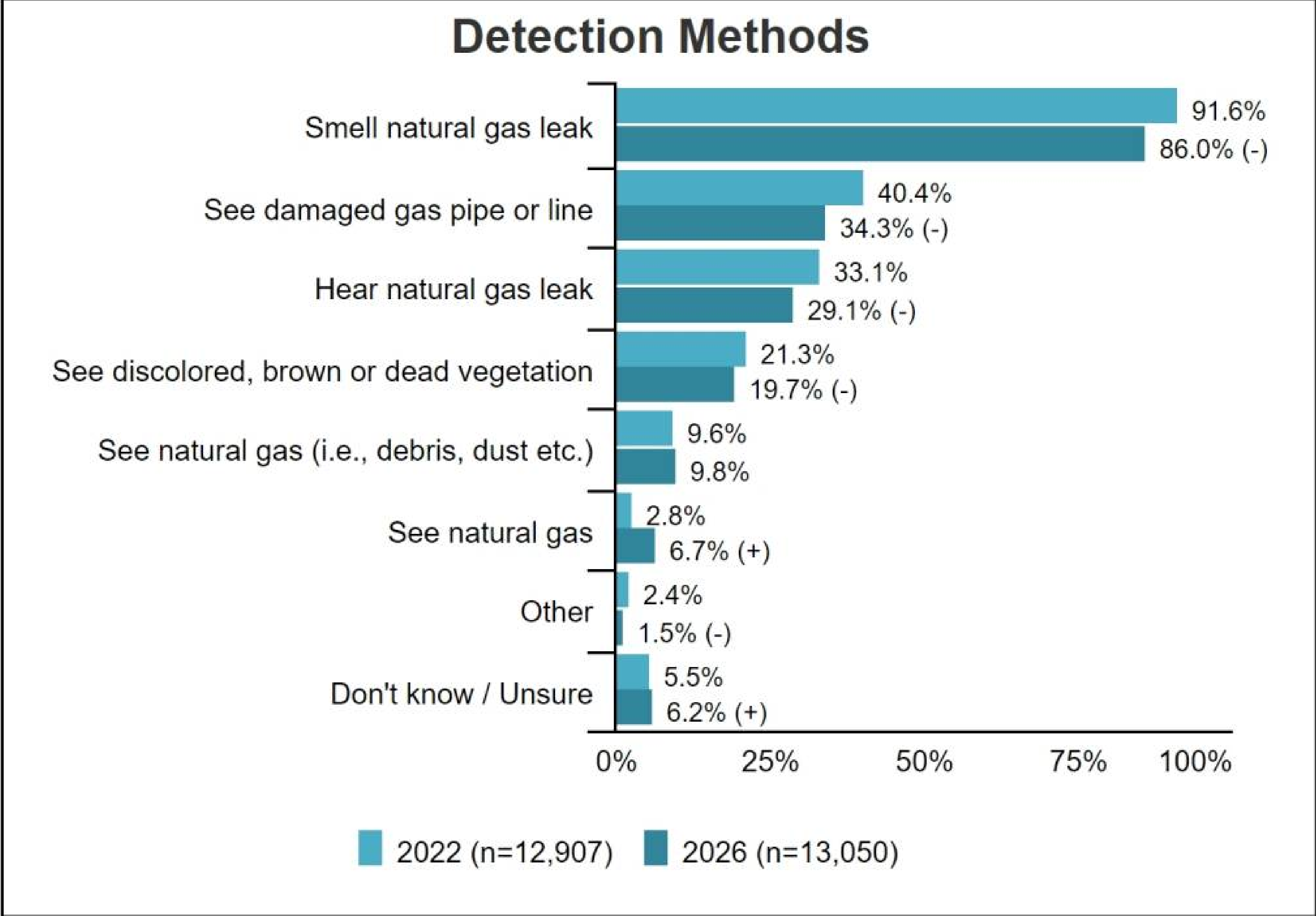
Q1: Prior to the survey today, please indicate how aware you were that natural gas pipelines run underground in many areas in and around your community including directly to the homes of natural gas customers?

Q2: How familiar are you with the smell of natural gas?

(+/-) indicates a statistically significant difference over the previous survey

Gas Leak Detection and Response

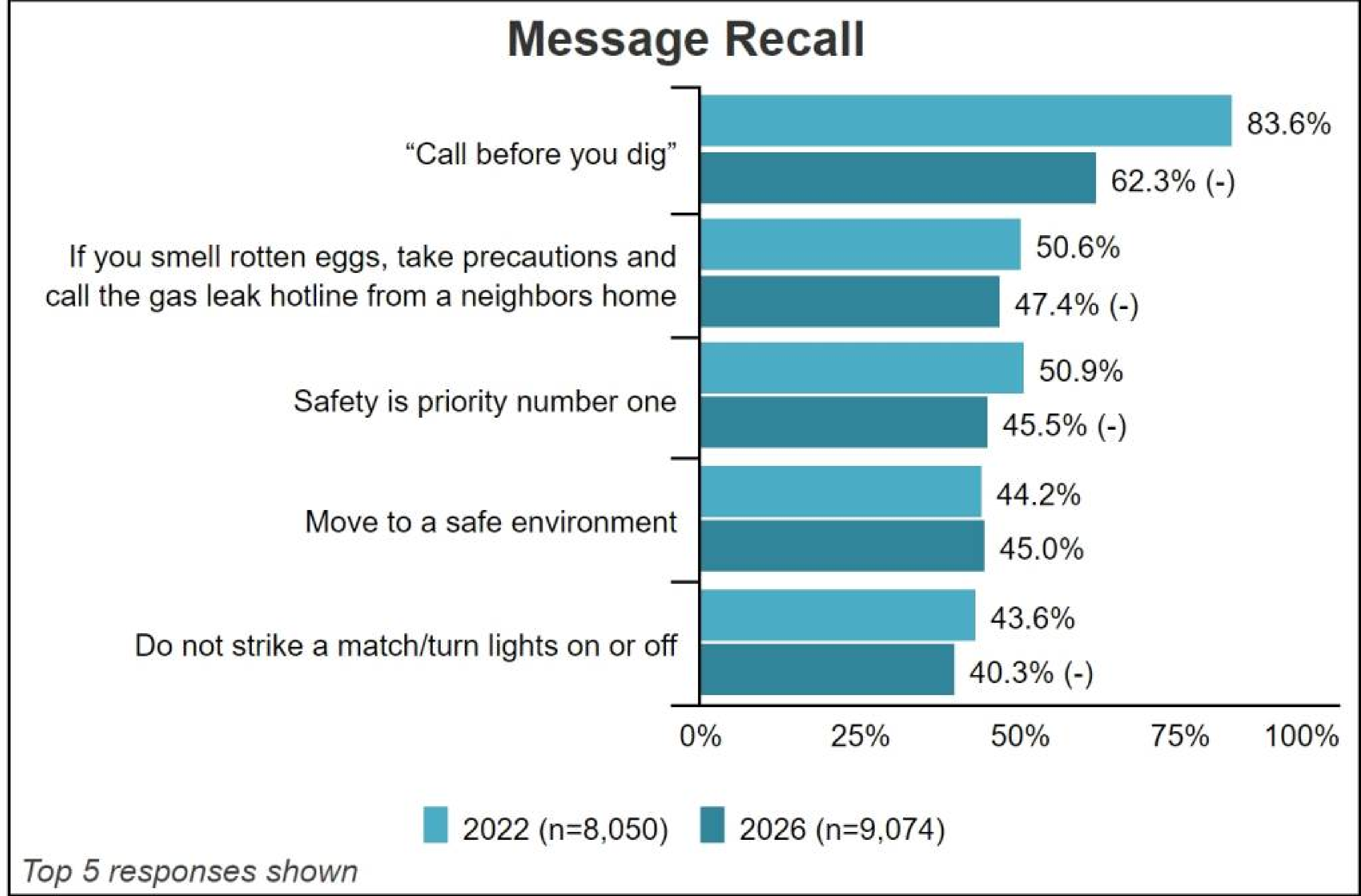
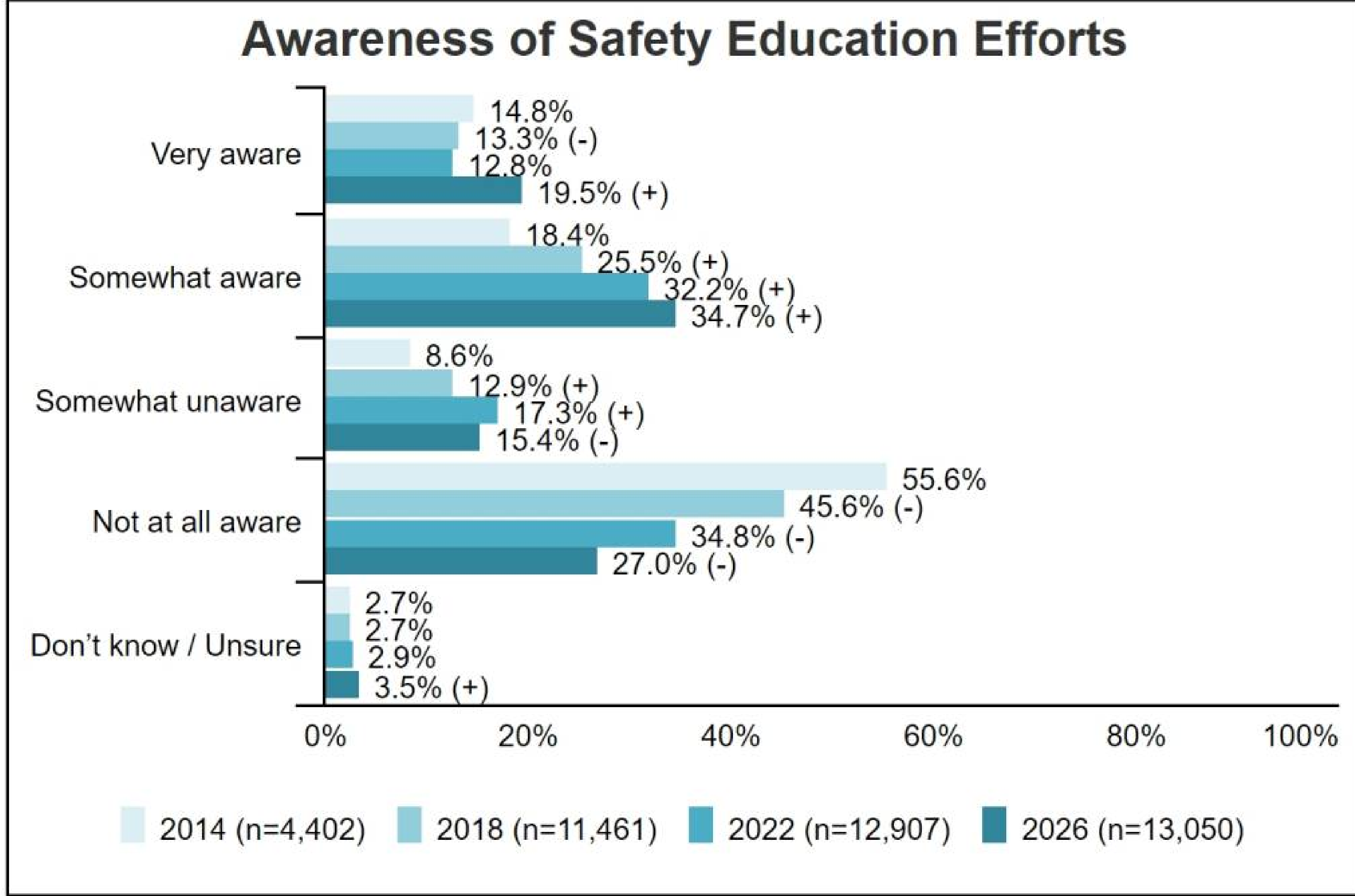
“Smell a gas leak” was reported as the most prominent way of detecting a leak by a vast majority of the Affected Public (86.0%, significantly fewer than 91.6% in 2022). Significant decreases were recorded in each of the top desired behaviors the public would take as a result of detecting a natural gas leak. These included “Call 911” (-11.6 percentage points), “Move to a safe area” (-7.1 percentage points), “Call local natural gas company or pipeline operator” (-5.1 percentage points), and “Leave the house/office/work site” (-10.2 percentage points).



Q8: Please indicate how you might detect a natural gas leak?
 Q9: If you were to cause or detect a natural gas leak, please indicate what you would do or what steps you might take?
 (+/-) indicates a statistically significant difference over the previous survey

Awareness of Safety Education

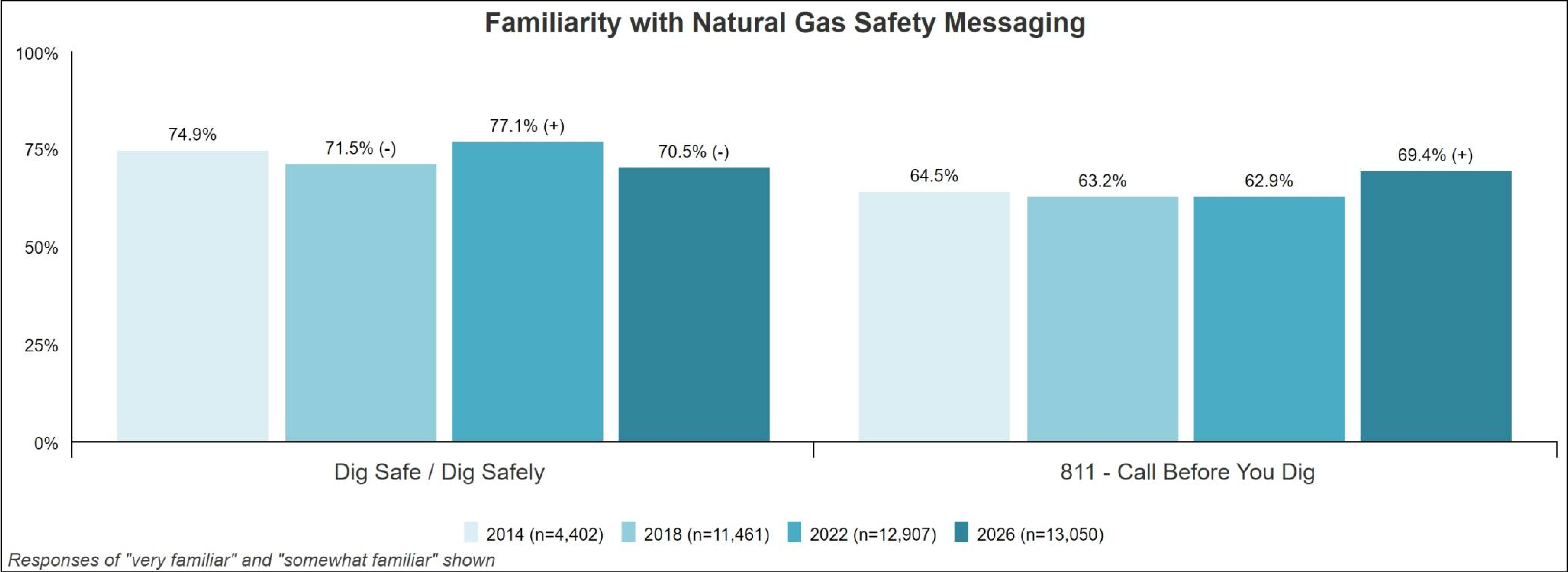
Overall, significantly more Affected Public respondents reported being “very” or “somewhat aware” of NGA’s pipeline safety education efforts in 2026 (54.2% over 45.0% in 2022). Among the general terms or messages recalled in an unaided format, the top responses included: “Call Before You Dig” (62.3%, a significant decrease from 83.6% in 2022), “If you smell rotten eggs, call the gas leak hotline” (47.4%, a significant decrease from 50.6% in 2022), and “Safety is priority number one” (45.5%, a significant decrease from 50.9% in 2022).



