

2004 Annual Customer Satisfaction Survey

Florida Department of Transportation
Florida's Turnpike Enterprise



TABLE OF CONTENTS

Executive Summary	1
Introduction	2
Traveling Florida's Turnpike	5
SunPass Program and Tolls	7
Service Plazas	12
Road Conditions	15
Table and Chart Index	inside back cover



Executive Summary

In April 2002, Governor Bush signed House Bill 261, creating Florida's Turnpike Enterprise (the Enterprise). The Florida legislature directed the Enterprise to:

- Pursue innovation and best practices as found in the private sector,
- Improve cost effectiveness and timeliness of project delivery,
- Increase revenue and expand the capital program, and
- Improve the quality of customer service.

The Enterprise's strategy is to use best practices and management strategies from business to achieve key initiatives developed during the Enterprise's first year. The very first initiative presented was the "Customer Satisfaction Survey." The purpose of this initiative was to define and develop a set of customer satisfaction measures by determining what is most important to customers and what would increase their level of satisfaction.

Since 2002, Florida's Turnpike Enterprise has conducted an annual survey of all of our SunPass customers; this year the number of

customers reached over 1.1 million. The Annual Customer Satisfaction Survey is a tool used to assist the Enterprise in better serving our customers and providing value for the toll paid. The survey focuses on three main customer service areas:

- SunPass Program/Tolls
- Service Plazas
- Road Conditions



Goal 1: Outstanding Service

"Customers traveling on Florida's Turnpike will receive a safe, efficient, and reliable traveling experience, convenient food, fuel, and restroom facilities, and a reduction or elimination of lines at toll plazas."

Introduction

The Survey

Florida's Turnpike Enterprise conducted the 2004 Customer Satisfaction Survey in October and November of 2004. SunPass customers had the choice of completing the postage paid surveys enclosed in their bi-annual *SunPassages* newsletters or by completing the survey online at the SunPass website, www.SunPass.com.

The primary objective of the survey was to measure customer satisfaction regarding Florida's Turnpike services. This report synthesizes all information gathered from the survey and provides an overview of the data collected.

The survey measured satisfaction in the following four areas of customer service (rated on a five-point response scale):

- Overall Satisfaction
- SunPass Program/Tolls
- Service Plazas
- Road Conditions

Questions regarding *overall* satisfaction with each of the four areas of customer service are displayed with 2002, 2003 and 2004 survey results. Questions concerning *individual* items within the four areas of customer service are displayed with the 2004 data only.



This report is based on a sample of 98,169 returned surveys and represents a 9% response rate. Based on the total population of SunPass customers, the data sample collected represents a 95% confidence level, plus or minus 2%. Data analysis was performed in Statistical Package for Social Sciences. The total percentages of the results were rounded to the nearest whole percents and calculations were based only on the responses collected for each question.

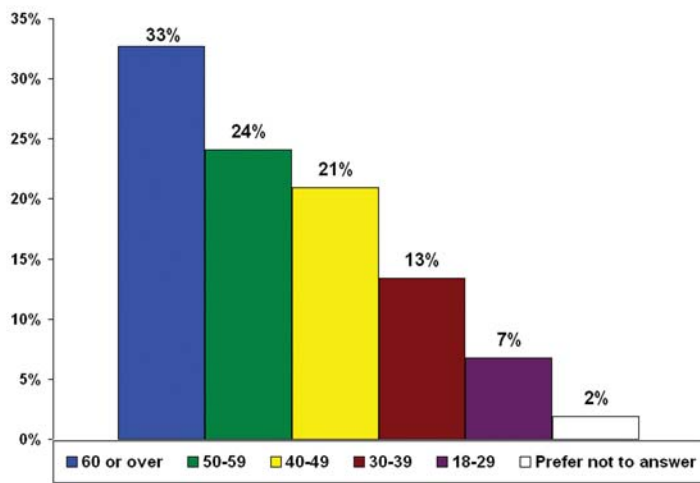
The Respondents

Demographics

Of the respondents, 57% are male and 41% female with 2% preferring not to answer. A total of 78% of the respondents are over the age of 40. The majority, 85%, have at least two years of college education; with 51% indicating they are graduates of a four-year college or graduate school. Lastly, 54% of the respondents reported household incomes of \$50,000 or more.

