

O₂ Czechia and its competitors

1st September 2024 – 31st August 2025

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Report structure

Goal

Provide KPIs and benchmarks about the O₂ brand's performance and reputation in Czechia

Period

1st of September 2024 – 31st of August 2025

Stakeholders

We support with this report: Social media manager, PR manager, Brand coordinator, Marketing manager, Head of Communications

Methodology

We automatically collected and analyzed public online and social media brand mentions from Czechia

Table of contents

I. Quantitative overview

II. Consumer motivation factor gap analysis for marketing

III. Social media content support

IV. PR support

V. SEO support

VI. Appendix



Research methodology

Data collection

We've collected public social media and online press data of the three competing brands on the CZ telco market including their own channels between 1st of September 2024 and 31st of August 2025.

The collected data included content from: Facebook, Instagram, TikTok, YouTube, Twitter, forums, application review sites, blogs and articles from news portals.

Total analysed dataset: O₂ – 21796 mentions, T-Mobile – 12840 mentions, Vodafone – 16726 mentions.

Data analysis

Data have been analysed in NMI (Neticle Media Intelligence), our intelligent media monitoring and analysis tool and in Zurvey, our professional CX survey and analysis software.

Mentions were given sentiments based on the contained positive and negative words and phrases. Negative sentiment (e.g. -2) means negative, zero means neutral, positive sentiment (e.g. +2) means positive content.

Owned vs. earned content: The report includes dedicated sections analysing owned content (brand-managed content) vs. earned content (mentions beyond owned channels).

Custom Labels were created and used to identify and group key topics in the content besides the automatically recognized topics for the 'Consumer motivation factor gap analysis for marketing' chapter.



Executive summary

Quantitative Overview

Competitive Activity

O₂ dominated the competition with the highest share of mentions and interactions, largely driven by nationwide outages and high-visibility campaigns. Vodafone maintained strong visibility through Facebook activity but faced reputational challenges due to a high share of negative sentiment from app reviews. T-Mobile, while least active overall, achieved the most favorable perception, supported by giveaways, CSR-driven content, and strategic partnerships.

Platform Strategies

Platform preferences varied for competing brands: O₂ prioritized TikTok, Vodafone relied on Facebook, while T-Mobile excelled on Instagram. O₂ led in overall content volume, while Vodafone concentrated on owned communication. T-Mobile achieved visibility through high-impact peaks from targeted campaigns.

Reputation

Reputation trends showed T-Mobile achieving the strongest and most consistent Web Opinion Index gains, while O₂'s outages posed a major reputational risk. Vodafone's index declined, reflecting persistent challenges.

Marketing, Social Media and PR support

Consumer motivation factor gap analysis for marketing

O₂'s strengths lie in competitive unlimited data tariffs, contract flexibility, and digital innovation through seamless eSIM use and intuitive app experiences. On the other hand, recurring concerns related to network reliability, overpricing, and weak customer support pose significant risks to loyalty with frequent mentions of possible churn.

Social media content support

O₂ had the strongest activity on TikTok, high engagement on Instagram, and was the only competitor with positive sentiment on Facebook. At the same time, Instagram interactions and earned engagement were weaker compared to rivals, especially T-Mobile.

PR support

O₂ gained positive coverage with the Voyo merge, new data offers, fraud protection, and quick marketing reactions, showing strength in product and ecosystem communication. Still, outages quickly damaged reputation, making network reliability the brand's most sensitive weakness. Action plan: strengthen digital lifestyle narrative, boost the fraud protection initiative with CSR-oriented content, implement rapid-response PR protocols for network incidents, and develop responsive marketing campaigns to engage with relevant news cycles like the power outage.



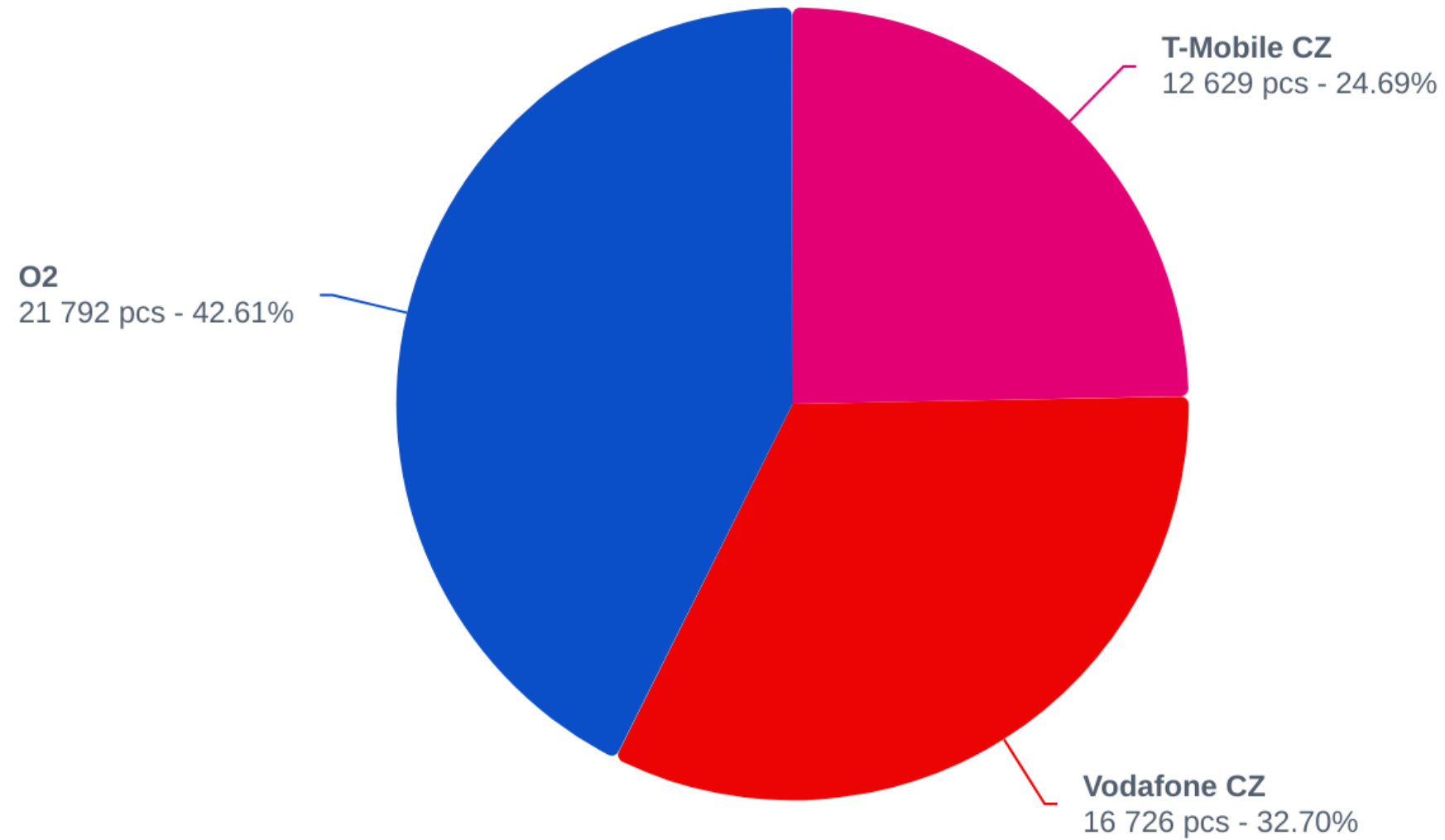
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I. Quantitative overview



Share of mentions – Competitors

O₂ had the strongest online presence, followed by Vodafone, while T-Mobile showed the lowest level of activity during the observed period

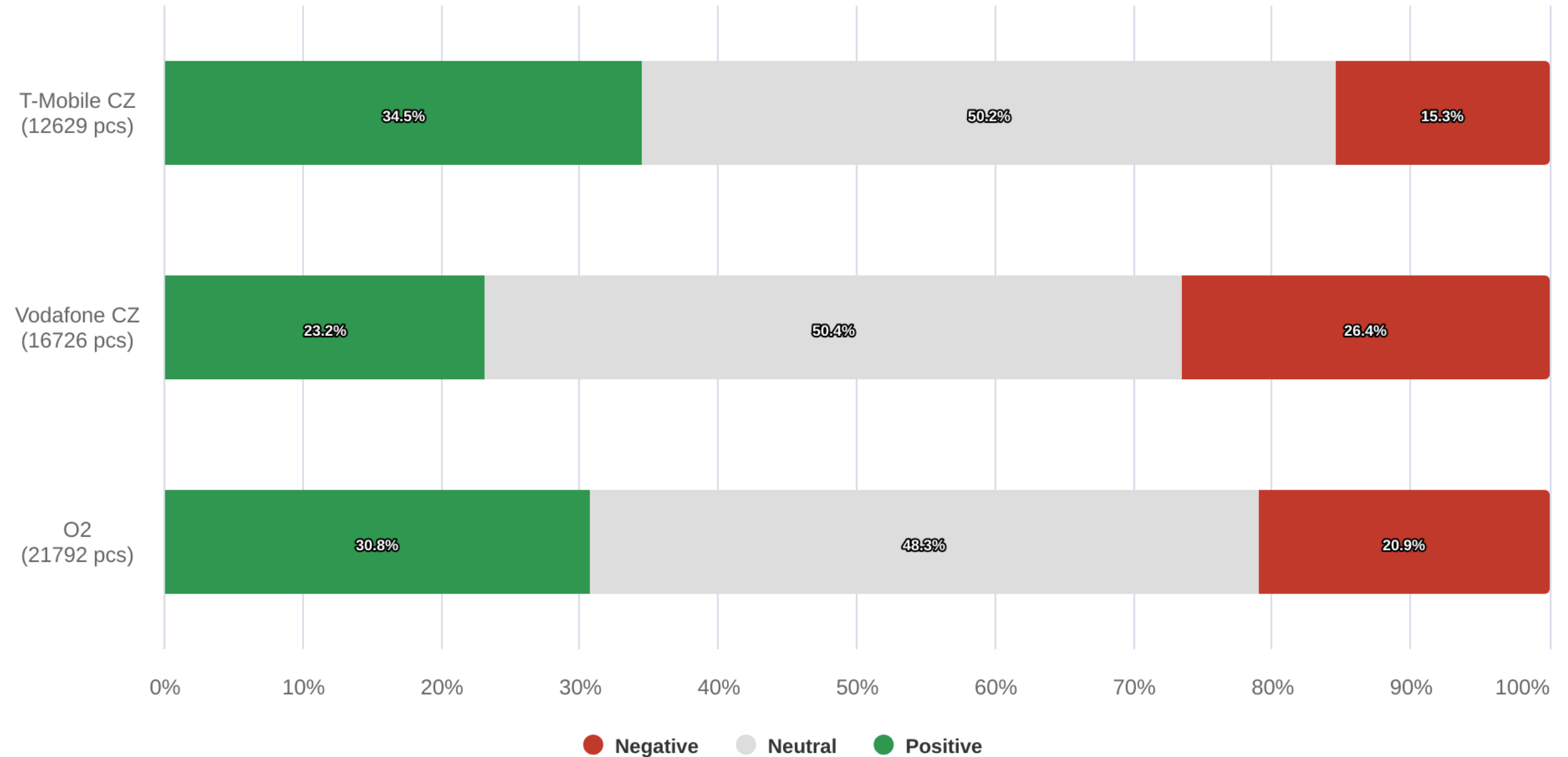


Shows the distribution of mentions between the keywords as a pie chart.

- Despite its relatively low mention number, T-Mobile was the most positively perceived competitor. The brand's own giveaways and sponsored social media posts were well-received by users.
- The highest share of negative mentions were present in Vodafone's case, mainly due to the overwhelming amount of critical application reviews.
- The majority of polarized content hailed from reviews in O2's case as well, granting the brand a favorable outcome.



Share of sentiment - Competitors



This chart shows the proportion of mentions according to the given keywords divided by sentiments.

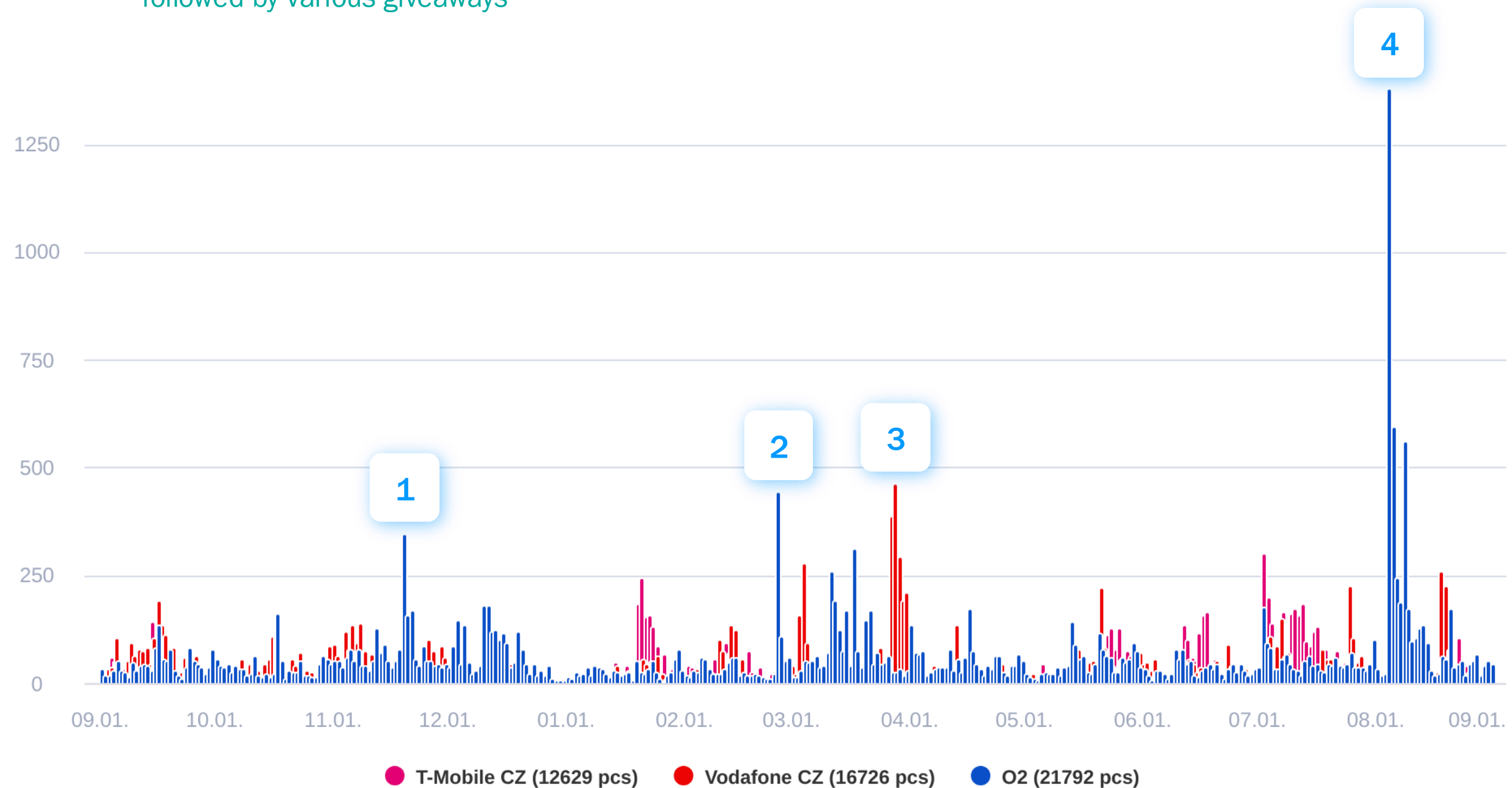
- O₂'s outstanding mention numbers were represented in the case of daily peaks as well, generating the highest peaks among competitors.