Q19: (Local Company) and the Northeast Gas Association have efforts underway to increase awareness of pipeline safety issues. Prior to the survey today, how aware of these safety education efforts were you?
 Q20: Please indicate the key messages in the pipeline safety education information you have read, seen or heard.
 (+/-) indicates a statistically significant difference over the previous survey

Familiarity with Messaging

Familiarity with the “Dig Safe/Dig Safely” message decreased significantly (-6.6 percentage points), while aided recall of the “811- Call Before You Dig” message among the general survey population increased significantly (+6.5 percentage points).

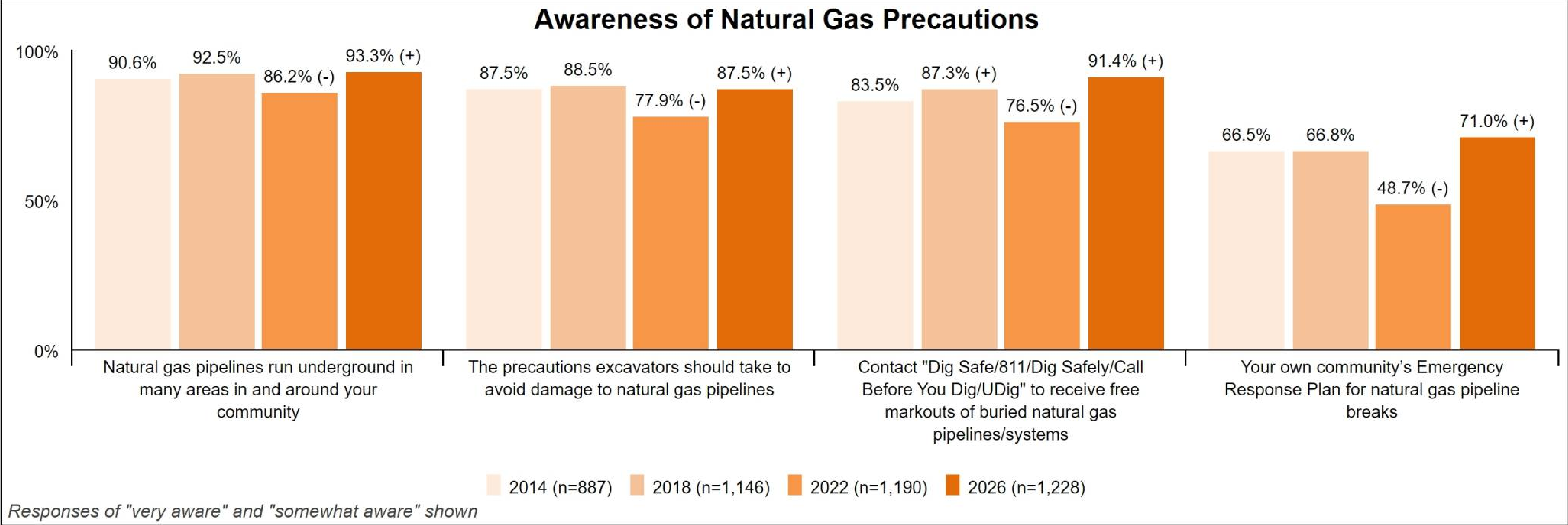


Q23-24: Prior to the survey today, please indicate how familiar you were with the following terms or actions related to pipeline safety. (+/-) indicates a statistically significant difference over the previous survey

PUBLIC OFFICIALS

Precaution Awareness

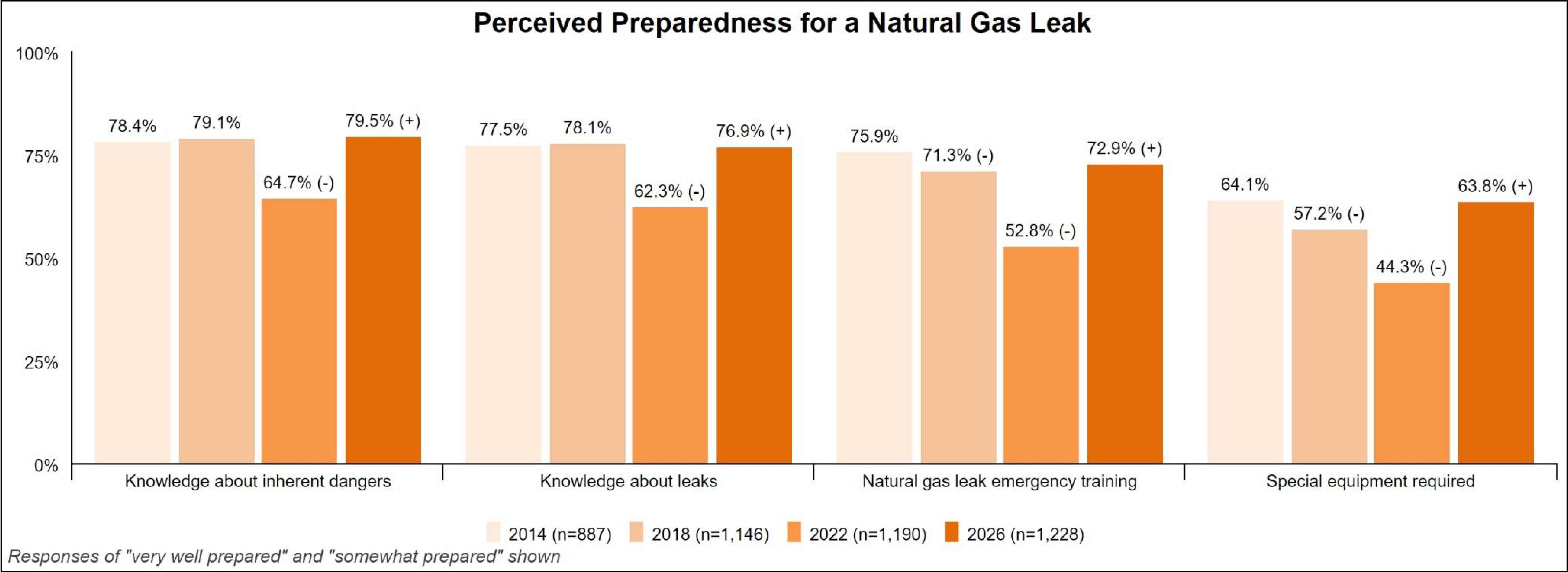
After awareness of major areas of natural gas safety declined significantly in 2022, rates of awareness increased significantly in 2026. Significantly more Public Officials were aware that "Natural gas pipelines run underground in many areas in and around your community" (+7.1 percentage points), "The precautions excavators should take to avoid damage to natural gas pipelines" (+9.6 percentage points), "Contact 'Dig Safe/811/Dig Safely/Call Before You Dig/UDig'" to receive free markouts of buried natural gas pipelines/systems" (+14.9 percentage points) and "Your own community's Emergency Response Plan for natural gas pipeline breaks" (+22.3 percentage points).



Q2-5: Please indicate how aware you are of each of the following related to natural gas pipeline safety. (+/-) indicates a statistically significant difference over the previous survey

Natural Gas Leak Preparedness

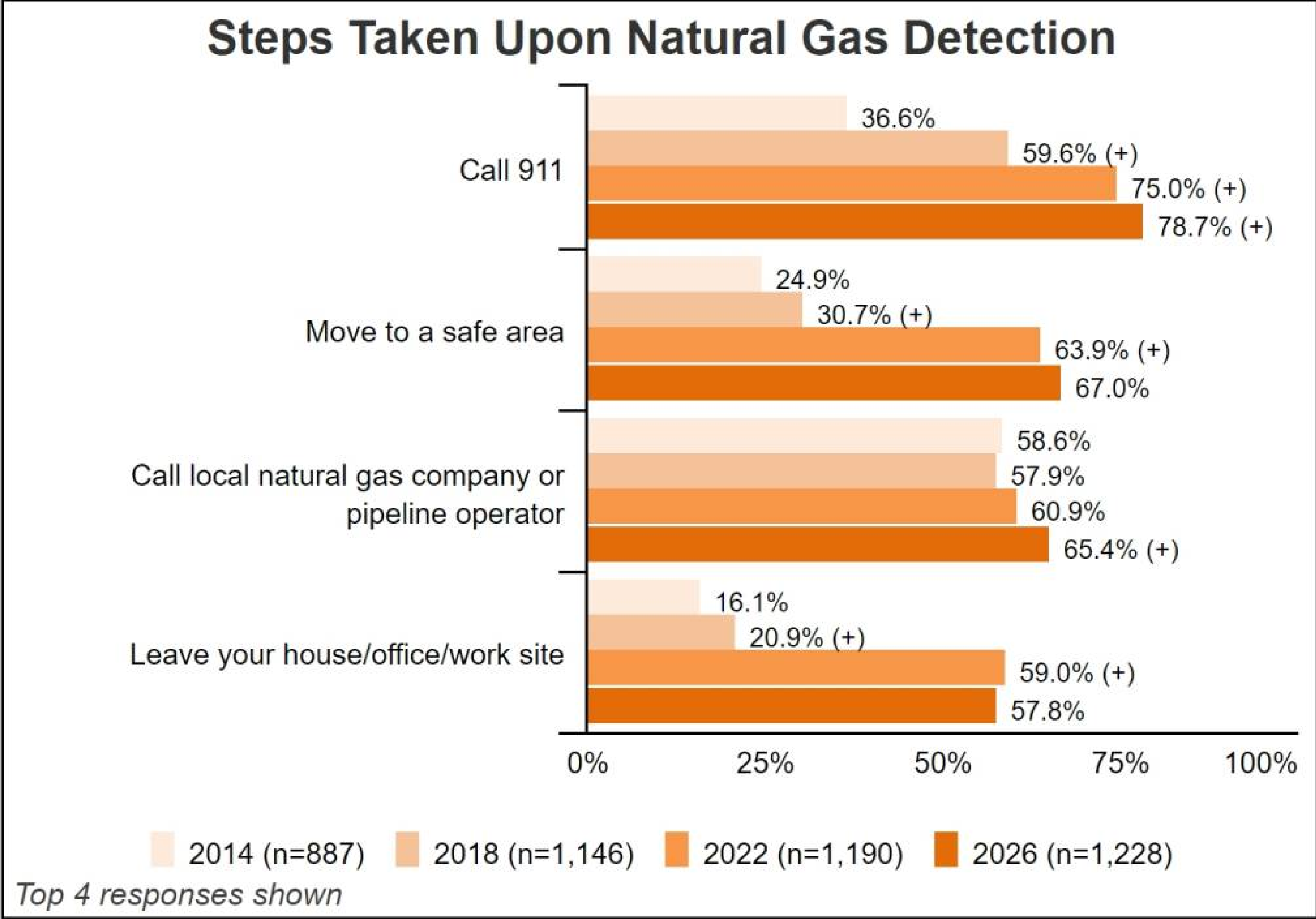
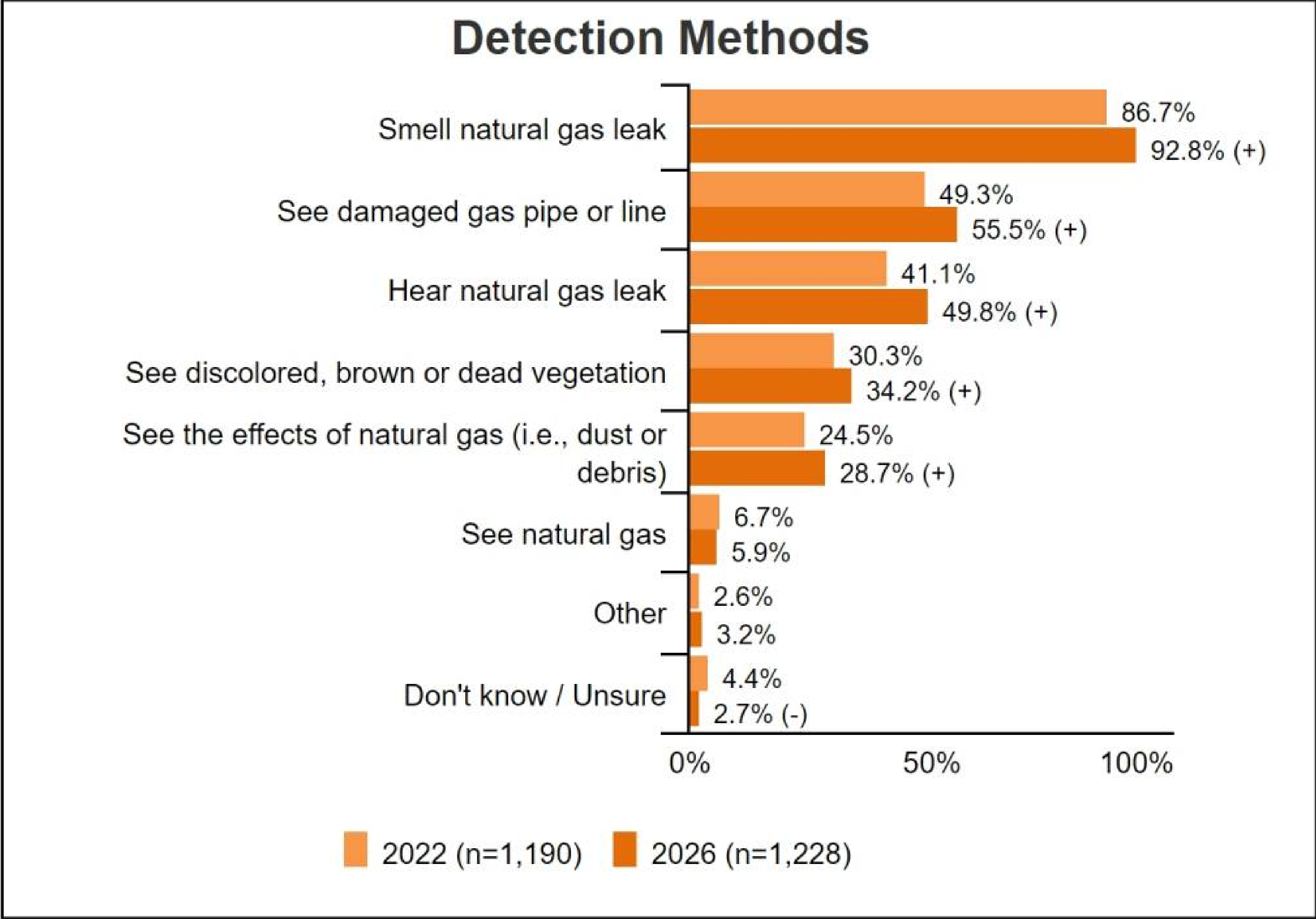
In 2026, significantly more Public Officials reported being prepared regarding "Knowledge about inherent dangers" (+14.8 percentage points), "Knowledge about leaks" (+14.6 percentage points), "Natural gas leak emergency training" (+20.1 percentage points) and "Special equipment required" (+19.5 percentage points).