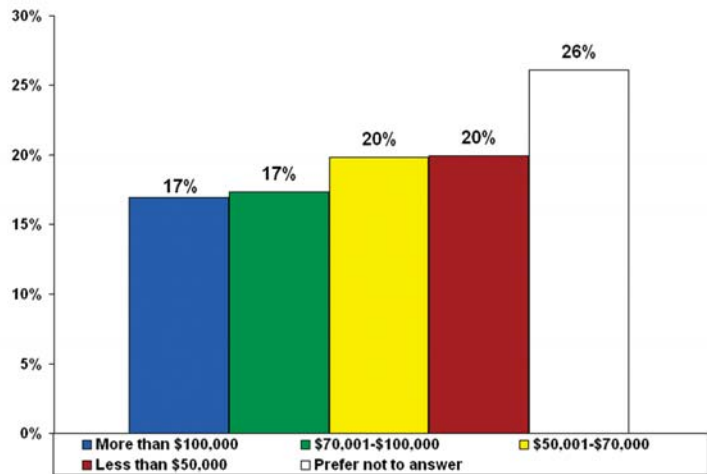
Age

Chart 1



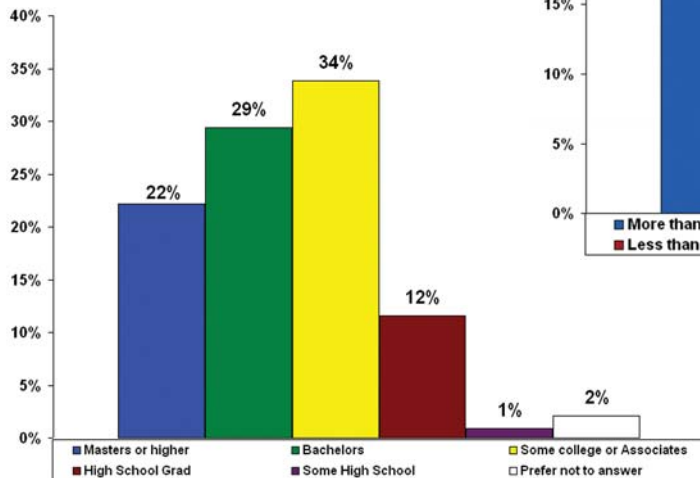
Household Income

Chart 3



Level of Education

Chart 2



Travel Profile

The traveler profile indicates that 59% of the respondents travel Florida's Turnpike Mainline or the Homestead Extension most often. The survey results indicate that 46% of respondents travel a Florida's Turnpike System roadway three or more times a week, with 37% traveling at least once or twice a week. Additionally, 64% of the respondents have been a part of the SunPass program for one year or more.

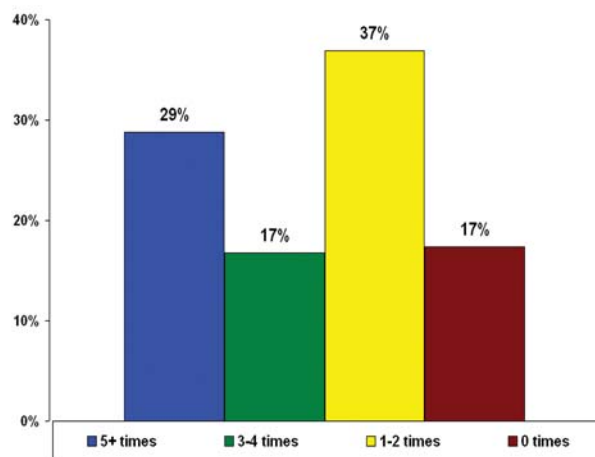
Turnpike Roadway Traveled by Respondent

Table 1

Primary Turnpike Roadway Traveled by Respondent	Annual Surveys		
	2004	2003	2002
<i>Florida's Turnpike Mainline</i>	44%	36%	39%
<i>Homestead Extension</i>	15%	22%	27%
<i>Sawgrass Expressway</i>	9%	12%	12%
<i>Bee Line Expressway</i>	3%	2%	4%
<i>Veterans Expressway</i>	8%	7%	7%
<i>Southern Connector Extension</i>	1%	1%	1%
<i>Polk Parkway</i>	2%	2%	3%
<i>Suncoast Parkway</i>	5%	4%	3%
<i>Toll 417</i>	2%	2%	4%
<i>Other</i>	11%	12%	-

