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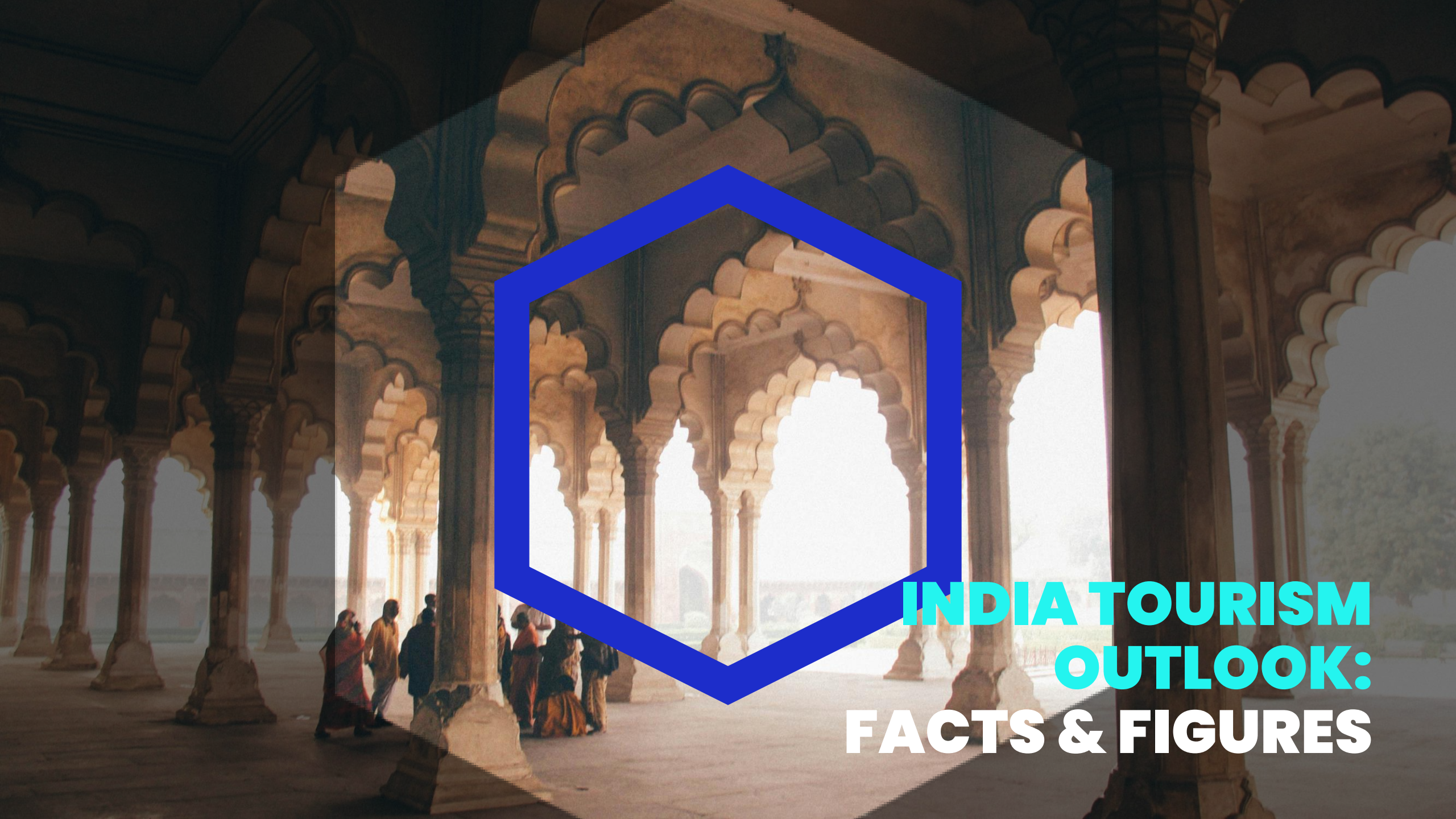
GLOBAL TRAVEL AND TOURISM RESILIENCE COUNCIL

INDIA MARKET INSIGHTS: OUTBOUND & INBOUND

November 7th, 2024

WORLD TRAVEL MARKET, LONDON





**INDIA TOURISM
OUTLOOK:
FACTS & FIGURES**



5th Largest Economy

India also has the largest population in the world*

*McKinsey

1.4K Million Population

India's population is also young, as the average age is 26.7 years old*

*McKinsey

31%

INDIA'S POPULATION IS MIDDLE CLASS, AND IS PROJECTED TO GROW BY 60% BY 2047

*India's Consumer Economy - PRICE



By **2030**, Indians will embark on **5 billion trips***, 1% of them abroad, equalling

50M
INTERNATIONAL TRIPS

*McKinsey & Booking.com





Indian Travel & Tourism **Grow Faster** Than Local Economy*

6.5%

Of 2023 India's GDP came
from travel & tourism

+7.4%

Forecasted India's tourism **GDP CAGR** by 2034 (+1,2pp more than economy)

+6.2%

Forecasted India's Global Economy **CAGR by 2034**

*Travel & Tourism Economic Impact 2024 (WTTC)

India's Air Connectivity, on the Rise

India's Air Connectivity Forecast: Next 6 months

October 2024 to April 2025

2.4M

Europe seats availability to India in the next 6 months

+15.1%

Year-over-year seats availability increase with European destinations

61.2M

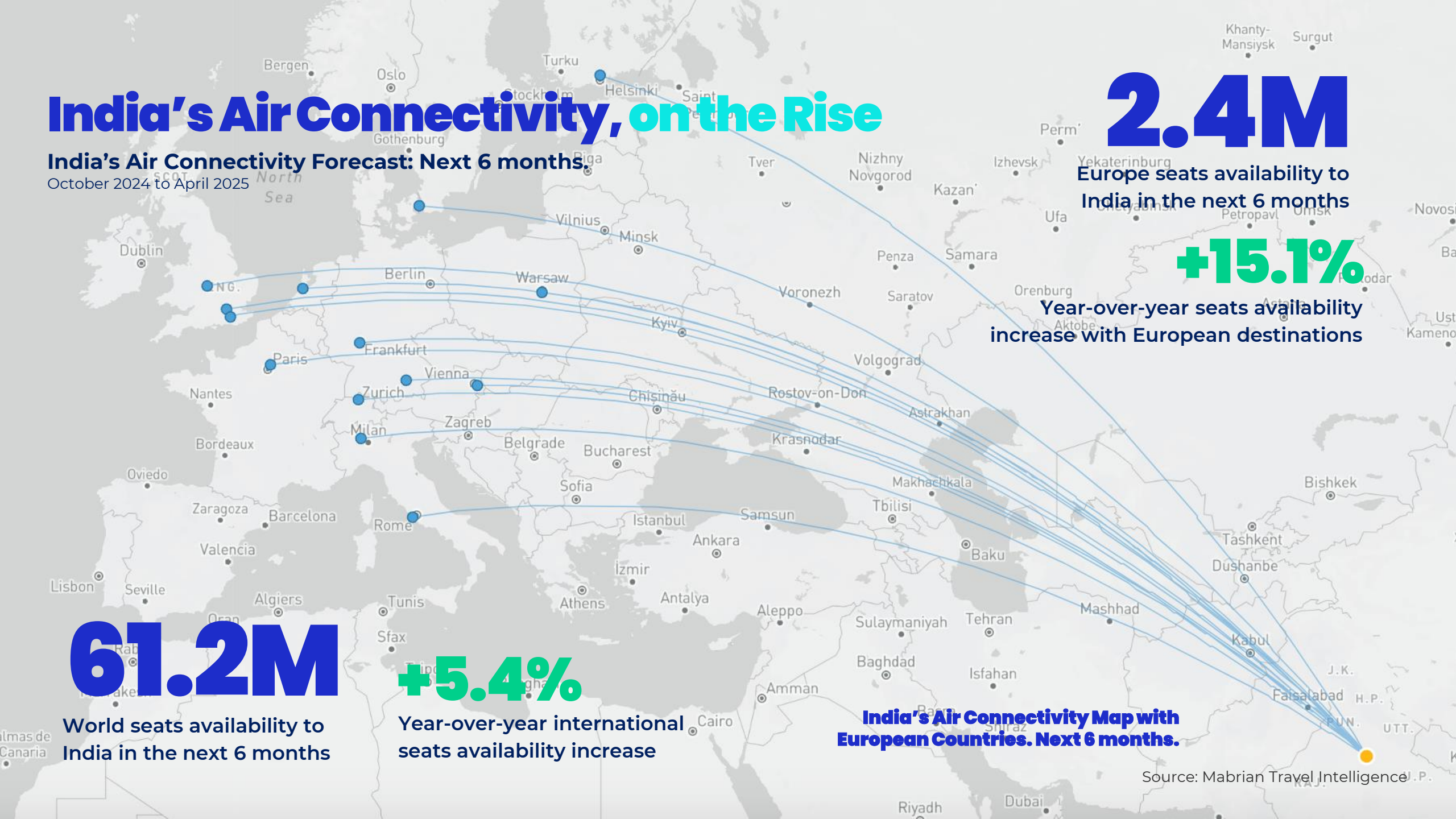
World seats availability to India in the next 6 months

+5.4%

Year-over-year international seats availability increase

India's Air Connectivity Map with European Countries. Next 6 months.