Q26-29: How prepared do you feel your community is for a natural gas leak in the following areas.
 (+/-) indicates a statistically significant difference over the previous survey

Gas Leak Detection and Response

More Public Officials reported "Calling 911" as a result of detecting a natural gas leak in 2026 (+3.7 percentage points), along with recorded increases of Public Officials reporting they would "Move to a safe area" in the event of a leak (+3.1 percentage points) and "Call local natural gas company or pipeline operator" (+4.5 percentage points). In addition, "Smell" remained the top method of detecting a gas leak among Public Officials (92.8%) in 2026 by a significant margin.



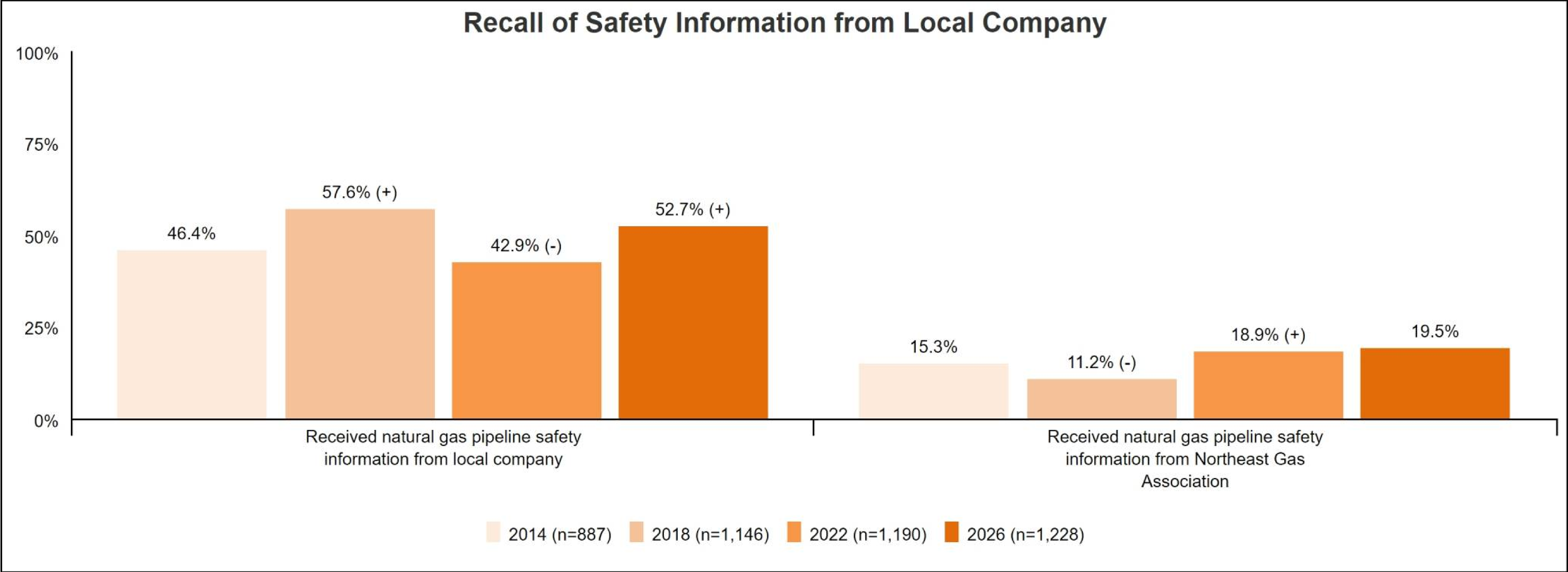
Q11: Please indicate how you might detect a natural gas leak?

Q12: If you were to cause or detect a natural gas leak, please indicate what you would do or what steps you might take?

(+/-) indicates a statistically significant difference over the previous survey

Recall of Safety Information from Utilities

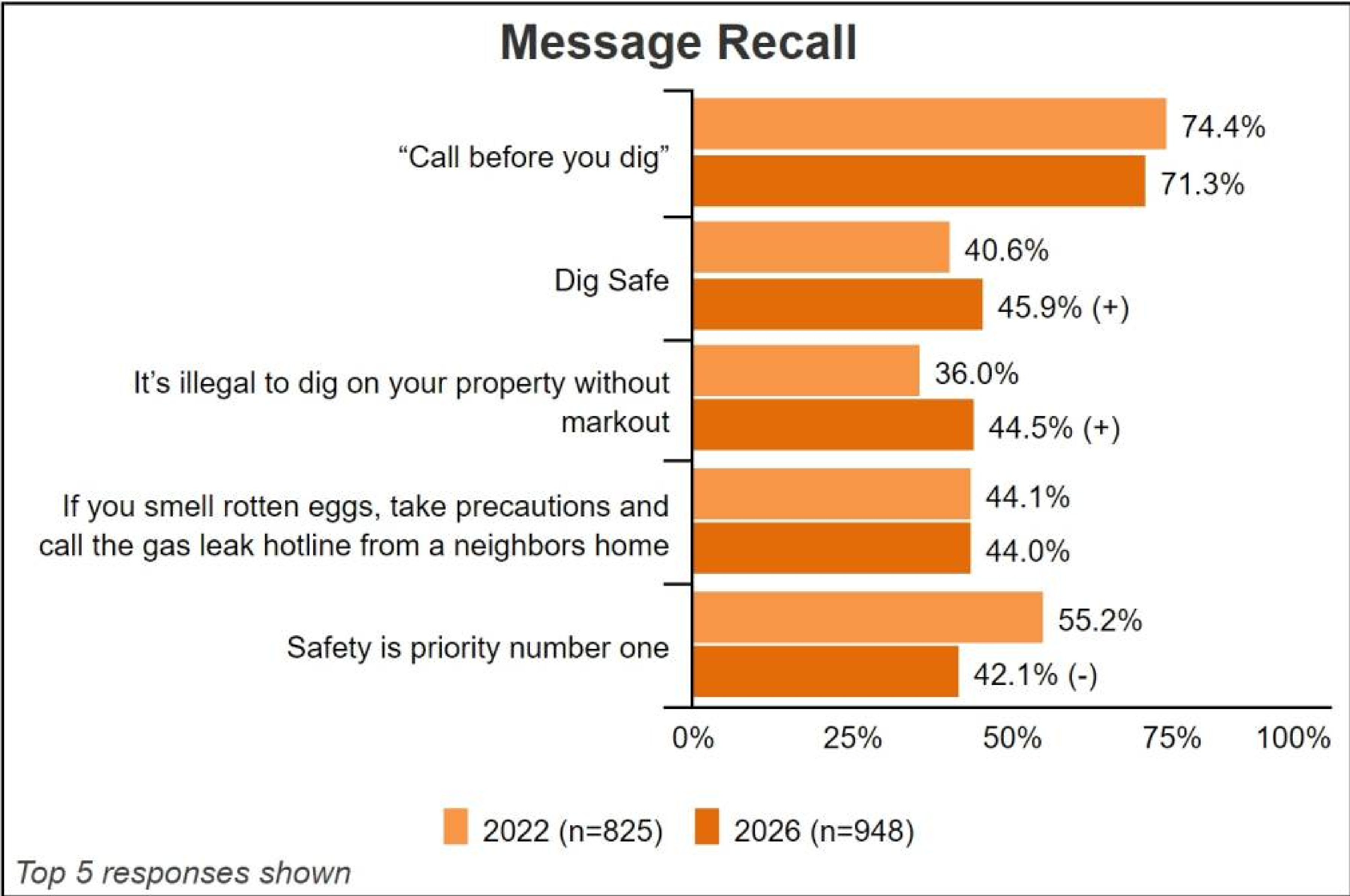
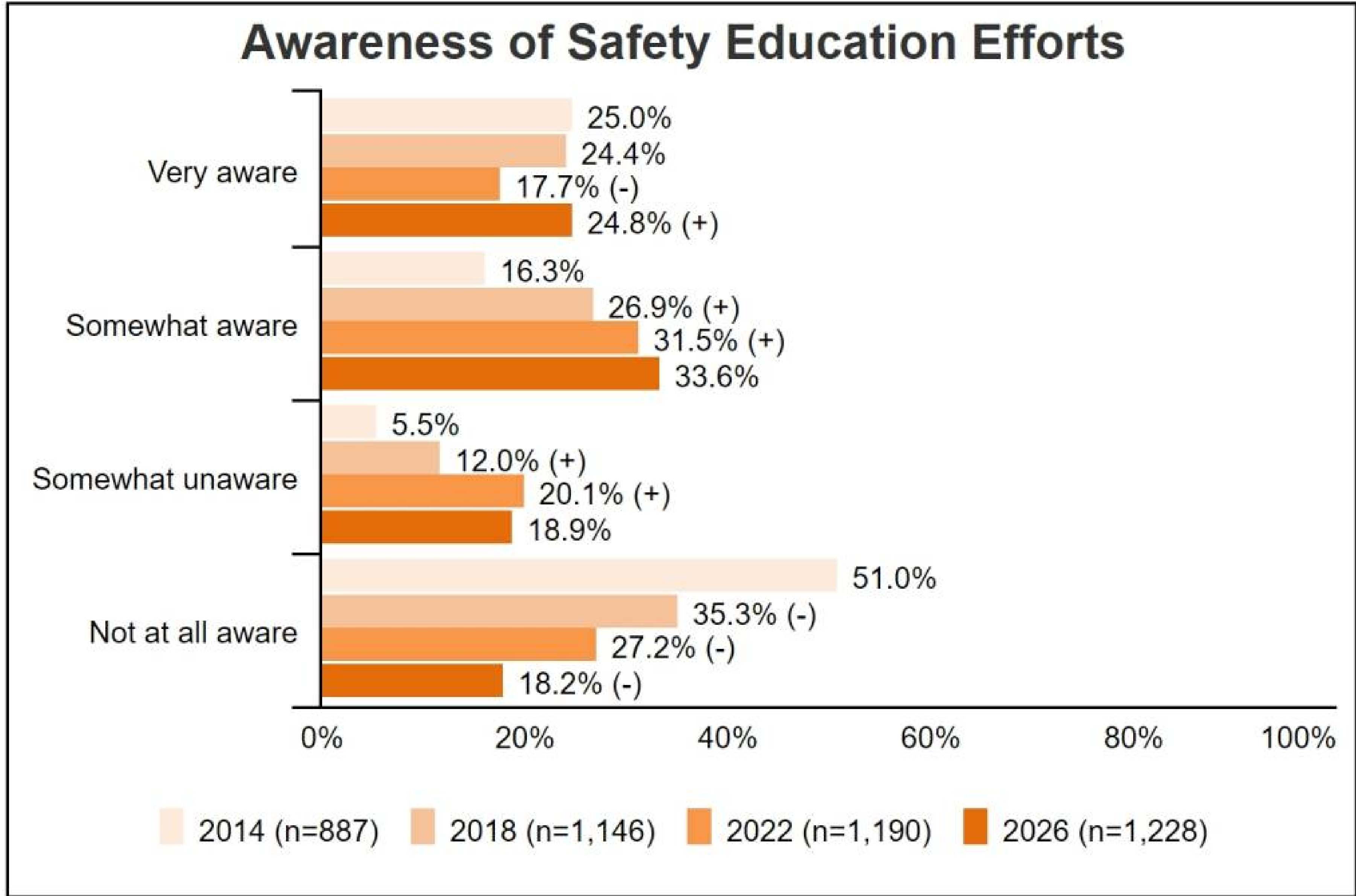
Significantly more Public Officials reported having “Received safety information from their local gas company” (+9.8 percentage points). However, no significant changes in the frequency of respondents who reported receiving natural gas pipeline safety information from NGA were recorded.



Q23-24: Please indicate if you have ever taken or been a part of any of the following actions... (+/-) indicates a statistically significant difference over the previous survey

Awareness of Safety Education

Public Officials reported an increase in general awareness of pipeline safety education efforts sponsored by NGA and local gas companies in 2026 (58.4% over 49.2% in 2022). The top terms or messages recalled in an unaided format included: “Call Before You Dig” (71.3%, a slight decrease from 74.4% in 2022), “Dig Safe” (45.9%, a significant increase over 40.6% in 2022), and “It’s illegal to dig on your property without markout” (44.5%, a significant increase over 36.0% in 2022).



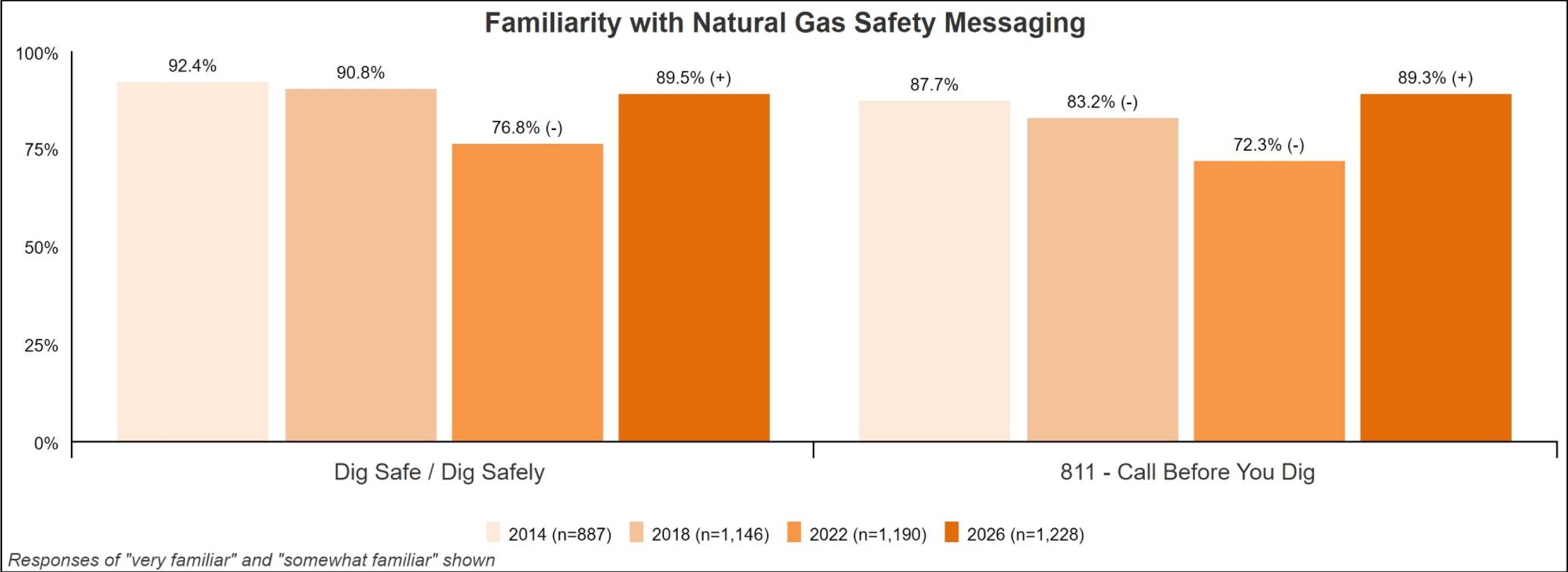
Q31: (Local Company) and the Northeast Gas Association have efforts underway to increase awareness of pipeline safety issues. Prior to the survey today, how aware of these safety education efforts were you?

