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HIGH BILLS AND POOR SERVICE LEAD TO FIRST DROP IN BROADBAND CUSTOMER SATISFACTION SINCE 2008

Broadband speeds might have rocketed by 30% this year^[1], but higher prices and declining customer service have triggered the first fall in customer satisfaction in three years. In fact, the shocking results of the latest uSwitch.com Broadband Customer Satisfaction Report show a drop in standards across every single category:

- **Speed:** despite average speeds increasing from 5.7Mb to 7.4Mb, satisfaction with speed falls from 71% to 68% as customers sign up to faster speeds than they actually receive
- **Value for Money:** satisfaction with value for money plummets as annual broadband bill climbs 5% to £176 a year^[2] – the first rise in three years. Over two million customers (13%) feel short-changed^[3]
- **Customer service:** mis-selling and bad billing leave just six out of 10 customers satisfied overall with service and over two million customers (14%) unhappy^[4]
- **Best provider:** Plusnet knocks shining star O2 off the top spot, winning four out of 11 categories - 90% of its customers are satisfied overall
- **Worst provider:** customers vote broadband dinosaur AOL bottom in seven categories - just two out of three customers (67%) are satisfied overall
- **Biggest drop:** TalkTalk's customer service score nosedives 9% with less than half (49%) its customers satisfied^[5] – it also comes bottom for technical support, quality of connection and ease of use
- **Bad deal:** over three million customers (19%) do not believe their provider has them on the best deal available to them^[6].

The 2011 Broadband Customer Satisfaction Report issued today by uSwitch.com, the independent price comparison and switching service, shows the first drop in customer satisfaction with broadband providers since 2008. The UK's most comprehensive report into

customer satisfaction, based on responses from 7,500 broadband users, reveals that, while average speeds have risen 30% over the last year^[1], this has been accompanied by a 5% rise in bills^[2] and a 2% drop in service levels^[7]. In fact, just six out of 10 broadband customers are now satisfied with the customer service they receive.

Best broadband – Plusnet has stolen the top spot from O2 for Best Overall Customer Satisfaction with an impressive 90% of its customers satisfied overall. Plusnet was acquired by BT in 2006 but has retained its own identity as a provider of low cost, reliable services. With its competitive pricing and 24/7 Sheffield-based customer service centre, it also wins Best Customer Service, Best Quality of Connection and Most Likely to be Recommended. Its broadband services start from just £6.49 a month for up to 20Mb. Despite not coming top overall, last year's winner O2 still wins seven out of 11 categories including Best Value for Money, Best Technical Support and Best Speed Satisfaction.

Worst broadband – Broadband veteran AOL is back at the bottom again after a brief respite last year, with just 67% of its customers satisfied overall. In fact customers vote the company last in seven out of 11 categories, including Speed Satisfaction, Ease of Use and Likely to be Recommended. According to the survey, its customers experience average speeds of 5Mb, compared to the 7.4Mb experienced by the average broadband user. AOL is owned by TalkTalk Telecom Ltd, but its services have taken a back seat to the aggressive marketing of its sister company.

Biggest Improver – The future is looking bright again for Orange, having pulled itself up from last year's position at the bottom of the ranks to fifth position in overall satisfaction. Three quarters of its customers are now satisfied with its service, a rise of 5% since last year^[8]. In fact it has improved in every single category except for satisfaction with speed.

Biggest Faller – Still struggling with the aftershocks of the Tiscali acquisition, TalkTalk has fallen to seventh place in overall satisfaction and comes bottom for Customer Service, Quality of Connection, Technical Support and Ease of Use.

Speed - According to the report, the average speed broadband customers get has jumped from 5.7Mb to 7.4Mb, a healthy rise of 30%. But the speeds that customers have signed up to are also considerably higher – averaging at 13Mb. As a result, customer satisfaction with speed has dropped from 71% to 68%. After reliability of connection, speed is the most important aspect for consumers choosing a broadband service, ahead of both price and customer service^[9]. O2 and

Virgin Media have held onto the top two positions, scoring 82% and 80% respectively in this category, while just 57% of AOL's customers are satisfied with their speed.

Value - The survey also shows that the average annual broadband bill has climbed 5% this year and now stands at £176, up from £167 in 2010^[2]. This is the first rise broadband customers have seen in three years, and is partly attributable to the 2.5% VAT increase. Overall, satisfaction with value for money has dropped from 73% to 68%. O2 remains top of the league but has seen its score drop from 93% of customers satisfied to 84%. The company recently introduced price rises across its broadband packages^[10], effective from 31st March 2011. Meanwhile BT remains at the bottom of the poll with just 61% of its customers satisfied with value for money. Customers on its Total Broadband Option 1 tariff will see prices rise 4% from £16.40 to £17 a month from 28th April.