1. O₂'s own [giveaway on Instagram](#), offering the latest iPhone 16 Pro in a raffle, generated notable traffic online.
2. The [merging of O₂ TV and Voyo](#) was announced by O₂ on Facebook. User reactions were divisive, with many expressing concerns over technical difficulties and tariff changes.
3. Vodafone's [themed giveaway](#), conducted on Facebook, asked users about their favorite movie soundtracks.
4. The [nationwide outages](#) of O₂'s services accumulated by far the highest number of daily mentions. The provider's own Facebook posts regarding the issue and its resolution became the center of attention.



Daily number of mentions

O₂'s nationwide outages generated by far the highest number of daily mentions, followed by various giveaways

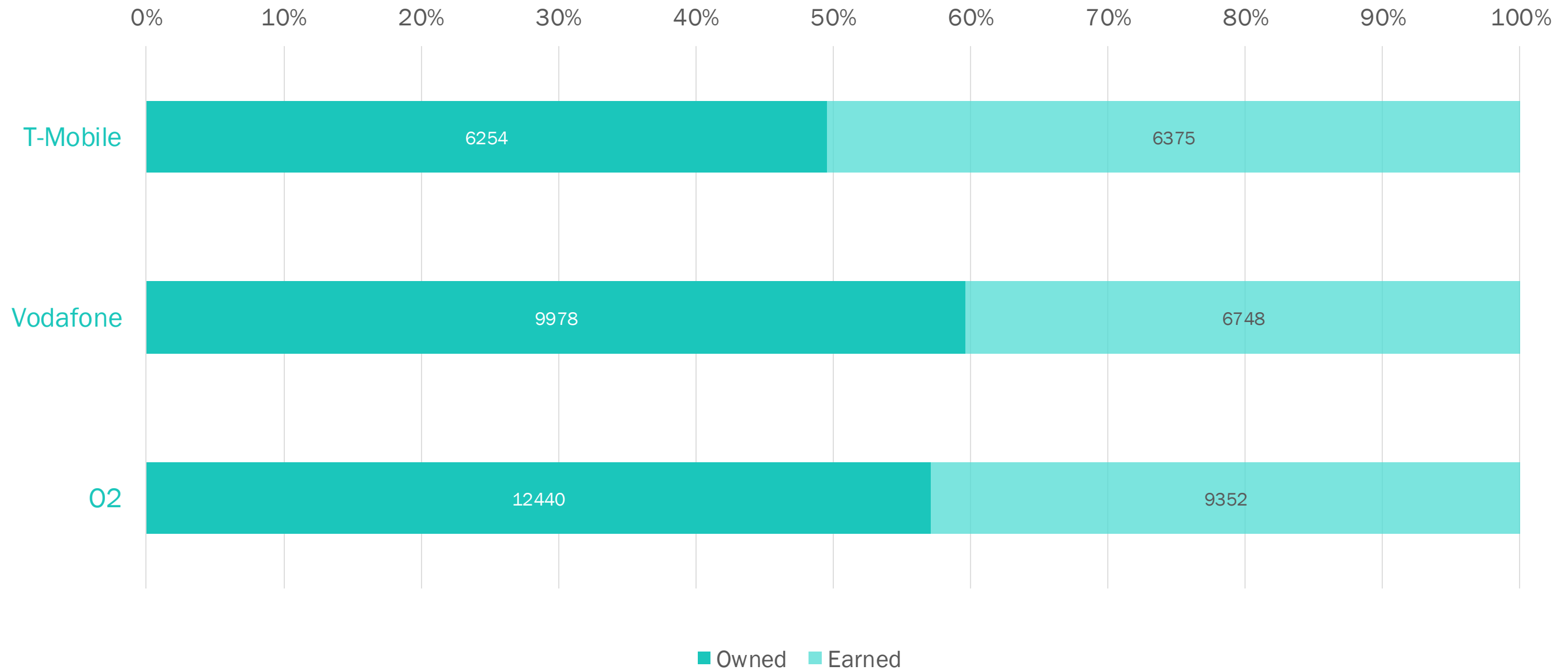


The Number of mentions chart shows the frequency of mentions according to a given keyword. The X-axis is time; the Y-axis is the number of mentions.



Owned vs earned content

Vodafone had the highest share of own mentions but in terms of content volume O₂ was the leader

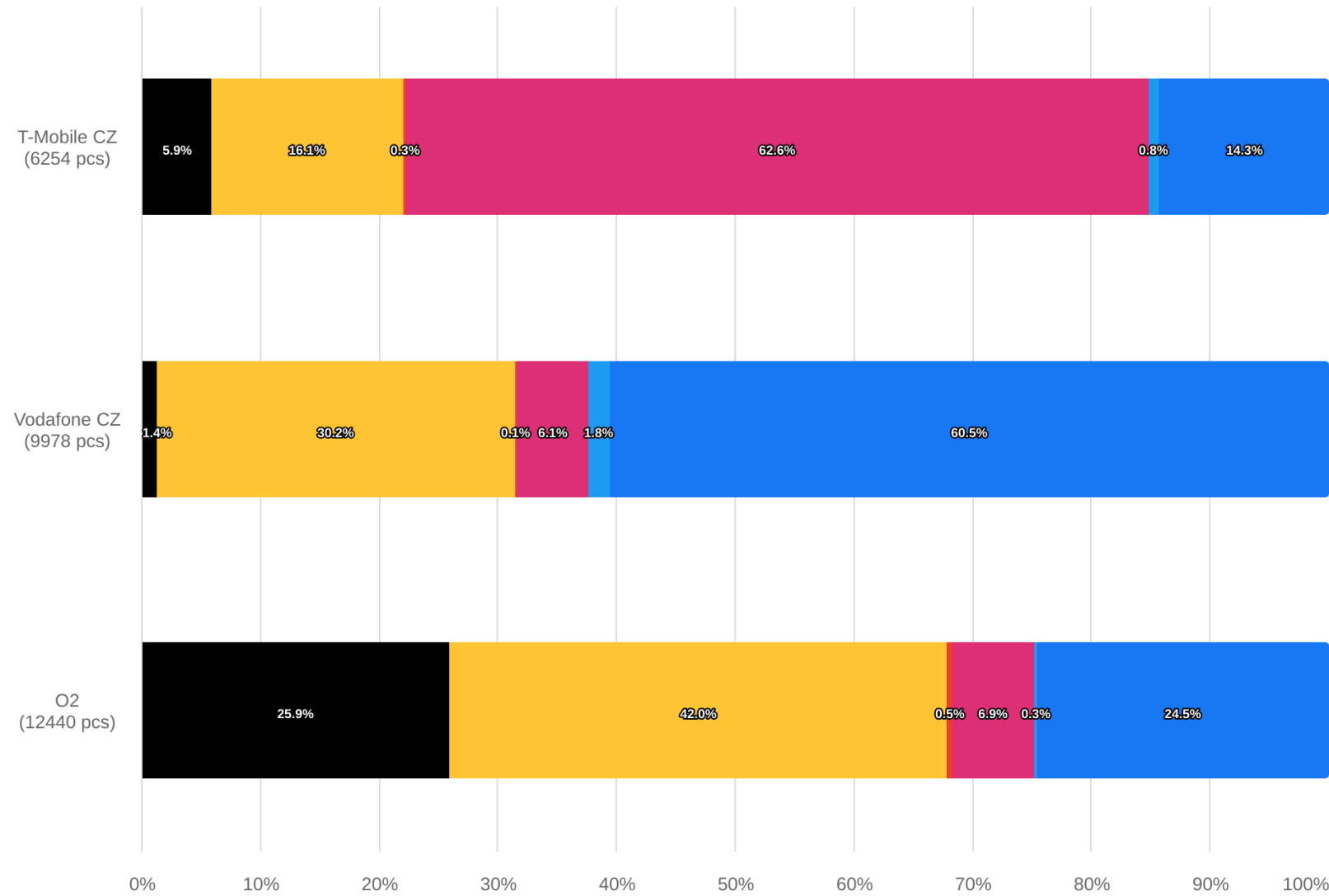




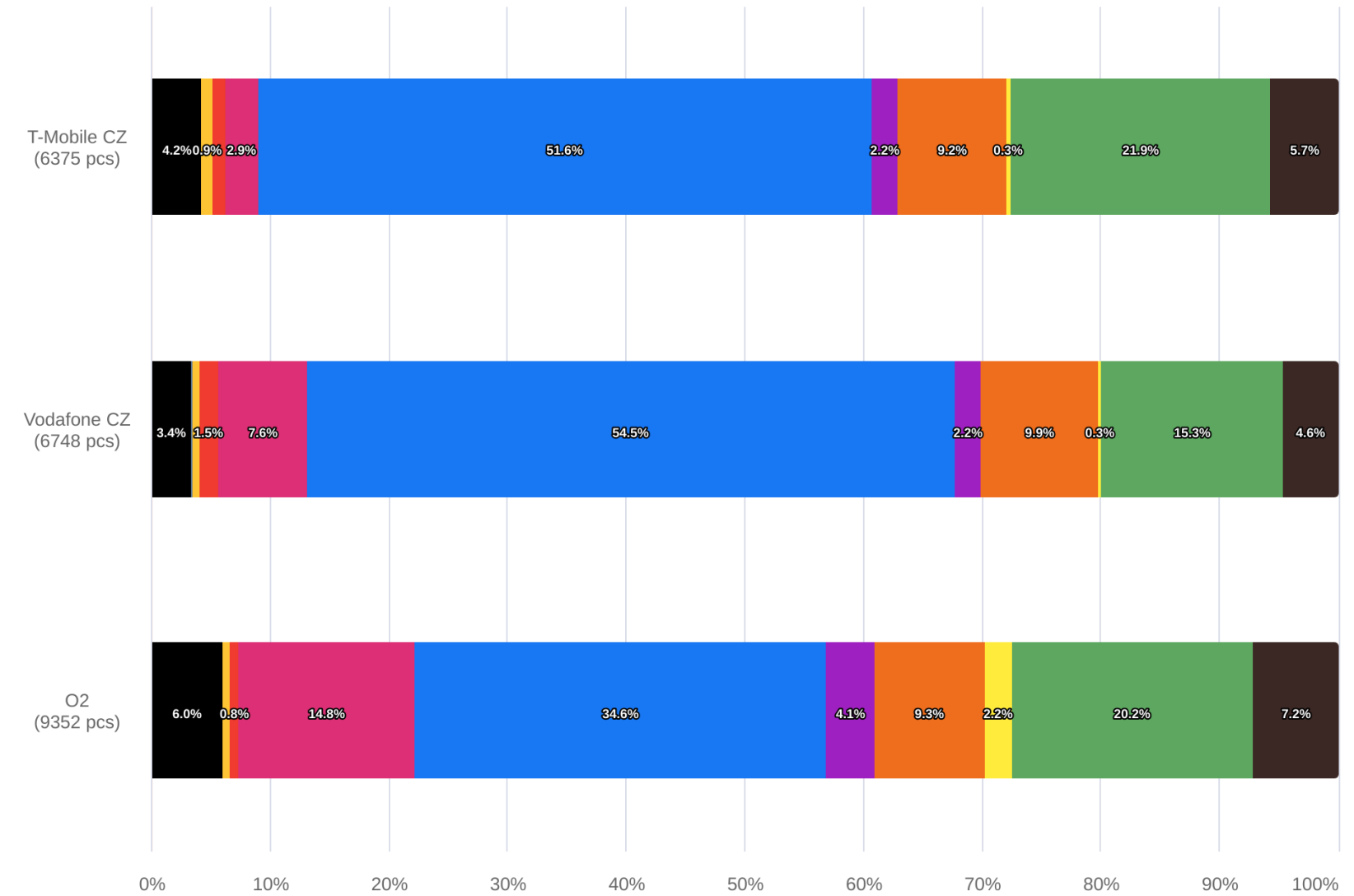
Share of platforms – Competitors

Among telecom brands, each prioritized a different social platform for owned communication: T-Mobile drove the most engagement via Instagram, Vodafone maintained dominance on Facebook, while O₂ placed its strategic emphasis on TikTok

Owned



Earned



- Frontpage
- Article
- Comment
- Blog
- Forum
- Facebook
- Twitter
- Instagram
- Video
- Review
- Other
- Tiktok
- LinkedIn