Q32: Please indicate the key messages in the pipeline safety education information you have read, seen or heard.

(+/-) indicates a statistically significant difference over the previous survey

Familiarity with Messaging

In aided recall questions, significantly more Public Officials reported being familiar with the “Dig Safe/Dig Safely” message in 2026 (+12.7 percentage points) and the “811 - Call Before You Dig” message (+17.0 percentage points).

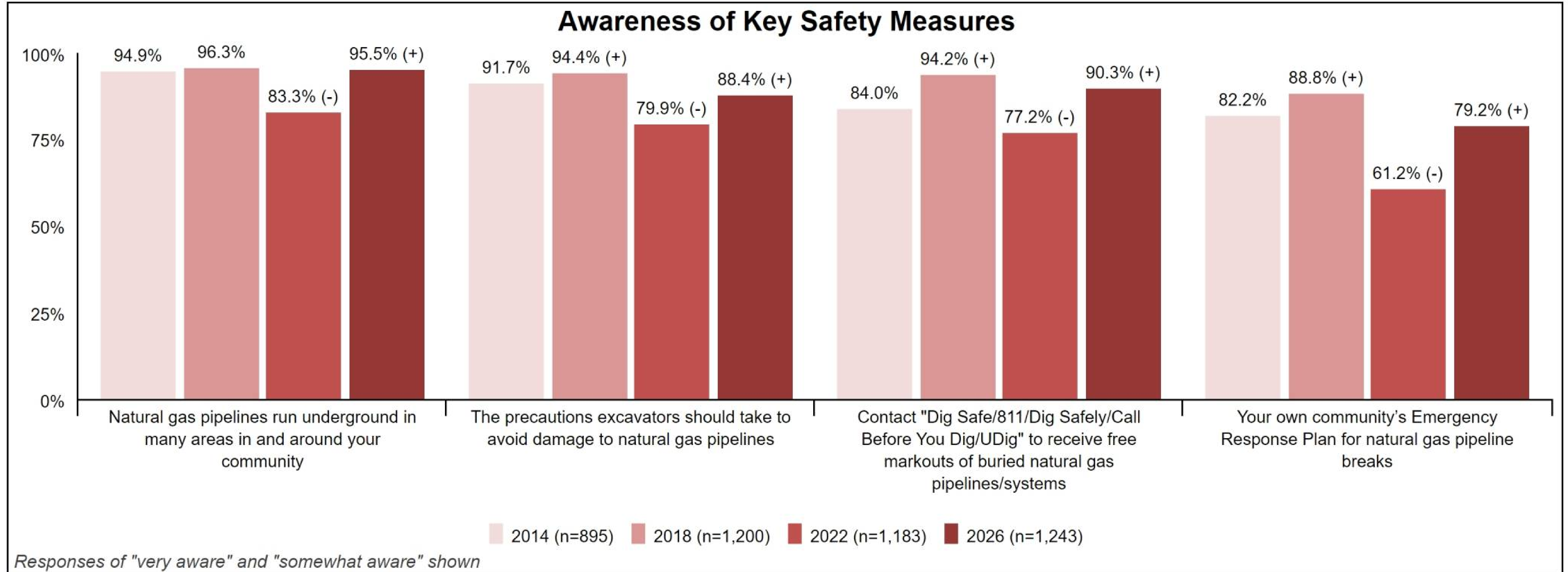


Q35-36: Prior to the survey today, please indicate how familiar you were with the following terms or actions related to pipeline safety. (+/-) indicates a statistically significant difference over the previous survey

EMS OFFICIALS

Awareness of Key Safety Measures

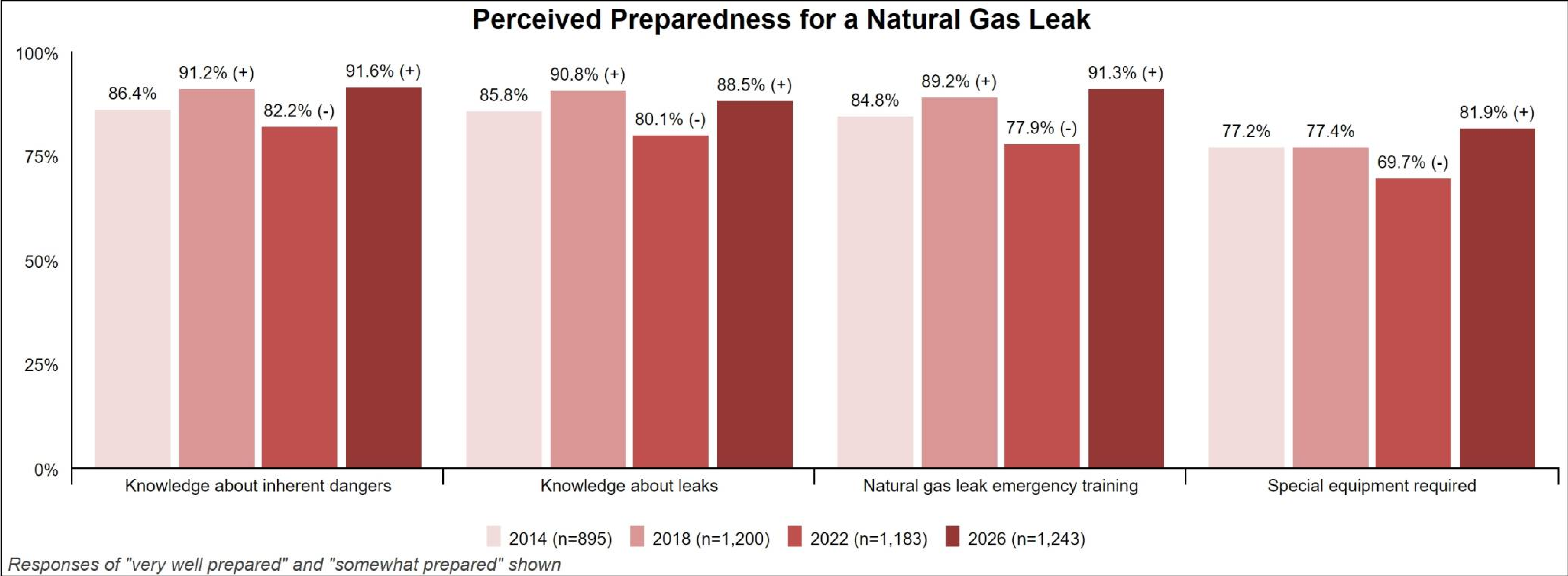
Awareness of key safety measures important to EMS Officials all increased significantly in 2026 from 2022. The largest increases were recorded in the areas of “Your own community's Emergency Response Plan for natural gas pipeline breaks” (+18.0 percentage points) and “Contact 'Dig Safe/811/Dig Safely/Call Before You Dig/UDig' to receive free markouts of buried natural gas pipelines/systems” (+13.1 percentage points).



Q2-5: Please indicate how aware you are of each of the following related to natural gas pipeline safety.
 (+/-) indicates a statistically significant difference over the previous survey

Response Training and Knowledge

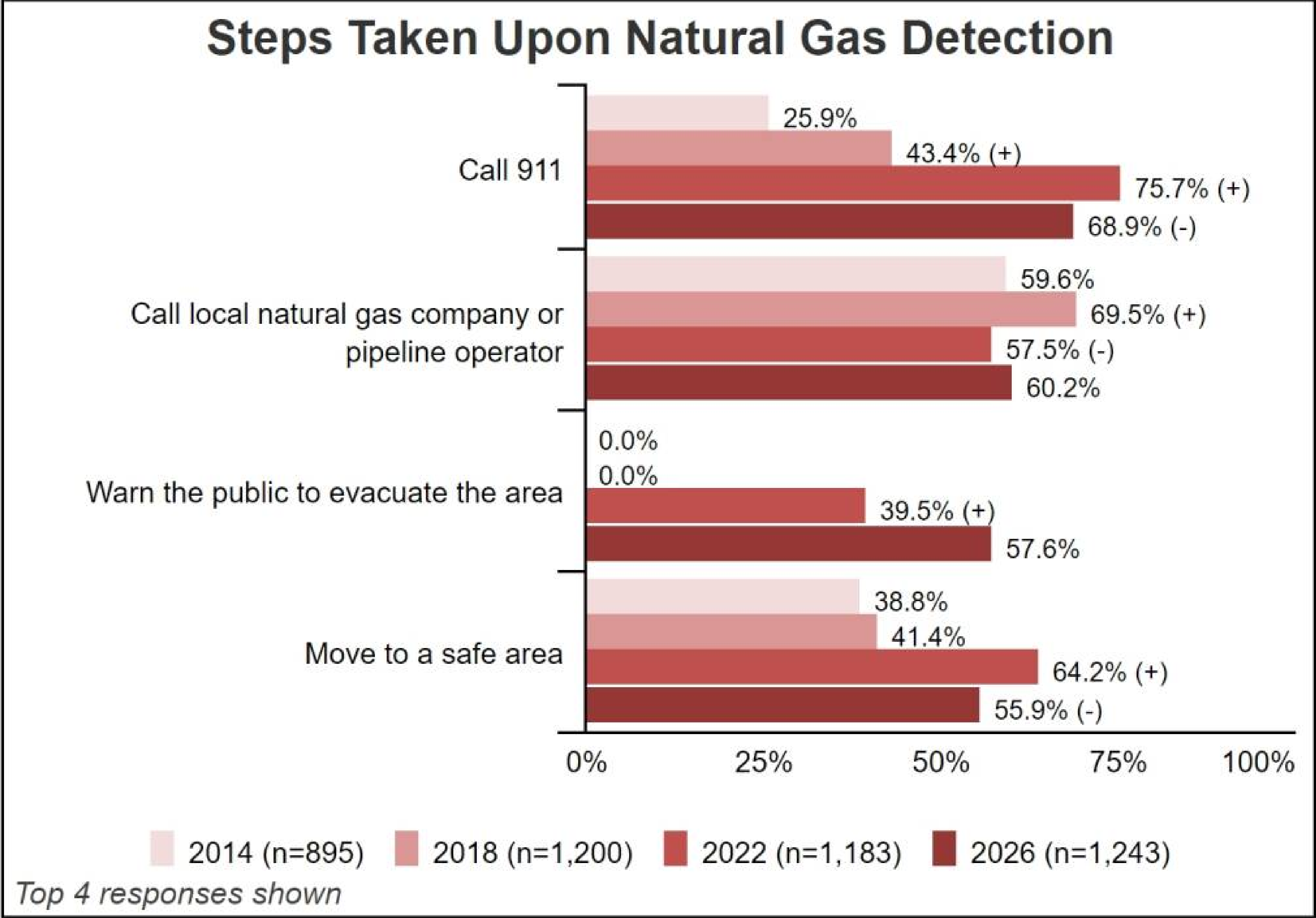
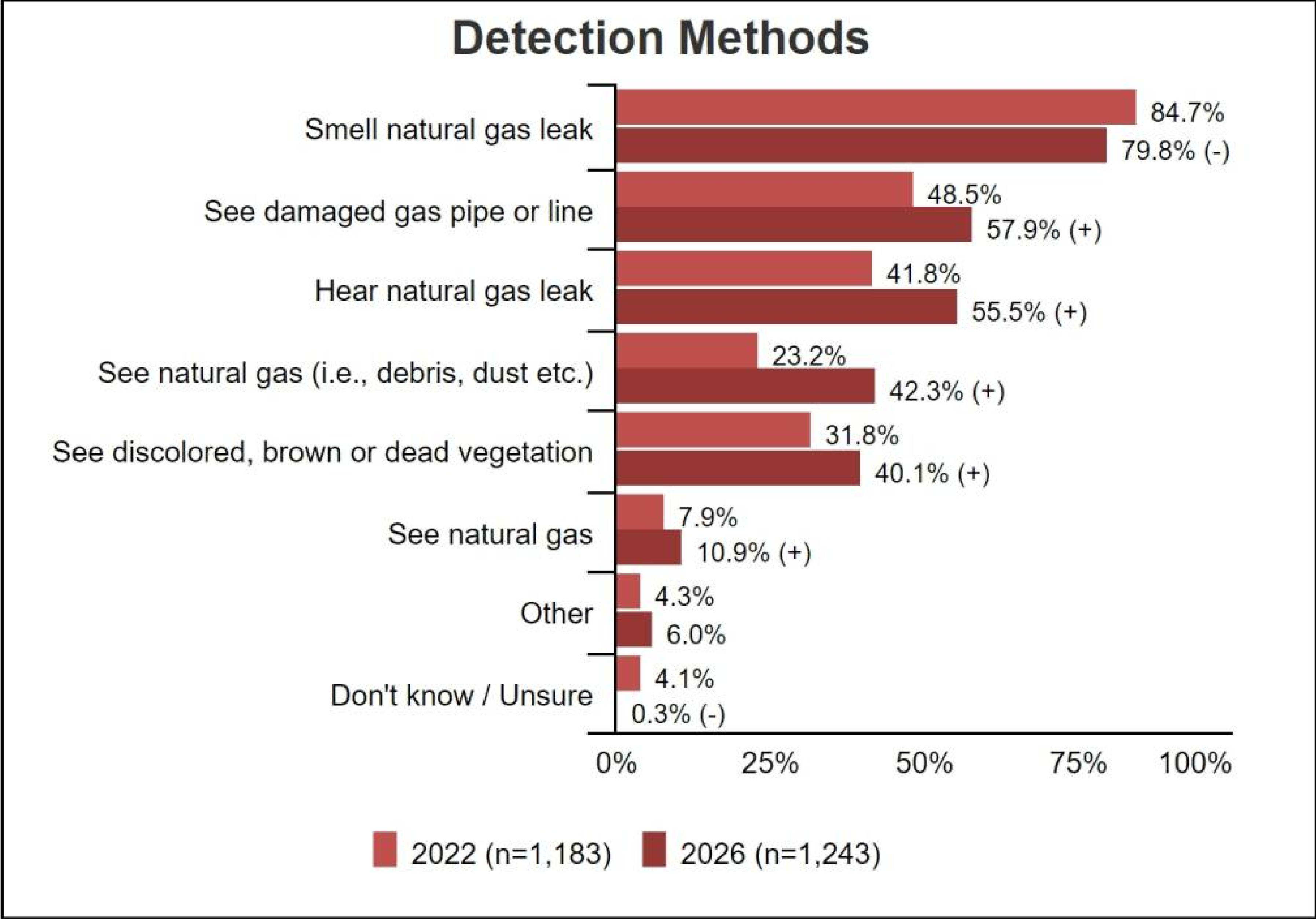
In addition to the increased awareness of safety measures, significantly more EMS Officials reported their community was well prepared with the necessary “Knowledge about inherent dangers” (+9.4 percentage points), “Knowledge about leaks” (+8.4 percentage points), “Natural gas leak emergency training” (+13.4 percentage points) and “Special equipment required” (+12.2 percentage points).