Service - Overall, just 60% of customers are satisfied with the service provided by their broadband company, a fall of 2% since last year, and there is now a gap of 31% between the best and worst provider. Plusnet tops the category with an impressive 80% of its customers satisfied, but TalkTalk drops to last place with less than half (49%) of its customers satisfied. The company has been plagued by problems since it acquired Tiscali in 2009 and was recently forced to pay out to thousands of customers who were hit with bills despite cancelling their service.

Lowest overall scores are seen in the category 'Best Deal for You', assessing whether customers feel their provider has placed them on the most appropriate plan. On average, just 45% of broadband customers are satisfied that this is the case. This means that over three million customers (19%) do not believe their provider has them on the best deal for them^[6].

Ernest Doku, technology expert at uSwitch.com, comments: "With greater competition and faster speeds than ever before, the u-turn in broadband satisfaction is alarming.

"People have taken broadband to the next level at home and are now enjoying content-rich applications such as YouTube and BBC iPlayer. But their experience will be seriously affected if the speed they need - and believe they should be getting - isn't the one they experience. Broadband that doesn't deliver is incredibly frustrating.

"Plusnet has shown that the simple formula of a reliable connection, good value and excellent customer service equals satisfied customers. Its rivals should sit up and take note of this - it's

not rocket science. In the meantime, it's more important than ever for customers to look at the whole picture when they are choosing their service, and think about what's important to them. If the companies at the bottom of the table don't try to address their failings, they could well see their customers vote with their feet."

Table 1: Winners and losers of the uSwitch.com Broadband Satisfaction Awards 2011

Category	Winner	Loser
BEST OVERALL CUSTOMER SATISFACTION	PLUSNET	AOL
Most likely to be recommended	Plusnet	AOL
Best value for money	O2	BT
Best customer service	Plusnet	TalkTalk
Best technical support	O2	Orange and TalkTalk
Best for billing	O2	AOL
Best quality of connection	Plusnet	TalkTalk
Best for speed satisfaction	O2	AOL
Best 'deal for you'	O2	AOL and BT
Best for ease of use	O2	AOL and TalkTalk
Best for setup support	O2	AOL

The full results can be viewed at www.uSwitch.com where customers can compare levels of customer service alongside information on cost and potential savings.

For more information visit www.uSwitch.com or call 0800 093 0607

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For further information please contact:

Charlotte Nunes, uSwitch.com on 020 7802 2913 or charlottenunes@uswitch.com

Stuart Lerman, Lansons Communications on 0207 294 3674 or stuartl@lansons.com

John Diviney, Lansons Communications on 0207 294 3696 or johnd@lansons.com

Notes to Editors:

Reference to satisfied customers includes only those who responded positively that they were very satisfied or fairly satisfied. Only those who responded as fairly dissatisfied or very dissatisfied are referred to as 'dissatisfied'.

Satisfaction ratings and rankings in tables are determined only by the percentage of satisfied respondents.

Total sample size in the YouGov survey was 7,759 adults. Fieldwork was undertaken 16th – 21st February 2011 with analysis conducted in March. The survey was carried out online. Specific reporting of results published for suppliers that received 150 or more responses. Data has not been weighted. Comparisons to 12 months ago refer to same YouGov survey conducted February 2010.

1. The average speed experienced by customers has increased from 5.7Mb to 7.4Mb – a rise of 30%.
2. Consumers now pay 14.64 a month for their broadband, compared to £13.95 in 2010. This is £176 a year compared to £167 a year and is a rise of 5%.
3. 13% of customers are fairly or very dissatisfied with the value for money from their broadband. Assuming this applies to the entire broadband population of 17 million customers (Ofcom 2010), this is 2.2 million.
4. 14% are fairly or very dissatisfied with customer service. Assuming this applies to the entire broadband population of 17 million customers (Ofcom 2010), this is 2.4 million.
5. In 2010 58% of TalkTalk's customers were satisfied. Now 49% are satisfied, a fall of 9%.

6. 19% of customers are fairly or very dissatisfied when it comes to their provider ensuring that they are on the best deal. This is 3.2 million when applied to 17 million broadband customers, assuming this applies to the entire broadband population.
7. In 2010, 62% of customers were satisfied with their customer service. This has dropped 2% to 60%.
8. 70% of Orange customers were satisfied overall in 2010 – now 75% are satisfied.
9. When asked which aspects of service were most important, 61% said reliability of connection, 57% said speed, 54% said value for money and 11% said customer support.
10. O2 is raising the monthly fee for its Access package by between £2.63 and £4.12 per month, from 31st March.