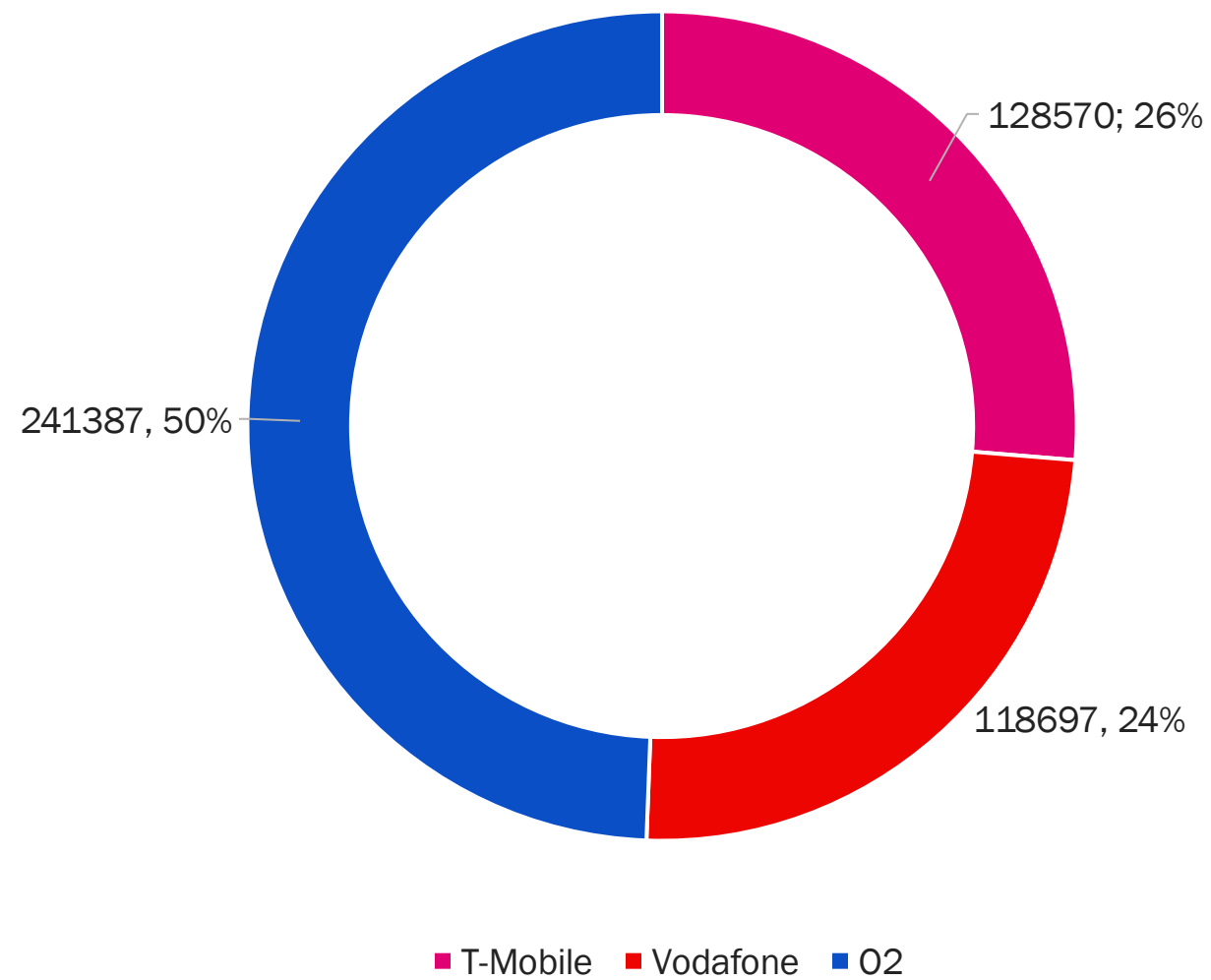
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- LinkedIn



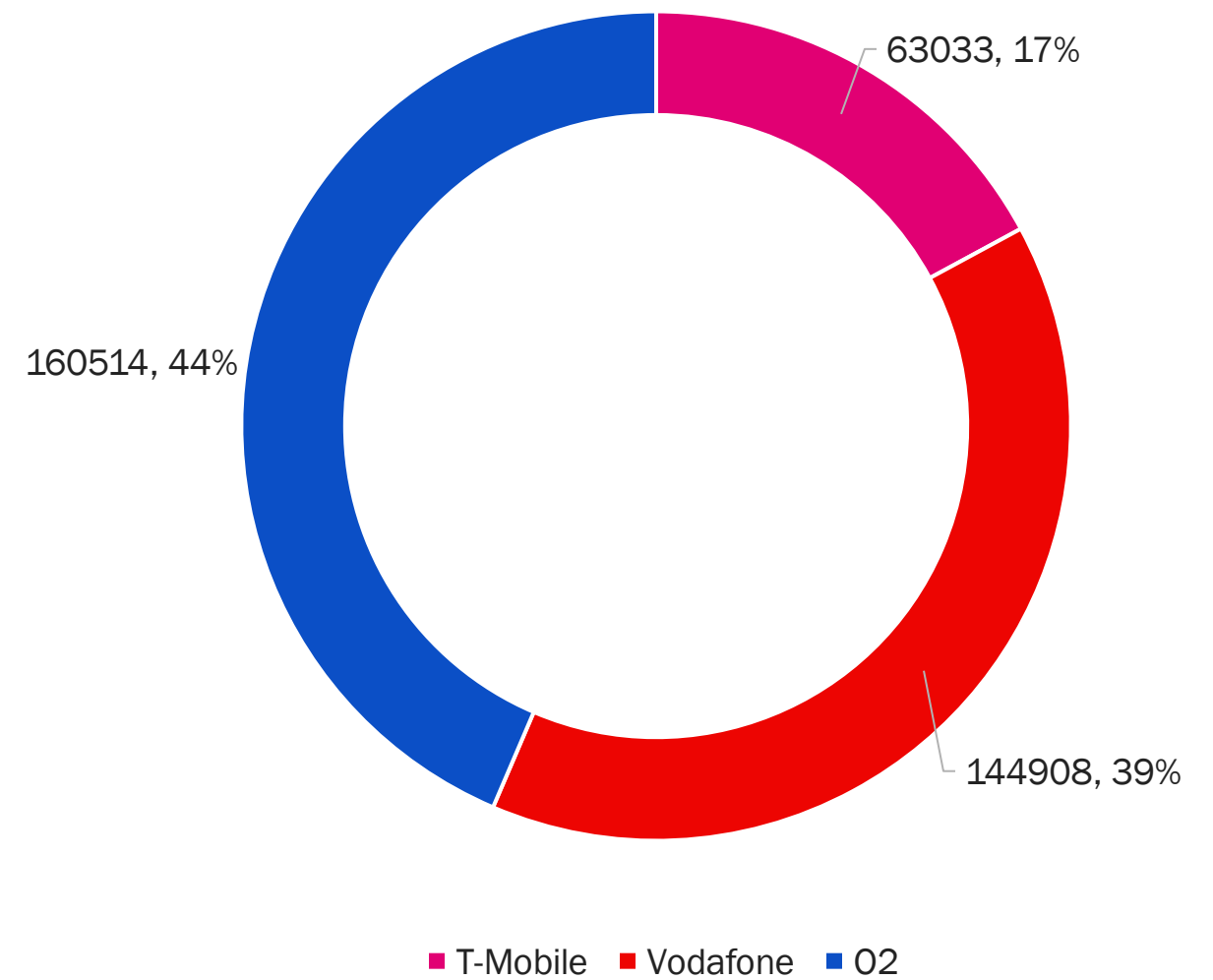
Share of interactions - Owned vs earned

Across both owned and earned social interactions, O₂ led the market, while T-Mobile ranked last regarding owned and Vodafone was the 3rd in terms of earned interactions

Owned Interactions



Earned Interactions



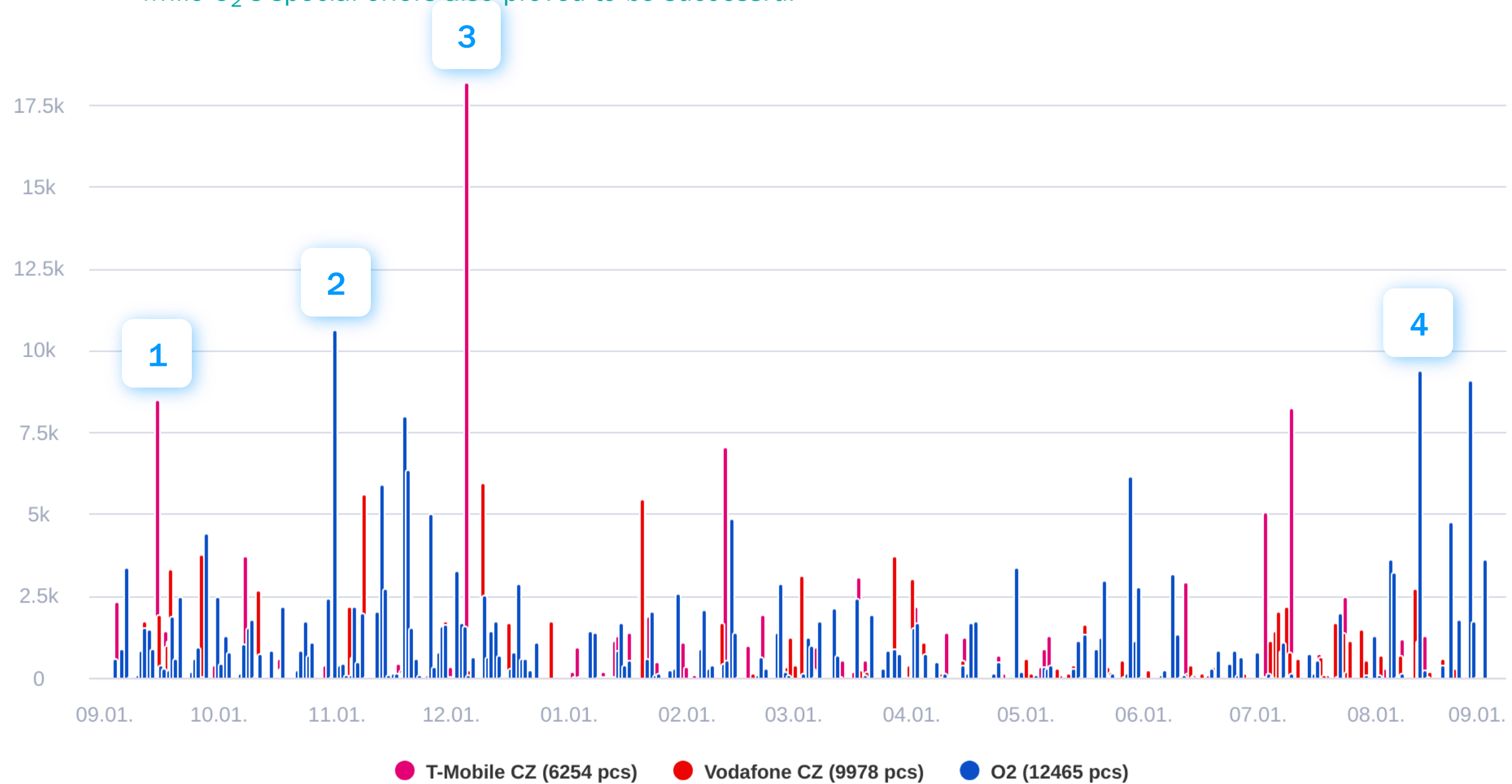
- O₂ had by far the highest number of mentions on own channels, followed by Vodafone. Despite T-Mobile's relatively low amount of content, it generated the highest peak of daily interactions during the examined period.

1. T-Mobile provided their customers with [unlimited calls and mobile data](#) due to the severe floods during mid-September.
2. O₂ shared several short-form videos as part of their [Digital Health initiative on TikTok](#), generating significant online traffic.
3. T-Mobile's [Christmas-themed giveaway on Facebook](#), offering participants a chance to win a T Phone Pro 2, achieved the highest number of owned daily interactions.
4. O₂ advertised its [unlimited plan on TikTok](#) with a one-month free trial. The social media post gathered sizeable traction.



Daily number of interactions – Owned content

A Christmas-themed giveaway from T-Mobile achieved the highest number of interactions, while O₂'s special offers also proved to be successful



The chart shows the daily public social media interaction (like, share, comment, etc.) number for each selected keyword.

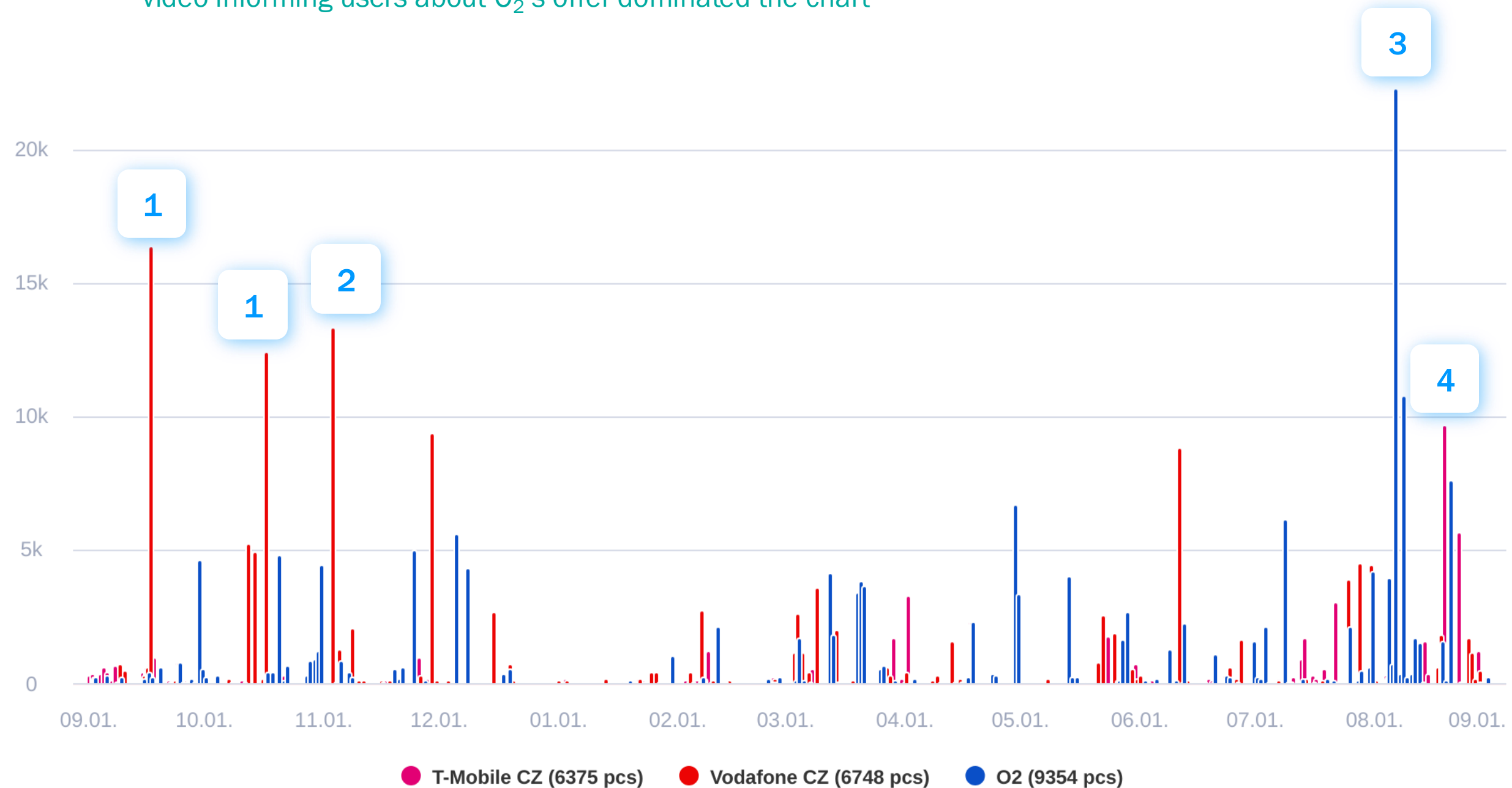
- Similarly to owned content, O₂ boasted the highest number of earned mentions as well. T-Mobile appeared more frequently than Vodafone, however, the difference was less noticeable compared to owned mentions' case.