Q28-31: How prepared do you feel EMS Officials are for a natural gas leak in the following areas. (+/-) indicates a statistically significant difference over the previous survey

Gas Leak Detection and Response

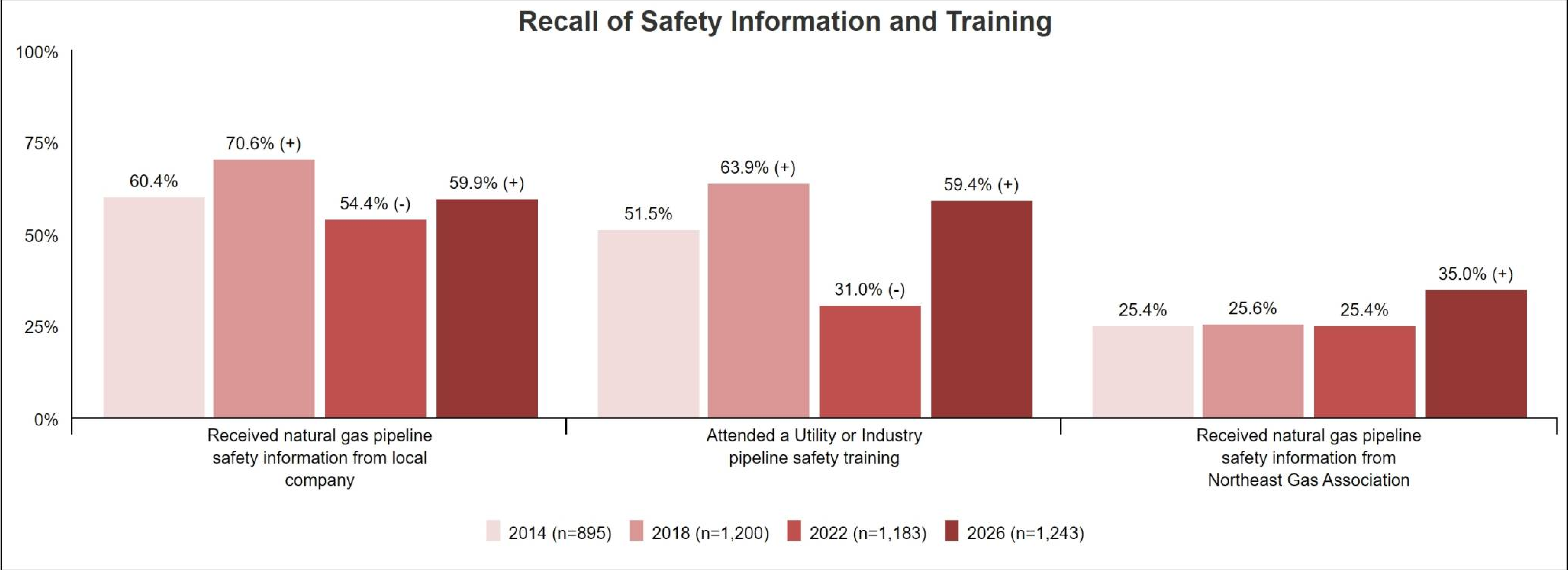
“Smell a gas leak” was reported as the most prominent way of detecting a leak by a vast majority of EMS Officials (79.8%, significantly fewer than 84.7% in 2022). Notably, significantly more EMS Officials in 2026 reported they would detect a natural gas leak by “seeing a damaged pipe or line” (+9.4 percentage points) and by “hearing natural gas leak” (+13.7 percentage points). The top responses to detecting a leak included “Call 911” (68.9%), “Call local natural gas company or pipeline operator” (60.2%), “Warn the public to evacuate the area” (57.6%), and “Move to a safe area” (55.9%).



Q11: Please indicate how you might detect a natural gas leak?
 Q12: If you were to cause or detect a natural gas leak, please indicate what you would do or what steps you might take?
 (+/-) indicates a statistically significant difference over the previous survey

Recall of Safety Information and Training

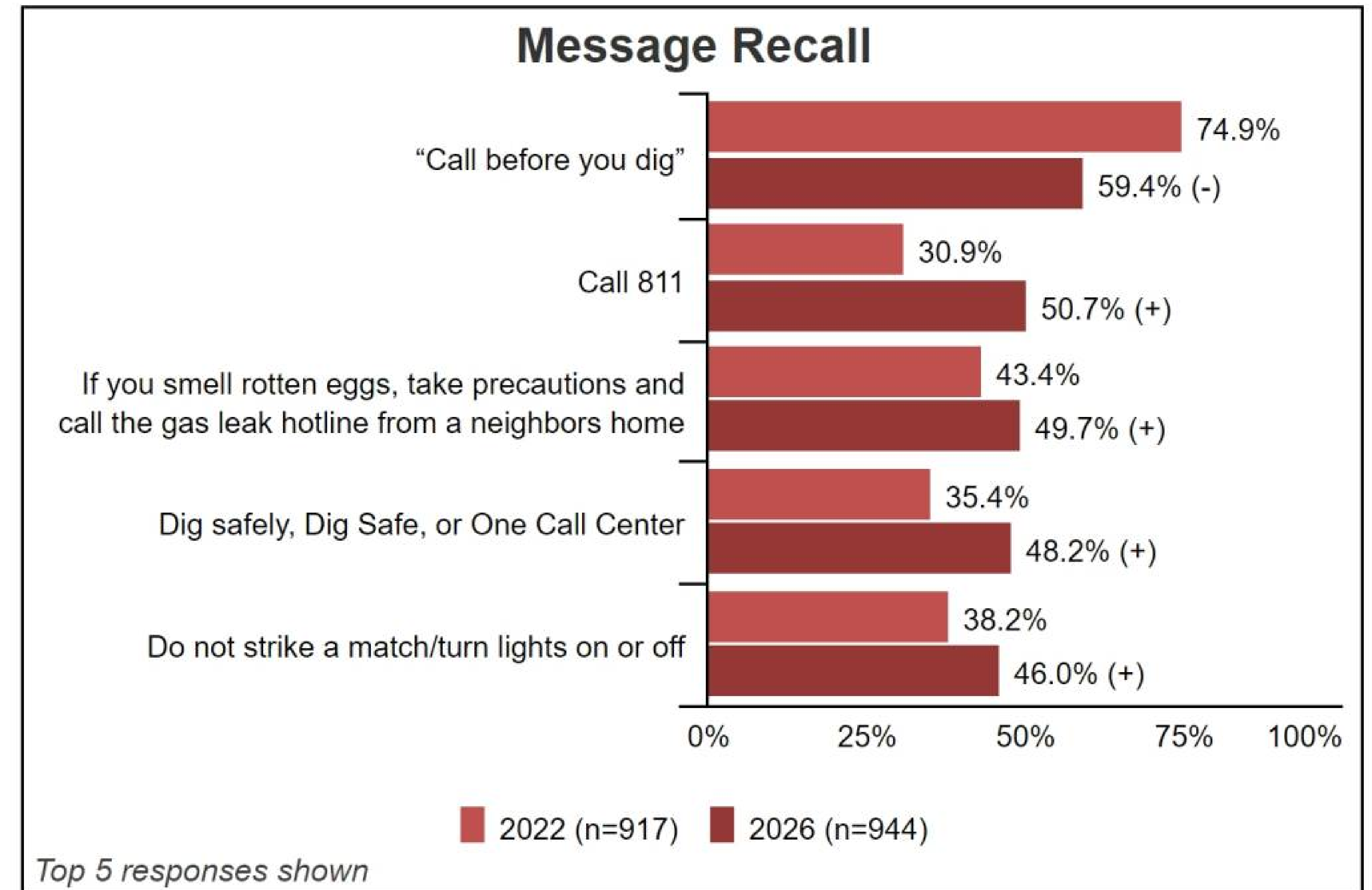
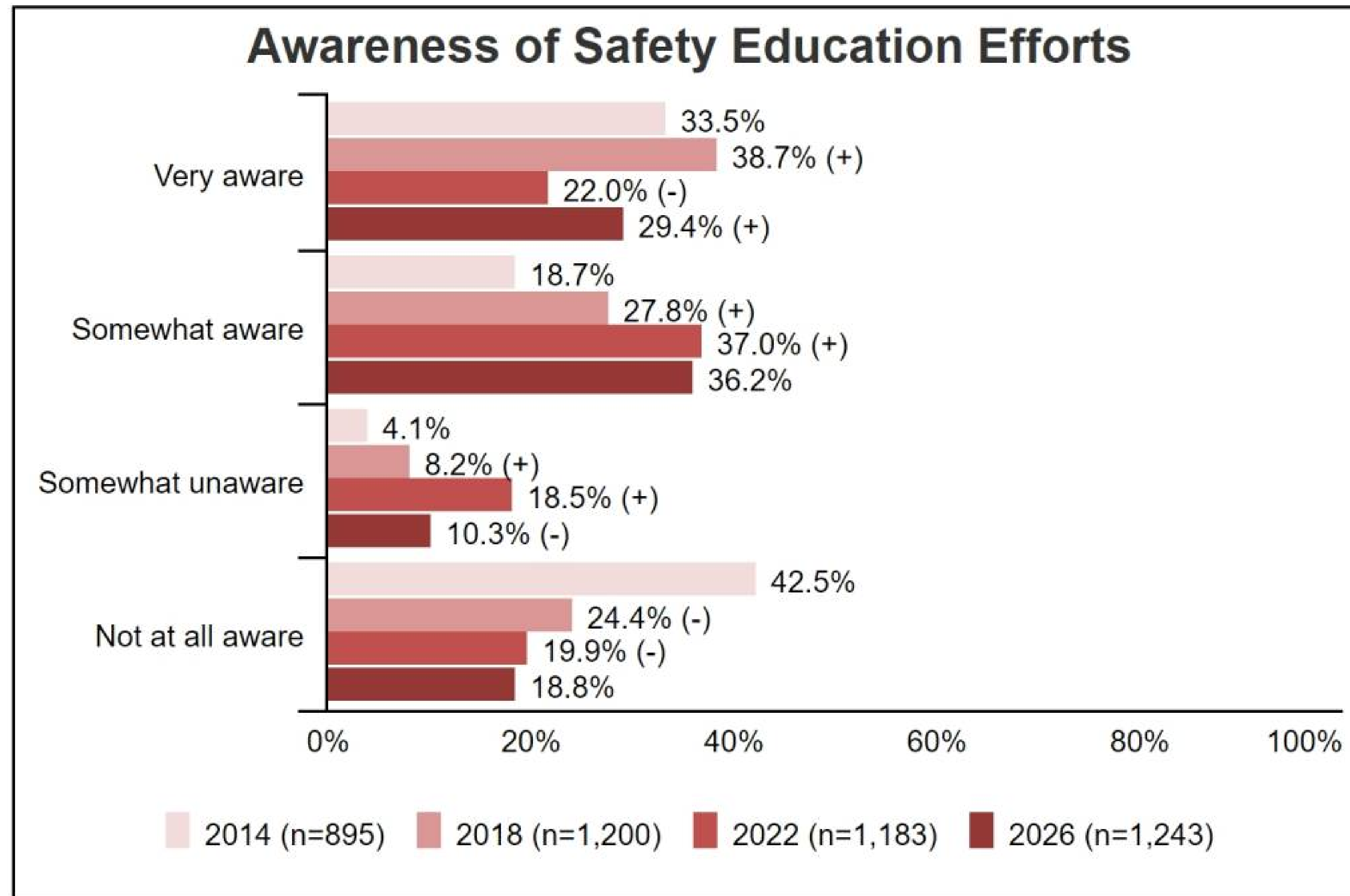
Significantly more EMS Officials reported having “Received safety information from their local gas company” (+5.5 percentage points), “Attended a utility or industry training session” (+28.4 percentage points), and “Received natural gas pipeline safety information from Northeast Gas Association” (+9.6 percentage points).



Q24,25,27: Please indicate if you have ever taken or been a part of any of the following actions... (+/-) indicates a statistically significant difference over the previous survey

Awareness of Safety Education

More EMS Officials were aware of pipeline safety education efforts in 2026 (65.6% over 59.0% in 2022). The top terms or messages recalled in an unaided format included: “Call Before You Dig” (59.4%, a significant decrease from 74.9% in 2022), “Call 811” (50.7%, a significant increase over 30.9% in 2022), and “If you smell rotten eggs, take precautions and call the gas leak hotline from a neighbor's home” (49.7%, a significant increase over 43.4% in 2022).



