

Can a brand survive a data breach?

Five months after one of the largest data breaches in Dutch history, we mapped the telecom market. Odido's network, prices and coverage score above expectation. Its credibility does not.

A Behavio Market Mapping study
of the Dutch mobile and internet category.



— 01 · OVERVIEW

Executive summary

In February 2026, attackers took the personal data of more than six million Odido customers, including bank account numbers, dates of birth, and passport details. Events like this are security stories, but there is a brand story in them as well: what buyers believe the company can be trusted with. Five months later, Behavio mapped the Dutch mobile and internet category to see where Odido now stands. This is one reading of the market, not a before-and-after comparison.

KEY INSIGHTS

Odido is still a strong brand on paper.

It reaches 86% awareness and 26% of buyers. It sits second in the category on salience, ahead of both Ziggo and Vodafone. Adjusted for brand size, it is stronger than expected on fair prices, simple to use, wide coverage, and fast network. The service and the price are not the problem.

It is the only brand buyers do not consider dependable.

Reliability and trustworthiness are the second and fifth most important needs in the market. Odido is the only one of six brands whose links to either need fall below what its size would predict, at -7 and -5. Every rival, including two budget resellers with 8% of buyers, sits at or above expectation on both.

Buyers are not indifferent about it. They are angry.

12% of category buyers feel anger toward Odido, against 2% for KPN. It is the only brand in the study where more buyers feel anger than love.



"The striking thing is how precise the damage is. Odido's network scores well. Its prices score well. People know the brand and think of it quickly. Then you get to reliability and trust, and it is the only brand in the category that is underwater, next to resellers a fraction of its size."

JIRI BOUDAL · BRAND EXPERT & BEHAVIO CEO

02 · BACKGROUND

The breach, and what followed it

On February 5 and 6, 2026, attackers reached Odido's customer relationship system. They **phished login details from customer service staff**, then called those same staff posing as Odido's own IT department to get the multi-factor prompts approved. Once inside, they copied customer records at scale.

Odido disclosed the breach on February 12 and notified the Dutch data protection authority. It initially put the number at **6.2 million customers, roughly a third of the country**. The final published dataset covered more than 6.5 million people and 600,000 companies. It reached Odido's budget brand Ben as well. The stolen fields included names, postal addresses, phone numbers, dates of birth, **bank account numbers**, customer service notes, and **passport and driver's license numbers**.

Odido refused to pay the ransom. The attacker group published the full dataset to the dark web on March 1.

6.5m

People in the published dataset, plus 600,000 companies

Mar 1

Full dataset published to the dark web after the ransom was refused

~350,000

People registered for the collective legal claim by late April

The story then ran for months. Prosecutors opened a criminal investigation, and authorities began examining whether Odido had kept customer data longer than the law allows.

Around 350,000 people had registered for a collective legal claim by late April. In May, Odido ruled out compensation. For half a year, the company was described in public as careless with personal data, and its own customers were organized against it.

Five months later, we measured what Dutch buyers think of the six brands in the category. This is what came back.

Account compiled from public reporting: NOS, Reuters, TechCrunch, NL Times, UpGuard, Cybernews, and Linklaters.

— 03 · METHODOLOGY

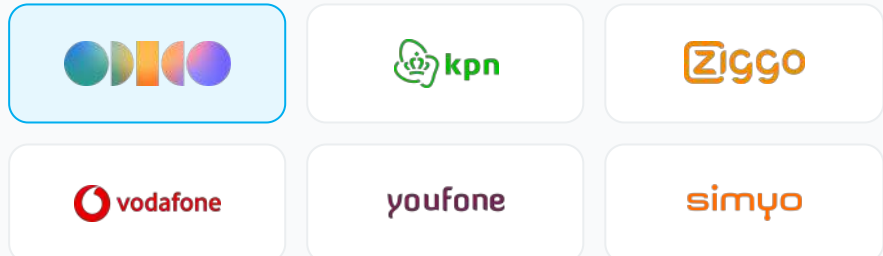
How was this measured?

