



# AR / VR in sports

Altman Solon 2022 Global Sports Survey

November 2022

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## **AR / VR in sports**

Background Global Sports Survey

Introduction to Altman Solon



# The use of AR and VR technology in sports is increasing and enhancing how sports are viewed and consumed

## Key observations

### AR & VR market

The use of **augmented reality (AR) and virtual reality (VR) technologies** in sports has increased and is **expected to grow**, with potential to **transform the way fans consume and engage** with sports

### Key trends and developments

**Growing interest among fans and teams/leagues in AR/VR**, with sports properties and their media and technology partners increasingly catering to fans by **developing and integrating AR/VR into their strategies**

### Implications

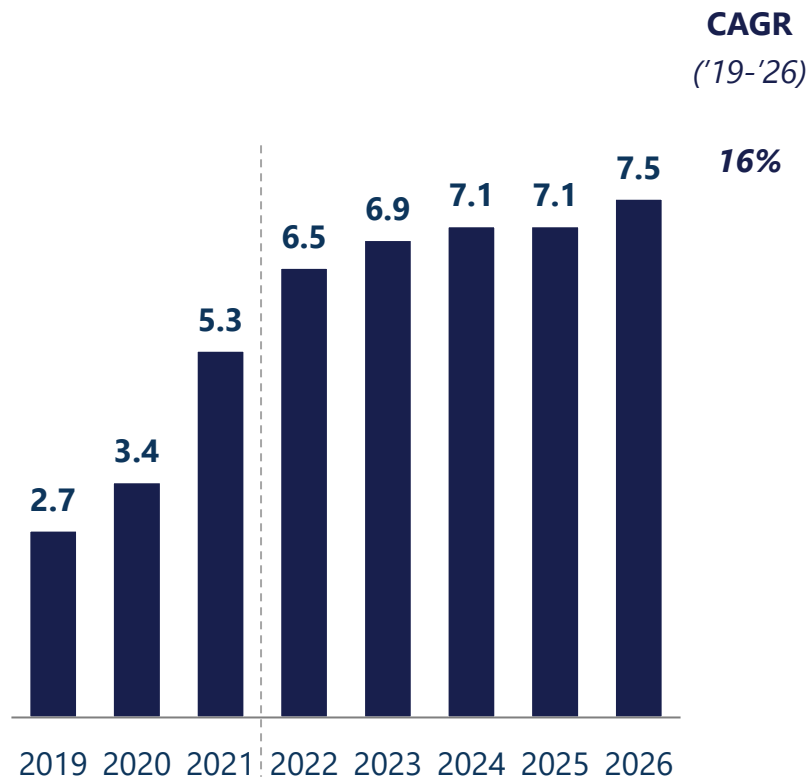
Opportunities for AR/VR technologies to **enhance sports viewing experiences, offer new ways of engaging fans** at home and in stadiums, and further **monetize sports assets and IP**

Sources: Altman Solon Research & Analysis

# Global augmented and virtual reality markets' strong growth over the next decade will change how sports are consumed

## Global AR/VR headset market

\$Bn, 2019-2026, market data until June 2022 & forecast



## Use cases in sports

- **Sports consumption:** AR and VR technologies can increase fan engagement by making games more visual, interactive and engaging
  - **AR is already commonly used** by broadcasters to overlay information on screen during broadcasts, but will be increasingly used as a way for fans to interact with attending live events
  - VR broadcasts allow **millions of fans to share a courtside seat**, enjoying new views of the game not previously possible
- **Sports training:** Athletes and fans are able to practice against simulated opponents in any conditions while maintaining a highly detailed performance log

**"The NBA has 300 million fans in China, almost none of whom will ever pay to see a game in-person. If just a fraction will pay to watch in VR it's worth building out"**

*- Jeff O'Brien, Technology Editor at Fortune*



# Virtual and augmented reality are transforming the way fans interact with sports

## Virtual and augmented reality sports use cases

### Overview

Technology	Use case	Examples
<b>Virtual Reality</b> 	<b>Live game viewing</b>	NBA, MLB, EPL, and more broadcast games in VR
	<b>Stadium tour</b>	Manchester City break ground on "e-Tihad", a digital, visitable version of their stadium
	<b>Athlete training</b>	MLB batters practice hitting against simulated pitches, quarterbacks taking virtual snaps
	<b>Video games</b>	Several sports games available in Oculus & PlayStation store
	<b>Refereeing</b>	NBA and European Soccer leagues to use VR to train referees
<b>Augmented Reality</b> 	<b>Overlay of game stats during broadcasts</b>	Formula 1 dashboard overlay shows comprehensive live car and driver data, including speed, gear, and throttle / brake levels
	<b>Overlay of player biometrics during broadcasts</b>	NFL overlays players' speeds during highlight receptions
	<b>Overlay of ball/player location on court/field</b>	Used for determining 'off-sides' calls in soccer and 'out' calls in ATP Pro Tour tennis
	<b>AR enabled merchandise</b>	Southampton FC sells scannable jerseys which link to AR content
	<b>Location-based AR visualizations</b>	Dallas Cowboys' stadium allows fans to "pose with the pros," and take pictures with Cowboy players of their choice
	<b>Advertising and marketing</b>	Virtual overlays allow properties to rotate virtual on-field ad spots during live events with little to no visual interruption