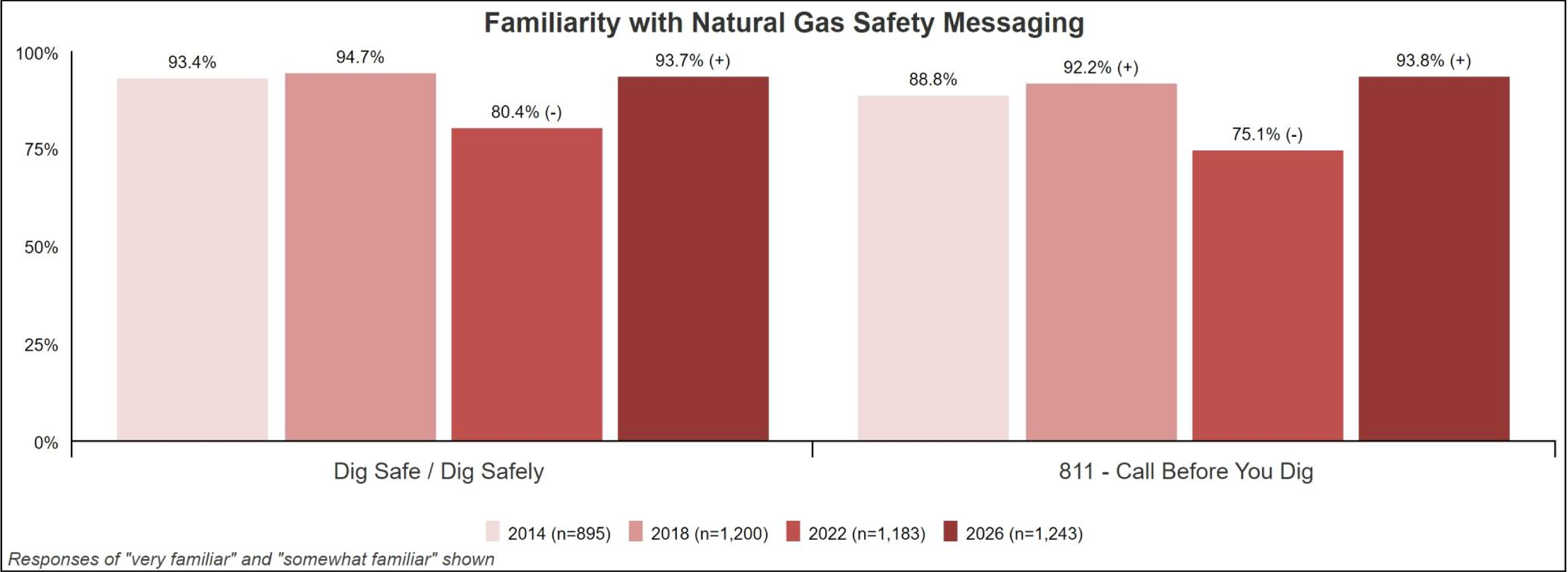
Q34: (Local Company) and the Northeast Gas Association have efforts underway to increase awareness of pipeline safety issues. Prior to the survey today, how aware of these safety education efforts were you?

Q35: Please indicate the key messages in the pipeline safety education information you have read, seen or heard.

(+/-) indicates a statistically significant difference over the previous survey

Familiarity with Messaging

In aided recall questions, significantly more EMS Officials reported being familiar with the “Dig Safe/Dig Safely” message in 2026 (+13.3 percentage points) as well as the “811-Call Before You Dig” message (+18.7 percentage points).

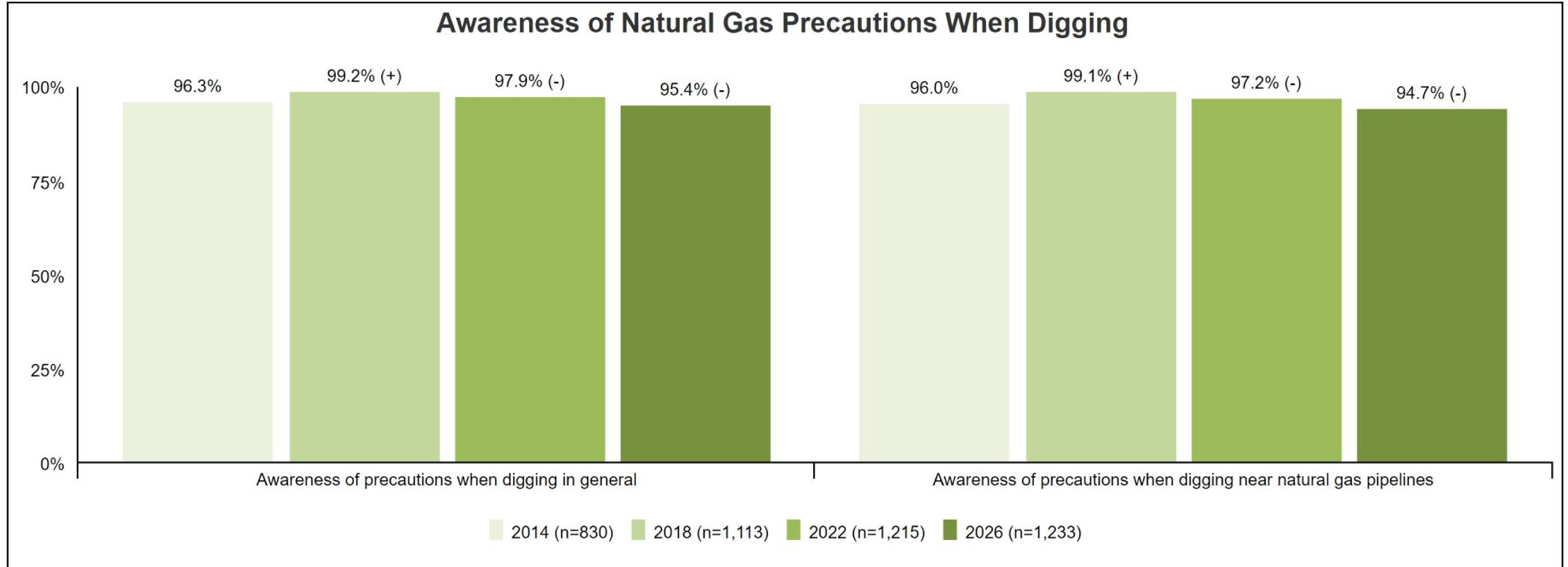


Q38-39: Prior to the survey, please indicate how familiar you were with the following terms or actions related to pipeline safety. (+/-) indicates a statistically significant difference over the previous survey

EXCAVATORS

Awareness of Precautions When Digging

Despite slight declines compared to 2022, almost all Excavators surveyed in 2026 reported being aware of both precautions required "When digging in general" (95.4%) and "When digging near natural gas pipelines" (94.7%).



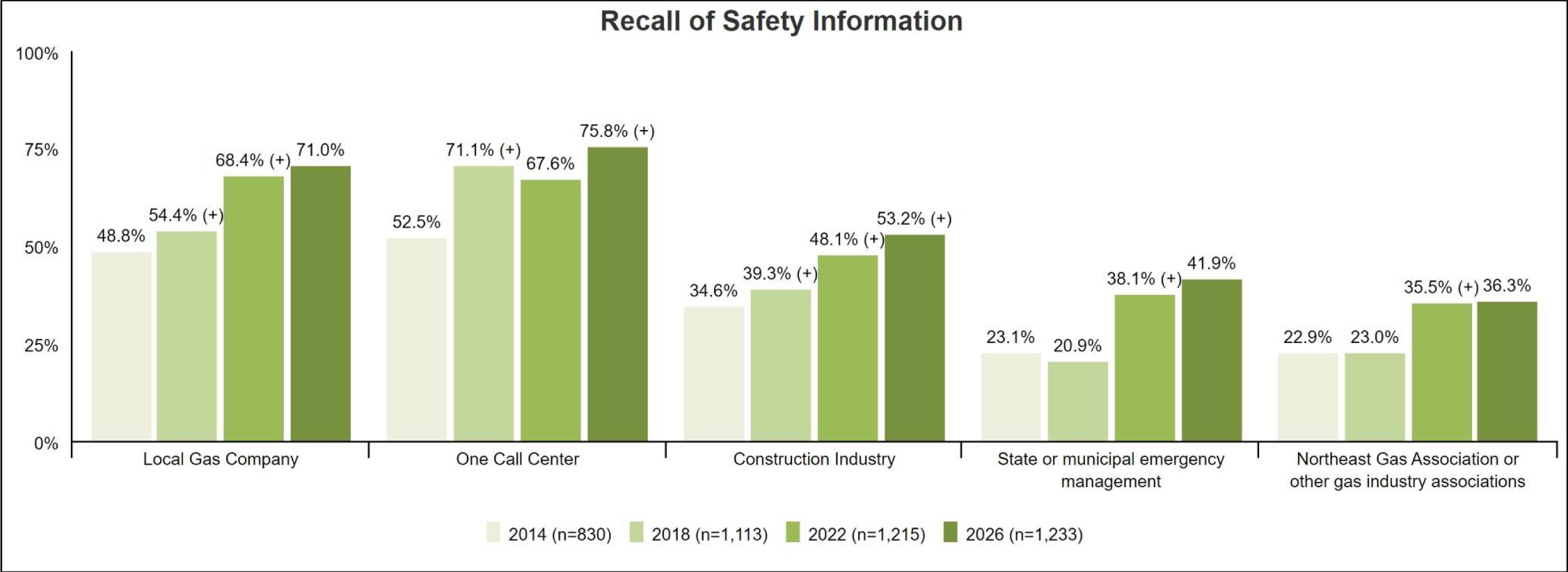
Q1: Overall, how aware are you of precautions required when digging in general?

Q7: Overall, how aware would you say you are about precautions required when digging near natural gas pipelines?

(+/-) indicates a statistically significant difference over the previous survey

Recall of Safety Information from Local Company

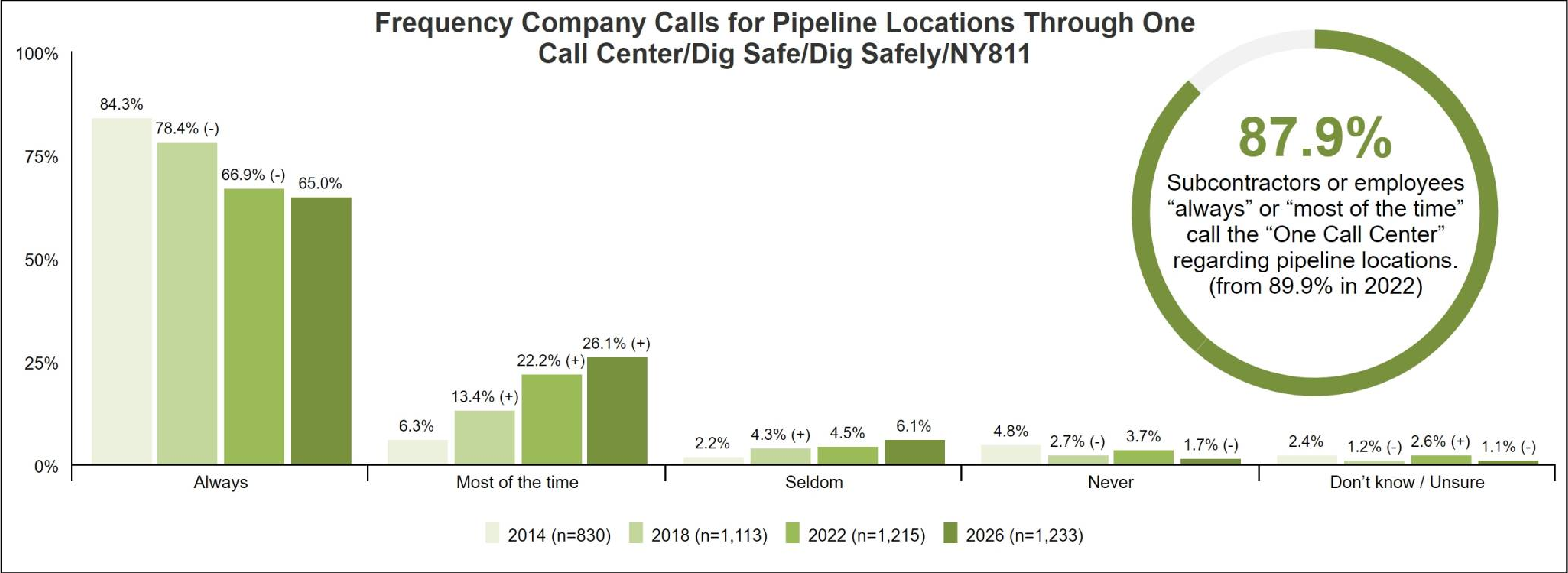
Significantly more Excavators recalled receiving information on natural gas safety from the "One Call Center" (+8.2 percentage points) and "Their own construction industry" (+5.1 percentage points), while slightly more respondents recalled receiving information from their "Local Gas Company" (+2.6 percentage points) and their "State or municipal emergency management" (+3.8 percentage points).



Q2-6: Over the last twelve months, please indicate if you recall receiving any information or communication on natural gas pipeline safety from... (+/-) indicates a statistically significant difference over the previous survey