Behavio Market Mapping shows a category through the eyes of its buyers. Instead of asking people what they think of a brand, it measures the fast, intuitive memory links between brands and needs. Those are the associations that drive real choice.

STUDY AT A GLANCE

MARKET	Netherlands, mobile and internet services.
WHEN	July 2026.
WHO	899 category buyers, defined as people who use mobile and internet services at least occasionally. Drawn from a nationally representative sample of 1,000 Dutch adults, balanced by age, gender, geography, and socio-economic status.
CATEGORY SIZE	90% of Dutch adults qualify as a category buyer on that definition.

BRANDS



Two notes on the brand list:

1. Ziggo and Vodafone are consumer brands of the same company, VodafoneZiggo. We measure them separately, the way buyers meet them.
2. Odido is widely reported as the country's largest mobile operator. It places third on buyers here because this study covers mobile and internet together, where broadband and TV bundles carry weight.

— 03 · METHODOLOGY

What the data focuses on

Every Behavio market map is built from three readings of the same buyers: the brands in their head, the needs that drive their choice, and the feelings attached to each brand.

Brand

Who buyers know, who comes to mind spontaneously, and who they actually buy.

AWARENESS
SALIENCE
BUYERS

Need

Ten needs in the category, each scored by the share of buyers for whom it is a real purchase driver.

NEED IMPORTANCE

Emotion

The specific feeling buyers hold toward each brand, from love through boredom to anger.

LIKEABILITY

THE VIEW THAT MATTERS MOST

Differentiation View: size-adjusted strength

Big brands win on raw association simply because more people know them. The Differentiation View takes brand size out of the picture and asks one question: is this brand stronger or weaker on this need than a brand its size would normally be?

- A score of 0 means exactly as expected.
- **A positive score** is a real strength the brand owns.
- **A negative score** is a need buyers do not credit it with, however big it is.

01

FINDING 01 · NEED IMPORTANCE

Trustworthiness and reliability are not just a nice thing to have in this category.

Seven of the ten needs matter to at least 80% of buyers. **Reliability** ranks second and **trustworthiness** fifth, and together they matter to more than eight buyers in ten, level with price and ahead of network speed.

The needs marketers most enjoy talking about come last. Only about half of buyers care whether their provider is innovative.

