

Special Report

# AI-Driven Excellence in Hospitality

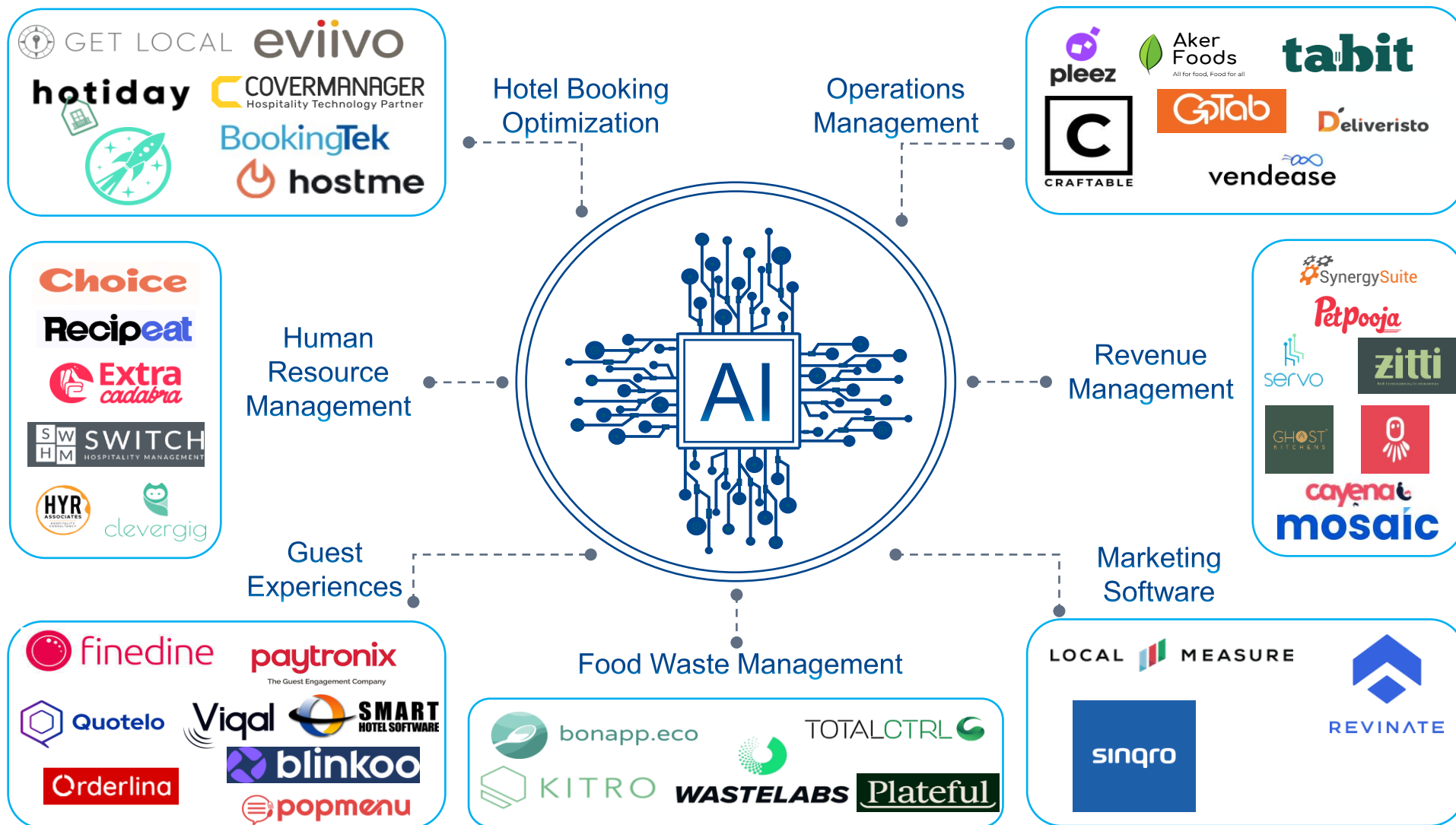


# Contents

---

<b>Comprehensive AI Solutions</b> Market Sub Sectors	02
<b>Market Activity</b> Fund Raise, Valuation	03
<b>Precedent Transactions</b> PE deals, VC investment	04
<b>Investors</b> List of PE firms and VC firms	06