Sources: Sports league websites, Altman Solon Research & Analysis

# Live action overlays have become widely adopted in sport, optimizing AR technology to enhance the fan experience

## Live action overlays Case studies



- AR integration into live sports broadcasts has **enhanced the fan viewing experience** and created **new sponsorship inventory** for properties
- Unique partnerships, such as **CBS Sports' NFL game also aired on Nickelodeon** (with a child oriented broadcast), have pushed the boundaries of what can be done and have seen wide praise
- AR supplements the performance of referees, **improving the accuracy of VAR** in soccer and **line calls in tennis**
- In-stadium AR supplements the experience of attending games **in-person** as well

Sources: Altman Solon Research & Analysis

# NBA optimizes Meta's Oculus VR headset to allow fans to interact and watch games from virtual courtside seats

## NBA courtside VR case study



The Premier League also broadcasts matches in VR, allowing fans to walk around virtual stadiums and watch from multiple viewing points

Fans can see each others' avatars and communicate through text or headsets as they watch the game in real time



- Fans that **own an Oculus headset** can watch certain NBA games **free of charge**
- Fans have the option to watch from courtside or a higher balcony where they can **interact with other fans**
- Rollout is still limited, as the NBA only offers **1-2 games per week in VR**, and local blackout restrictions still apply, making it difficult for fans in local markets to watch their team
- **Meta has partnered** with the **Premier League** and **WWE** as well for similar endeavours



# Southampton FC releases '21/'22 kits with several scannable features that give fans access to exclusive AR content

## Southampton FC case study



"We're a club driven to innovate, and the **AR technology is an exciting way to bring our fans closer to the club** and bring their shirt to life with that extra exclusive content that we know they'll absolutely love."  
- Sarah Batters, Director of Marketing & Partnerships, Southampton FC

- Southampton FC partners with AR providers Formidable and UNIT9 to develop a '21/'22 jersey with **unique AR capabilities**
- Fans can scan 4 different parts of the jersey with their smart phone to **access exclusive content**
- Experiences include **walking into the stadium** or watching the team captain juggle in front of you, all through AR
- Digital nature of the scannable content allows for **constant updates and modifications**, as well as potential **sponsor integrations** in the future



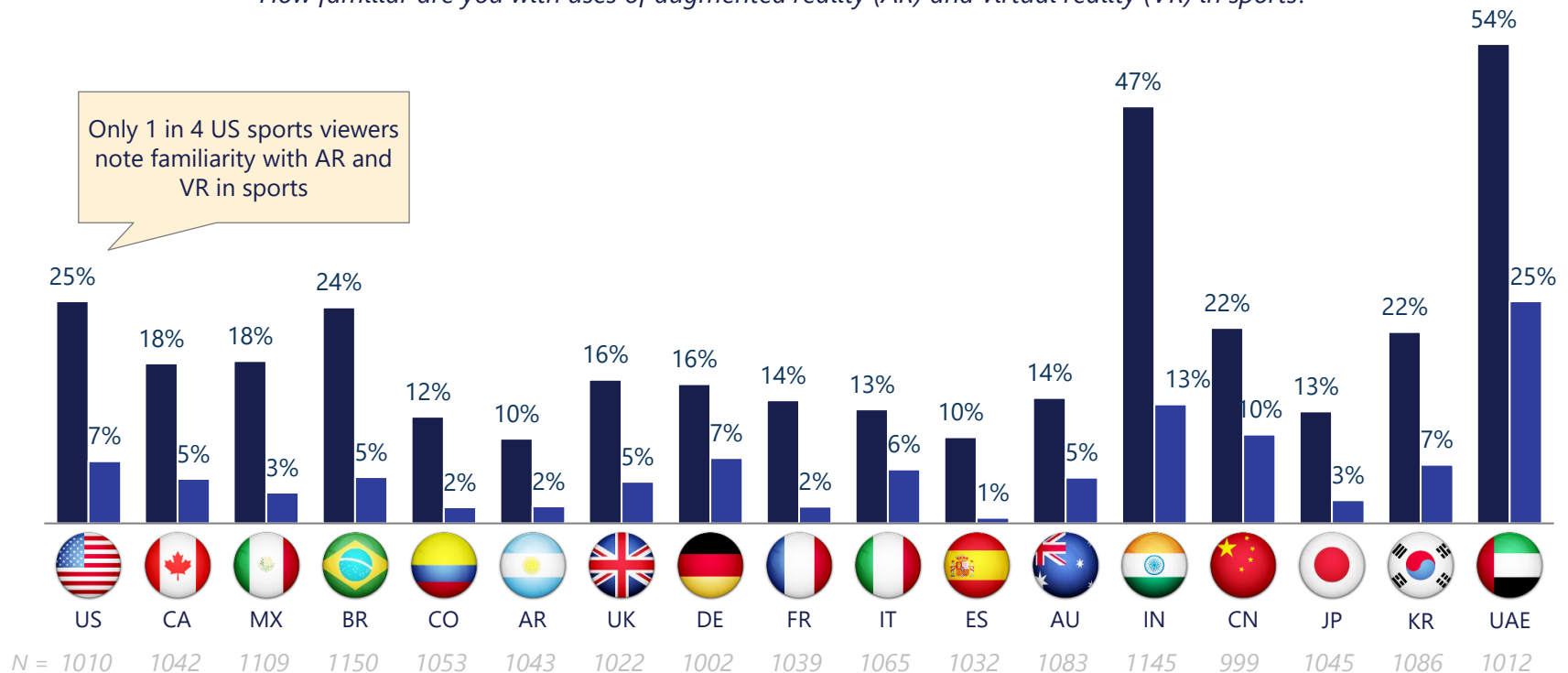
# While awareness of AR/VR use cases in sports is higher among sports viewers, fans as a whole report generally low awareness