Frequency Companies Call for Pipeline Locations

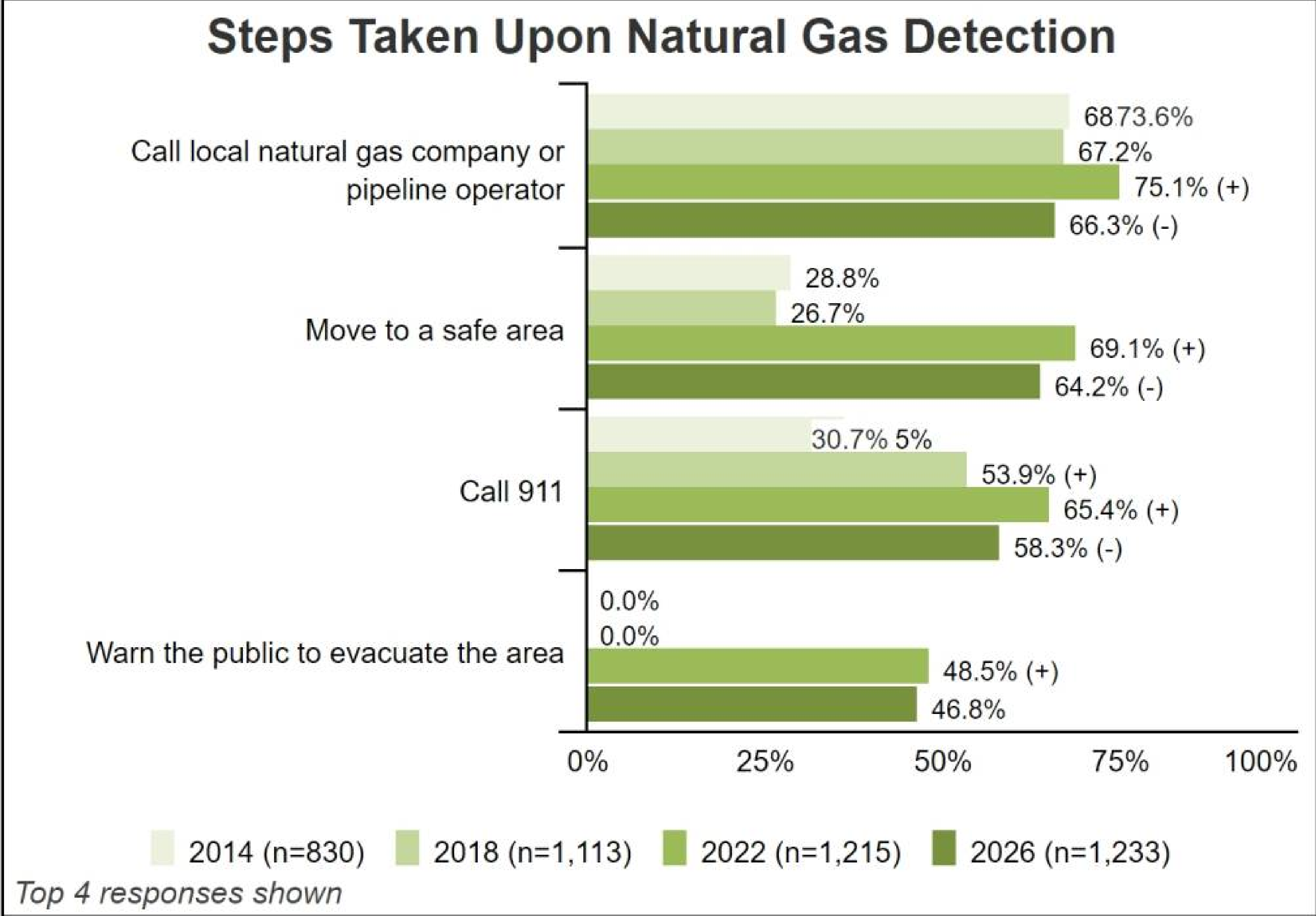
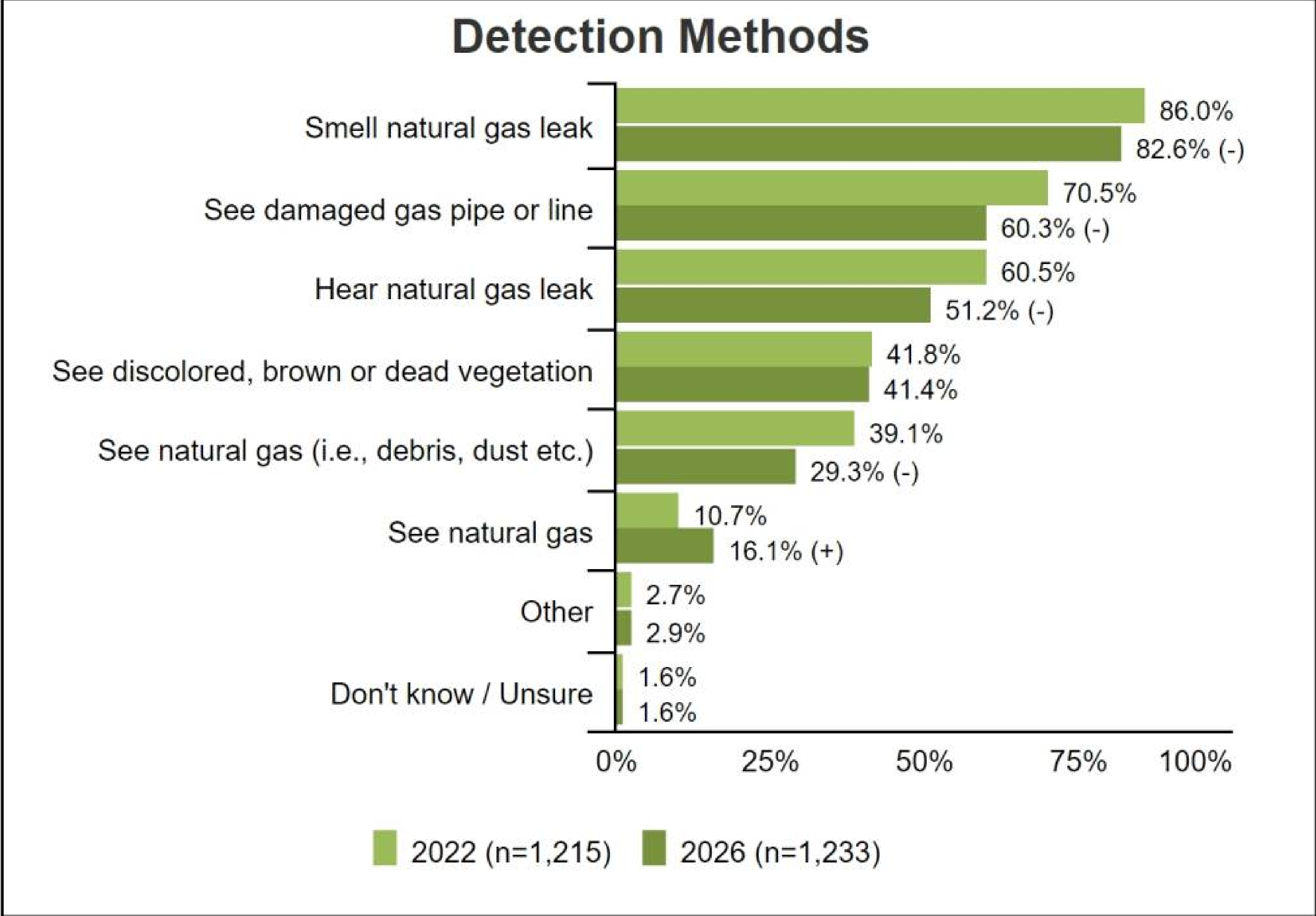
Slightly more Excavators reported, personally, calling the “One Call Center” “always” or “most of the time” in 2026 (91.1% over 89.1% in 2022), while slightly fewer respondents reported ensuring subcontractors or other employees also called regarding pipeline locations (87.9% from 89.9% in 2022). Notably, the frequency of Excavators who reported calling the “One Call Center” “always” has declined each period since 2014.



Q9: And, how frequently would you say you or someone else at your company contact the One Call Center/Dig Safe/811/Dig Safely/NY811 regarding pipeline locations?
 Q11: And, how frequently would you say these other employee operators or subcontractors contact the One Call Center/Dig Safe/811/Dig Safely/NY811 regarding pipeline locations?
 (+/-) indicates a statistically significant difference over the previous survey

Gas Leak Detection and Response

"Smell a gas leak" was reported as the most prominent way of detecting a leak by a vast majority of Excavators (82.6%, significantly fewer than 86.0% in 2022). The top steps taken upon natural gas leak detection included "Call local natural gas company or pipeline operator" (66.3%, significantly fewer than 75.1% in 2022), "Move to a safe area" (64.2%, significantly fewer than 69.1% in 2022), "Call 911" (58.3%, significantly fewer than 65.4% in 2022), and "Warn the public to evacuate the area" (46.8% slightly fewer than 48.5% in 2022).



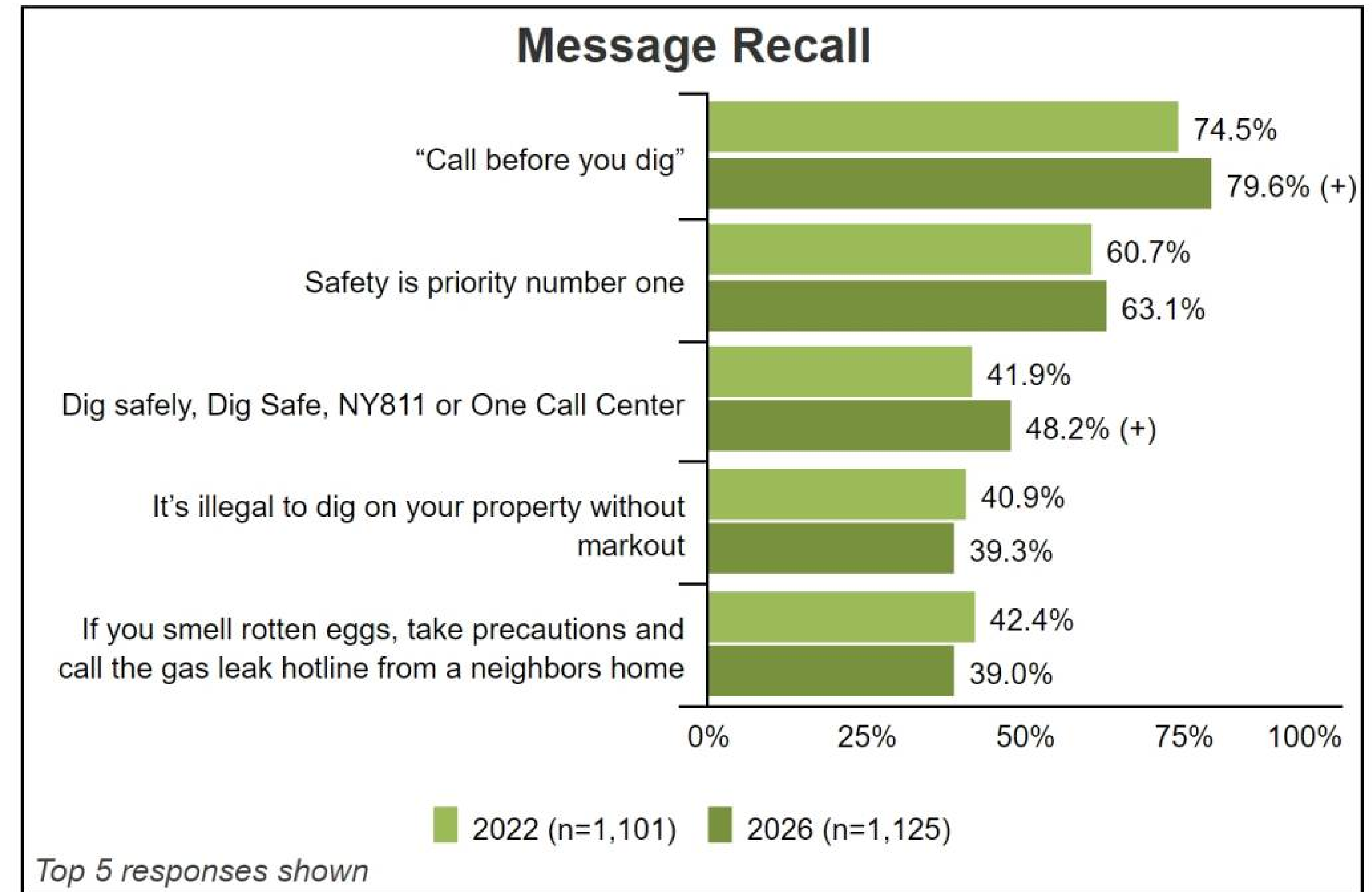
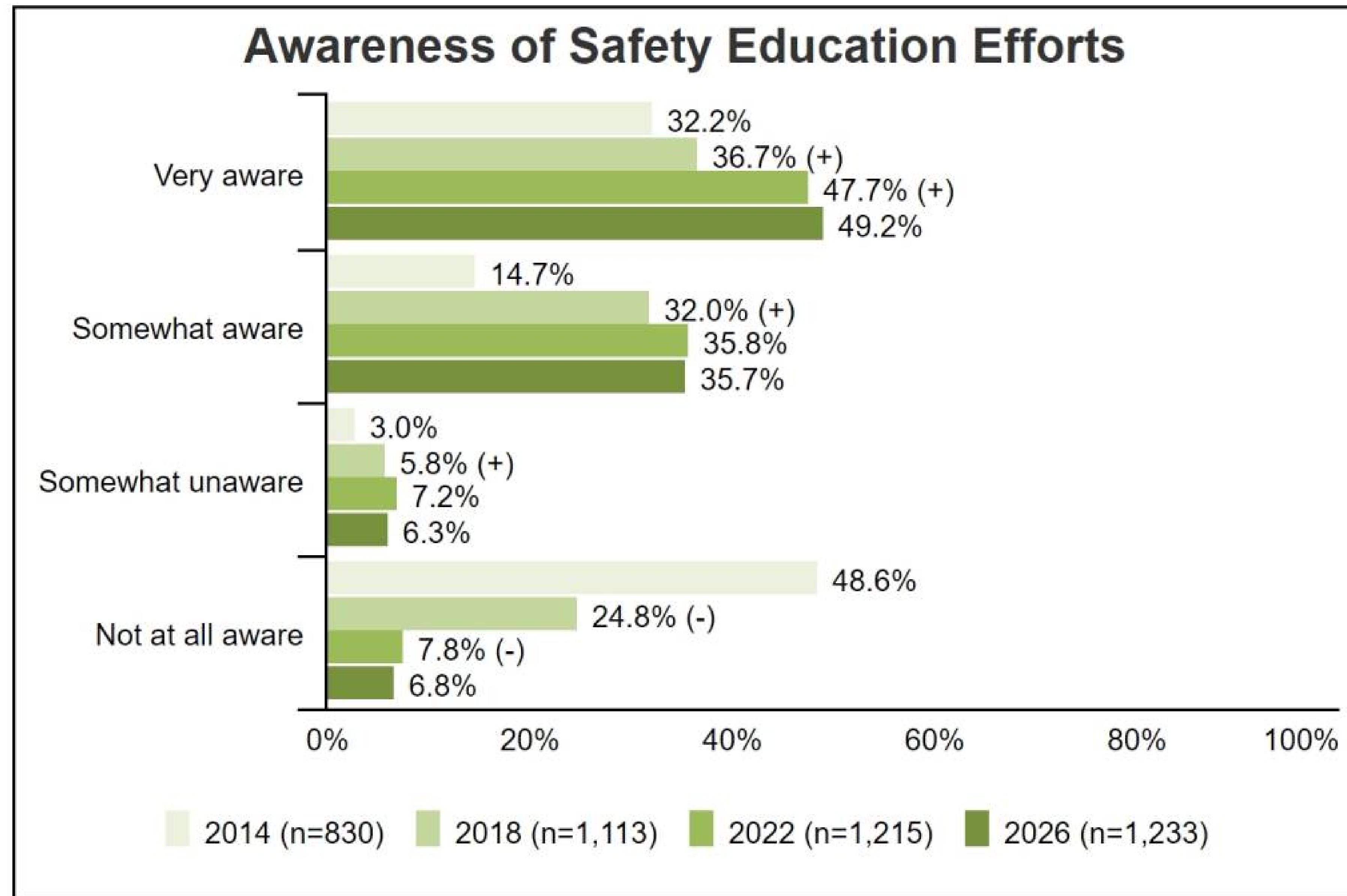
Q23: Please indicate how you might detect a natural gas leak?

Q24: If you were to cause or detect a natural gas leak, please indicate what you would do or what steps you might take?

(+/-) indicates a statistically significant difference over the previous survey

Awareness of Safety Education

Slightly more Excavators were generally aware of natural gas pipeline safety education efforts in 2026 (84.9% over 83.5% in 2022). Among those who were aware, top messages recalled in an unaided format were "Call Before You Dig" (79.6%, a significant increase over 74.5% in 2022), "Safety is priority number one" (63.1% over 60.7% in 2022), and "Dig safely, Dig Safe, NY811 or One Call Center" (48.2%, a significant increase over 41.9% in 2022).