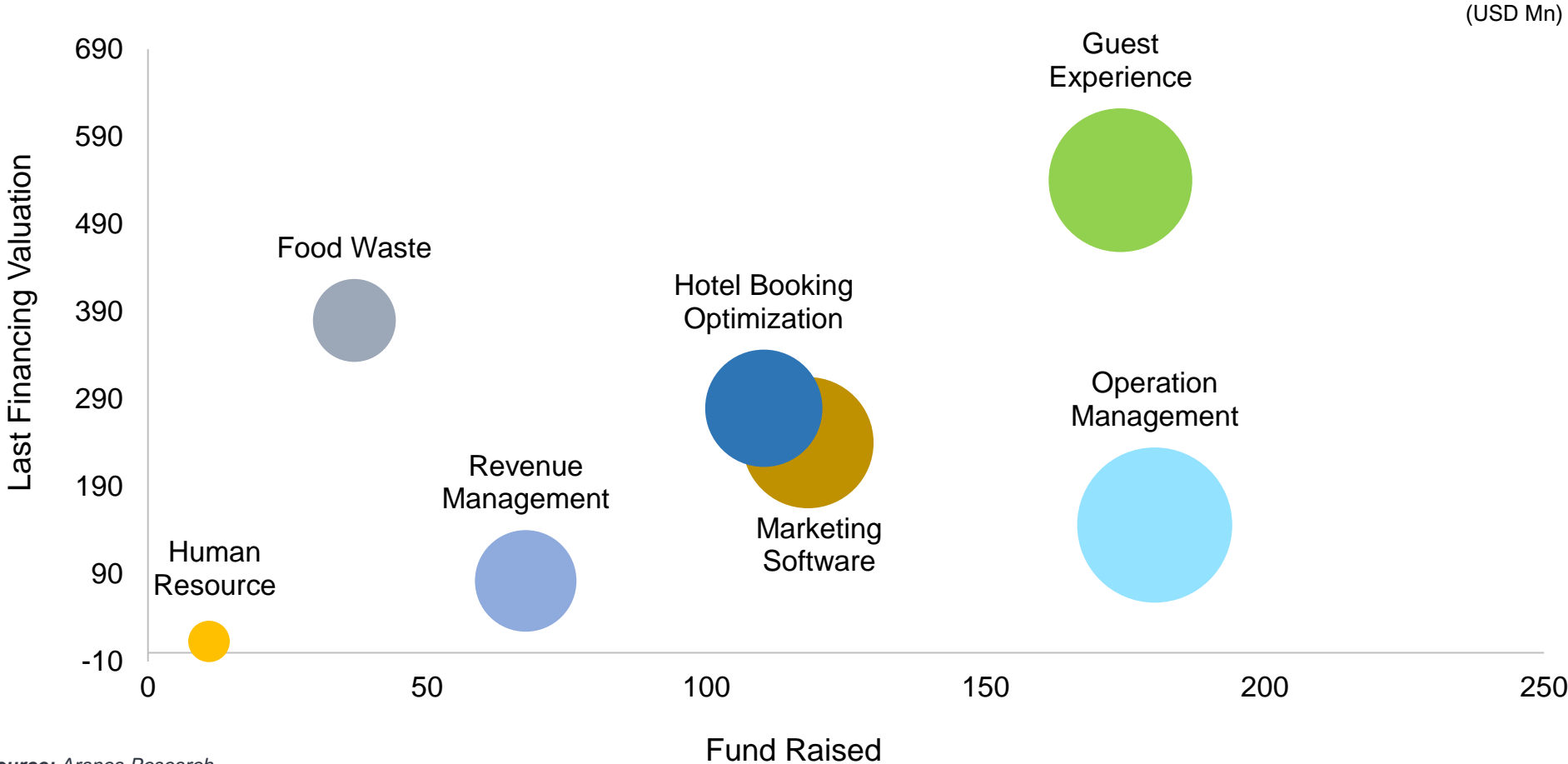
# Comprehensive AI Solutions: From Hotel Booking Optimization to Guest Experiences and Beyond..



Source: Aranca Research











# Market Activity Totaling over USD 650 Million was Observed in the AI Hospitality Sector since 2020..

Of the AI in Hospitality sector trade transactions analysed since 2020, Operation Management and Guest Experience subsector accounted for 46% of total deal flow whereas Human Resource Management contributed least of about 1% of total deal flow.