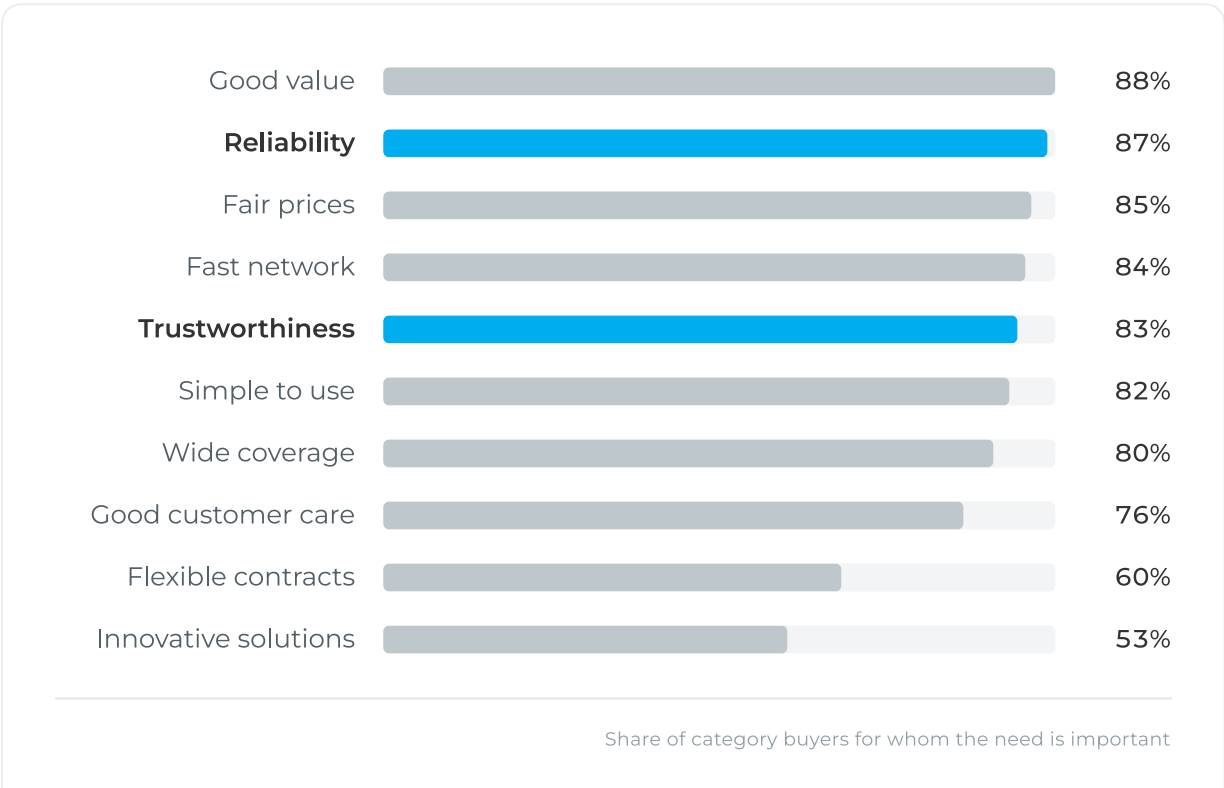


FIG. 1 Need importance, ranked. Reliability and trustworthiness sit among the top five drivers of choice.

KEY INSIGHT

In Dutch telecom, being trusted is a top-five purchase driver, not a reputational nice-to-have.

02

FINDING 02 · BRAND METRICS

Odido is known and its product is respected.

Odido ranks second on salience and leads Vodafone on awareness, salience, and buyers. Adjusted for size, it is stronger than expected on four of the seven high-importance needs.