1. Vodafone's [unlimited #jetovtobě tariffs](#) were advertised on Instagram with multiple sponsored posts, featuring various influencers.
2. A YouTube video, offering a deep-dive into [ONO's financial affairs](#), mentioned Vodafone among its partners.
3. By far the highest number of daily earned interactions was generated by a tech influencer's [TikTok video](#), informing users about O₂'s special deal and asking the brand for a possible collaboration.
4. Another TikTok post, sponsored by T-Mobile, warned users about [cell phones' monitoring capabilities](#).



Daily number of interactions – Earned content

T-Mobile's sponsored Instagram posts achieved the most peaks, however, a TikTok video informing users about O₂'s offer dominated the chart



The chart shows the daily public social media interaction (like, share, comment, etc.) number for each selected keyword.

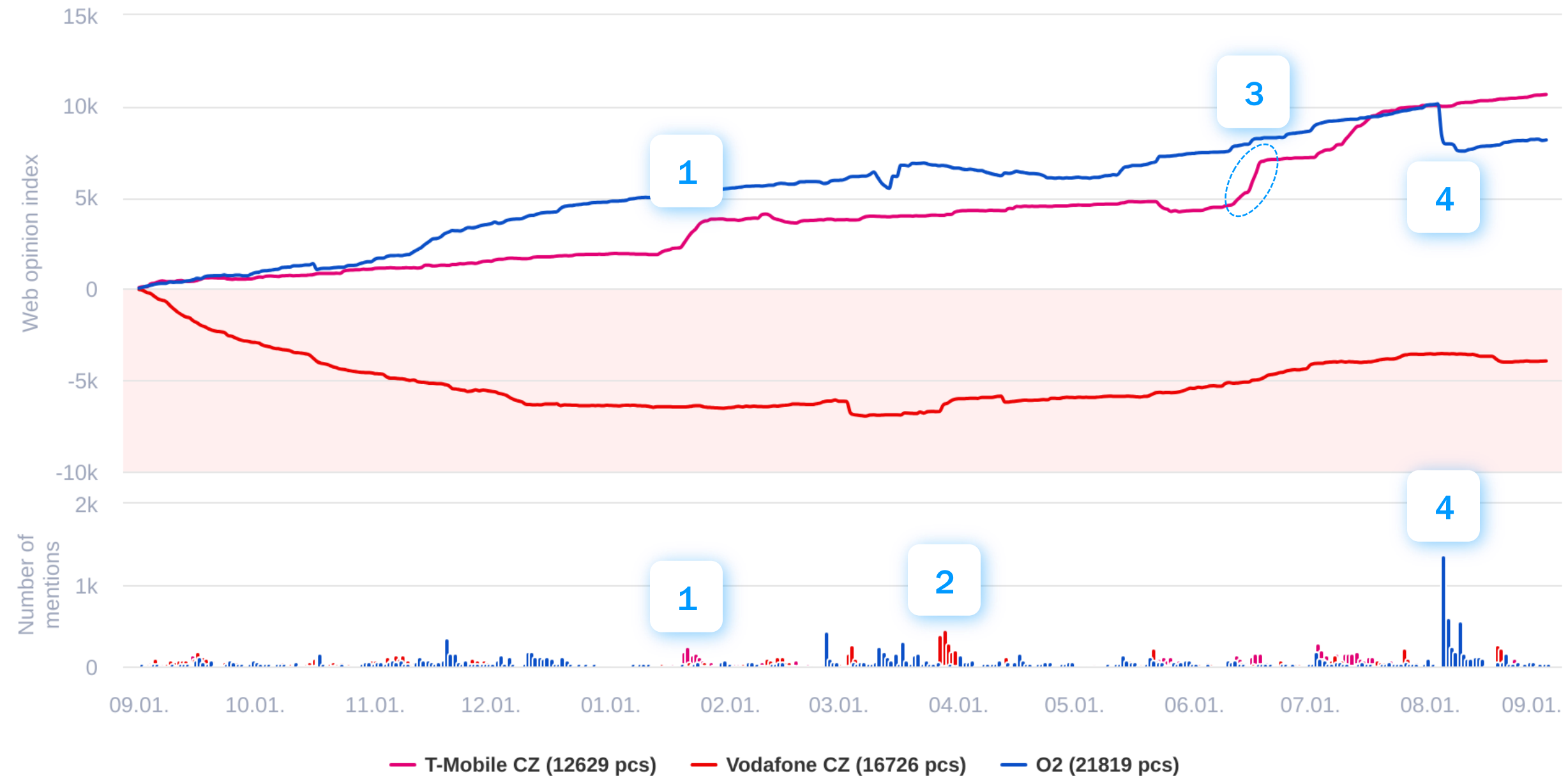
- While Vodafone's Web Opinion Index showed a notable decline during the first few months of the year, T-Mobile's and O₂'s reputation steadily increased.

1. T-Mobile announced its recurring partnership with the [Colours of Ostrava festival](#), alongside a matching giveaway, on Instagram.
2. Vodafone's [giveaway on Facebook](#) asked users about their favorite film music scores, generating numerous replies.
3. T-Mobile's WOI further increased due to another [giveaway celebrating their partnership with the Colours of Ostrava festival](#).
4. O₂'s most notable fallback and the highest number of daily mentions were the results of the provider's nationwide outages. The news appeared both in the [online press](#) and on [social media](#).



Online reputation of market players (Web Opinion Index)

Due to the harsh reception of O₂'s outages, T-Mobile achieved the highest Web Opinion Index among its competitors



The top chart shows the online reputation while the bottom chart shows the number of mentions behind it.



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II. Consumer motivation factor gap analysis for marketing



II. Consumer motivation factor gap analysis for marketing

II.I Situation: Brands and motivation factors in user generated content (social buzz and sentiment)

	<i>General</i>	<i>AVG opinion index</i>	<i>Network Quality & Coverage</i>	<i>AVG opinion index</i>	<i>Pricing & Value for Money</i>	<i>AVG opinion index</i>	<i>Customer Service & Support Experience</i>	<i>AVG opinion index</i>	<i>Tariffs & Flexibility</i>	<i>AVG opinion index</i>	<i>Digital Experience & Innovation</i>	<i>AVG opinion index</i>
O2	17035	0.1	505	-1.6	23	-1.3	22	-2.2	34	0.5	157	0.5
T-Mobile	8958	0.6	195	-1.1	18	0.7	9	-2.2	18	0.6	54	0.5
Vodafone	12875	-0.8	291	-1	24	0.3	18	-0.6	24	0.3	291	-1

Explanation: first columns show the general mention number (frequency) of each brand on the Czech online and public social media (aka. buzz). The AVG opinion index means the average the sentiment score the brand gets in the mentions. The positive score means positive sentiment while 0 score means neutral sentiment.



II. Consumer motivation factor gap analysis for marketing

II.II Complication: O₂'s strong and weak points based on the online and social media buzz



Tariffs & Flexibility

Competitive unlimited data plans and flexible contracts, highlighting affordability and roaming-free convenience.



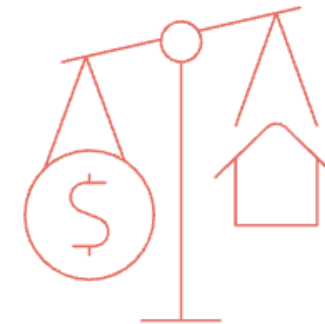
Digital Experience & Innovation

Easy eSIM activation, unlimited data, and intuitive app features.



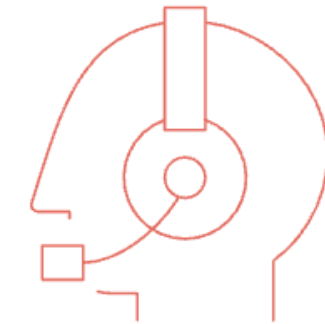
Network Quality & Coverage

Frequent drops and poor coverage despite claimed strong signal.



Pricing & Value for Money

Overpriced data packages and bundled services they don't need.



Customer Service & Support

Long wait times, poor communication, and unhelpful support leave issues unresolved.



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III. Social media content support



III. Social media content support

III.I Situation: Owned social media KPIs per brand per platform

	<i>FB followers</i>	<i>FB posts</i>	<i>FB comments</i>	<i>FB comment sentiment</i>	<i>FB likes</i>	<i>FB shares</i>	<i>IG followers</i>	<i>IG posts</i>	<i>IG comments</i>	<i>IG comment sentiment</i>	<i>IG likes</i>	<i>TT followers</i>	<i>TT videos</i>	<i>TT comments</i>	<i>TT comment sentiment</i>	<i>TT likes</i>	<i>YT followers</i>	<i>YT videos</i>	<i>YT comments</i>	<i>YT likes</i>
T-Mobile	230853	94	802	-0.06	19613	3612	29970	116	4857	1.26	39599	11600	34	605	0.32	30374	122000	18	17	569
Vodafone	243730	292	5739	0.06	26552	1395	21265	109	1012	-0.31	33331	10403	32	151	0.13	31200	21900	11	2	60
O2	243746	197	2846	-0.38	29910	1614	26957	131	4066	0.52	34195	112900	123	5199	0.2	131962	39900	56	4	425



III. Social media content support

III.II Situation: Earned social media KPIs per brand per platform

	<i>FB posts</i>	<i>FB comments</i>	<i>FB comment sentiment</i>	<i>FB likes</i>	<i>FB shares</i>	<i>IG posts</i>	<i>IG comments</i>	<i>IG comment sentiment</i>	<i>IG likes</i>	<i>TT videos</i>	<i>TT comments</i>	<i>TT comment sentiment</i>	<i>TT likes</i>	<i>YT videos</i>	<i>YT comments</i>	<i>YT likes</i>
T-Mobile	844	1364	-0,26	10539	1802	70	137	0,86	15224	18	255	0,18	16295	65	322	2932
Vodafone	989	2402	-0,32	8627	2587	95	782	0,29	72926	9	225	0,27	14586	101	3772	20499
O2	340	2482	0,26	14019	1967	172	1448	0,79	97667	17	878	225	48503	75	332	1789



III. Social media content support

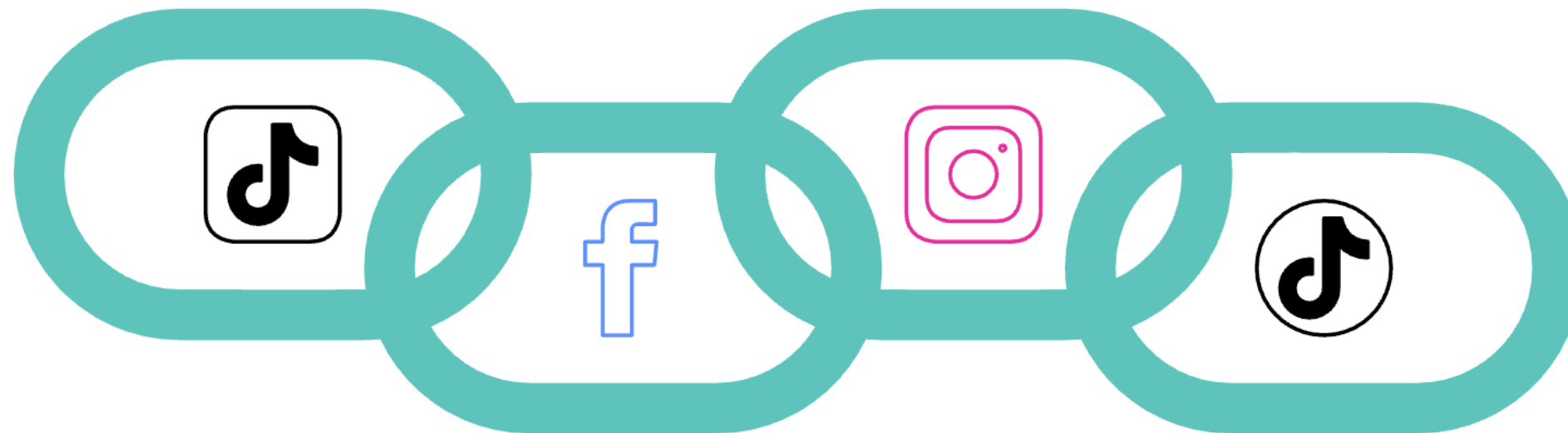
III.III Complication: O₂'s earned and owned social media strong points

Owned Media

Consistent presence across platforms, dominance on TikTok (content & engagement).

Earned Media - Instagram

Highest content volume with top engagement.



Earned Media - Facebook

Positive sentiment, high likes despite fewer posts.

Earned Media - TikTok

Top user engagement levels.