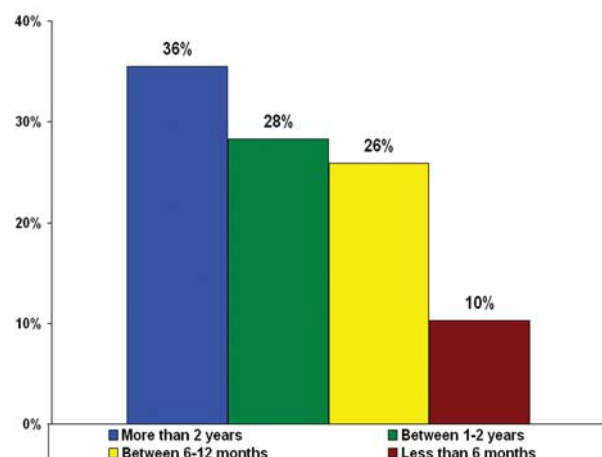
Weekly Use of Florida's Turnpike

Chart 4



Customer Tenure in the SunPass Program

Chart 5



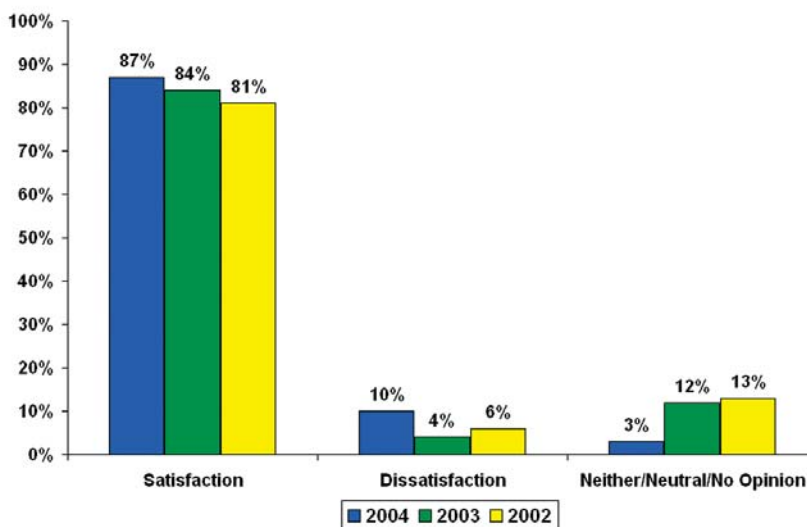
Traveling Florida's Turnpike Measuring Overall Satisfaction

Value for Toll Paid

The 2004 survey revealed an 87% satisfaction rating with the value received for the toll paid. This is a three-percentage point increase from the 2003 survey and a six-percentage point increase from the 2002 survey.

Overall, I feel I received value in the form of safety, service, and convenience for the toll I paid.

Chart 6



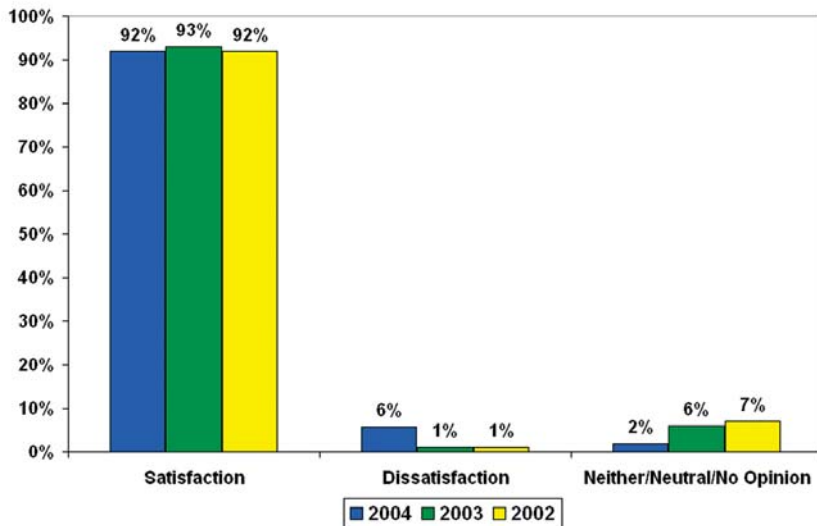
Customer Recommendation of Florida's Turnpike

In 2004, 92% of the survey respondents indicated that they would recommend using Florida's Turnpike to family and friends. Customer willingness to recommend use of the Turnpike has been consistently high since 2002.



Overall, I would recommend using the Turnpike System to family and friends.

Chart 7



SunPass Program and Tolls

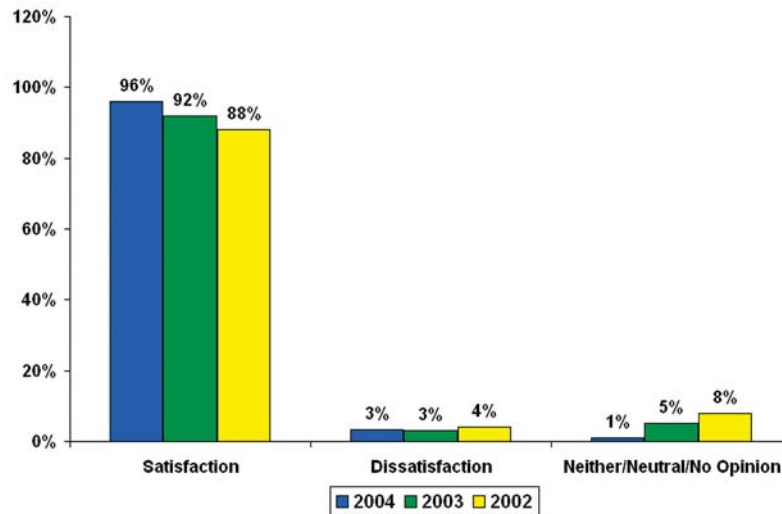
Satisfaction with SunPass Program

Overall satisfaction with the SunPass program increased from 92% in 2003 to 96% in 2004. The 2004 satisfaction rating is also eight-percentage points above the 2002 rating.