## Awareness of AR and VR in sports

% of respondents in each country selecting "somewhat familiar" or "very familiar"

- Monthly sports viewers
- Sports non-viewers

*How familiar are you with uses of augmented reality (AR) and virtual reality (VR) in sports?*




















Sources: Altman Solon 2022 Sports Survey, Altman Solon Research & Analysis

# A significant portion of sports fans are interested in live stats and player data, some would also like to see social media comments

## Interest in on-screen AR overlays for sports

% of monthly sports viewers in each country that are "very interested" or "somewhat interested" in AR overlays


















																	
US	CA	MX	BR	CO	AR	UK	DE	FR	IT	ES	AU	IN	CN	JP	KR	UAE	
Live game and player stats	38%	32%	45%	61%	48%	38%	21%	23%	33%	24%	28%	29%	56%	36%	31%	41%	68%
Live biometrics of players	25%	17%	38%	38%	37%	26%	16%	12%	24%	18%	20%	16%	47%	29%	20%	27%	59%
Animation-style effects added to players	23%	19%	39%	47%	36%	22%	12%	15%	23%	18%	19%	16%	45%	32%	16%	24%	58%
Live betting odds and trending picks	23%	18%	32%	44%	38%	20%	14%	11%	20%	15%	18%	14%	42%	22%	17%	21%	46%
Fantasy sports information/stats	24%	19%	37%	44%	34%	19%	12%	12%	18%	14%	16%	13%	45%	33%	20%	24%	57%
Trending comments from social media	23%	20%	39%	48%	36%	23%	14%	12%	20%	20%	18%	17%	47%	33%	19%	28%	58%