Source: Mabrian Travel Intelligence



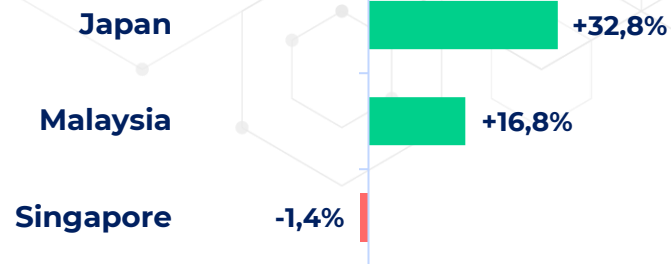


**INDIA INBOUND MARKET:
INSIGHTS & TRENDS FOR
EUROPE**

Key Inbound Markets Visiting Indian Destinations

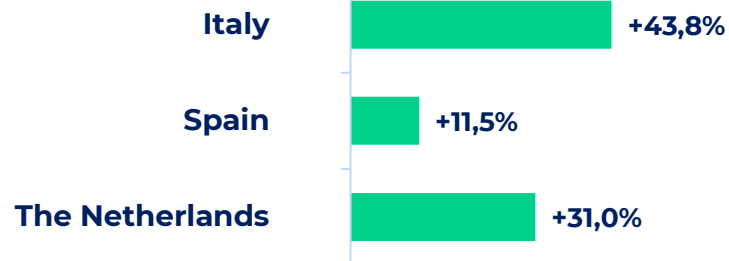
Asian Inbound Markets

Last 12 Months vs. Previous Period



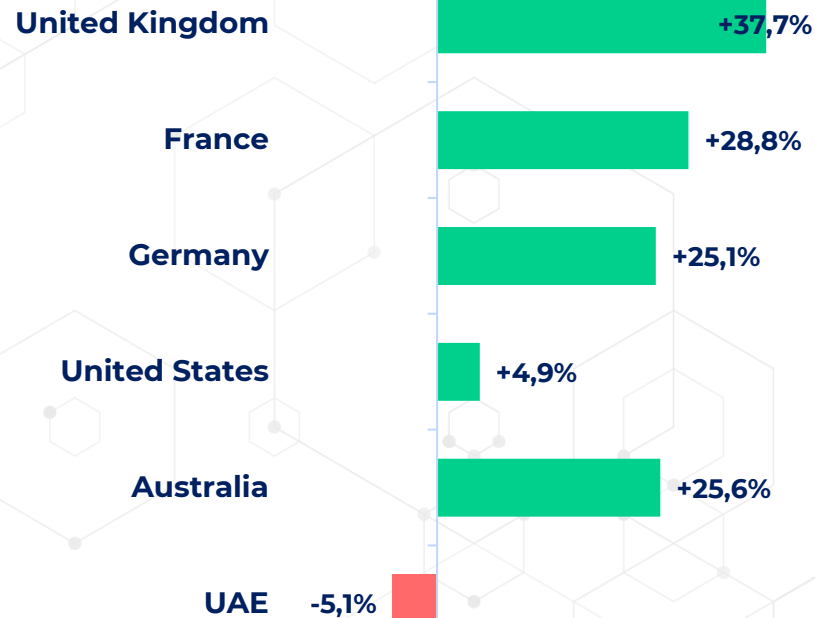
Western European Inbound Markets

Last 12 Months vs. Previous Period



Top Inbound Markets for India.

Last 12 Months vs. Previous Period



India's Inbound Markets: The Strength of Europe, US, and Australia

According to Mabrian's Visitors' Profile data for the last 12 months, **the top five inbound markets to India show a solid growth trend**, while demand from the United Arab Emirates has slightly declined.

The data highlights the **strong demand from European and other long-haul markets for travel to India**. Within the top five inbound markets, all show annual growth: United Kingdom, with the largest increase (+37.7%), leads as India's top inbound market, followed by France (+28.8%), Germany (+25.5%), the US (+5%), and Australia (+25.6%). Additional European markets within the top ten also demonstrate robust growth, including Italy (+43.8%), Spain (+11.5%), and the Netherlands (+31%).

In addition to a **moderate increase from North America, where the US and Canada saw inbound demand rise** by +4.9% and +8.6% respectively, there is notable growth from certain Asian markets, especially Japan (+32.8%) and Malaysia (+16.8%). Demand from Singapore, however, has slightly declined (-1.4%).

Finally, **among key neighbouring markets, performance is uneven**: travel demand from Bangladesh has decreased by -6.5%, while Nepal (+16.7%) and Sri Lanka (+7.5%) show positive growth signs.

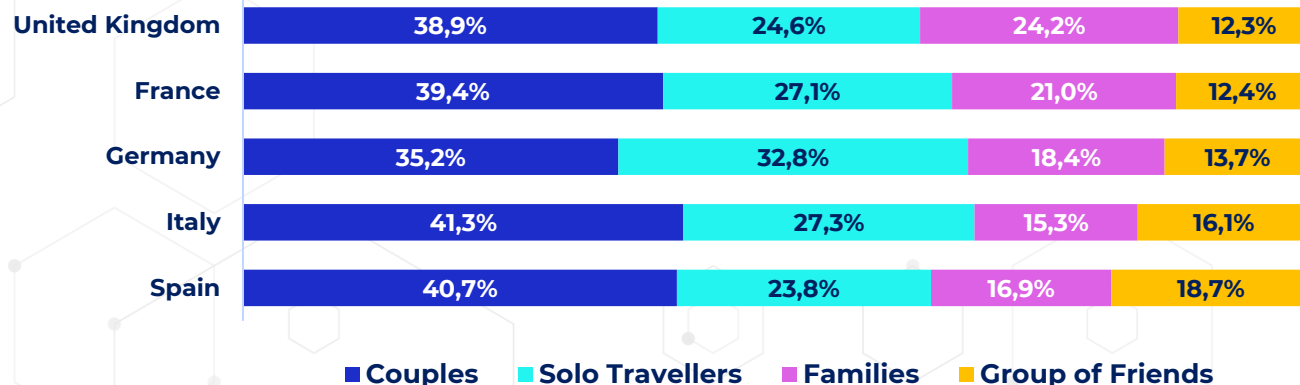
European Traveller's Profile: Couples and solo travellers to explore Indian destinations

Among the markets analysed, **four out of ten travellers visit India with their partners**. This ratio is slightly lower in the case of Germany, which has a larger share of solo travellers (close to 33%). **Solo travel is also quite popular among these markets**, averaging 24% among British and Spanish travellers and 27% among Italians and French.

It's worth noting that, **when travelling to India, these European nationalities show a more balanced ratio of female to male travellers**. In fact, **more women than men travel to India among the European markets studied**. Compared to the global demand to India (65.5% male vs. 34.5% female), female demand is, on average, 14 percentage points higher among these European markets. This is particularly notable among Italian and Spanish travellers, with women making up 53% in both cases, and French travellers, where women represent half of the demand.

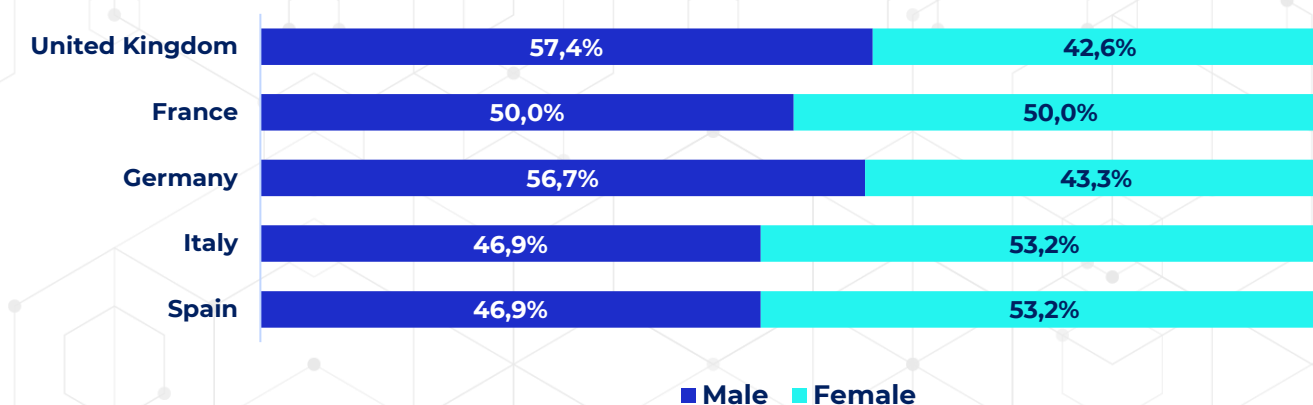
Share of travellers' categories. European travellers to India.

Full Year 2023



Share of travellers' gender. European travellers to India.