III. Social media content support

III.IV Complication: O₂'s earned and owned social media weak points

Earned media

Average engagement was higher for competitors



Owned media

Interaction volume and comment sentiment lag behind T-Mobile



II. Social media content support

II.III Resolution: Potential actions based on social media insights

Social Insight	Potential Social Media Action
Key hashtags for O2 in the earned social media: #O2 (125), #oxygen (37), #oxygen (29), #cooperation (27), #atgreen (23), #breathing (19), #outage (18), #energy (16), #breath (15)	<i>Apply these hashtags in posts/video descriptions to have more earned social media and reach</i>
Key topics about O2 on Facebook: #tv (366), #phone (283), #outage (242), #internet (240), #mobile (200), #app (183), #problem (168), #operator (149), #data (137)	<i>Apply these topics in the social media communication to have more interaction and reach</i>
Key topics about O2 on Instagram: app (133), internet (85), telephone (81), data (75), mobile (70), tv (50), 5G (49), photo (48), world (37)	<i>Apply these topics in the social media communication to have more interaction and reach</i>
Key topics about O2 on Tiktok: 5g (281), telephone (149), mobile (103), internet (57), app (36), tv (34), tariff (34), video (33), plug (29), luck (25)	<i>Apply these topics in the social media communication to have more interaction and reach</i>
Key topics about O2 on Youtube: tv (16), web (11), app (11), health (9), box (8), competition (7), project (7), courage (7), test (6), podcast (6)	<i>Apply these topics in the social media communication to have more interaction and reach</i>
Influencers, key users talking about O2: slaviapraha, _asitomas_, elinkahladikova, davidvorak, adel.hante, dimaarrest, justklaudy, mol_cup, kate_a_ollie	<i>Involve them in a partnership to have more XBrand mentions from relevant and authentic influencers and opinion leaders.</i>
General telco industry social media trending topics in order of engagement: tv, tariff, comment, mobile, telephone, competition, package, sport, app, rules	<i>Involve these topics in your social media messages and communication to attract more interaction and reach</i>



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IV. PR support



IV. PR support

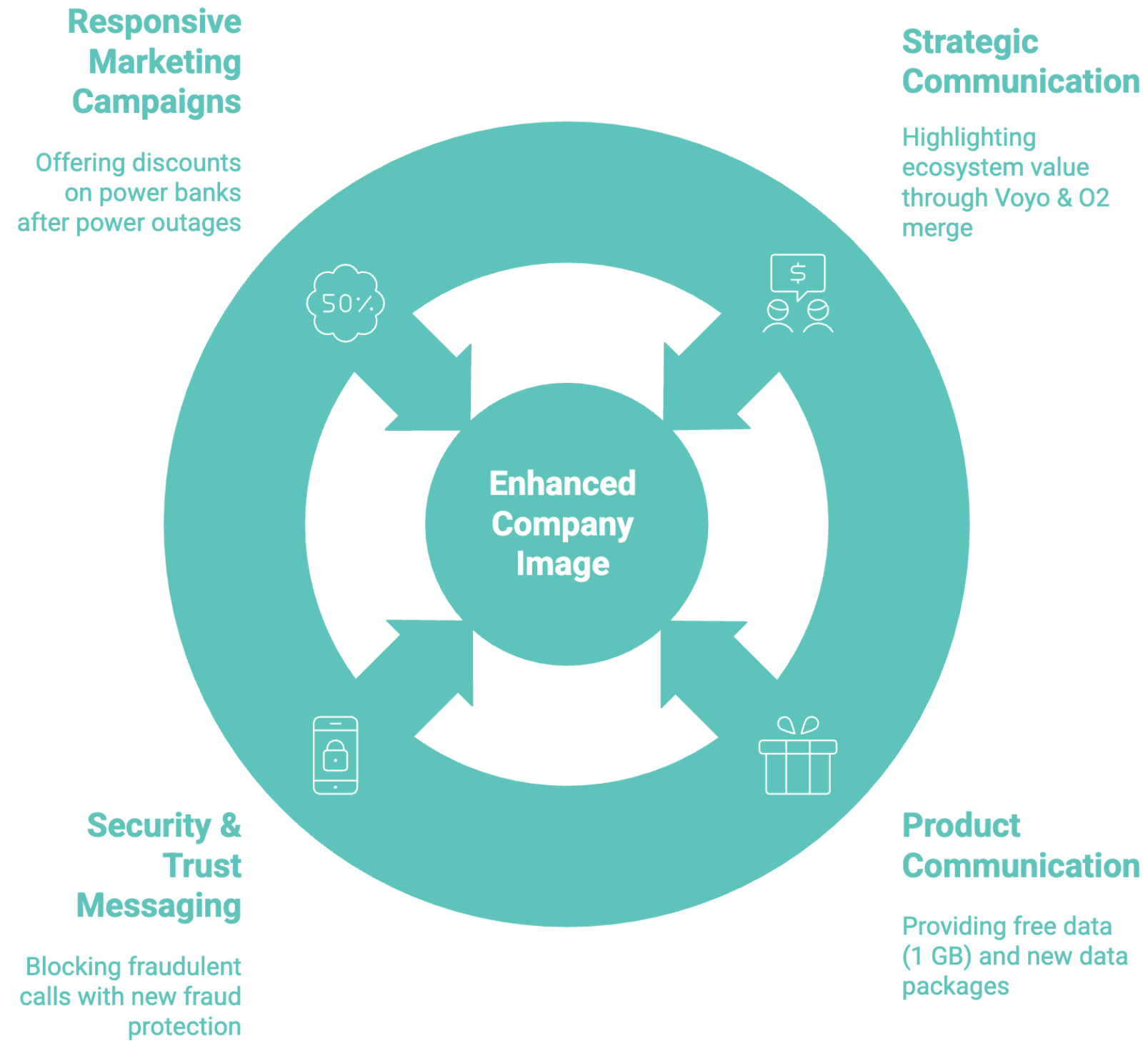
IV.I Situation: O₂ mentions on online news portals benchmarked with key competition

	<i>Article mentions</i>	<i>Article AVG opinion index</i>	<i>Article estimated reach</i>	<i>Article key topics</i>	<i>Frontpage mentions</i>	<i>Frontpage AVG opinion index</i>
O ₂	1893	1.9	24 723 893	tv (850), sport (425), operator (337), mobile (234), director (169), internet (158), tariff (151), app (133), channels (115), station (102)	670	0.3
T-Mobile	1398	2.2	13 699 271	operator (258), director (190), mobile (147), app (120), telephone (105), tariff (76), tv (75), 5g (69), commercial (66), partner (65)	361	0.9
Vodafone	1033	1.8	15 272 417	tv (156), operator (155), mobile (144), tariff (78), director (71), internet (67), app (59), package (55), foundation (53), category (52)	313	0.6



IV. PR support

IV.II Complication: O₂'s online media strong points





IV. PR support

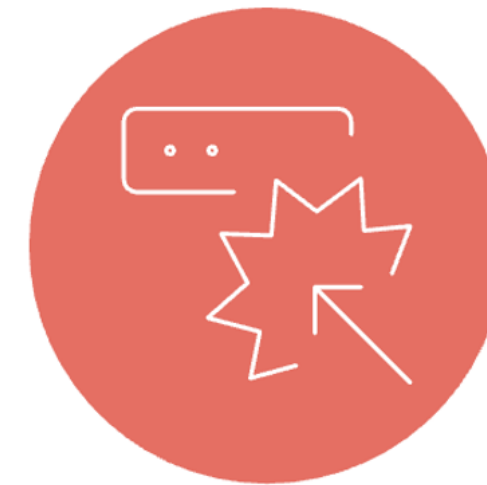
IV.III Complication: O₂'s online media weak points

Although O₂ experienced only two major outages in the examined period, each incident triggered online press and generated negative response on social media as well



Network Reliability

Outages generate negative press coverage



Reputation Sensitivity

As the story spreads across social channels, it boosts the decline of brand reputation



IV. PR support – Actionable items

IV.V Resolution: Potential PR actions based on online media insights

Potential Actions

1. Places where positive articles are needed (paid or organic), because there were negative content about the brand: blesk.cz, idnes.cz, mobilnet.cz, e15.cz, mediaguru.cz

2. Places where articles are needed (paid or organic), because competitor brands are mentioned more frequently: penize.cz, mam.cz, zive.cz, playzone.cz

3. Places where articles are needed (paid or organic), because they act as reference hubs: mobilmania.zive.cz, denik.cz, t-press.cz

4. Reinforcing the ecosystem narrative

Build on the positive Voyo & O₂ merge communication by communicating a broader “digital lifestyle” story (TV, data, apps, payments) focusing on entertainment + connectivity ecosystem feature, not just a telco

5. Security messaging

Use the joint fraud protection initiative to position O₂ as the spokesperson for digital safety with a CSR twist: professional interviews and educational content (online press), influencer partnerships too boost reach on social media

6. Crisis communication

Establishing a rapid-response PR protocol: instant action, regular updates, and proactive communication to press and social including fixes.

7. Responsive marketing

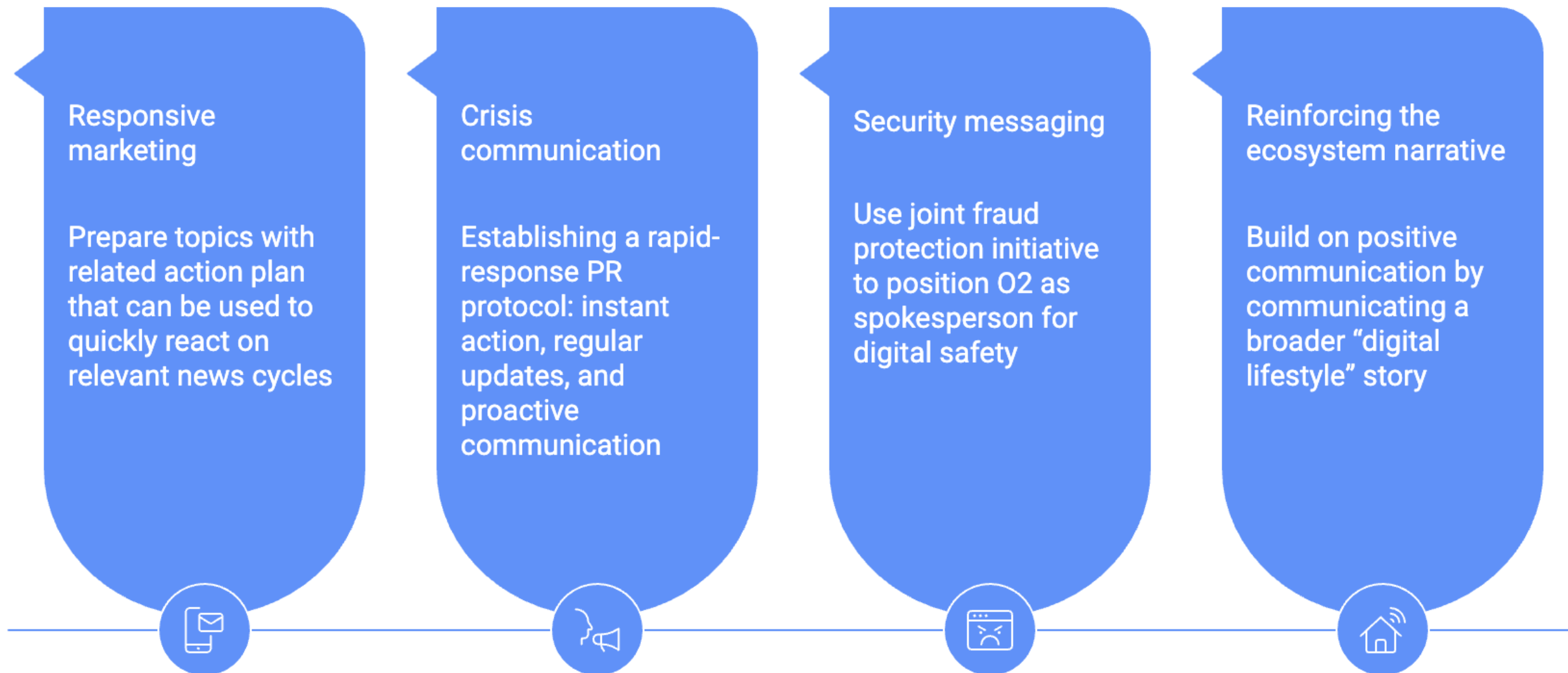
Prepare a bunch of topics with related action plan that can be used to quickly react on relevant news cycles.



IV. PR support – Actionable items

IV.V Resolution: Potential PR actions based on online media insights

Potential Actions





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V. SEO support



IV. SEO support

Social Insight	Potential SEO Action
<p>Most active O2 topics: app (2035), tv (1860), telephone (893), mobile (883), operator (818), sport (786), internet (746), evaluation (732), 5G (670), data (579)</p>	<p><i>Consider using these as meta tags in content</i></p>
<p>Most shared O2 mentions: TikTok user looking for collab: Collaboration pls? @O2_cz 🙄📧 . CORRECTION: O2 Tag free discount does not cover it . sorry. O2 own TikTok: A mobile phone from outer space? 🗿 That's #NothingPhone3; Tune in to your inner girl math mindset and try the unlimited plan for a month for free.</p>	<p><i>Consider applying phrasings in content (own, earned, paid)</i></p>
<p>Most active O2 Forum threads: O2 mobile data outage, calls, SMS Oneplay has increased the price of O2 tariffs, how to give notice O2 outage on August 8, 2025: The operator's third outage in a row</p>	<p><i>Consider creating own content (blog, FAQ) or paid content based on these</i></p>
<p>Most active competitor Forum threads: Superfast fixed internet is provided by O2, T-Mobile and Vodafone: same price, different benefits Vodafone TV launched a cheap package of sports channels T-Mobile is giving away 85 GB of free summer data to prepaid subscribers</p>	<p><i>Consider creating own (blog, FAQ) or paid content based on these</i></p>