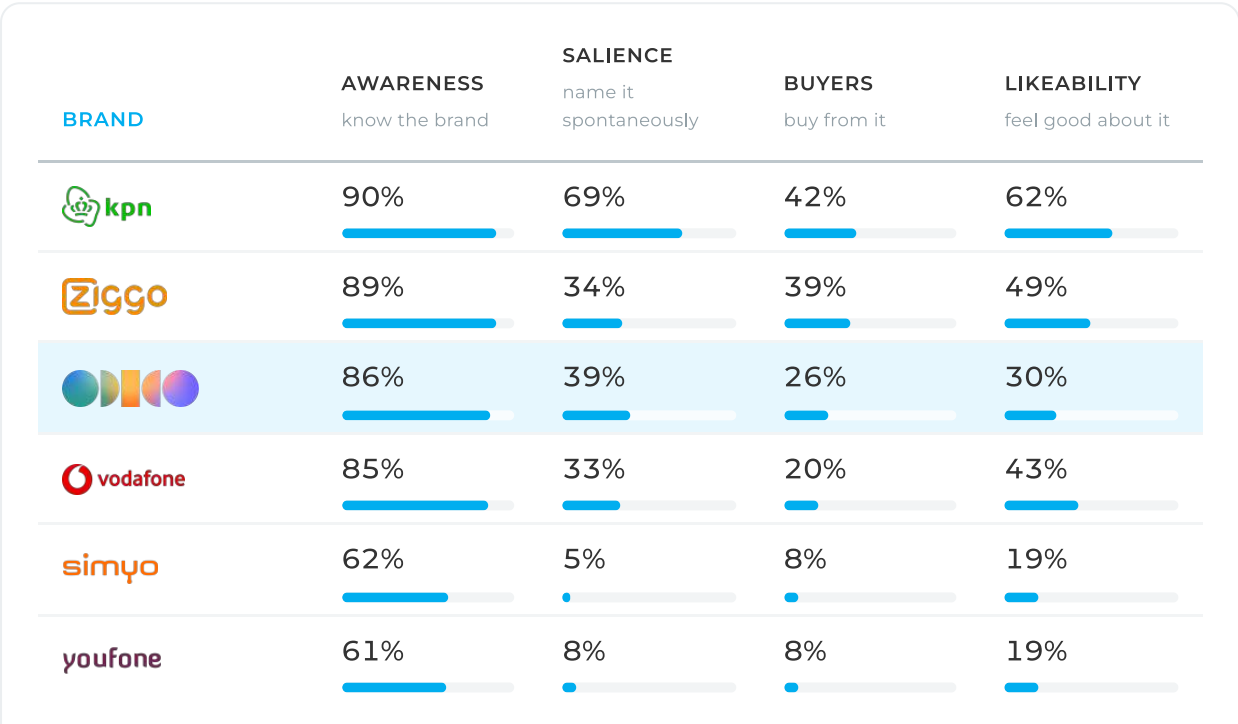


FIG. 2 Key brand metrics. Odido leads Vodafone on every measure except how people feel about it.

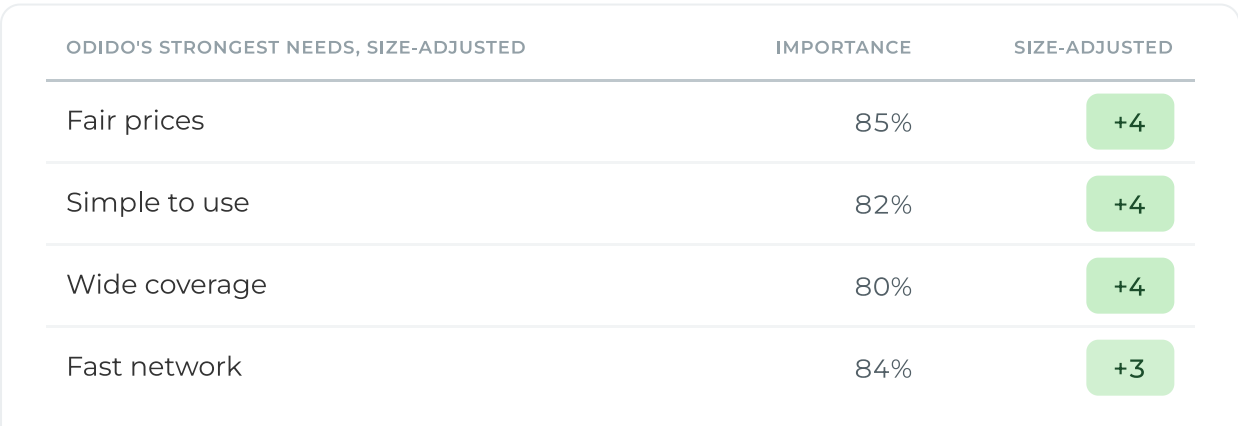


FIG. 3 Size-adjusted scores, Odido. Four positives on high-importance needs.