Sources: Altman Solon 2022 Sports Survey, Altman Solon Research & Analysis

# VR allows the same platform to deliver sports content alongside social experiences and gaming

## Interest in using VR for sports content from home

% of monthly sports viewers in each country that are very or somewhat interested

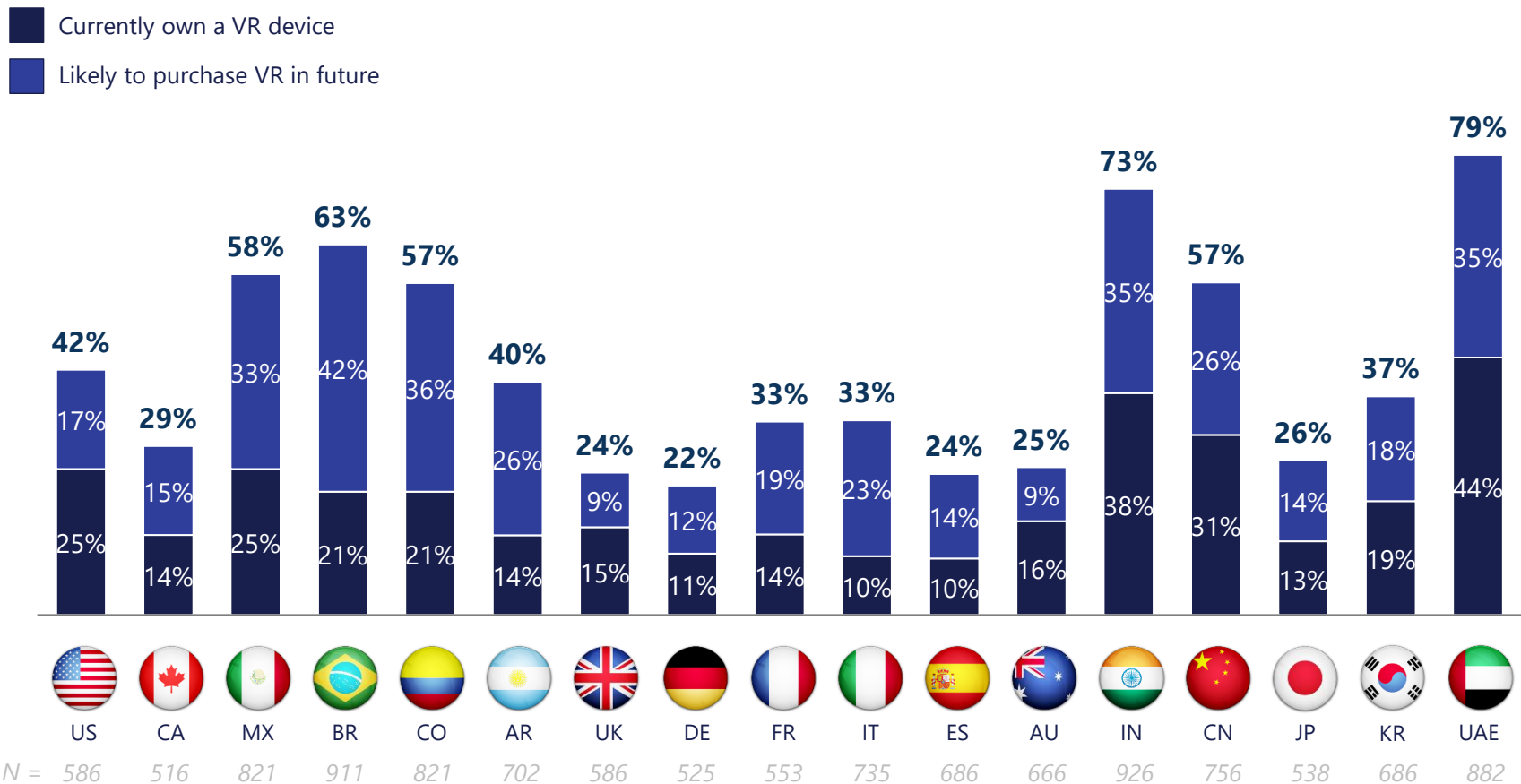
																	
Watching live games in VR	32%	27%	45%	61%	52%	39%	21%	19%	30%	26%	24%	22%	51%	37%	31%	42%	68%
Watching live games in your favorite arena in VR	31%	28%	47%	63%	56%	47%	23%	21%	34%	28%	27%	24%	54%	34%	31%	39%	72%
Watching live from a player's point-of-view in VR	32%	27%	39%	57%	42%	34%	20%	18%	31%	28%	21%	24%	47%	32%	33%	38%	66%
Sports training sessions in VR	25%	18%	35%	48%	36%	23%	16%	15%	25%	19%	14%	16%	44%	26%	21%	29%	60%
Stadium tours in VR	27%	24%	42%	59%	41%	31%	19%	14%	29%	23%	22%	19%	49%	29%	25%	34%	67%
Meetups with players in VR	29%	22%	37%	48%	41%	26%	17%	13%	26%	21%	17%	18%	45%	27%	21%	32%	63%
Sports video games in VR	29%	23%	39%	52%	40%	27%	19%	14%	25%	22%	18%	18%	44%	30%	25%	31%	63%

Sources: Altman Solon 2022 Sports Survey, Altman Solon Research & Analysis

# Sports viewers in Latin America are more likely to own a VR device or purchase a VR device in the future than European viewers

## VR device ownership

% of monthly sports viewers in each country that currently own or are likely to own a VR device in the next 3 years




















Sources: Altman Solon 2022 Sports Survey, Altman Solon Research & Analysis

# Video games, where most VR content currently resides, create an additional way to appeal to tech-focused sports fans

## Sports fan video game interest by game type

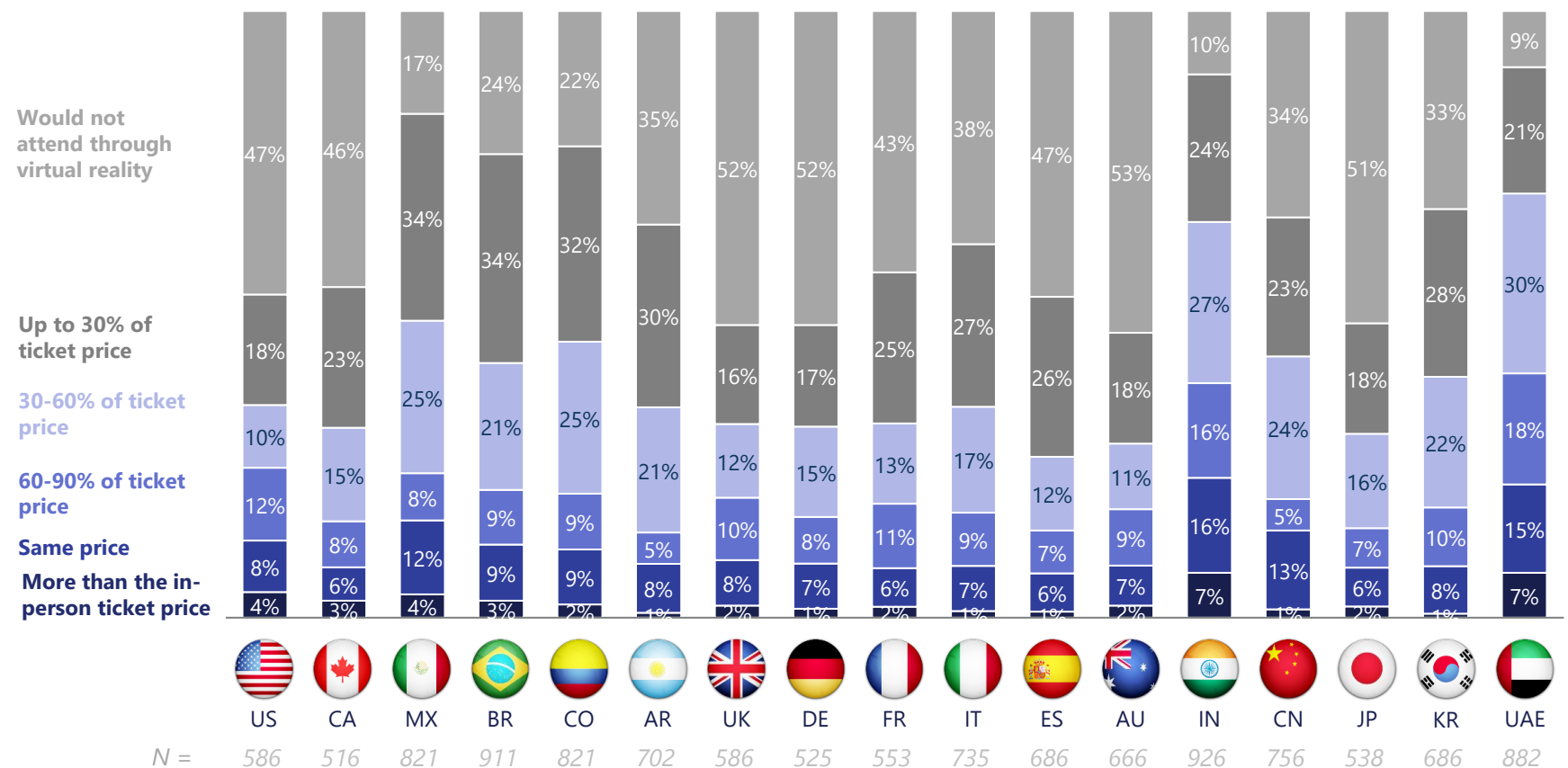
% of monthly sports viewers in each country that play video games at least monthly