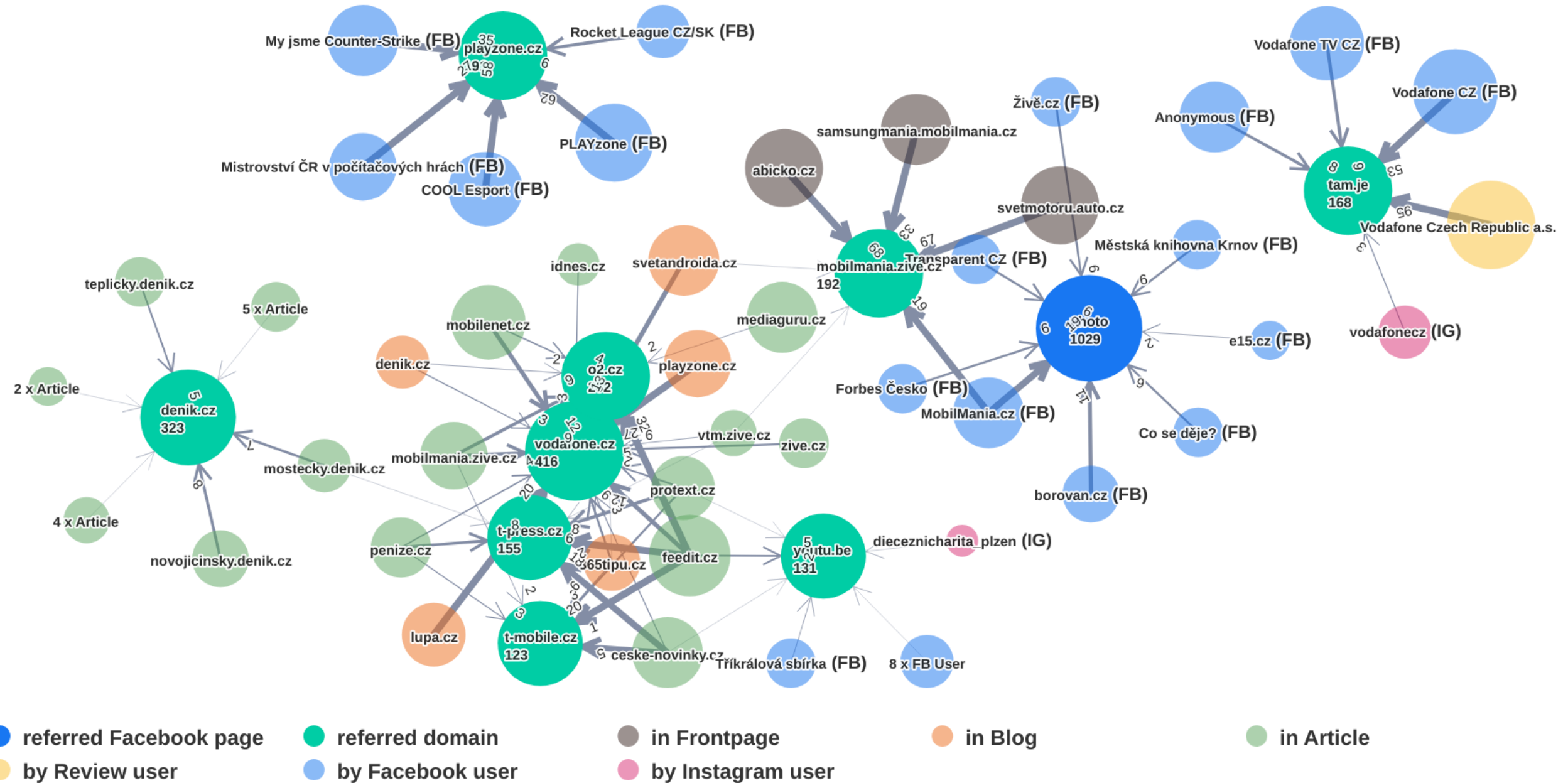
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VI. Appendix



Network analysis of authors

Despite having the highest number of mentions, O₂ appeared less on the most prominent websites, compared to T-Mobile and Vodafone

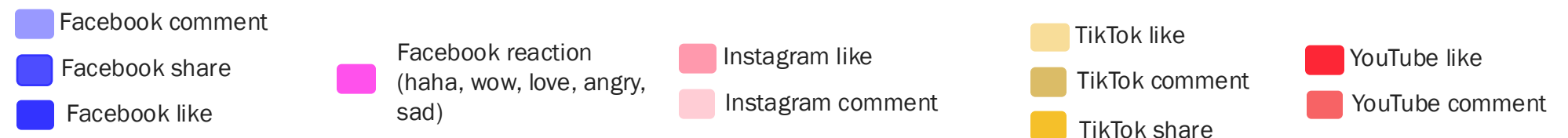
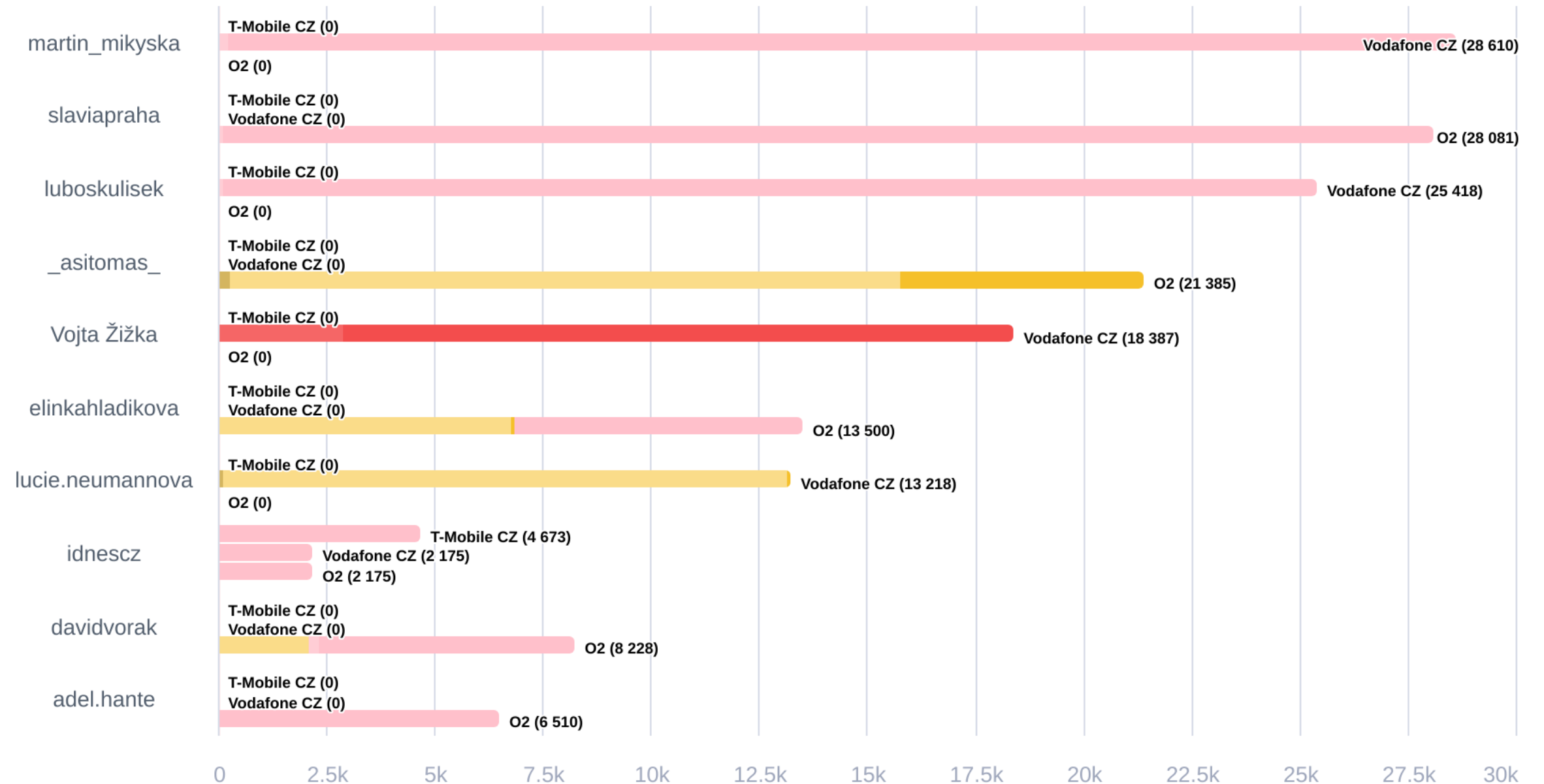


- O₂ and Vodafone appeared to be much more successful in earned content's instance, compared to T-Mobile.
- Vodafone's earned engagement hailed mostly from sponsored Instagram posts, easily raising the brand above its competitors.
- Asitomas's TikTok video generated notable engagement in the case of O₂, drawing attention to one of the brands' deals and asking for a possible collaboration in the future.
- T-Mobile appeared on the list due to iDNES.cz's articles shared on Instagram.



Identification of influencers and opinion leaders by social media platform for earned media – Most engaging authors

O₂ and Vodafone dominated the list, as T-Mobile appeared only due to news articles

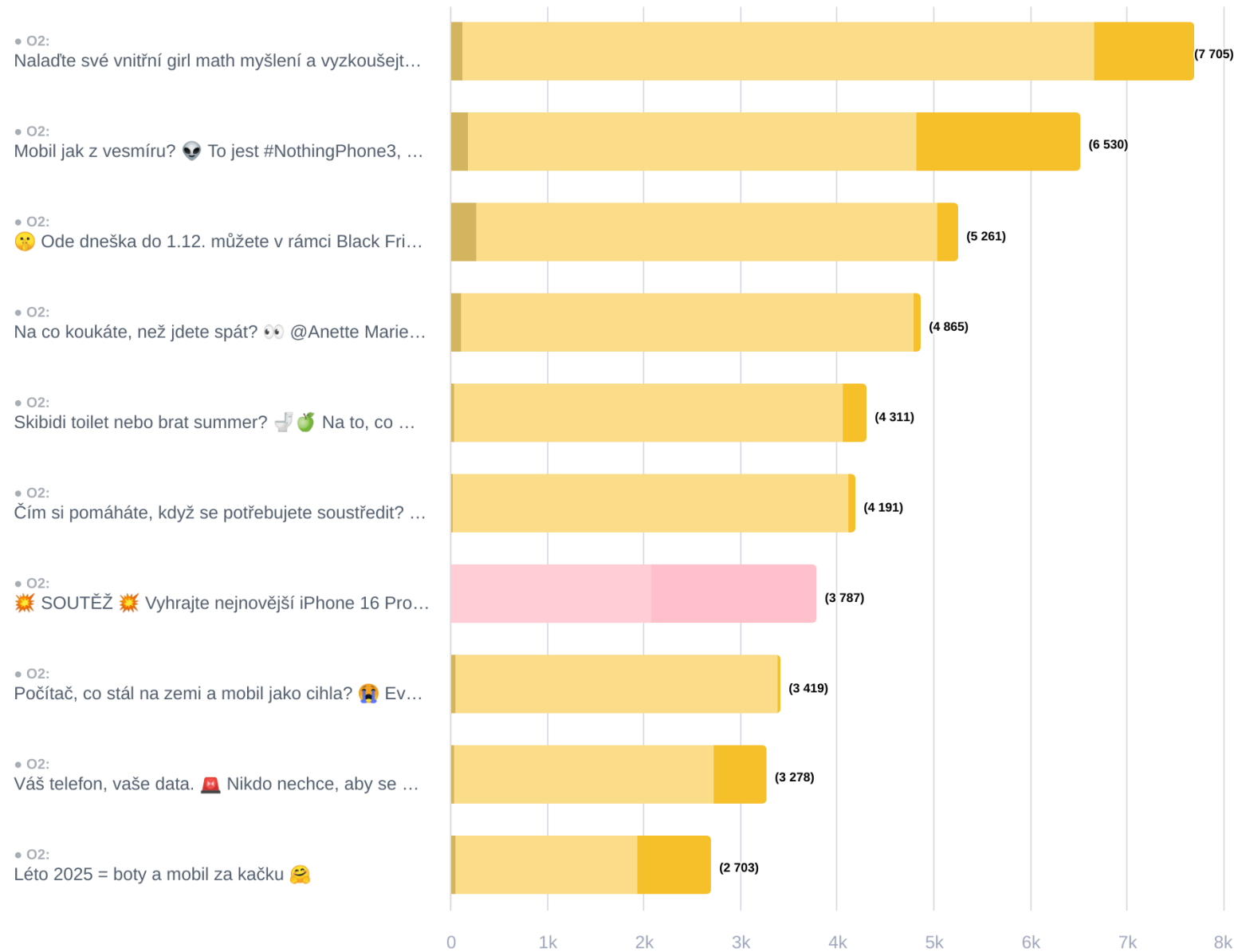




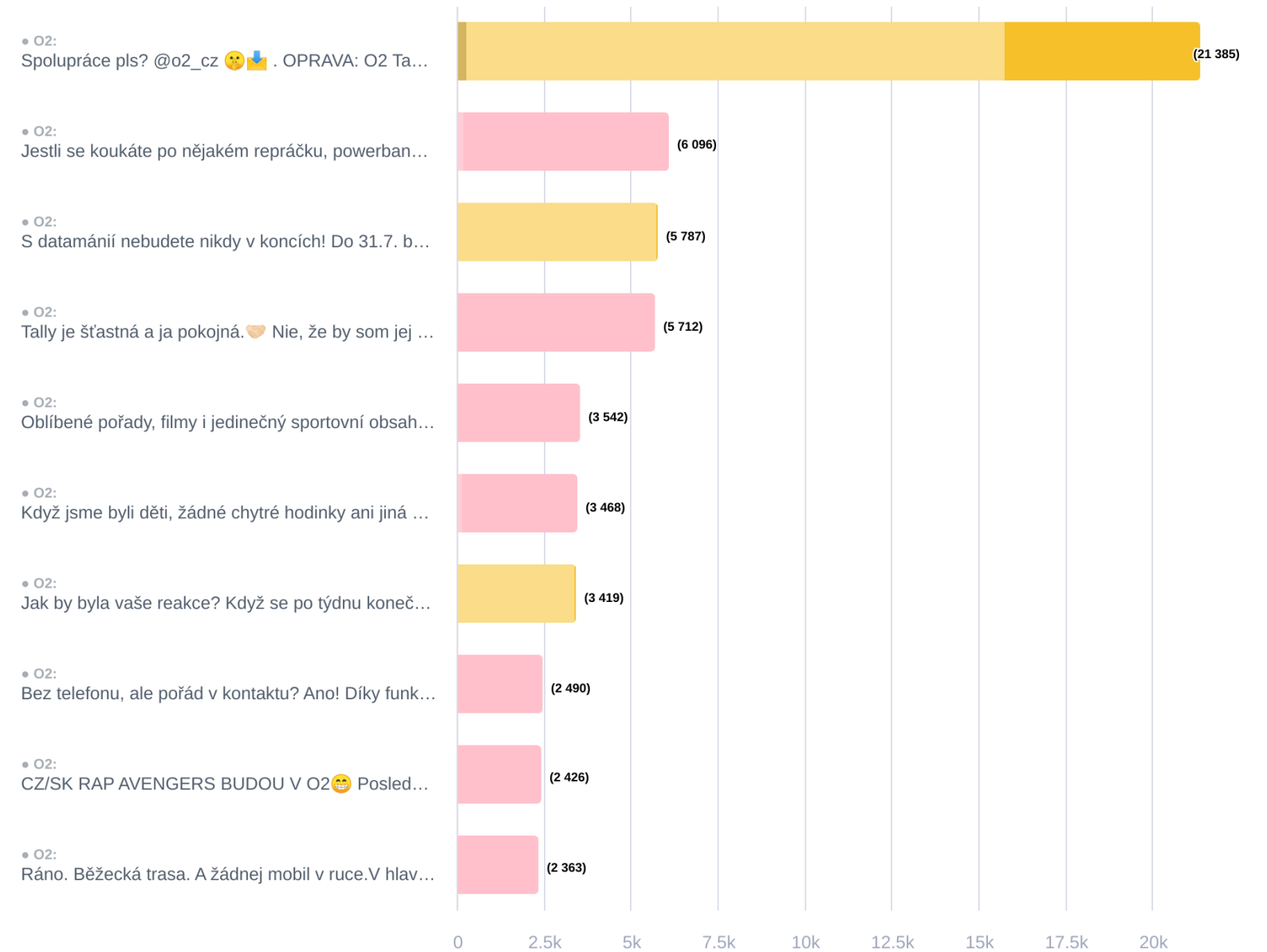
Most engaging social media posts of O₂ – Owned vs earned

O₂'s most successful owned content revolved around short-formed TikTok videos, highlighting the brand's special deals. The only Instagram post on the list was a giveaway, which offered participants a chance to win the latest iPhone 16 Pro model. Among earned content, a TikTok video, informing users about one of O₂'s deals, generated by far the highest amount of traction, followed mainly by various influencers' sponsored Instagram and TikTok posts.