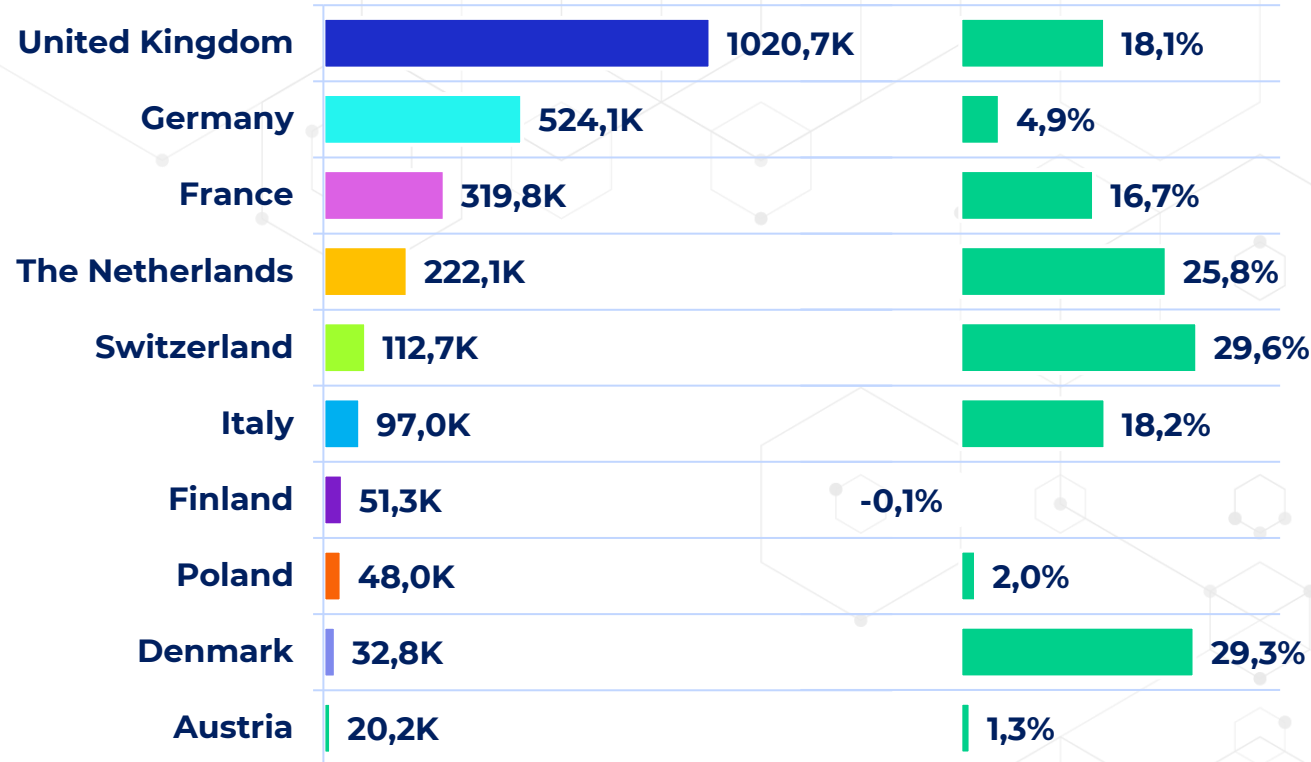
Full Year 2023



Air Connectivity with Europe, a closer look

Seats Availability to India from European Source Markets: Forecast Next 6 months.

October 2024 to April 2025



Solid network with key European hubs, except Spain

Overall, **India's air connectivity is on an upward trend, with routes linking the country to all major European air connectivity hubs.**

Notably, seat availability on flights to India has increased from the United Kingdom (+18.1%), Germany (+4.9%), France (+16.7%), the Netherlands (+25.8%), and Italy (+18.2%), strengthening the network with Europe. However, Finland has seen a decrease in connectivity, and Spain has lost two legacy routes and no longer has direct flights to India.

Another key insight is the **balance between traditional and low-cost carriers operating routes from India to Europe, which leans toward legacy airlines.** All European countries with routes to India are served primarily by traditional airlines, except Italy, where low-cost carriers represent 52% of seat availability, and Switzerland, where low-cost carriers hold 74.6%.

Arts & Culture, a Key Driver for European Travellers to Anchor Segmented Experiences

As a global insight, **European markets share similar drivers and interests when traveling to India, though the mix of preferred experiences varies.** This suggests that tourism products, services, campaign focuses, and marketing strategies should be tailored for each market, using **Arts & Culture as a foundational driver** that encompasses specific combinations of experiences that resonate in each source market.

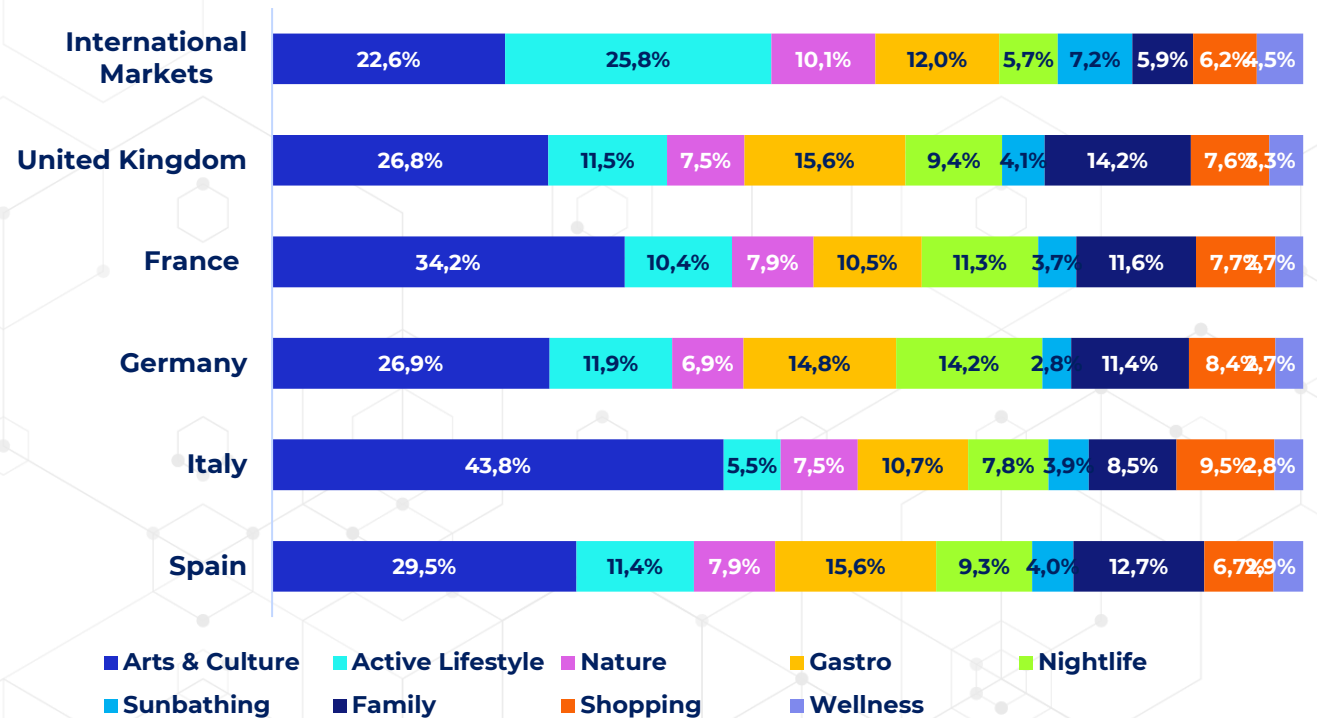
Arts & Culture is the strongest driver for key European inbound markets, performing above the global average, and is especially popular among Spaniards, French, and, notably, Italians (almost double the average interest). Gastronomy is also a highly significant driver for Europeans, particularly for Spaniards, British, and Germans, with Italians and French following, though to a slightly lesser extent.

Active tourism and nature represent two untapped drivers for these inbound markets, compared to India's overall international positioning. Active well-being travel—a combination of outdoor activities, nature, and wellness—is a strong trend among European travellers and is a significant driver for visiting India. In fact, **40.8% of demand drivers for India revolve around this type of experiences.**

Considering the distinct sentiment distribution by country of origin, it is possible to infer which experiences best resonate with each European source market:

- **Wellness is a highly positive attribute for British travellers in particular,** as well as for Spaniards and Italians. **Given India's strong association with wellness, this presents an opportunity to attract other traveller segments** by designing and promoting wellness-specific products and experiences.
- Spaniards, British, and French travellers are also **drawn to nature and outdoor experiences, finding them especially enjoyable.** Active tourism, in particular, is well-regarded by Germans, British, and French travellers.
- **European travellers are more inclined than other international visitors to enjoy shopping experiences in India,** viewing them as a reflection of the cultural appeal that draws them to the destination.
- Lastly, **family activities are important drivers for these source markets when traveling to India.** This motivation is stronger than the global average and should be monitored as a trend, especially in terms of product and experience design, lodging options, and safety perceptions.