Overall, I am satisfied with the value that I receive from the SunPass Program.

Chart 8

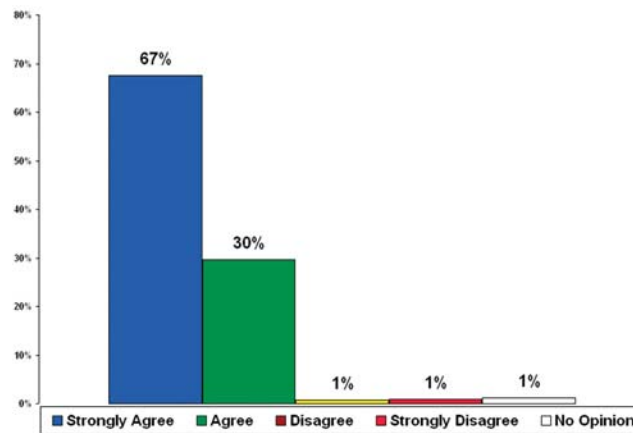


Customer Recommendation of the SunPass Program

According to the 2004 survey, 97% of respondents would recommend the SunPass program to family and friends.

I would recommend purchasing SunPass to family and friends.

Chart 9

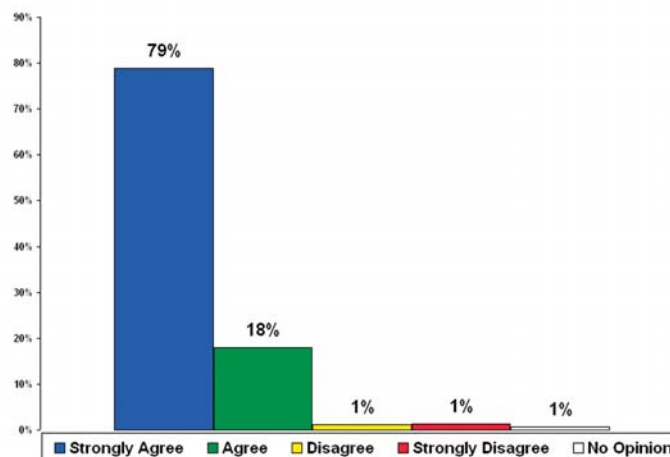


Time Savings with SunPass

A total of 97% of respondents feel that they save time using SunPass compared to paying cash for tolls.

As a SunPass customer, I feel that I save time using SunPass, compared to paying cash for tolls.

Chart 10

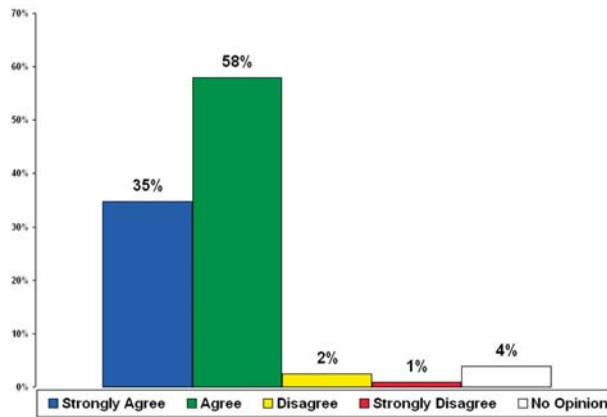


Appearance of the Toll Plazas

In 2004, 93% of respondents were satisfied with the appearance of the toll plazas.

I am satisfied with the appearance of the toll plazas on the Turnpike System.

Chart 11

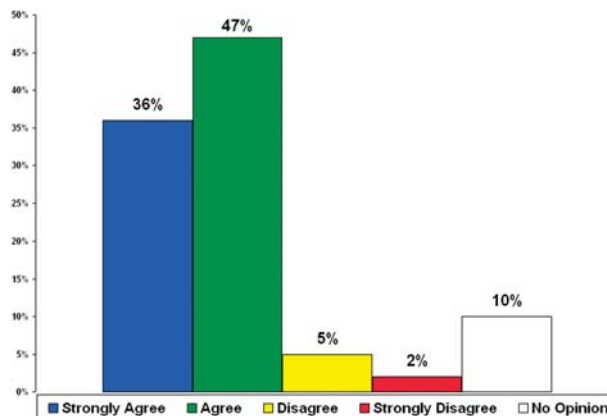


Toll Collector Friendliness

The 83% satisfaction rating shows a significant increase in respondent satisfaction with the toll collectors encountered. The 2004 rating is seven-percentage points higher than 2003.

I think that the toll collectors that I come in contact with are friendly and treat me as a value customers.