																	
	US	CA	MX	BR	CO	AR	UK	DE	FR	IT	ES	AU	IN	CN	JP	KR	UAE
Puzzle	71%	63%	73%	64%	71%	65%	68%	54%	59%	60%	67%	68%	84%	65%	63%	57%	78%
Strategy	61%	50%	59%	58%	55%	45%	50%	48%	51%	45%	42%	53%	68%	52%	32%	54%	71%
Role-playing	48%	43%	50%	46%	43%	33%	50%	39%	42%	39%	36%	46%	58%	51%	49%	38%	58%
Action-adventure	59%	50%	67%	65%	59%	49%	54%	46%	50%	45%	50%	49%	67%	54%	42%	39%	69%
Sports	58%	52%	68%	68%	65%	53%	59%	47%	56%	50%	53%	50%	67%	50%	44%	55%	83%
Racing	55%	52%	72%	64%	59%	43%	55%	46%	55%	45%	56%	58%	73%	47%	40%	45%	70%
First- or third-person shooter	57%	51%	65%	64%	58%	47%	57%	49%	49%	43%	48%	56%	67%	61%	37%	50%	72%
Multiplayer battle arena	47%	37%	55%	56%	48%	35%	41%	30%	37%	30%	36%	41%	62%	63%	29%	48%	72%
MMORPG	46%	40%	53%	47%	45%	33%	40%	31%	34%	30%	34%	43%	60%	49%	31%	40%	64%
Battle royale	57%	47%	62%	61%	56%	44%	48%	39%	50%	36%	44%	48%	70%	51%	33%	41%	69%
Platform	54%	48%	69%	65%	62%	44%	52%	42%	53%	42%	51%	55%	67%	55%	42%	37%	67%
A family-friendly	53%	43%	62%	56%	53%	43%	49%	35%	43%	34%	43%	50%	66%	49%	28%	37%	66%

Sources: Altman Solon 2022 Sports Survey, Altman Solon Research & Analysis

# Most sports fans would be willing to pay to attend sporting events in virtual reality

Willingness to pay for a sporting event ticket in VR compared to in-person  
% of monthly sports viewers in each country



Sources: Altman Solon 2022 Sports Survey, Altman Solon Research & Analysis



# Properties, partners and fans will benefit from the growing use of AR and VR technologies in the world of sports

Trend	Implications for Stakeholders
AR is already enhancing sports viewing experiences	<ul style="list-style-type: none"><li>• <b>AR is already being used throughout sports</b> to enhance broadcasts and viewing experiences, with continued investment in the technology expected over the coming decade</li><li>• Monthly &amp; weekly sports viewers are familiar with and appreciate the simple AR overlays that broadcasts add in; <b>~25% of sports viewers would like more player stats, biometrics and live odds layered in</b></li><li>• <b>On-field performance, especially by referees, has been directly improved using AR tools</b> (e.g., offsides/goal decisions in soccer) with clear visuals on broadcasts showing fans exactly what happened</li></ul>
VR sports content and consumption will slowly expand	<ul style="list-style-type: none"><li>• <b>25% of US sports viewers own a VR device and 17% plan to buy one in the next 3 years</b>, but in other geographic areas (e.g., LatAm) <b>most sports viewers own or plan to own a VR device</b></li><li>• As VR ownership increases, at-home live viewing through VR will unlock <b>new engagement and monetization opportunities</b> for leagues and teams</li><li>• VR technology allows athletes to <b>train against customizable competition</b> in a wide variety of settings, allowing for increased performance at often lower cost</li></ul>
Willingness to pay to watch sports in VR is emerging	<ul style="list-style-type: none"><li>• <b>~1/3 of sports viewers would be interested in watching live sports in VR</b> and more than half of US fans expressed some level of willingness to pay to attend/watch sporting events in VR</li><li>• <b>Leagues and teams can offer fans new content and experiences</b> (e.g., live events in VR, virtual tours and meetups) without geographic restrictions</li></ul>

Sources: Altman Solon 2022 Sports Survey, Altman Solon Research & Analysis

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AR / VR in sports

**Background Global Sports Survey**

Introduction to Altman Solon

# Our annual global sports survey analyzed consumer behavior, preferences, and willingness to pay for sports programming

## Survey background

**~25-minute online survey conducted in July and August 2022**

- **Sample of ~17,000 18+ years old respondents across 17 countries**

- US, Canada, UK, Germany, Italy, France, Spain, Mexico, Brazil, Colombia, Argentina, Australia, India<sup>1</sup>, UAE, South Korea, Japan and China; combined these countries represent 52% of the worldwide population
- Respondents are representative of country population, weighted by age, gender, and income



Note: <sup>1</sup>Survey in India conducted in English only

## Example topics covered

**Sports Viewership** – viewing habits, average viewing time, preferred programming

**Sports Interest and Fandom** – favorite leagues, teams, players; drivers of interest in sports

**Sports Content Consumption** – favorite types of sports content, preferred viewing and consumption platforms, preferred level of engagement and interaction