Share of Demand Drivers from Western European Travellers to India.
Full Year 2023



Explore culture, outdoors and landmarks: Indian travellers interests in Europe

Consistent with demand drivers' data, Arts & Culture reflects on the European travellers choices when deciding the destinations to visit in their trips to India.

Data indicates that **all European markets visiting India, as studied in this report, tend to build travel itineraries around the so-called Golden Triangle circuit** (Delhi, Rajasthan, and Uttar Pradesh), featuring iconic destinations such as Agra (home of the Taj Mahal), Jaipur (the Pink City), and New Delhi, India's unique capital. **These travel plans are often enriched by adding other stops in India, enabling visitors to experience the country through a range of activities**, including active tourism, nature, gastronomy, relaxation, and shopping, as mentioned in the prior section.

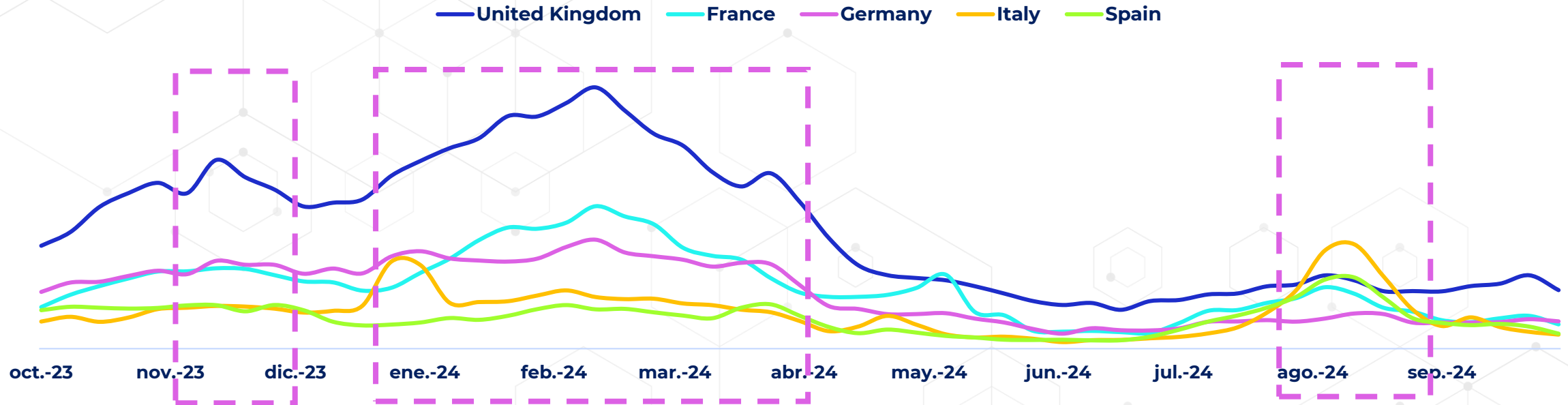
This mix varies by nationality and is also influenced by specific interests, as well as India's promotional efforts within each market. Among the complementary key Indian destinations considered by the European markets analysed are **Kerala** (with its lush jungles, beaches, and stunning colonial heritage), **Maharashtra** (home to Bollywood and Gandhi's legacy, centred in the vibrant regional capital of Mumbai), and the regions of **Goa and Tamil Nadu**, popular for their connections to Europe and their appeal as sun and beach destinations.



European travel patterns to India: A counter-seasonal market

Seasonality: European Market Demand to India.

Last 12 Months

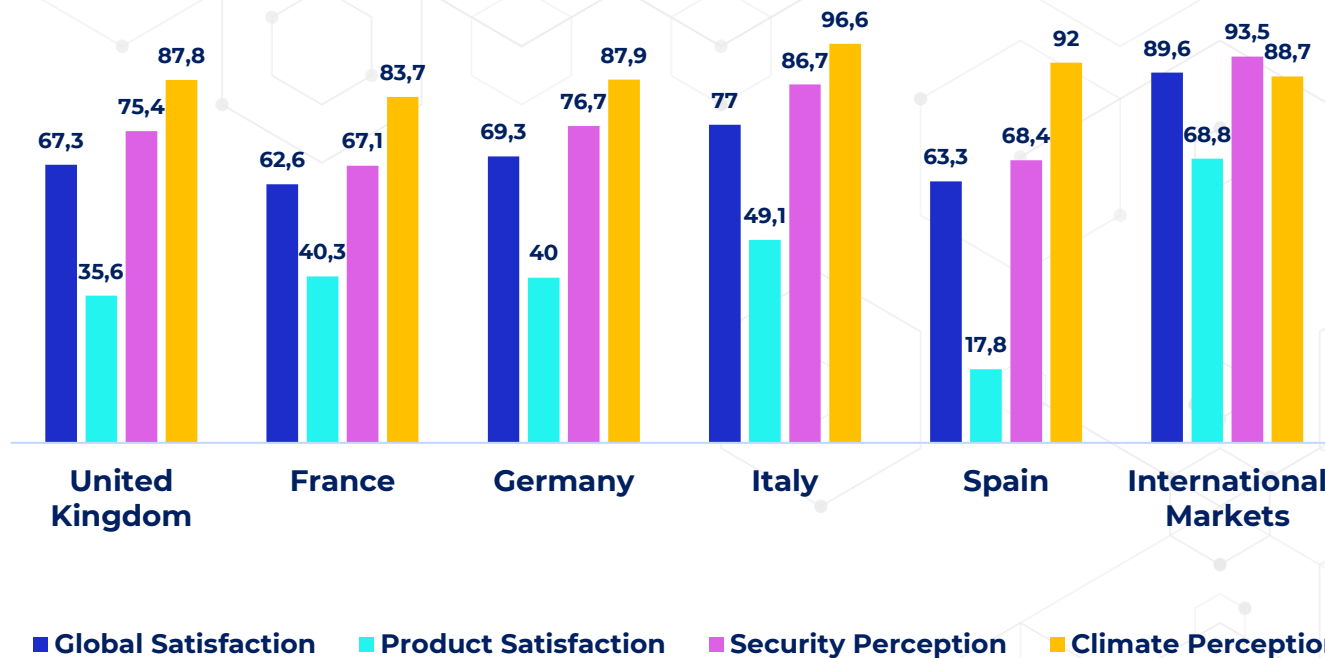


Overall, and particularly in comparison to seasonality patterns for travel to European countries, **India is a less seasonal destination for European travellers. India's seasonality rate during the peak demand months (from mid-October to late January) accounts for 35.2% of total annual tourist demand.** This percentage is significantly lower than that of other heavily seasonal European destinations, which, in some cases, reach double this rate.

Interestingly, **Europeans—particularly the British, French, and Germans—tend to travel to India during the Western winter** (November, and especially in January and February). **Beyond winter demand, Italians also show a peak in travel to India during the Western summer season, while Spanish demand is more pronounced in August.** The cases of Italy and Spain suggest that, for these particular source markets, long-haul trips are still preferred during the summer holiday period, with August being especially popular.

Building Up India's Travel Destination Perception for European Markets

Overall Perception of India as Destination from European markets.
(Index 0-100 points) Last 12 Months



Aiming at Refining Experience and Tourist Services in India

The European markets analysed fall below the global average in terms of overall satisfaction (which is relatively high, at 89.6 out of 100 points). Except for Italy, this index is below 80 points in all markets studied, and below 70 for France and Spain. This suggests a need to revise promotional messaging to better align expectations and to enhance travel products and services, which are key factors impacting the global experience negatively.

The main challenge India faces with these savvy and experienced source markets is the perception of its tourism products and services. This perception is particularly low among Spaniards and British travellers, as well as among the French, Germans, and Italians. This indicates that the quality of local travel products and services should be reviewed and improved.

Safety perception, too, is an area for attention, especially for the primary European markets, with Spaniards and French travellers expressing the most concerns. Italy is an exception, with safety perceptions relatively close to the global average. While climate perception is generally positive, this insight suggests that India should develop safety targeted strategies for each European market to improve safety perceptions, particularly for the most sensitive groups, to mitigate any potential negative impact on demand.

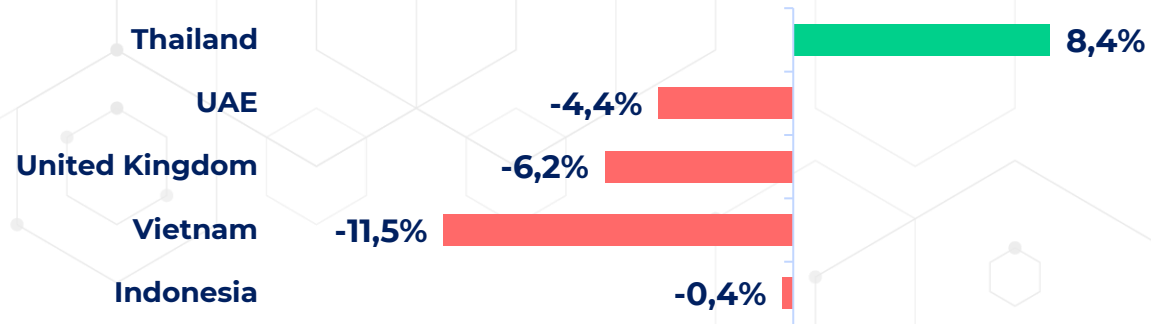
In terms of tourism products and services, there is a clear misalignment between European perceptions of India's value proposition. Expectations are unmet, presenting an opportunity for improvement. Addressing this gap will require a deeper understanding of the habits, needs, and priorities of Indian and European travellers alike, along with an overall enhancement of the experience for European visitors in India.