Chart 12



Customer Comments on SunPass

SunPass Lanes

SunPass customers commented on three main areas regarding SunPass lanes: more SunPass lanes, consistent placement of SunPass lanes, and removal of SunPass lane gates. As a result Florida's Turnpike Enterprise has targeted increasing the number of SunPass lanes and SunPass only ramps that provide direct connections to and from roadways off Florida's Turnpike.

SunPass Statements

Several survey respondents recommended emailed notices when their SunPass account balances are low and periodic emailed or regular mailed account statements. Although account statements are not currently mailed, SunPass customers can go online to www.SunPass.com to check their accounts.

SunPass General/Other

Respondents requested a better way to attach the transponder to the windshield to keep it from falling off while driving. Additionally, respondents would like quick customer service when calling the Customer Service Call Center. To address this concerns, suction cup transponder holders are available for sale at Florida's Turnpike service plazas as an alternative to other adhesives. Also, Florida's Turnpike Enterprise will be opening a second call center in Orlando in 2005 with approximately 65 additional customer service representatives to serve you.



Toll Pricing/Cost

The most frequently mentioned comments involve reduction in toll rates and discounts for SunPass customers. In an effort to address these comments, Florida's Turnpike Enterprise provided SunPass customers a pricing advantage by excluding SunPass customers from the toll rate increase implemented in March 2004. No minimum usage is required and you save every time!

Summary of Sunpass Program and Tolls

Table 2

Statement	Satisfaction			Dissatisfaction			Neither/Neutral/No Opinion		
	2004	2003	2002	2004	2003	2002	2004	2003	2002
<i>When contacting SunPass... customer service reps were responsive and friendly, and treated me as a valued customer.</i>	77%	82%	82%	3%	2%	3%	20%	16%	15%
<i>As a SunPass customer, I feel that I save time using SunPass, compared to paying cash for tolls.</i>	97%	96%	94%	2%	2%	3%	1%	2%	3%
<i>When I check my SunPass account balance, it is accurate.</i>	79%	82%	79%	3%	3%	4%	18%	15%	17%
<i>I think that the gates in the "SunPass Only" lanes area an effective device to reduce speed through the toll plaza.</i>	73%	65%	64%	23%	20%	22%	4%	15%	14%
<i>I think that the toll collectors that I come in contact with are friendly and treat me as a valued customer.</i>	83%	76%	73%	7%	5%	7%	10%	19%	20%
<i>I am satisfied with the appearance of the toll plazas on the Turnpike System.</i>	93%	84%	84%	3%	3%	4%	4%	13%	12%
<i>Overall, I am satisfied with the value I receive from the SunPass program.</i>	96%	92%	88%	3%	3%	4%	1%	5%	8%
<i>I would recommend purchasing SunPass to family and friends.</i>	97%	96%	95%	2%	1%	1%	1%	3%	4%

Service Plazas

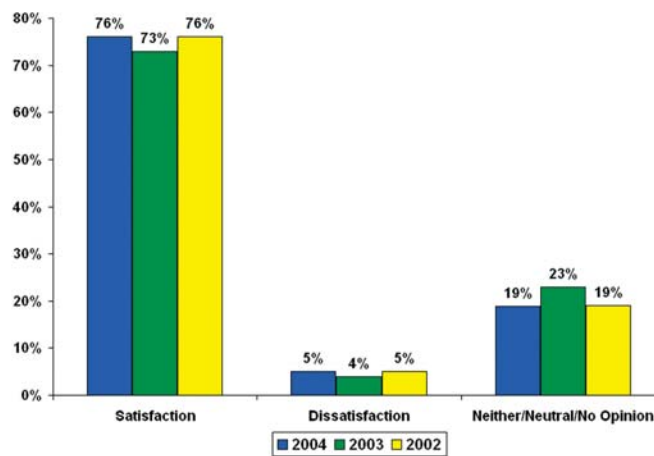
Overall Level of Service at Turnpike Service Plazas

Satisfaction ratings returned to higher levels in the 2004 survey with 76% of the respondents satisfied with the level of service at Turnpike Service Plazas.



Overall, I am satisfied with the level of service provided at Turnpike service plazas.

Chart 13

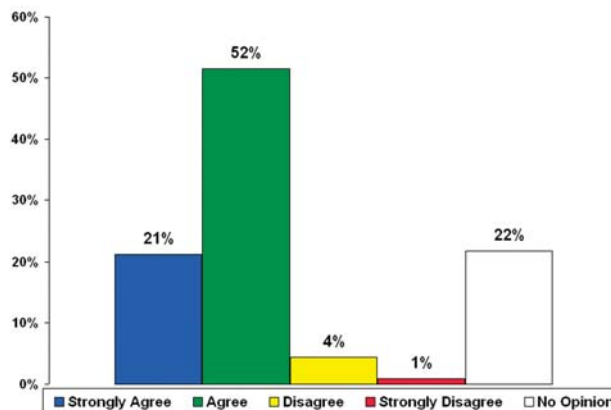


Customer Recommendation of Turnpike Service Plazas

According to the 2004 survey, 73% of respondents would recommend Turnpike service plazas to family and friends.