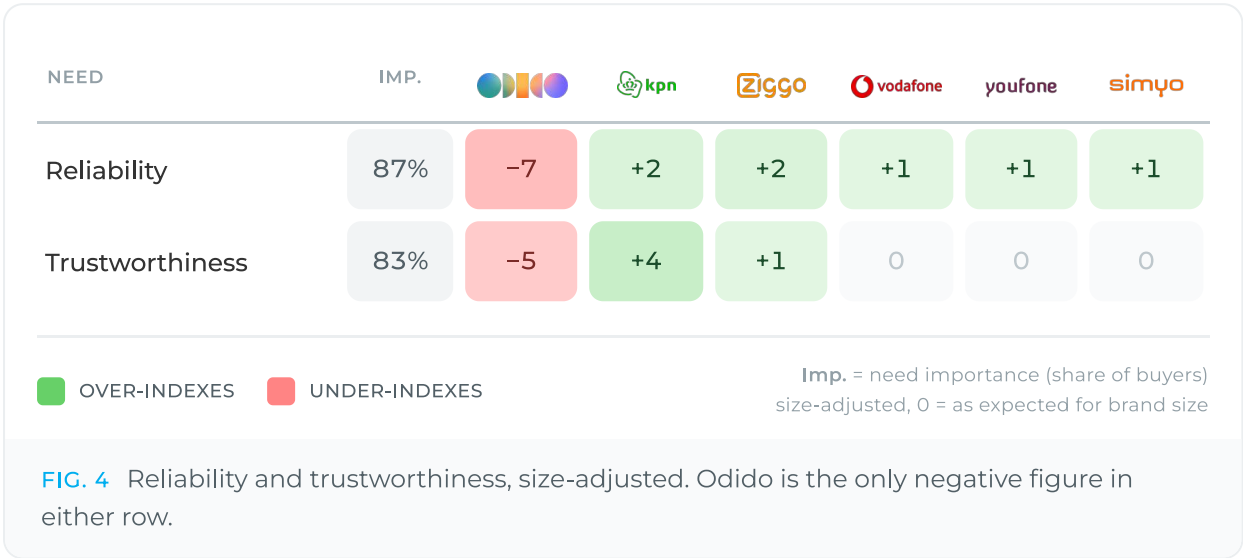
KEY INSIGHT

Odido's service and price are credited by buyers. Its likeability, at 30%, is the lowest of the four major brands.

03

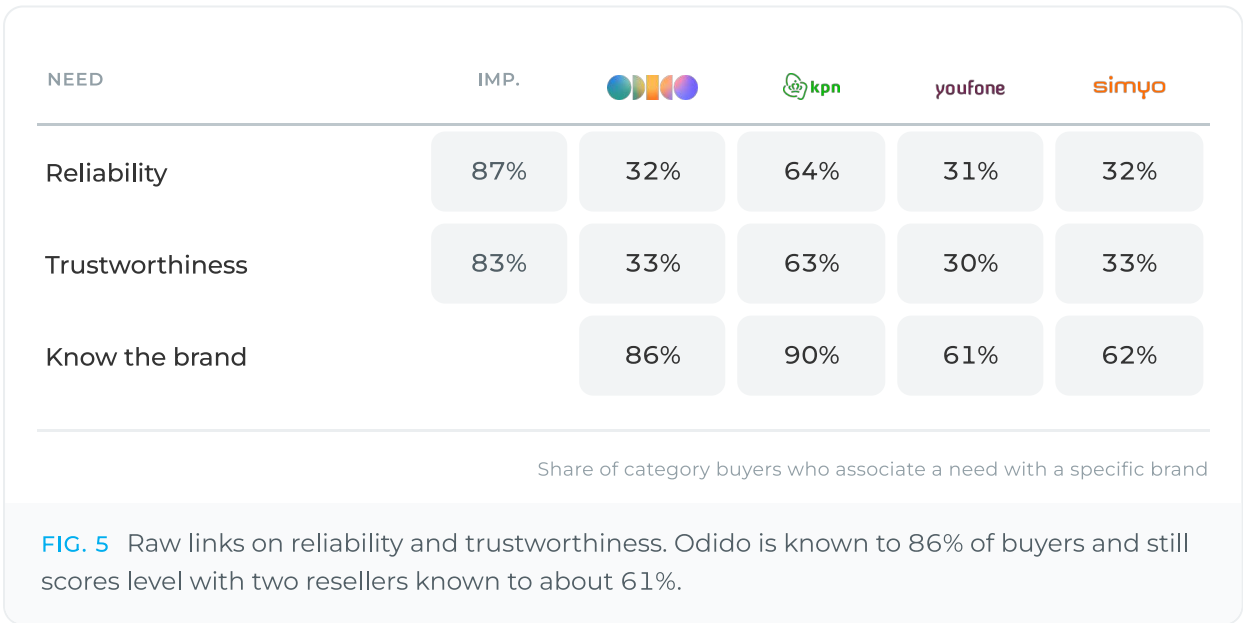
FINDING 03 · RELIABILITY & TRUST

On reliability and trustworthiness, however, Odido is far behind every rival.