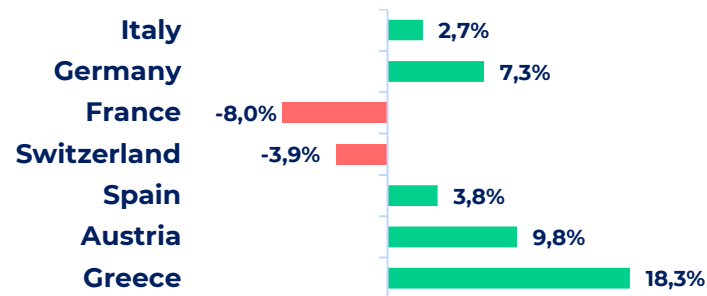
**INDIA OUTBOUND MARKET:
INSIGHTS & TRENDS FOR
EUROPE**

Emerging Destinations of Choice for Indian Travellers

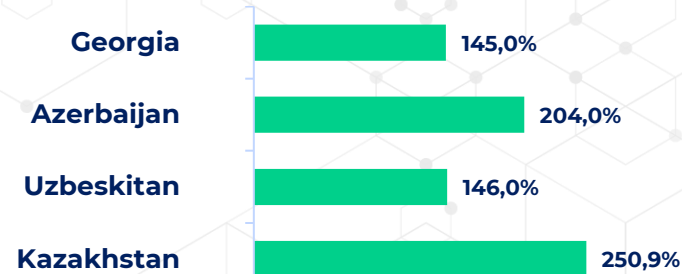
Top Outbound Destinations for Indian Travellers.
Last 12 Months vs. Previous Period



Top European Destinations for Indian Travellers.
Last 12 Months vs. Previous Period



Demand Trends in Central Asia & Caucasus.
Last 12 Months vs. Previous Period



Uneven performance of top choices and alternative destinations

According to Mabrian's Visitors' Profile data, and beyond the strong preference for domestic travel, **the five most visited outbound destinations for Indian travellers are Thailand** (the only destination showing a growing trend, with an 8.4% year-over-year increase), **followed by the UAE, United Kingdom, Vietnam, and Indonesia. All of these destinations, except Thailand, show a year-over-year decline in demand** to varying degrees, suggesting that Indians may be exploring alternative options when travelling abroad.

Given that European countries rank among the top choices for Indian travellers, this report focuses on analysing these preferences. **Among Western European destinations, Indians continue to show interest in all-time favourites** such as Italy (with a 2.7% annual increase) and Germany (up by 7.3%), both of which remain in the top ten choices, along with France, where demand has declined by 8% year-over-year. **Demand is also growing for emerging favourites, with trending destinations like Spain** (up by 3.8%), **as well as Austria** (up by 9.8%) **and Greece** (up by 18.3%), **these last two showing the strongest growth among European destinations sought by Indian travellers.**

Interestingly, demand from the Indian market for **Central Asia and the Caucasus shows a robust three-digit growth** trend, though demand remains niche.

Indian Traveler's Profile: Couples and families to explore European destinations

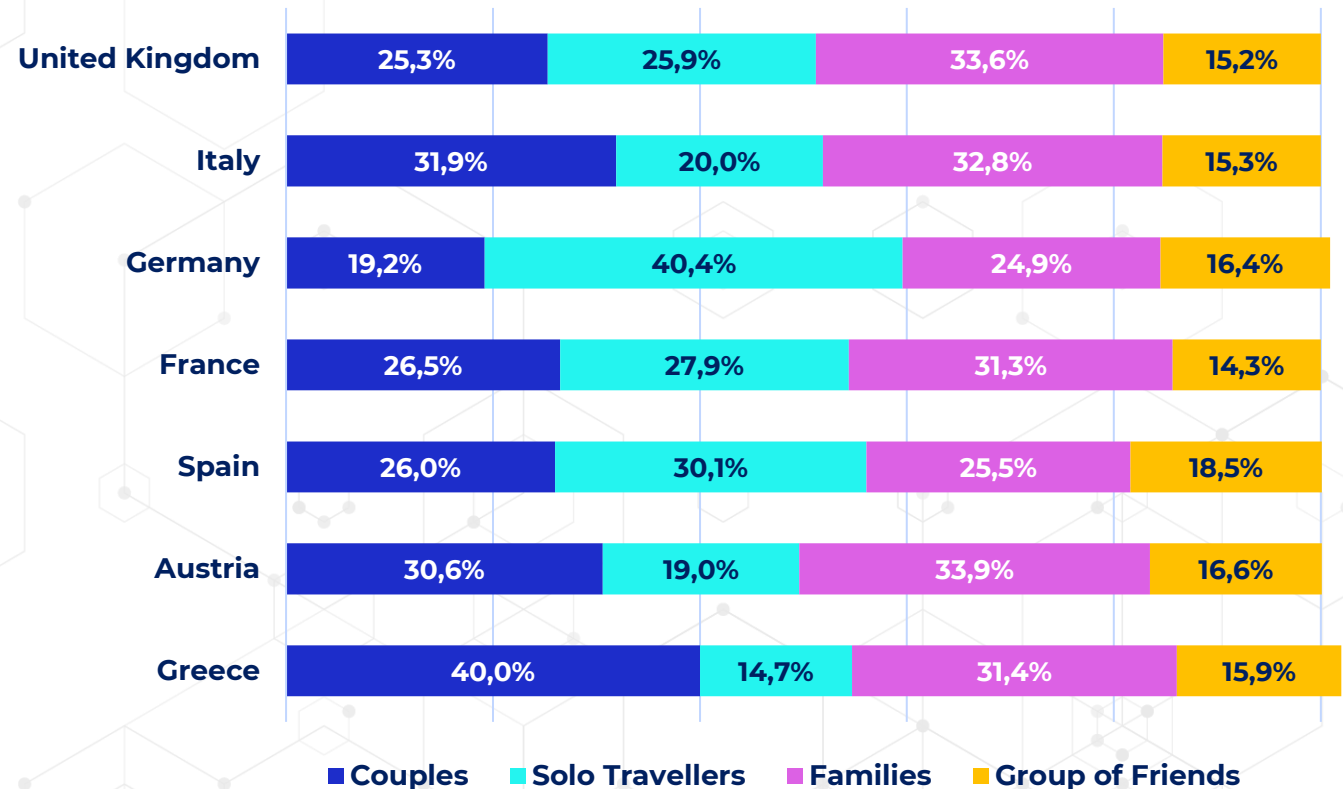
On average, **one in three Indian travellers visiting the European destinations studied travels either as a couple or in family groups.** This ratio is even higher in Greece, where four out of ten Indian visitors travel as couples.

There are three notable exceptions to this pattern among the destinations analysed. In the **United Kingdom and Spain, travel patterns are more balanced**, with a similar distribution between couples (25% for the UK and 26% for Spain), solo travellers (28% for the UK and 30% for Spain), and families (34% for the UK and 25.5% for Spain). **The other exception is Germany, where over 40% of Indian visitors are solo travellers.**

The data also indicate that **Indians often view their trips to Europe as a family-oriented activity**, particularly when visiting Austria, the United Kingdom, and Italy. This suggests that these European destinations should cater specifically to Indian family groups, a valuable segment to consider.

In terms of gender distribution, Indian men tend to travel to these European destinations more frequently than Indian women. **For every three Indian women travelling to these destinations, there are seven men.** This proportion is slightly higher in certain destinations, such as Germany and especially the UK, where three men visit for every woman travelling to British destinations.