I would recommend to family and friends to stop at a service plaza when traveling on the Turnpike.

Chart 14

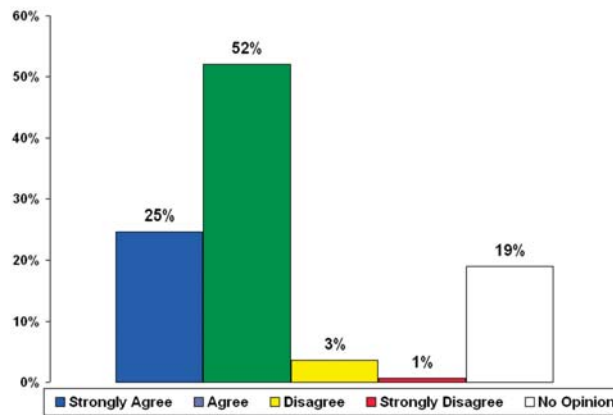


Cleanliness of Service Plazas

Respondent satisfaction with service plaza cleanliness in 2004 remained consistent with satisfaction levels in 2003.

I am satisfied with the cleanliness of the service plazas.

Chart 15

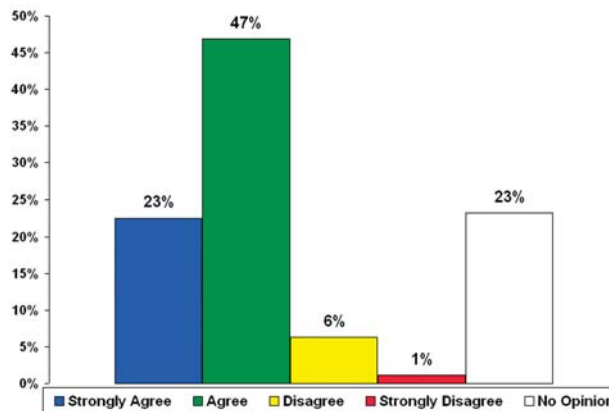


Restroom Cleanliness at Service Plazas

The satisfaction rating in 2004 increased three-percentage points to 70% compared to 2003. This represents an upturn from the dip in satisfaction that occurred in 2003.

I am satisfied with the cleanliness of the restrooms at the service plazas.

Chart 16



Customer Comments on Service Plazas



Service Plaza Vendors

According to the 2004 survey, respondents are looking for a wider variety of food choices, especially healthier options. Other comments in this area referenced later service hours or 24-hour service for late night drivers. In an effort to serve late night drivers, Florida's Turnpike service station operator, Citgo, now provides selections of soft drinks, snacks, and pharmacy-type products available 24-hours. Additionally, one food concept in the service plaza is required by Florida's Turnpike Enterprise to service customers 24-hours as well.

General Service Plaza

Respondents indicated that they desire clean restrooms, short lines at the food vendors, and friendly customer service representatives. Florida's Turnpike Enterprise has modified its service plaza inspection program to increase responsiveness to customer needs. Each service plaza and service station is inspected on over 350 items emphasizing safety and presentation for our customers. Additionally, Florida's Turnpike Enterprise has recently completed its restroom renovations allowing easier access and efficiency for patrons.

Summary of Service Plazas

Table 3

Statement	Satisfaction			Dissatisfaction			Neither/Neutral/ No Opinion		
	2004	2003	2002	2004	2003	2002	2004	2003	2002
<i>I am satisfied with the cleanliness of the service plazas.</i>	77%	78%	84%	4%	4%	4%	19%	18%	12%
<i>I am satisfied with the cleanliness of the restrooms at the service plazas.</i>	70%	67%	75%	7%	6%	7%	23%	27%	18%
<i>I think that the prices at the service plazas are reasonable.</i>	53%	44%	49%	24%	20%	22%	23%	36%	29%
<i>There is sufficient travel information available at the service plazas.</i>	71%	74%	78%	3%	2%	2%	26%	24%	20%
<i>I think that the level of security provided at the service plazas is sufficient.</i>	63%	60%	63%	8%	6%	6%	29%	34%	31%
<i>I think that service plaza staff are friendly and courteous and treat me as a valued customer.</i>	67%	59%	60%	9%	7%	9%	24%	34%	31%
<i>Generally, I do not have to wait in line at the service plazas.</i>	64%	51%	53%	15%	19%	21%	21%	30%	26%
<i>I would recommend to family and friends to stop at a service plaza when traveling on the Turnpike.</i>	73%	67%	69%	5%	5%	6%	22%	28%	25%
<i>Overall I am satisfied with the level of service provided at Turnpike service plazas.</i>	76%	73%	76%	5%	4%	5%	19%	23%	19%