Its reliability score is **the most negative single figure for any major brand anywhere in the study.**

The raw links say the same thing. Odido sits level with Youfone and Simyo, and roughly half of KPN.



KEY INSIGHT

Odido scores no better on trust than two resellers a fraction of its size, even though far more people know it.

04

FINDING 04 · EMOTION

More buyers are angry at Odido than love it.

Anger is rare in this category. Four of the six brands sit at 3% or below.

FEEL ANGER TOWARD ODIDO

12%

Against 2% for KPN, and 1% for both resellers.

FEEL LOVE TOWARD ODIDO

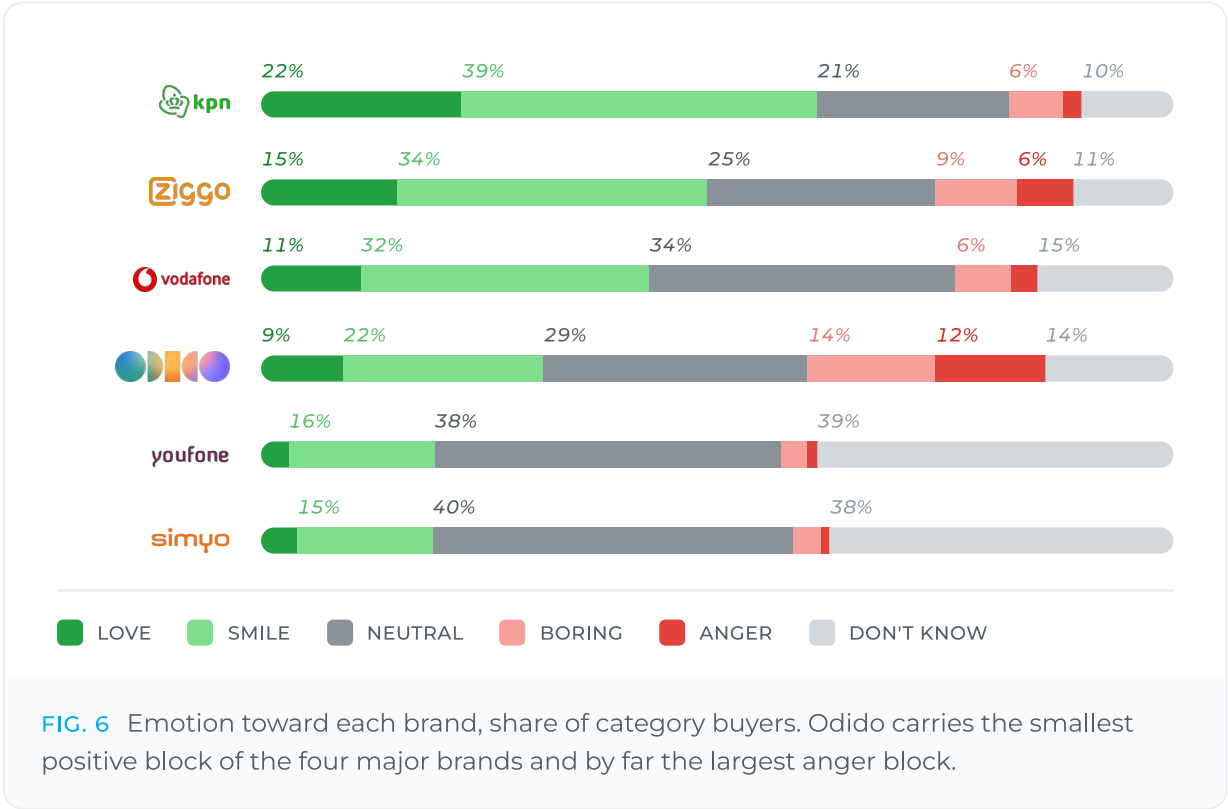
9%

The only brand in the study where the anger figure is the larger of the two.