Share of Travellers' Categories. Indian travellers to Western Europe.
Full Year 2023

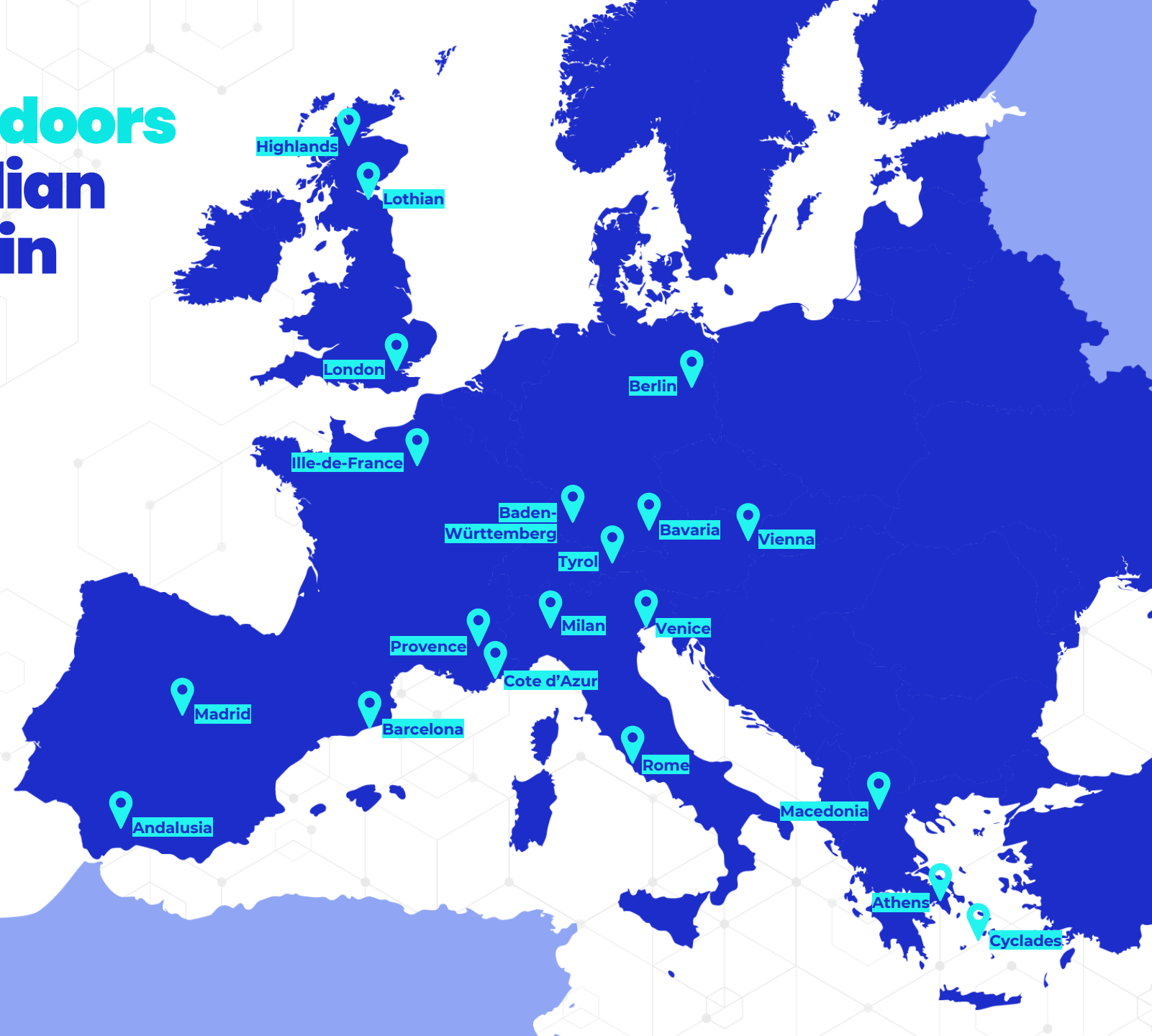


Explore culture, outdoors and landmarks: Indian travellers interests in Europe

The preferences of Indian travellers when visiting European destinations reflect a strong interest in **outdoor landmarks**—such as Bavaria in Germany, the Tyrol region in Austria, Macedonia and the Cyclades Islands in Greece, Provence, the Alps, and the Pyrenees in France, the Midlands and Highlands in the UK, Lothian in Scotland, and Campania in Italy. These natural attractions are **often combined with vibrant cultural hotspots**, including cities like London and Manchester in the UK, Berlin and the Baden-Württemberg region in Germany, Île-de-France and the Côte d’Azur in France, Barcelona, Madrid, and various Andalusian cities in Spain, Athens and Crete in Greece, Rome, Venice, and Milan in Italy, and Vienna and Salzburg in Austria, to name a few.

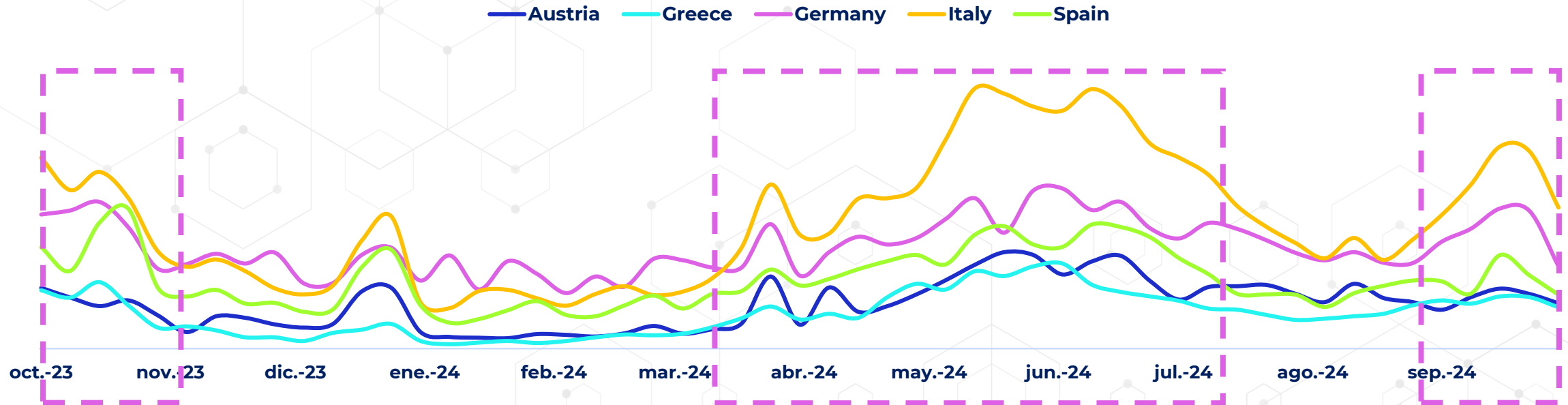
This aligns with behavioural data insights developed in detail further on, and **suggests that Indian visitors are keen to experience the full breadth of Europe**, exploring both the cultural and natural highlights of each destination. Their travel patterns indicate a desire to engage in diverse activities that showcase each country’s unique identity.

Source: Mabrian Travel Intelligence



Indian travel patterns: A seasonal-friendly market for Europe

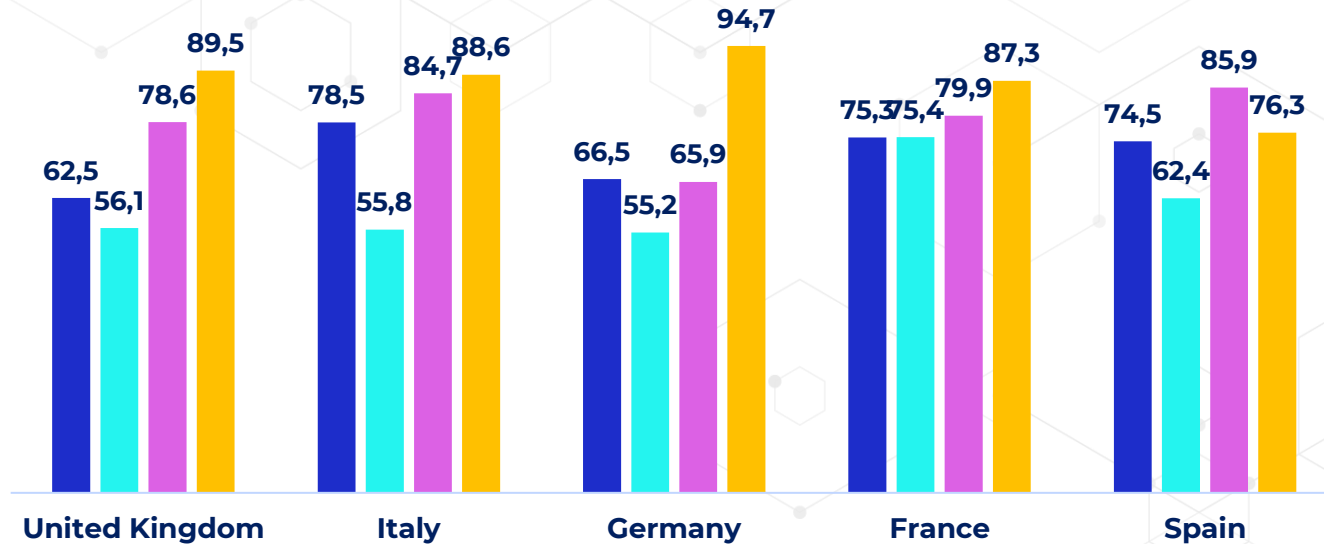
Seasonality: European Destinations of Choice for Indian Travellers:
Last 12 Months



From a seasonality perspective, **India is a highly advantageous market for Europe, as Indian travellers tend to visit during Europe's low and shoulder seasons** (March to July), **with May and June being peak months due to Indian school summer holidays**. The UK, Spain, Italy, and Greece also experience a surge in demand from Indian visitors during the late or extended summer season, spanning September and October. Additionally, **there is another notable demand peak from the Indian market during Indian school winter holidays**, which is a shorter period in December and January.