Owned



Earned

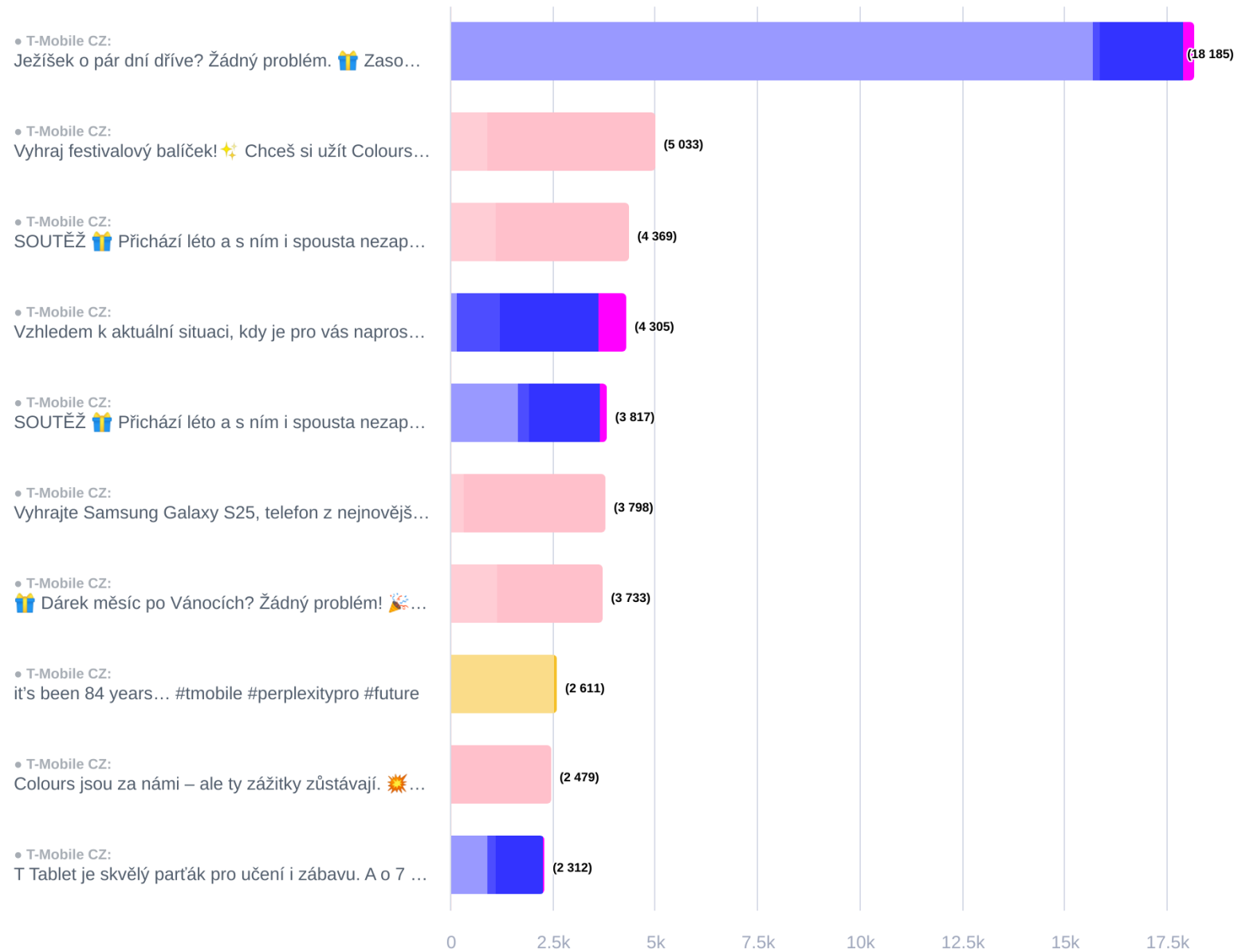




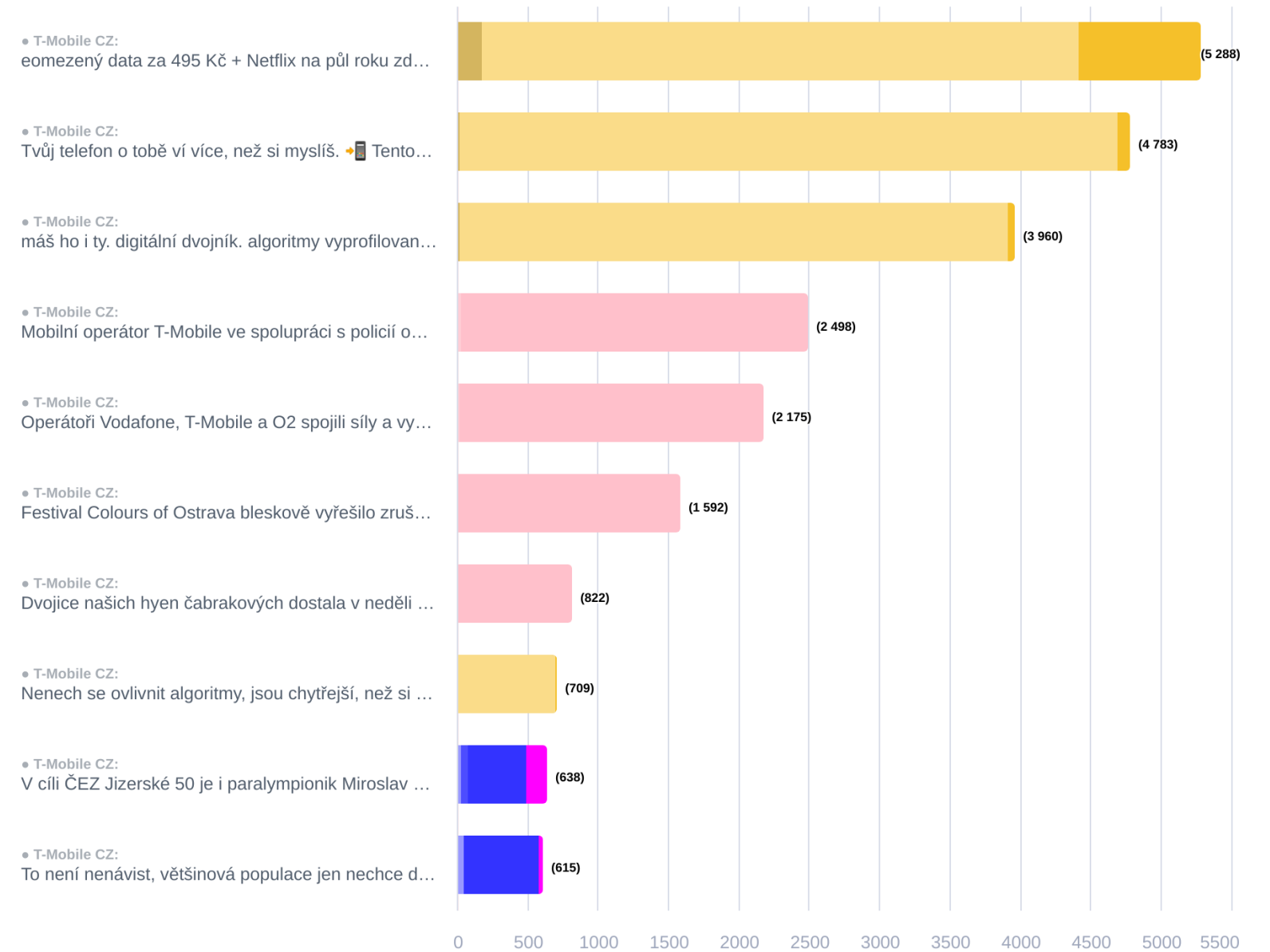
Most engaging social media posts of T-Mobile – Owned vs earned

By far the most engaging post from T-Mobile’s own content was a Christmas-themed giveaway on Facebook, offering participants a chance to win a T Phone Pro 2. Further successful own posts were connected to various giveaways and the brand’s partnership with the Colours of Ostrava festival. In earned contents’ case sponsored TikTok mentions gathered the most traction, followed by iDNES.cz’s articles shared on Instagram.