**Online Sports Video** – awareness and use of OTT sports video subscription services

**Sports Viewing Experiences** – interest in viewing features (e.g., AR overlays, camera controls) and new viewing/engagement experiences (e.g., VR, Metaverse)

**Digital Technologies in Sports** – awareness and interest in sports NFTs, fan tokens, crypto, DAOs

**Sports Betting, Gaming, & Collectibles** – sports betting frequency, behaviors, preferences, and average wagers; sports activity and collectible interests


















# The survey also measured interest in 40+ top sports leagues and competitions globally

US-based	European Soccer	International Soccer	Other Sports	Tournaments / Events
Major League Baseball	Bundesliga	Argentina Primera División	Australian Football League	FIFA Men's World Cup
Major League Soccer	English Premier League	Campeonato Brasileiro Série A	Formula 1	FIFA Women's World Cup
National Basketball Association	FA Women's Super League	Categoría Primera A	Formula E	Rugby World Cup
National Football League	La Liga	Chinese Super League	Indian Premier League	Six Nation's Championship
National Hockey League	Ligue 1	Conmebol Copa Libertadores de América	KBO League	Summer Olympics
Ultimate Fighting Championship	Serie A	J1 League	Men's ATP Tour	Winter Olympics
Women's National Basketball Association	UEFA Champions League	Liga MX	Men's PGA Tour	
World Wrestling Entertainment	UEFA Conference League	K League 1	Nippon Professional Baseball	
	UEFA Europa League	UAE Pro League	One Championship	
			Women's LPGA Tour	
			Women's WTA Tour	

# The Olympics and World Cup are top ranked sports properties for sports fans, performing well in North America, Europe and Asia

## League and tournament interest by country

% of monthly sports viewers in each country that are 'very interested' or 'somewhat interested' in each league




























																	
	US	CA	MX	BR	CO	AR	UK	DE	FR	IT	ES	AU	IN	CN	JP	KR	UA
#1	NFL: 69%	Summer Olympics: 66%	FIFA Men's: 71%	FIFA Men's: 92%	FIFA Men's: 83%	FIFA Men's: 87%	FIFA Men's: 73%	FIFA Men's: 76%	Summer Olympics: 69%	Serie A: 69%	La Liga: 75%	Summer Olympics: 62%	FIFA Men's: 66%	Summer Olympics: 73%	Summer Olympics: 71%	FIFA Men's: 81%	FIFA Men's: 82%
#2	Summer Olympics: 57%	NHL: 65%	Summer Olympics: 69%	Brasileiro: 82%	Connebol Copa: 72%	AR Primera División: 83%	EPL: 67%	Bundesliga: 70%	FIFA Men's: 68%	Summer Olympics: 67%	FIFA Men's: 70%	AFL: 57%	Summer Olympics: 63%	Winter Olympics: 63%	Winter Olympics: 68%	Summer Olympics: 77%	EPL: 77%
#3	MLB: 57%	Winter Olympics: 64%	Liga MX: 68%	Summer Olympics: 78%	UEFA CL: 70%	Connebol Copa: 75%	Summer Olympics: 59%	UEFA CL: 60%	Winter Olympics: 63%	FIFA Men's: 67%	UEFA CL: 69%	Winter Olympics: 54%	IPL: 63%	NBA: 61%	NPB: 65%	Winter Olympics: 73%	UEFA CL: 75%
#4	Winter Olympics: 56%	FIFA Men's: 48%	Winter Olympics: 65%	FIFA Women's: 77%	EUFA EL: 66%	UEFA CL: 59%	UEFA CL: 59%	Winter Olympics: 57%	Six Nation's Champions hip: 56%	Winter Olympics: 62%	UEFA EL: 64%	FIFA Men's: 40%	Winter Olympics: 60%	FIFA Men's: 43%	FIFA Men's: 60%	EPL: 64%	UEFA Conf. League: 74%
#5	NBA: 47%	NFL: 45%	UEFA CL: 56%	UEFA CL: 73%	Summer Olympics: 64%	Summer Olympics: 55%	UEFA EL: 48%	Summer Olympics: 55%	Rugby World Cup: 55%	UEFA CL: 62%	Summer Olympics: 61%	Rugby World Cup: 37%	FIFA Women's: 51%	UEFA EL: 41%	MLB: 53%	KBO League: 61%	UEFA EL: 70%
#6	FIFA Men's: 38%	MLB: 44%	UEFA EL: 53%	Connebol Copa: 73%	FIFA Women's: 64%	UEFA EL: 52%	Winter Olympics: 47%	UEFA EL: 53%	UEFA CL: 55%	Formula 1: 55%	UEFA Conf. League: 52%	Formula 1: 32%	Formula 1: 46%	UEFA CL: 40%	FIFA Women's: 39%	UEFA CL: 52%	La Liga: 67%
#7	NHL: 36%	FIFA Women's: 37%	FIFA Women's: 51%	Winter Olympics: 72%	EPL: 64%	EPL: 51%	Six Nation's Champions hip: 42%	FIFA Women's: 45%	Ligue 1: 52%	UEFA EL: 55%	Formula 1: 48%	EPL: 31%	WWE: 44%	EPL: 38%	J1 League: 39%	MLB: 51%	Summer Olympics: 65%
#8	MLS: 30%	NBA: 35%	La Liga: 51%	Formula 1: 66%	Categoría Primera A: 62%	La Liga: 49%	Rugby World Cup: 42%	UEFA Conf. League: 39%	FIFA Women's: 51%	UEFA Conf. League: 46%	FIFA Women's: 47%	ATP Tour: 30%	EPL: 43%	Serie A: 37%	Rugby World Cup: 38%	K League 1: 46%	UAE Pro League: 63%
#9	EPL: 30%	Formula 1: 33%	UEFA Conf. League: 50%	UEFA EL: 64%	La Liga: 60%	FIFA Women's: 47%	FIFA Women's: 38%	Formula 1: 34%	UEFA EL: 45%	ATP Tour: 38%	ATP Tour: 44%	FIFA Women's: 28%	NFL: 41%	La Liga: 37%	UEFA CL: 30%	UEFA EL: 41%	Winter Olympics: 61%
#10	PGA Tour: 30%	ATP Tour: 31%	NFL: 49%	EPL: 61%	Winter Olympics: 60%	Winter Olympics: 45%	UEFA Conf. League: 37%	EPL: 31%	UEFA Conf. League: 39%	FIFA Women's: 36%	Winter Olympics: 42%	WTA Tour: 27%	UEFA CL: 41%	Formula 1: 35%	EPL: 29%	LPGA Tour: 38%	Serie A: 59%
N=	586	516	821	911	821	702	586	525	553	735	686	666	926	756	538	686	882
	American Football	Basketball	Baseball	Hockey	Tennis	Soccer League	Soccer Tournament	Racing	Olympics	Other							