How Indian Travellers Perceive the European Travel Experiences

Overall Perception (UK, Italy, Germany, France, and Spain)
Index 0-100 Points. Last 12 Months.



■ Global Satisfaction ■ Product Satisfaction ■ Security Perception ■ Climate Perception

Understanding Indian travellers' behaviour in Western Europe

This section delves into the behavioural patterns of Indian travellers, focusing on key destinations such as the UK, Italy, Germany, France, and Spain, while also considering Austria and Greece as emerging trends in demand.

Interestingly, the cultural gap that affects European travellers' satisfaction when visiting India mirrors Indian travellers' perceptions when visiting Europe. There is a clear misalignment between Indian expectations of European destinations and the actual experiences provided, resulting in satisfaction indices that could be improved.

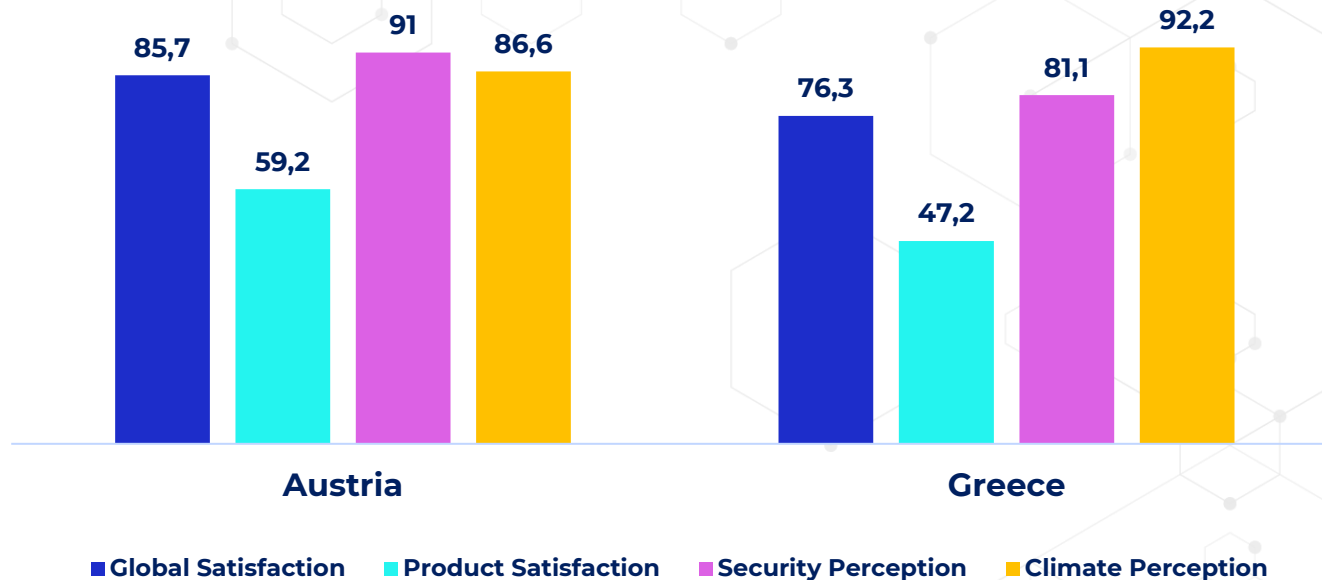
Indian travellers report the most satisfactory travel experiences in France, Italy, and Spain. The case of France stands out, as global satisfaction and satisfaction with tourist products are closely aligned. In contrast, there is a discrepancy of 12 points in Spain and 22 points in Italy between these two indices. This suggests that products and services aimed at Indian travellers can be further adapted and enhanced to meet their specific habits, needs, and priorities. **In Germany and the United Kingdom, global satisfaction falls below 70 points** (out of 100) in both cases, while satisfaction with tourist products averages 55.5 points, indicating that Indian travellers' expectations are not being met in these two destinations.

Perceptions of safety are quite high among Indian travellers in Spain and Italy, followed closely by France and the United Kingdom. Conversely, Indians feel less safe in Germany compared to other Western European destinations, presenting a key challenge for Germany in promoting itself in the Indian market.

The climate is generally regarded positively across all analysed European destinations, although it is viewed less favourably in Spain compared to its competitors, yet still well above 70 points. Climate is an appealing aspect when promoting these destinations to Indians, who appreciate mild and cooler weather conditions in Europe.

How Indian Travellers Perceive the European Travel Experiences

Overall Perception (Austria and Greece)
Index 0-100 Points. Last 12 Months



Experience, at the core of Indian travellers' satisfaction

Among the most in-demand destinations for Indian travellers, Austria and Greece have shown the strongest increase in demand, along with similar traveller perceptions as the other European destinations studied. Austria and Greece demonstrate a better performance in the Global Satisfaction Index compared to other European destinations; in fact, Greece is quite close to Italy regarding overall satisfaction with the destination experience.

Conversely, both Austria and Greece perform similarly to other European destinations, losing traction when it comes to assessing the actual tourist products and services, an issue that should be addressed by these destinations. Finally, Austria and Greece are among the best performers in terms of safety perception, as well as in the regard for climate conditions.

European Authenticity: Indian Travellers' Preferences Rely on Cultural Experiences

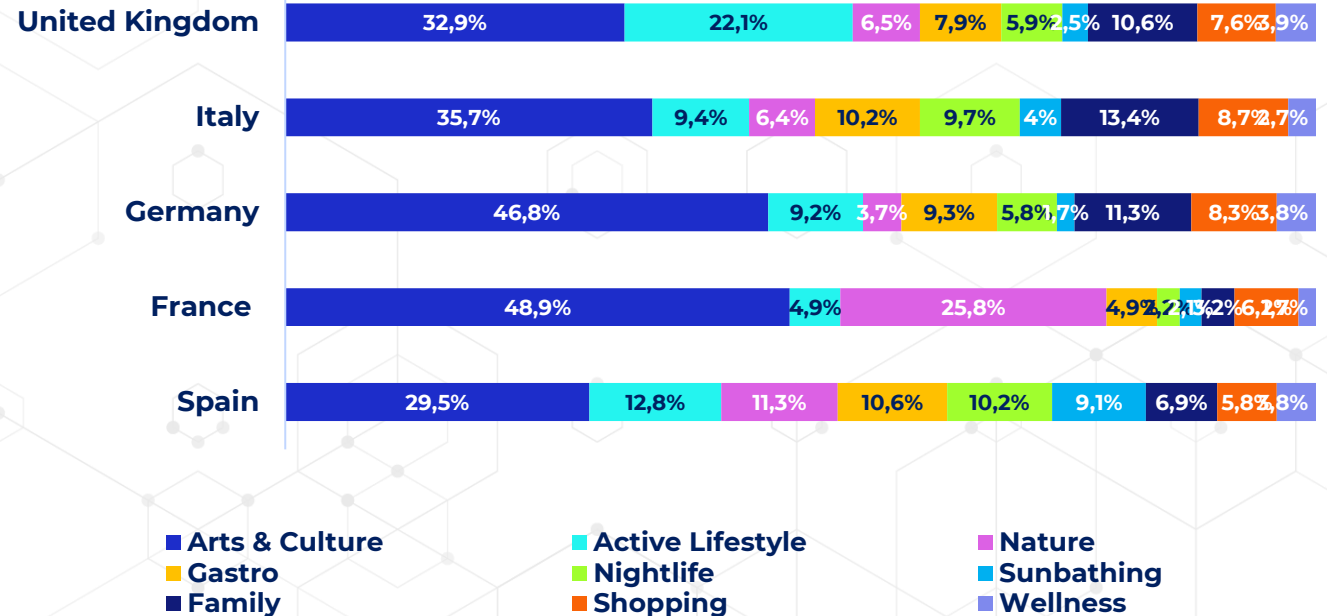
For Indian travellers, European countries represent a **strong cultural destination**. This factor is particularly relevant when visiting France and Germany, attracting almost half of Indian visitors, while it is also significant for approximately one in three Indians visiting the United Kingdom and Italy.

Considering the share of demand drivers, **the experiences promoted in Indian markets for each destination should be adapted, with Arts and Culture as the reference point**. Nature, outdoor activities, and an active lifestyle hold great potential for the United Kingdom and France, as these drivers are particularly well-regarded according to sentiment distribution.

Italy, Germany, and the United Kingdom have potential in attracting attention to family-oriented plans and shopping experiences. Gastronomy and nightlife can be emphasised by Spain and Italy, as **gastronomy is generally viewed as a well-regarded experience and a strong selling point for all the analysed European destinations**, though less so in the case of Germany.

Last but not least, **Indians place importance on wellness experiences, particularly in the United Kingdom, Spain, and Italy**. This aligns with the significance of well-being in Indian culture, which could lead to opportunities for developing new tourist products.