Owned



Earned

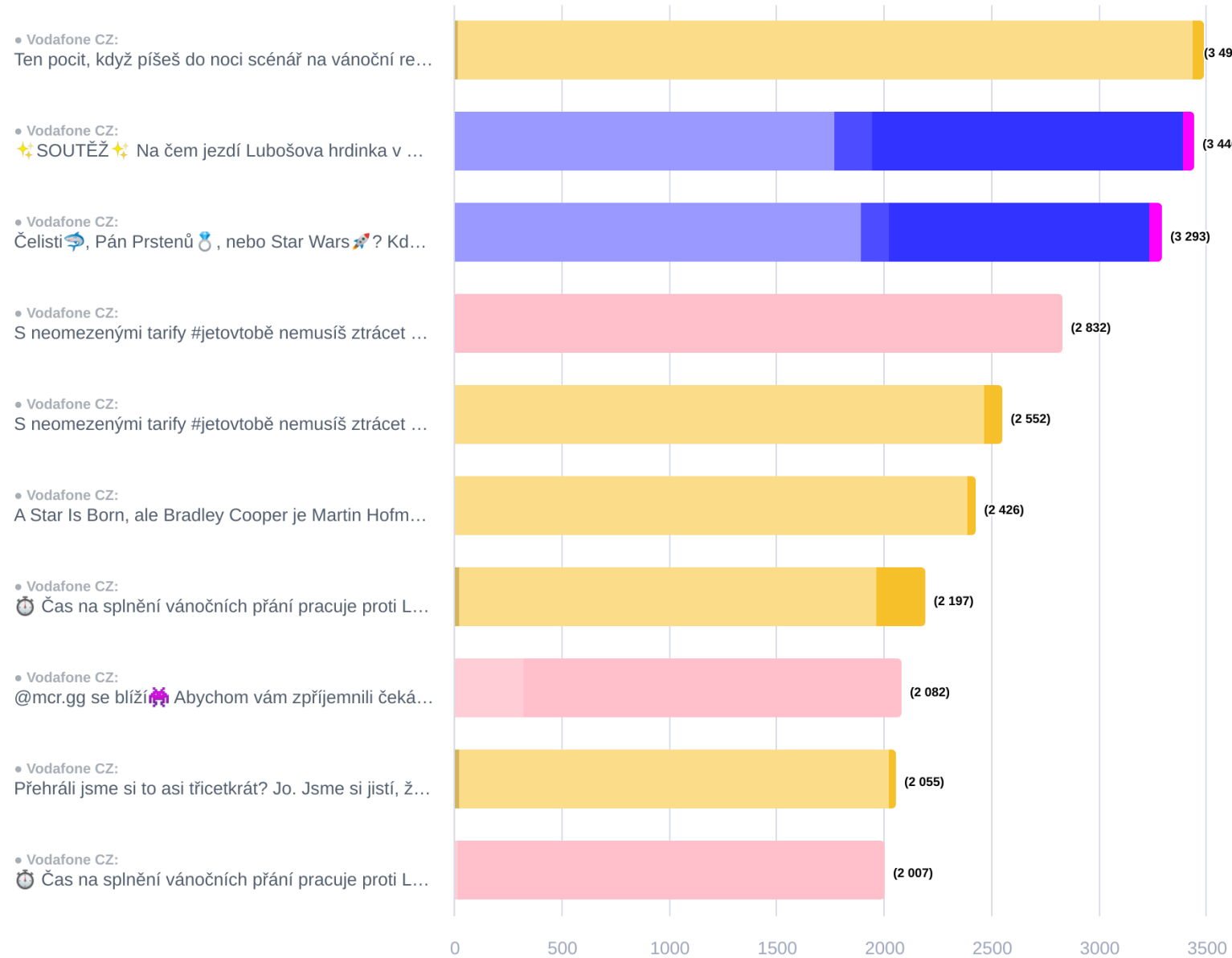




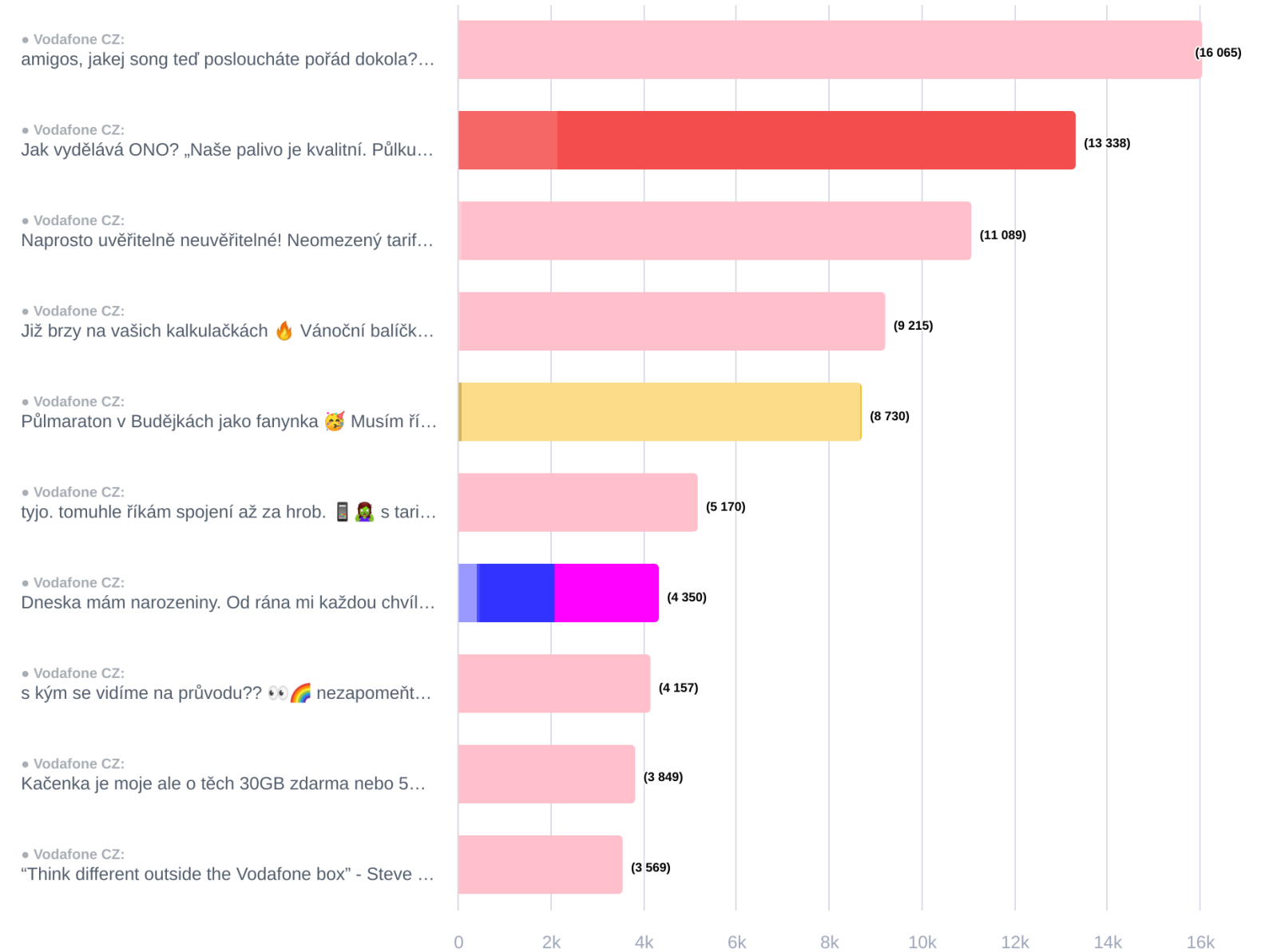
Most engaging social media posts of Vodafone – Owned vs earned

Vodafone generated the lowest number of interactions in the case of owned content. A humorous TikTok video proved to be the most successful among users, with two Facebook giveaways following. The brand’s presence among earned content was significant, mainly due to sponsored Instagram posts, informing users about Vodafone’s current offers. A lengthy YouTube video, which explored ONO’s financial affairs, also earned high engagement.

Owned

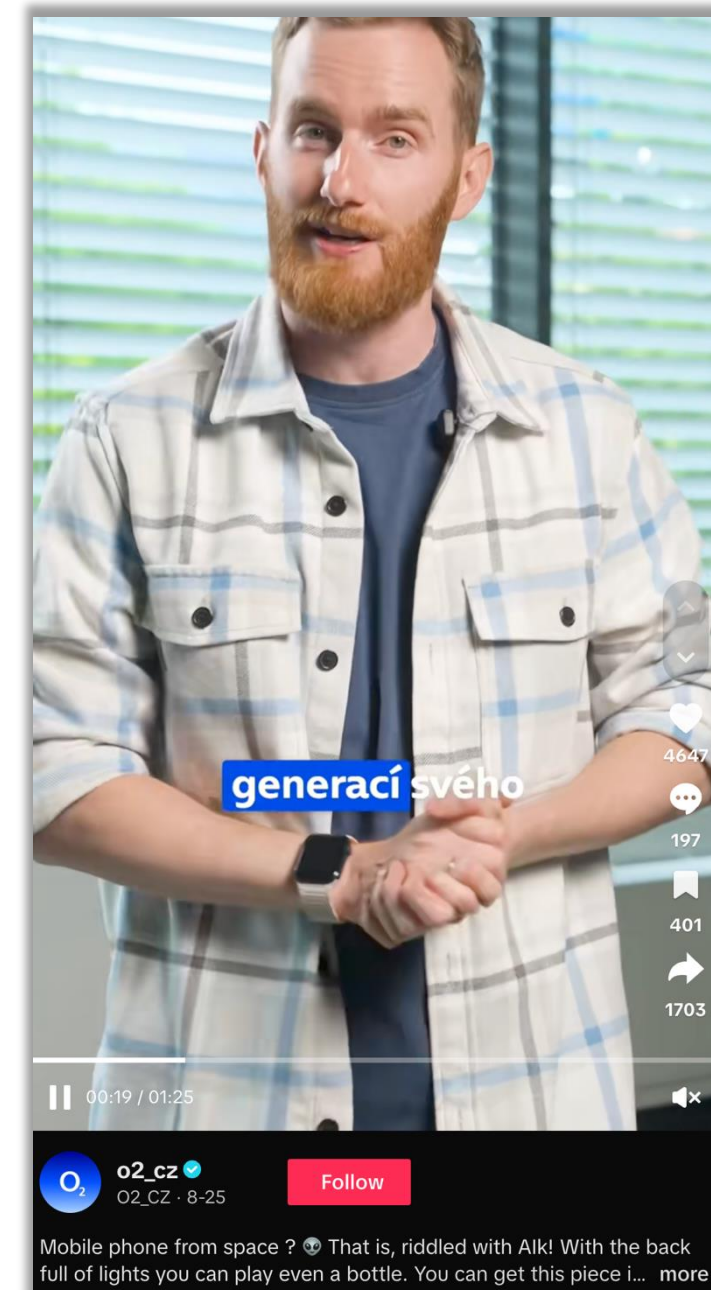
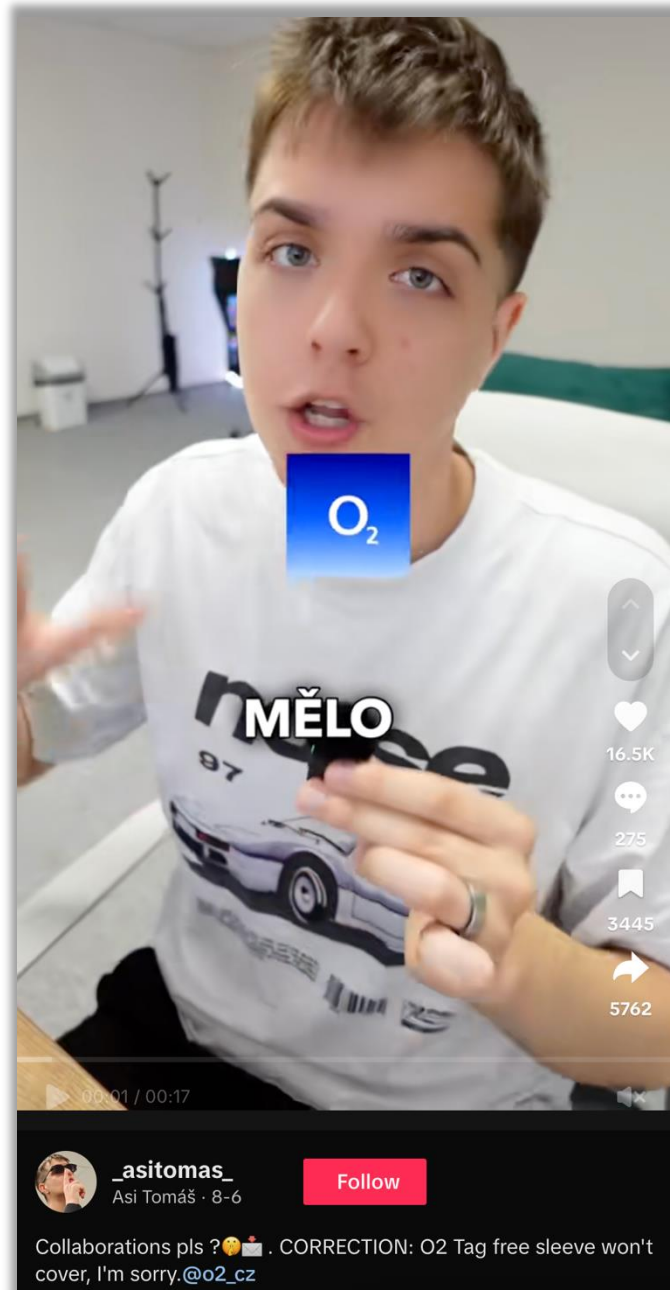


Earned





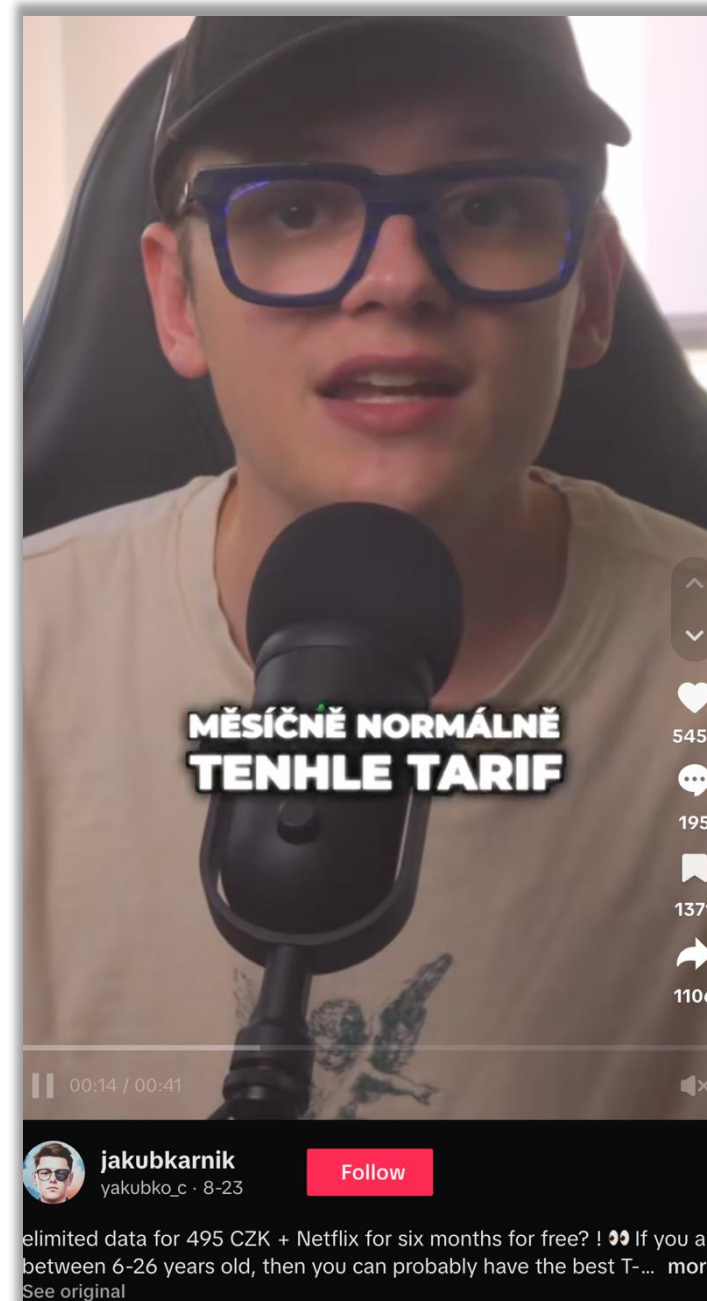
Most engaging posts – O₂



Click on the images to open the posts and articles



Most engaging posts – T-Mobile



Click on the images to open the posts and articles



Most engaging posts – Vodafone

luboskulisek and vodafonecz
Paid partnership with vodafonecz
Original audio

luboskulisek 54 w
amigos, jakej song ted' posloucháte pořád dokola? 🙌🎧

s neomezenými tarify [#jetovtobě](#) od [@vodafonecz](#) si můžete svůj algoritmus taky vyladit a mít na podzim připravenej playlist podle vás 📱🔥

[#dlouhodobaspoluprace](#)
See translation

For you ▾

jan_hrdlicka 54 w
Hana Zagorová - Spěchám
31 likes Reply See translation

View all 1 replies

16,035 likes
17 September 2024

martin_mikyska and vodafonecz
Paid partnership with vodafonecz
Original audio

martin_mikyska 50 w
Naprostu uvěřitelně neuvěřitelné!

Neomezený tarif [#jetovtobě](#) od [@vodafonecz](#)

[#spoluprace](#)
See translation

For you ▾

pavel.khol 49 w
Slibuju že už ho nikdy nepozvu 🤔🤔🤔

jakub_z_loun 49 w
A internet celý den nejde proč?

opravdu obdivuhodné

10,994 likes
17 October 2024

martin_mikyska and vodafonecz
Paid partnership with vodafonecz
Original audio

martin_mikyska 43 w
Již brzy na vašich kalkulačkách 🔥

Vánoční balíčky vysněných telefonů najdeš na [@vodafonecz](#) 📱
See translation


For you ▾

fiservit 42 w
🔥🔥
Reply

tranzi_47 43 w
Darius z NFS Carbon?
1 like Reply

kradeny_ucet 43 w

9,144 likes
29 November 2024

 Click on the images to open the posts and articles



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