Table 2: Cheapest standalone broadband packages

ISP Name	Product name	Download Speed	Download Restrictions	Setup Cost	Monthly Cost	1st Year Cost
AOL	Broadband Only	up to 8Mb	10GB	Free	£15.31	£153.72
BT	Broadband Option 1	up to 20Mb	10GB	Free	£16.40	£196.80
Orange	Simply Broadband	up to 20Mb	Unlimited *	Free	£15.00	£180
O2	The Basics	up to 20Mb	20GB	£25.53	£13.28	£184.36
PlusNet	Value 20Mb	up to 20Mb	10GB	£25.00	£6.49	£102.88
Sky	Unlimited	up to 20Mb	Unlimited *	Free	£15.00	£180
TalkTalk	Essentials	up to 24Mb	40GB	Free	£3.49	£41.88
Virgin Media	Broadband: L	up to 10Mb	Unlimited *	£40	£21.00	£277.00
Data provided by www.uSwitch.com. Correct as of 15th March 2011						
* Subject to fair use/acceptable use policy						
AOL - Free Wireless Router, £5.31 for first 3 months						
BT - BT Home Hub Included						
Orange - Free Wireless Router, Free HP Printer						
O2 - Free Standard Wireless Box						
PlusNet - Free wireless router, Unlimited usage between midnight and 8am						
Sky - Free Sky Wireless Router						
TalkTalk - Free Wireless Router, Unlimited evening & weekend calls to UK landlines						
Virgin Media - Free, Virgin Media Hub Router, £16 for first 3 months						

About Us:

uSwitch.com is a free, impartial, online and telephone-based comparison and switching service, helping consumers compare prices on gas, electricity, water, heating cover, home telephone, broadband, digital television, mobile phones and personal finance products including mortgages, credit cards, current accounts and insurance. In 2010 uSwitch.com celebrated ten years of saving customers money.

The service is also available via fax and post. Consumers should fax 020 7233 5933 or write to Customer Services, uSwitch.com, Centro 3,19 Mandela Street, London, NW1 0DU, with their postcode and usage details.

uSwitch.com is owned by Forward Internet Group plc, a privately funded collection of internet-based businesses focused on consumer engagement and innovation.

	Best Overall Customer Satisfaction					
	Mar-10		Mar-11		Change (10 to 11)	
	Score	Position	Score	Position	Score	Position
AOL	72%	7	67%	8	-5%	-1
BT	75%	6	74%	6	-1%	0
Orange	70%	8	75%	5	5%	3
O2	92%	1	89%	2	-3%	-1
Plusnet	87%	2	90%	1	3%	1
Sky	86%	3	81%	3	-5%	0
TalkTalk	77%	5	70%	7	-7%	-2
Virgin Media	82%	4	79%	4	-3%	0
Average	79%		76%		-3%	
Range	23%		23%		0%	

	Most Likely to be Recommended					
	Mar-10		Mar-11		Change (10 to 11)	
	Score	Position	Score	Position	Score	Position
AOL	54%	7	47%	8	-7%	-1
BT	62%	6	61%	5	-1%	1
Orange	47%	8	51%	7	4%	1
O2	85%	1	74%	2	-11%	-1
Plusnet	79%	2	82%	1	3%	1
Sky	74%	3	68%	3	-6%	0
TalkTalk	64%	5	54%	6	-10%	-1
Virgin Media	69%	4	67%	4	-2%	0
Average	65%		62%		-3%	
Range	38%		35%		-3%	

	Best Value for Money					
	Mar-10		Mar-11		Change (10 to 11)	
	Score	Position	Score	Position	Score	Position
AOL	68%	6	63%	7	-5%	-1
BT	63%	8	61%	8	-2%	0
Orange	65%	7	70%	5	5%	2
O2	93%	1	84%	1	-9%	0
Plusnet	83%	3	82%	2	-1%	1
Sky	84%	2	76%	3	-8%	-1
TalkTalk	79%	4	72%	4	-7%	0
Virgin Media	72%	5	68%	6	-4%	-1
Average	73%		68%		-5%	
Range	31%		23%		-8%	

	Best Customer Service					
	Mar-10		Mar-11		Change (10 to 11)	
	Score	Position	Score	Position	Score	Position
AOL	60%	5	55%	6	-5%	-1
BT	60%	5	61%	5	1%	0
Orange	44%	8	52%	7	8%	1
O2	79%	1	77%	2	-2%	-1
Plusnet	76%	2	80%	1	4%	1
Sky	66%	3	63%	3	-3%	0
TalkTalk	58%	7	49%	8	-9%	-1
Virgin Media	65%	4	62%	4	-3%	0
Average	62%		60%		-2%	
Range	35%		31%		-4%	