Source: Aranca Research

## Deal Activity is Fueled by Numerous Smaller Deals Alongside a Few Large Buyouts. (1/2)

Business Segment	Companies	Investors	Deal Date	Deal Size (USD Mn)
Operations Management		Truist Ventures	29 <sup>th</sup> Jun 2023	18.5
		Hack VC Kairos Angels	26 <sup>th</sup> Sep 2022	30.0
		Doorway Capital Azimut Libera Impresa	28 <sup>th</sup> Jul 2022	7.1
Guest Experience		TechOne venture Capital	27 <sup>th</sup> Mar 2023	0.5
		Gateway Ventures	2 <sup>nd</sup> Nov 2022	4.0
		1Kubator Banque Populaire	2 <sup>nd</sup> Nov 2022	1.2
Marketing Software		The Access Group	11 <sup>th</sup> Jul 2023	88.0
		Future Now Capital	1 <sup>st</sup> Jul 2022	2.0
Food Waste Management		Early Game Venture Impact Ventures	26 <sup>th</sup> Apr 2023	0.7
		Norselab	30 <sup>th</sup> May 2022	77.0

Source: Aranca Research

## Deal Activity is Fueled by Numerous Smaller Deals Alongside a Few Large Buyouts. (2/2)

Business Segment	Companies	Investors	Deal Date	Deal Size (USD Mn)
Hotel Booking Optimization	 BookingTek	Hambro Perks	15 <sup>th</sup> Jan 2024	1.9
	 hotiday	AFP Capital 40Jemz ventures	26 <sup>th</sup> Jun 2022	0.5
	 hostme	Schaffer Family Trust	15 <sup>th</sup> Apr 2021	0.5
Revenue Management	 zitti	Broadheaven Capital Partner	19 <sup>th</sup> Jan 2023	8.0
	 mosaic	IdeaSpace Ventures	4 <sup>th</sup> Oct 2022	7.1
	 Petpooja	Aroa Venture Partner	15 <sup>th</sup> Nov 2015	4.5
Human Resource Management	 SWITCH HOSPITALITY MANAGEMENT	TM3 Capital	27 <sup>th</sup> Oct 2022	0.08
	 Choice	Presto Ventures Reflex Ventures	20 <sup>th</sup> Jul 2022	2.48
	 Extra cadabra	Bpifrance SIDE Capital	16 <sup>th</sup> Jan 2020	1.67

Source: Aranca Research

Active Venture Capitalist & Private Equity Investors in the sector includes Tiger Global, TPG, Warburg Pincus and Canaan Partners..

Venture Capitalist Investors	AUM (USD Bn)	No of Investment	Private Equity Investors	AUM (USD Bn)	No of Investment
Tiger Global Management	55,956	1	Kohiberg Kravis Roberts	578,000	1
Andreessen Horowitz	42,000	2	TPG	224,000	2
Canaan Partners	6,800	1	Silver Lake	102,036	2
B Capital Group	5,000	2	Vista Equity Partners	100,000	1
Global Founders Capital	4,000	1	General Atlantic	84,000	2
Felicis Ventures	3,000	2	Intermediate Capital Group	81,000	1
Pitango Venture Capital	3,000	1	Warburg Pincus	81,000	1
Partech	2,696	1	Apax Partners	80,888	1
MSA Capital	2,500	1	Hg	65,000	4
500 Global	2,400	1	TA Associates Management	59,600	1

Source: Aranca Research



## Our work for Clients

**500+**

Market & Business Advisory  
Projects

**100+**

Procurement & Supply Chain  
Projects

**150+**

Projects & Technology  
Assessments

### ABOUT ARANCA



#### Growth Advisory

CXOs in Strategy, SBUs, Sales, Marketing, CI/MI, Innovation



#### Valuation & Financial Advisory

CFOs in Start-ups, PE/VC Firms, Corporate M&A Teams, Mid-market Companies



#### Technology | IP Research & Advisory

R&D, Tech Scouting, Open Innovation, IP Teams, Product Development



#### Investment Research & Analytics

Brokerage, Hedge Funds, IRPs, I-Banks, AMCs, Investor Relations



# Connect with our Team



## Tanvi Mantri

Senior Analyst,  
Investment Research

+91 223937 9999  
tanvi.mantri@aranca.com



## Neha Kakar

Manager,  
Investment Research

+91 124668 9999  
Neha.Kakar@aranca.com



## Avinash Singh

EVP,  
Investment Research

+91 124668 9999 (ext. 951)  
avinashg.singh@aranca.com

**For more details:** [www.aranca.com](http://www.aranca.com) | <https://www.linkedin.com/company/aranca> | <https://www.aranca.com/knowledge-library>

# Decide Fearlessly

---

From startups to the Fortune 500, private equity and global financial firms, Aranca is the trusted research and advisory partner for over 2,500 companies

[www.aranca.com](http://www.aranca.com)



This material is exclusive property of Aranca. No part of this presentation may be used, shared, modified and/or disseminated without permission.  
All rights reserved.