SAY THEY DON'T KNOW IT

14%

In line with Vodafone. This is not a brand nobody has an opinion about.



KEY INSIGHT

The feeling is held by people who know Odido well. That is a harder starting position than indifference.

— 04 · RESULTS

In their own words

Buyers who picked an emotion were asked why. Most negative answers about Odido mention the leak, and many mention the way it was handled. None of them credit the company for its response.

● BORING

"The data breach is what I now know Odido for the most."

WOMAN

18-29

● ANGER

"The amount of spam and phishing since that data breach is unprecedented."

WOMAN

30-44

● ANGER

"Just look at the newspapers."

MAN

45-64

● SMILE

"The data leak has caused damage to their image."

MAN

65+

KEY INSIGHT

Buyers bring up plenty of other things about Odido. What stands out is that the leak comes up even among those who feel warmly about the brand.

Open-ended follow-up to the emotion question, translated from Dutch. The emotion label is the respondent's own choice.

— 05 · INSIGHT

What the data reveals

Odido is not a small brand with small-brand scores. It is a top-three brand carrying one specific deficit. Three things in the data say so.

01 The weakness is specific

Adjusted for its size, Odido is above expectation on fair prices, simple to use, wide coverage, and fast network. It is below expectation on reliability, trustworthiness, and customer care. **Buyers credit Odido with what the service does. They do not credit it with being dependable.**

02 No rival has the same deficit

Youfone and Simyo hold 8% of buyers each and spend a fraction of Odido's marketing money. Both sit at or above expectation on reliability and trust. **Being small and cheap costs a brand nothing in credibility here, so size does not explain Odido's position.**

03 The feeling is not mild

12% of category buyers report anger toward Odido, more than report love. Anger of that size is rare in this category, where four of the six brands sit at 3% or below. **Whatever produced it, this is an active feeling held by people who know the brand well.**

KEY INSIGHT

This study cannot prove the breach caused these scores. What it does show is one narrow deficit that no rival shares, on the second most important need in the category.

— 06 · WHAT'S NEXT

What to watch next

What this study shows is a position, measured at one point in time. The interesting part is what happens to it next, and that is a question for a second mapping of the same category.

01 Whether the trust gap closes

Odido sits at -7 on reliability and -5 on trustworthiness, size-adjusted, while every rival sits at or above expectation. Repeating the measurement shows whether those two numbers move back toward the category, or drift further out.

02 Whether the anger fades

12% of category buyers report anger toward Odido today, against 9% who report love. Anger can cool into indifference, or it can settle into a stable association that the brand carries for years. Only a later measurement can tell where the sentiment goes.

03 What buyers do when they can switch

Attitudes are one thing, but the question that matters is whether Odido loses customers. Contracts end at different moments, so most buyers cannot act on how they feel right away. The next measurement can show how much of this attitude turns into a switch to a different provider.



Want the full picture? Every need, brand, and differentiation view is in the [live Behavio report](#).

About Behavio

Behavio is the marketing research that tells you what to do next. [Market Mapping](#) shows a whole category through the eyes of its buyers, and returns a ranked shortlist of the needs a brand should go after.

It is built on a simple truth: **what people say is not what they do**. Behavio makes advanced behavioral methods scalable for cross-border consumer brands, helping them track brand performance, map markets, and test ads in one dashboard.

Since 2015, its tools have been trusted by over **600 brands across 40+ markets**, including some of the EU's fastest-growing: Notino, GymBeam, and Decathlon. Backed by **Airbridge Equity Partners** and named to the **Deloitte Fast 50** twice.

PRESS CONTACT

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