	Best Technical Support					
	Mar-10		Mar-11		Change (10 to 11)	
	Score	Position	Score	Position	Score	Position
AOL	57%	6	54%	6	-3%	0
BT	58%	5	58%	4	0%	1
Orange	43%	8	47%	7	4%	1
O2	74%	1	75%	1	1%	0
Plusnet	74%	1	71%	2	-3%	-1
Sky	62%	3	60%	3	-2%	0
TalkTalk	54%	7	47%	7	-7%	0
Virgin Media	60%	4	58%	4	-2%	0
Average	58%		57%		-1%	
Range	32%		28%		-4%	

	Best for Billing					
	Mar-10		Mar-11		Change (10 to 11)	
	Score	Position	Score	Position	Score	Position
AOL	69%	8	67%	8	-2%	0
BT	73%	7	74%	7	1%	0
Orange	75%	6	80%	5	5%	1
O2	86%	2	84%	1	-2%	1
Plusnet	82%	4	82%	3	-0%	1
Sky	79%	5	79%	6	0%	-1
TalkTalk	87%	1	82%	3	-5%	-2
Virgin Media	85%	3	83%	2	-2%	1
Average	80%		79%		-1%	
Range	18%		17%		-1%	

	Best Quality of Connection					
	Mar-10		Mar-11		Change (10 to 11)	
	Score	Position	Score	Position	Score	Position
AOL	67%	8	68%	7	1%	1
BT	77%	5	74%	6	-3%	-1
Orange	71%	7	77%	5	6%	2
O2	87%	1	83%	2	-4%	-1
Plusnet	78%	4	84%	1	6%	3
Sky	82%	2	79%	4	-3%	-2
TalkTalk	72%	6	67%	8	-5%	-2
Virgin Media	82%	2	81%	3	-1%	-1
Average	77%		75%		-2%	
Range	20%		17%		-3%	

	Speed/Usage Offered					
	Mar-10		Mar-11		Change (10 to 11)	
	Score	Position	Score	Position	Score	Position
AOL	63%	7	57%	8	-6%	-1
BT	67%	5	62%	5	-5%	0
Orange	63%	7	62%	5	-1%	2
O2	88%	1	82%	1	-6%	0
Plusnet	70%	4	70%	4	0%	0
Sky	74%	3	71%	3	-3%	0
TalkTalk	66%	6	62%	5	-4%	1
Virgin Media	79%	2	80%	2	1%	0
Average	71%		68%		-3%	
Range	25%		25%		-0%	

	Best "deal for you"					
	Mar-10		Mar-11		Change (10 to 11)	
	Score	Position	Score	Position	Score	Position
AOL	46%	5	41%	7	-5%	-2
BT	45%	7	41%	7	-4%	0
Orange	45%	7	46%	4	1%	3
O2	76%	1	63%	1	-13%	0
Plusnet	55%	3	56%	2	1%	1
Sky	56%	2	53%	3	-3%	-1
TalkTalk	52%	4	43%	5	-9%	-1
Virgin Media	46%	5	43%	5	-3%	0
Average	49%		45%		-4%	
Range	31%		22%		-9%	

	Best for Ease of Use					
	Mar-10		Mar-11		Change (10 to 11)	
	Score	Position	Score	Position	Score	Position
AOL	81%	5	76%	7	-5%	-2
BT	81%	5	78%	5	-3%	0
Orange	75%	8	78%	5	3%	3
O2	92%	1	92%	1	-0%	0
Plusnet	87%	2	89%	2	2%	0
Sky	87%	2	85%	3	-2%	-1
TalkTalk	81%	5	76%	7	-5%	-2
Virgin Media	83%	4	82%	4	-1%	0
Average	83%		80%		-3%	
Range	18%		16%		-2%	

	Quality of Info during Switch					
	Mar-10		Mar-11		Change (10 to 11)	
	Score	Position	Score	Position	Score	Position
AOL	67%	6	60%	8	-7%	-2
BT	67%	6	64%	6	-3%	0
Orange	61%	8	62%	7	1%	1
O2	89%	1	84%	1	-5%	0
Plusnet	79%	3	78%	2	-1%	1
Sky	82%	2	78%	2	-4%	0
TalkTalk	73%	4	66%	5	-7%	-1
Virgin Media	73%	4	70%	4	-3%	0
Average	72%		68%		-4%	
Range	28%		24%		-4%	