Sources: Altman Solon 2022 Global Sports Survey, Altman Solon Research & Analysis

# Outside of the US, Canada, and the UAE, European soccer leagues have higher interest internationally than the US leagues

## League interest by country

% of monthly sports viewers<sup>1</sup> in each country that are very or somewhat interested<sup>2</sup> in each league

																	
US	CA	MX	BR	CO	AR	UK	DE	FR	IT	ES	AU	IN	CN	JP	KR	UA	
	69%	45%	49%	36%	22%	15%	21%	19%	19%	16%	15%	21%	41%	18%	16%	14%	41%
	47%	35%	44%	55%	42%	39%	15%	16%	24%	24%	34%	24%	34%	61%	24%	35%	53%
	57%	44%	37%	23%	31%	11%	13%	9%	13%	10%	8%	18%	24%	17%	53%	51%	33%
	36%	65%	21%	21%	14%	12%	12%	14%	13%	10%	10%	14%	36%	15%	11%	13%	33%
	30%	30%	47%	61%	64%	50%	67%	31%	36%	36%	36%	31%	43%	38%	29%	64%	77%
	24%	20%	38%	46%	49%	27%	21%	70%	29%	24%	25%	16%	34%	34%	25%	32%	58%
	22%	25%	51%	56%	60%	46%	23%	22%	32%	32%	75%	17%	38%	37%	24%	30%	67%
	21%	22%	38%	48%	45%	36%	20%	17%	52%	23%	26%	16%	35%	32%	18%	24%	57%
	24%	22%	39%	53%	51%	38%	21%	21%	30%	69%	27%	17%	34%	37%	26%	25%	59%
	24%	33%	46%	66%	47%	46%	36%	34%	36%	55%	48%	32%	46%	35%	24%	18%	55%
N=	586	516	821	911	821	702	586	525	553	735	686	666	926	756	538	686	882

Note: <sup>1</sup> Respondents that watch sports daily, weekly or monthly <sup>2</sup> Respondents selecting 4 or 5 on a 5-point interest scale for each league (5 = very interested, 1 = not at all interested)  
Sources: Altman Solon 2022 Global Sports Survey, Altman Solon Research & Analysis



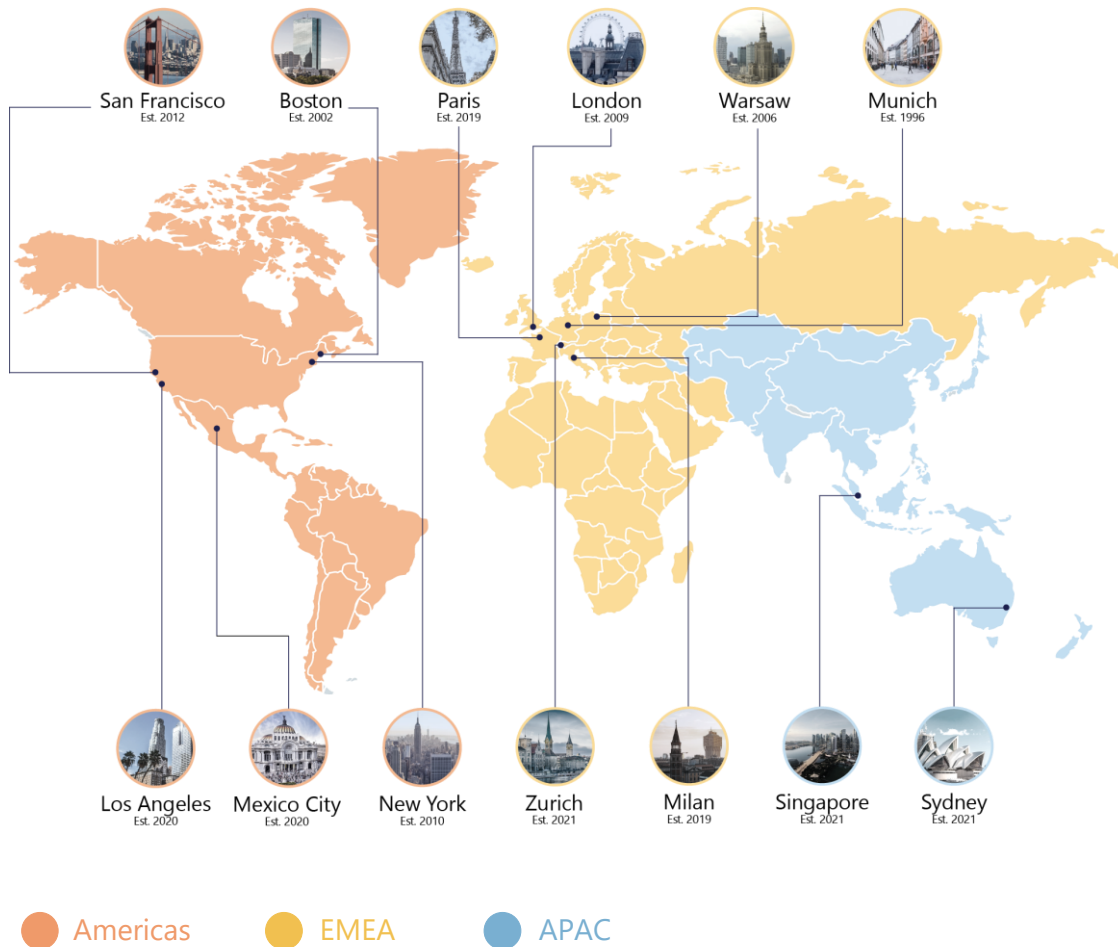
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AR / VR in sports