Road Conditions

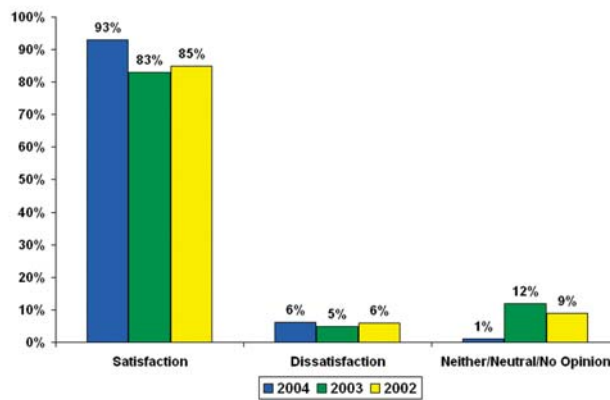
Overall Satisfaction with Turnpike Road Conditions

According to the 2004 survey, 93% of respondents are satisfied with the road conditions on the section of the Turnpike System that they travel. This represents a ten-percentage point increase from the 2003 survey.



Overall, I am satisfied with the road conditions on the section of the Turnpike System that I travel.

Chart 17

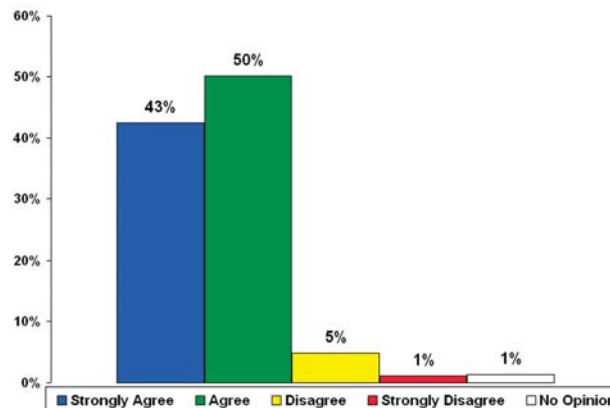


Turnpike System Signage

A total of 93% of survey respondents feel that the signage on the Turnpike System is well maintained and easy to read.

Signage on the Turnpike System is well maintained and the signs are easy to read.

Chart 18

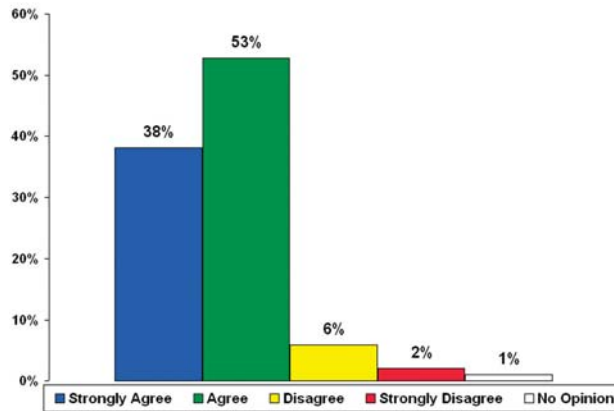


Smooth Pavement on Turnpike Roadways

In 2004, 91% of survey respondents felt that the Turnpike roadways that they travel are well maintained with smooth pavement.

The Turnpike roadways that I travel are well maintained with smooth pavement.

Chart 19

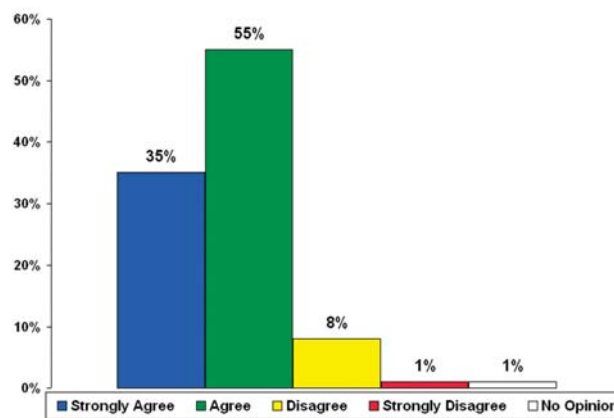


Debris Removal

According to the 2004 survey, 90% of survey respondents agree that Turnpike roads are clean and free of debris.

The Turnpike roadways are clean and free of debris.

Chart 20



Customer Comments on Road Conditions

Roadway Construction

Several survey respondents indicated a preference to have roadway construction and lane closures occur overnight or during non-peak travel times to minimize construction related congestion. Quick completion of construction projects was also a common topic. Florida's Turnpike Enterprise compels its contractors to perform all construction involving lane closures at night. However, there are some cases in which the work can not be performed safely at night, which leads to daytime lane closures. While we are committed to making your travel as enjoyable as possible, safety for both you and our employees is our number one priority.