Share of Demand Drivers. Indian travellers to Western Europe
Full Year 2023



European Authenticity: Indian Travellers' Preferences Rely on Cultural Experiences

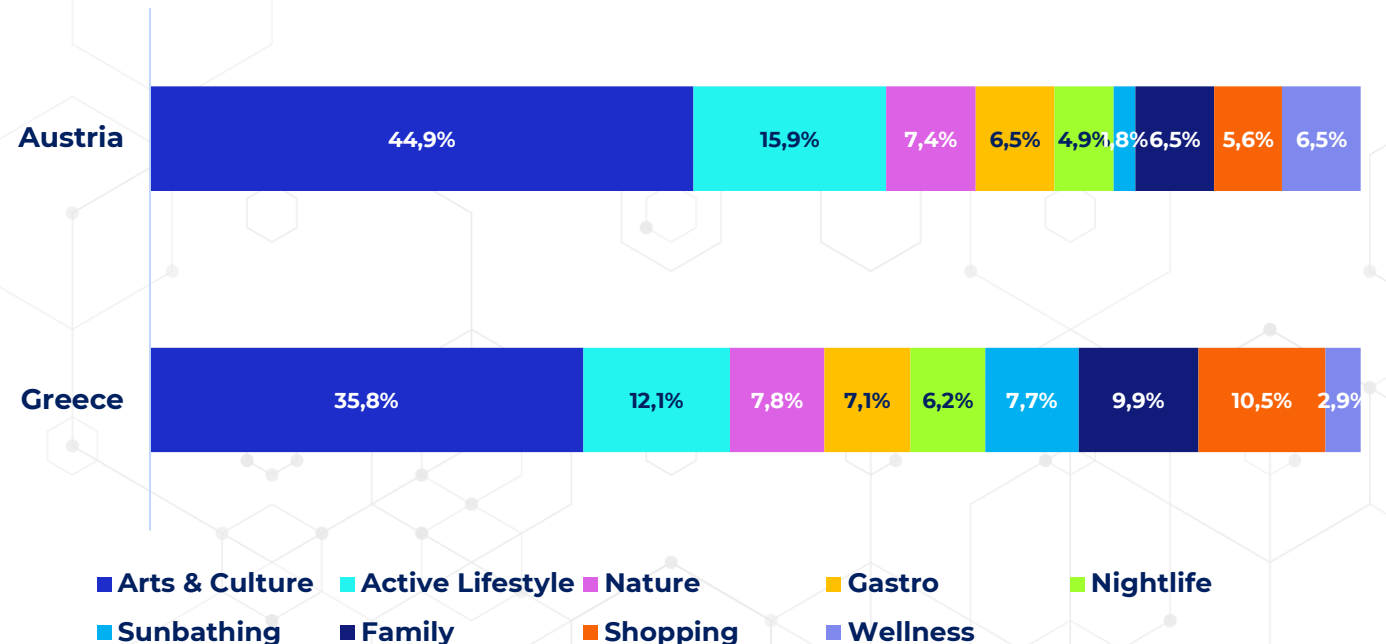
As with the other European destinations analysed, **Arts & Culture remains a very strong driver for Indian travellers visiting both Austria and Greece, alongside active tourism.**

Interestingly, **the motivations for Indian travellers to visit Greece are quite varied, indicating numerous opportunities to combine cultural attractions with other experiences,** depending on the traveller segment.

In contrast, wellness in Austria is almost as significant for Indian travellers as sunbathing in Greece, providing diverse options to promote these destinations among different segments of Indian audiences.

As observed with the other Western European destinations analysed, wellness experiences are important for Indian travellers and can translate into opportunities to attract high-impact Indian travellers, thereby increasing their length of stay and expenditure.

Share of Demand Drivers. Indian travellers to Western Europe
Full Year 2023





TAKE-OUTS:
QUICK WINS AND
LONG-TERM GOALS



QUICK WINS

Inbound Market Take-Outs

LONG-TERM VIEW

- **By understanding seasonal demand trends from European markets, promotional activities and product development can be made more effective.** Tactical campaigns during the European winter or summer (e.g., Spain or Italy), featuring appealing deals and experiences tailored for European travellers, could increase arrivals and multi-destination circuits, thereby enhancing both the length of stay and expenditure.
- **Perceptions of safety are a key consideration in maintaining robust European demand from solo travellers,** particularly among European women, who are comparatively more likely to travel solo to India than female travellers from other nationalities.
- **Improving products and services for European travellers is essential for enhancing perceptions of the destination,** as well as for developing targeted promotional campaigns tailored to specific markets and segments of interest.
- By positioning India as an experience-led, multi-destination product, this destination can move beyond the traditional model of milestone-hopping between cities and instead **promote experience-hopping based on refined traveller segmentations.** This approach will contribute to longer stays, increased spending, and higher satisfaction levels.



QUICK WINS

Outbound Market Take-Outs

LONG- TERM VIEW

- **Addressing the cultural gap is crucial.** Failing to close this gap effectively when catering to Indian travellers can lead to lower satisfaction with their travel experiences in destinations they are highly motivated to visit.
- **Indian demand**, which does not overlap with the European summer season (considering Indian travellers' preferences, such as experiences aimed at couples), can be **harnessed effectively by recognising specific seasonality trends.** This can be extremely advantageous for European destinations and presents many opportunities to develop products and services tailored to honeymooners, families, and solo travellers.
- **Expanding air connectivity networks to and from India is essential for leveraging routes that promote both inbound and outbound travel** from a strategic, long-term perspective.
- **Destinations should focus on developing travel products and services that reflect the preferences of Indian travellers, tailoring offerings to their specific needs and habits.** It is important to view Indian travellers not as a single market but as diverse segments, each with millions of potential customers across the country. To do so, is key to build collaborative bridges with travel industry players (tour operators, DMCs, airlines, promotion boards), to cater to specific needs of Indian, as well as European travellers.



**ABOUT
MABRIAN**



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- **30 global data sources**
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- **Specialised in destinations**



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More than **30 sources**
to offer the largest
standardized travel
database

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Inspiration**

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- FLIGHT PRICES
- FLIGHT BOOKING
- ACCOMMODATION

**Booking &
Planning**

- SPEND
- INTERESTS & PERCEPTION
- MOBILE DATA

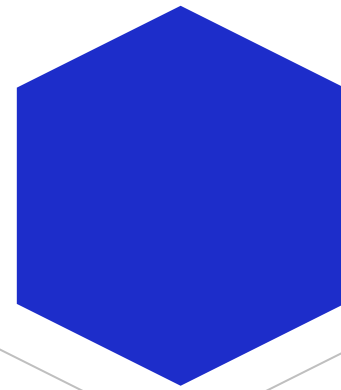
**Behaviour &
Experience**

TRIP REVIEWS

**Sharing &
Rating**

PRESENT IN MORE THAN 40
COUNTRIES

**VAST
WORLDWIDE
EXPERIENCE IN
DESTINATIONS**



Sources & definitions

Indexes definitions

GTPI (Global Tourist Perception Index): This index measures the overall level of visitor satisfaction with the destination. This combines the Hotel, Product, Security and Climate indices and analyses the distribution of general sentiment about the destination.

TPI (Tourist Product Satisfaction Index): This index, based on tourist mentions on social media, measures the level of satisfaction with the following products on offer at destination: Arts & Culture, Food & Cuisine, Family Activities, Active Lifestyle, Nightlife, Sunbathing, Wellness, Shopping and Nature. This index is obtained by analysing the distribution of positive, negative and neutral comments that are made in relation to each of these products on social media through Natural Language Processing techniques.

PSI (Perception of Security Index): This index measures the level of security perceived by visitors, based on tourist mentions on social media. This index is calculated using advanced Natural Language

Techniques that allow to understand when a comment on social media refers to these issues as well as the sentiment of the mention.

PCI (Climate Perception Index): This index, based on tourist mentions on social media, measures the level of visitors' satisfaction with the climate at the destination using Natural Language Processing techniques. This is achieved by measuring the volume of "complaints" on social media, that is, negative comments regarding the meteorology at destination and setting an inverse relationship: the lower the volume of negative comments, the higher the satisfaction index. This allows us to understand the relationship between the expectations of the visitors and the reality of the destination.

HSI (Hotel Satisfaction Index): This index, based on reviews on hotel portals, measures the level of tourist satisfaction with hotels at destination for 3-, 4- and 5-star hotels, based on comments made on TripAdvisor, Booking and Expedia. It is calculated using Natural Language Techniques to understand the sentiment of mentions.

Indexes scale

The indices show values between 0 and 100 points. Below is the rating scale to know the meaning and evolution of the indicators over time.

From 0 to 24 points: The indices in this scale, show very low levels of satisfaction and confidence and are therefore a priority area for revision.

From 25 to 49 points: Relatively low level of satisfaction and confidence. Significant potential for improvement.

From 50 to 74 points: Good to very good satisfaction level. Moderate potential for improvement.

75 to 100 points: Excellent levels of satisfaction and confidence. In some cases there is room for improvement, although in most of them these are levels to maintain and consolidate.

Sources



Air Connectivity Source:
Cirium. It includes direct scheduled flights

Hotel Price Source: OTAs

Social Media Sources: Instagram and Twitter

Hotel Review Sources & Visitors' Profile: Expedia.com, Booking.com, TripAdvisor



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