Background Global Sports Survey

**Introduction to Altman Solon**

# Altman Solon – the leading strategy consulting firm for technology, media, and telecommunications



## Altman Solon

- Largest global strategy consulting firm with an exclusive focus on the TMT sectors
- Combination of strategic, commercial, operational, and technical expertise as well as capital markets perspective
- Trusted advisor to C-level executives from blue-chip companies worldwide conducting hundreds of strategy projects each year
- Global reach: Client engagements in more than 100+ countries

# Altman Solon supports the TMT industry in all aspects of value creation

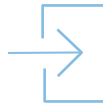
## Altman Solon core competencies

### Strategy



- Business planning, market and competitive analysis
- Growth strategy
- Customer value maximization
- Digital infrastructure decisions and strategy
- Design and negotiation of active / passive sharing initiatives
- Frequency auctions

### Go-to-Market



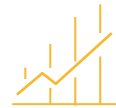
- Product development and roll-out
- Customer segmentation and market research
- Pricing strategy
- Sales channel strategy development
- Customer experience and service delivery concept
- Organization build-up

### Performance Improvement



- Capex Optimization and infrastructure planning
- Cost sharing / outsourcing strategies and negotiation support
- Opex optimization
- CRM and churn mitigation
- Sales optimization
- Systems, organizational restructuring, process redesign

### Capital Markets



- Commercial and business plan due diligence
- Technical due diligence
- Post-merger-integration and 100-day-program
- Cash improvement program
- Refinancing support
- Capital market office

# We work with a wide range of leading companies, vendors, and operators across subsectors in TMT

## Altman Solon core industries

### Media & Digital



- Broadcast TV, radio station groups
- On Demand & OTT platforms in video, music, text, and games
- Sports teams/leagues and federations
- Studios
- Book, magazine, newspaper and online publishers
- Production companies
- Gaming developers
- Broadcast and cable TV network groups
- Digital app developers
- Online retailers
- Backend infrastructure operators



### Technology

- Software Vendors and SaaS players
- Managed Service Providers
- Data Center Operators
- Processors, Devices, and Systems
- Cloud and Hosting Providers
- OEM and Consumer Electronics
- Network Equipment Vendors



### Telecom

- Wireless Carriers
- Cable Companies
- Fiber Providers
- Satellite Operators
- Tower Companies

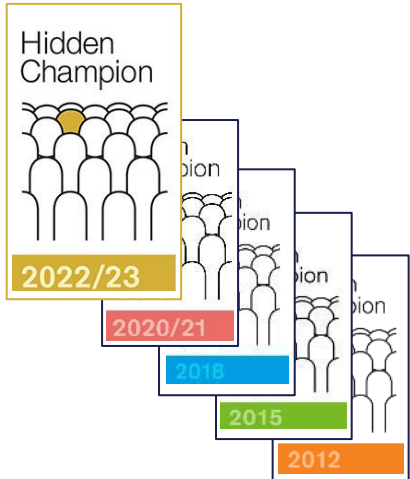


### Investors

# We have been selected as the #1 TMT advisor among consulting firms by an independent institute

## Ranking of TMT consulting expertise – 2022/23

Rank	Consulting firm	Points
1	<b>Altman Solon</b>	<b>415</b>
2	McKinsey & Company	390
3	Boston Consulting Group	386
4	Bain & Company	367
5	Oliver Wyman	364



## Methodology

- Survey of 750+ C-level representatives of German major enterprises, by WGMB

## Perceived industry expertise

- 500 points = very high
- 300 points = medium
- 100 points = very low

# We were named “TMT Due Diligence Provider of the Year” at the TMT M&A Awards for four straight years

TMT Finance M&A adviser of the year and shortlisted companies since 2018



- The awards were established by TMT Finance and recognize outstanding deals and dealmakers, advisers as well as financing and leadership activity in technology, media and telecommunications globally
- Independent jury: each award is judged by a panel of leading TMT finance and advisory executives
- Criteria taken into consideration are deal volume and number of transactions advised on regionally and globally

Source: WGMB, CAPITAL, TMT Finance, Altman Solon



# Global reach. Local expertise.

## Our Offices

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## Our Experience

Engagements in 100+ countries



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