Signage

Repair and replacement of damaged signs were common comments in the 2004 survey due to the survey's release near the end of the 2004 hurricane season. Respondents also request additional overhead electronic message boards to provide traffic information to drivers. Florida's Turnpike Enterprise is working as quickly as possible to replace damaged and destroyed signage along our roadways.

Police/FHP and Speed Limits

Requests for increased police presence to enforce speed limits and deter reckless driving were noted. There were also several comments for raised speed limits, consistent speed limits, and fast accident clearance. In an effort to promote timely accident clearance, Florida's Turnpike Enterprise has instituted a Quick Clearance Policy. The Quick Clearance Policy requires any lane blocking accident to be removed from travel lanes in 90 minutes or less. If rapid clearance is achieved the wrecker operators receive a bonus. The Quick Clearance Policy will reduce secondary accidents, injuries to police and firemen, and improves traffic flow. Additionally Troop K, Florida's Turnpike's Highway Patrol Troop, has added 18 troopers as of March 1, 2005 to assist in keeping Florida's Turnpike safe for our customers.



General Road Conditions

A frequently noted comment requested additional Road Rangers and to extend Road Ranger services to around the clock. Additional travel lanes, median barriers to prevent cross over accidents, and improved roadway lighting were frequently mentioned items. Florida's Turnpike Enterprise is currently working towards expanding the Road Ranger program to assist even more motorists in need of aid. To better meet the safety needs of Florida's Turnpike travelers, an aggressive 18 month project to install an additional 150 miles of guardrail began in the fall of 2004.



Summary of Road Conditions

Table 4

Statement	Satisfaction			Dissatisfaction			Neither/Neutral/No Opinion		
	2004	2003	2002	2004	2003	2002	2004	2003	2002
<i>The Turnpike roadways are well maintained with smooth pavement.</i>	91%	83%	86%	8%	7%	7%	1%	10%	7%
<i>Grass along the Turnpike is maintained at an appropriate height.</i>	93%	89%	90%	4%	2%	3%	3%	9%	7%
<i>Turnpike roads are clean and free of debris.</i>	90%	83%	83%	9%	6%	7%	1%	11%	10%
<i>Signage on the Turnpike is well maintained and signs are easy to read.</i>	93%	89%	91%	6%	4%	3%	1%	7%	6%
<i>I am satisfied with the amount of time it takes to clear an accident on the Turnpike.</i>	55%	46%	46%	22%	18%	18%	23%	36%	36%
<i>If I were stranded...I would feel confident that Road Rangers, Highway Patrol, or a Wrecker Operator would respond.</i>	76%	66%	65%	9%	7%	8%	15%	27%	27%
<i>I am satisfied with the signage and warning signals provided to alert drivers of construction work zones.</i>	90%	83%	84%	7%	5%	6%	3%	12%	10%
<i>My delays within construction zones on the Turnpike System are acceptable.</i>	69%	55%	55%	22%	18%	21%	9%	27%	24%
<i>The Turnpike road ways that I travel have a sufficient amount of traffic lanes.</i>	75%	65%	67%	23%	20%	22%	2%	15%	11%
<i>Overall, I am satisfied with the road conditions of the section of the Turnpike that I travel.</i>	93%	83%	85%	6%	5%	6%	1%	12%	9%

Table and Chart Index

Tables

- Table 1 - Turnpike Roadway Traveled by Respondent
- Table 2 - Summary of SunPass Program and Tolls
- Table 3 - Summary of Service Plazas
- Table 4 - Summary of Road Conditions

Charts

- Chart 1 - Age of Respondents
- Chart 2 - Level of Education of Respondents
- Chart 3 - Household Income of Respondents
- Chart 4 - Weekly Use of Florida's Turnpike
- Chart 5 - Customer Tenure in the SunPass Program
- Chart 6 - Value for Toll Paid
- Chart 7 - Recommendation of Use
- Chart 8 - Value of SunPass Program
- Chart 9 - Customers Recommending SunPass
- Chart 10 - SunPass Saves Time
- Chart 11 - Appearance of Toll Plazas
- Chart 12 - Friendliness of Toll Collectors
- Chart 13 - Overall Service Plaza Satisfaction
- Chart 14 - Customers Recommending Stopping at a Service Plaza
- Chart 15 - Cleanliness of Service Plazas
- Chart 16 - Cleanliness of Restrooms
- Chart 17 - Overall Road Conditions
- Chart 18 - Easy to Read Signs
- Chart 19 - Smooth Pavement
- Chart 20 - Clean and Free of Debris



**Florida's Turnpike Enterprise
Milepost 263, Florida's Turnpike
Building 5313, Turkey Lake Service Plaza
Ocoee, Florida 34761**

407.532.3999

www.floridasturnpike.com