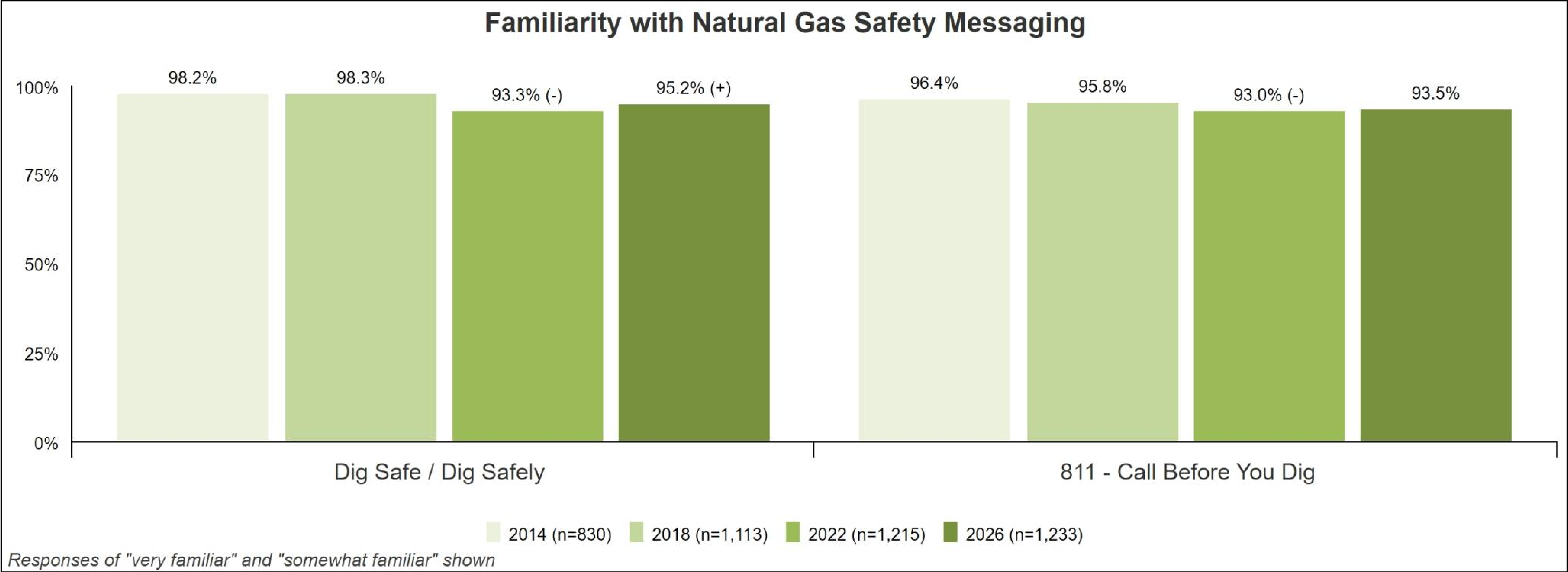
Q30: (Local Company) and the Northeast Gas Association have efforts underway to increase awareness of pipeline safety issues. Prior to the survey, how aware of these safety education efforts were you?

Q31: Please indicate the key messages in the pipeline safety education information you have read, seen or heard.

(+/-) indicates a statistically significant difference over the previous survey

Familiarity with Messaging

More Excavators were familiar with the "Dig Safe / Dig Safely" messaging in 2026 (+1.9 percentage points), while a consistent frequency of respondents were familiar with the "811 - Call Before You Dig" messaging.



Q34-35: Prior to the survey today, please indicate how familiar you were with the following terms or actions related to pipeline safety.
 (+/-) indicates a statistically significant difference over the previous survey



Considerations





Strengthen the Connection Between Awareness and Action

Findings indicate that while overall awareness of natural gas pipeline safety remains high across audiences, this awareness does not consistently translate into appropriate response behaviors, particularly among the Affected Public and Excavators. Declines in reported likelihood of taking key protective actions suggest a gap between recognizing safety information and knowing how to apply it in real-world situations. Strengthening the linkage between awareness and action may help ensure that safety education produces consistent behavioral outcomes across stakeholder groups.

Recommended Actions:

- Reframe safety communications to emphasize decision-making in real-world scenarios, illustrating when and why specific actions should be taken.
- Integrate step-by-step response guidance into all major safety communications to reinforce procedural knowledge rather than general awareness alone.
- Reinforce key behaviors through consistent cross-audience messaging, ensuring that response expectations remain aligned across residents, professional stakeholders, and excavators.
- Incorporate messaging that clarifies consequences of delayed or incorrect responses, reinforcing urgency and risk recognition.



Improve Message Retention Through Greater Consistency and Reinforcement

Mixed results in recall of major safety campaigns across stakeholder groups suggest that while exposure to pipeline safety information is occurring, message retention remains uneven. Declines in unaided recall of foundational messages, alongside continued reliance on odor-based leak detection, indicate an opportunity to improve how safety information is encoded, remembered, and retrieved. A more structured and consistent messaging framework may help strengthen long-term knowledge retention across audiences.

Recommended Actions:

- Standardize core safety language and terminology across all outreach materials to reduce fragmentation of key messages.
- Increase repetition of foundational safety concepts across programs, campaigns, and training initiatives to reinforce long-term recall.
- Align campaign messaging more closely with high-recognition cues (e.g., emergency actions, recognition of leak indicators) to strengthen cognitive associations.
- Ensure that educational materials emphasize fewer, clearer priority messages to improve retention and reduce information overload.



Reintroduce Qualitative Research to Deepen Understanding of Message Effectiveness and Behavioral Drivers

While the quantitative findings provide clear direction on trends in awareness, recall, and intended behaviors, further insight into the underlying reasons behind declining message retention and gaps between awareness and action can be obtained through qualitative research. Previous qualitative research, including a series of in-depth focus groups conducted in 2014, provided valuable context around how stakeholders interpret messaging, perceive risk, and respond to safety communications. Given the shifts observed in 2026, reintroducing qualitative research will help uncover the “why” behind these trends and inform more effective, behavior-driven communication strategies moving forward.

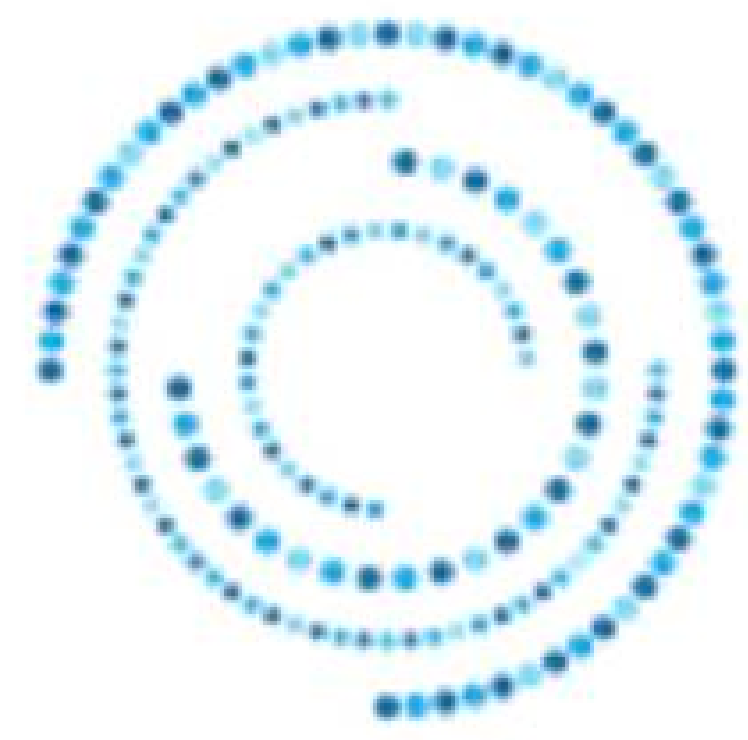
Recommended Actions:

- Reintroduce focus groups as part of the next research cycle to explore how different stakeholders interpret and prioritize pipeline safety messaging.
- Use qualitative sessions to diagnose drivers of declining message recall and identify barriers preventing translation of awareness into action.
- Test revised messaging, visuals, and campaign concepts in a controlled setting prior to broader rollout to ensure clarity, relevance, and impact.
- Conduct stakeholder-specific groups (e.g., Affected Public, Excavators, Public Officials, EMS) to capture nuanced differences in perceptions, needs, and behaviors.
- Integrate qualitative insights with quantitative findings to develop more targeted, audience-specific communication strategies that improve both recall and real-world response behaviors.



About GreatBlue







Harnessing the Power of Data

...to help clients achieve organizational goals.

 **Data** supporting strategic decisions to improve products and services. Since 1979, our experience with study and instrument design, data collection, analysis, and formal presentation assists our clients in identifying the “why” and “what’s next.”

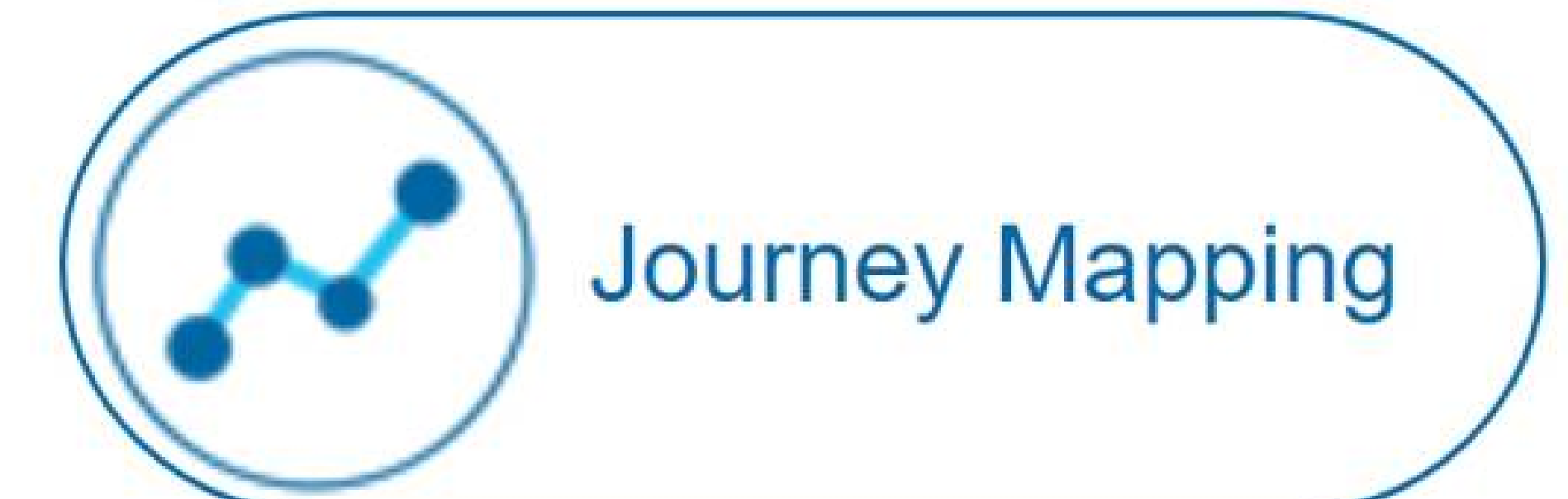
 **Talent** with a knowledge base in a wide range of industries and methodologies ensures a 360° view of the challenges faced and the expertise to address them.

 **Solutions** that are customized to provide a personalized approach to understanding organizational, employee, and customer needs, allowing for more informed decisions.

Methodologies:



Studies:



Michael Vigeant CEO

MJV@GreatBlueResearch.com

Chris Biggs SVP, Research & Strategy

Chris@GreatBlueResearch.com

Seamus McNamee VP, Research

Seamus@GreatBlueResearch.com

Courtney Moore Insights Manager

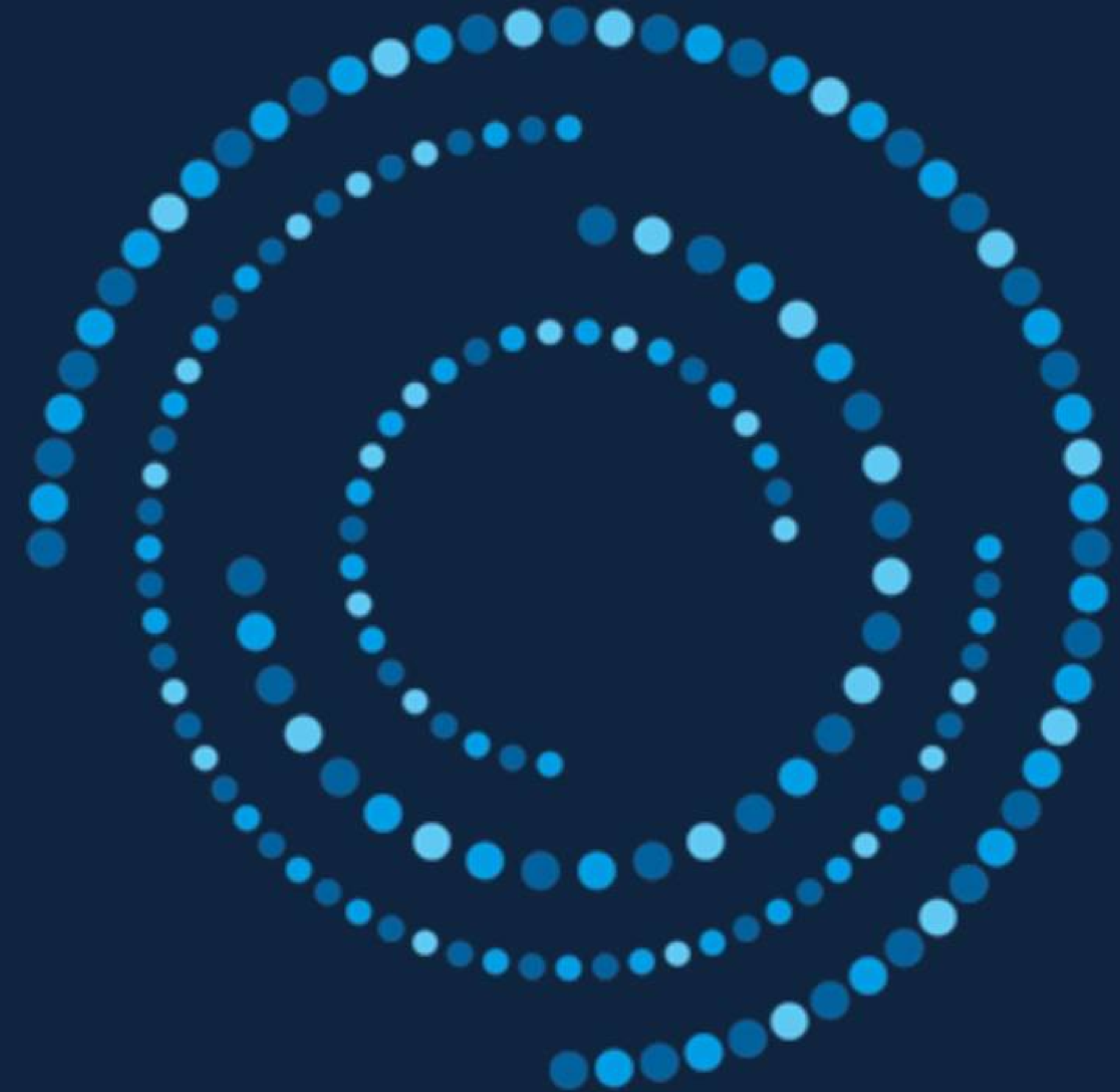
Courtney@GreatBlueResearch.com

Catherine Vollmer Project Manager

Catherine@GreatBlueResearch.com

Adam Moscato Insights Analyst

Adam@GreatBlueResearch.com



WHAT'S NEXT.



/GreatBlueResearch

20 Western Blvd
Glastonbury, CT 06033
(860) 740-4000



GreatBlue Research