

What I See What I Take

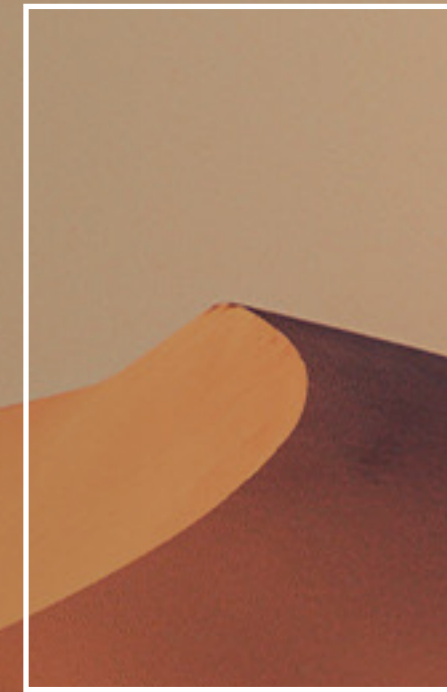
What a TikTok trend about photography can teach us about content fragmentation and complexity in a multi-source world.

Sabre



Lately, we've been hooked on the latest TikTok trend – “What I See Versus What I Take,” which highlights how photographers can find beauty in a vast, complicated scene by refining their vision and removing distractions to focus on a clear subject of their choosing.

It's caught our interest because it's a fitting metaphor for how the increasingly fragmented travel sector operates in a vast and complicated content space – with a greater-than-ever need to zero in on what's important.



what I see

WHAT I SEE VS WHAT I TAKE

When it comes to travel, technology enables more choices (which is wonderful) yet also fuels complexity (which overwhelms). As with most situations, it's one thing to have access to nearly infinite options appealing to every taste; it's another to parse through it and find exactly what you need.

For example, travel agencies operate in an ever-expanding content space, with flights, hotels, car rentals, rail tickets, and more available from thousands of sources – access that agents of yesteryear could have only dreamed of! But without some help, we've found they're facing the very real threat of too much of an (exceedingly complicated) good thing.

Fragmentation and complexity are starting to take a toll on operations. We recently conducted third-party research, surveying travel agents in 14 countries across the globe, to better understand the full impact of this widening breadth of fragmented content and explore which technology solutions can alleviate some of these pain points – or, in photographic terms, how to capture the perfect shot amidst an overwhelming landscape.

Here is what our study revealed.



what I take

01 TAKING IN THE SCENE

Understanding the complexities of content fragmentation

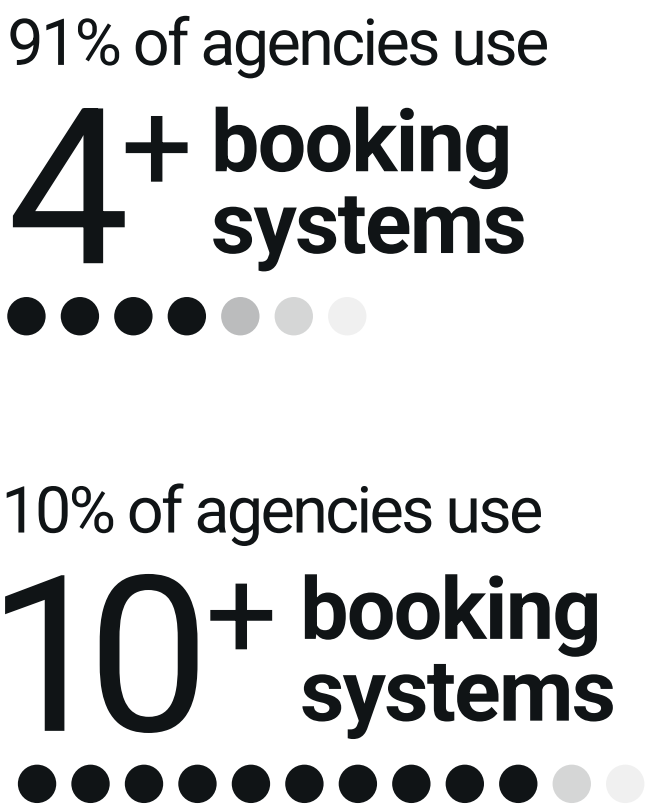


what I see

System sprawl is rampant.

Research revealed over 91% of agencies operate with four or more booking systems, underscoring a high level of operational complexity.

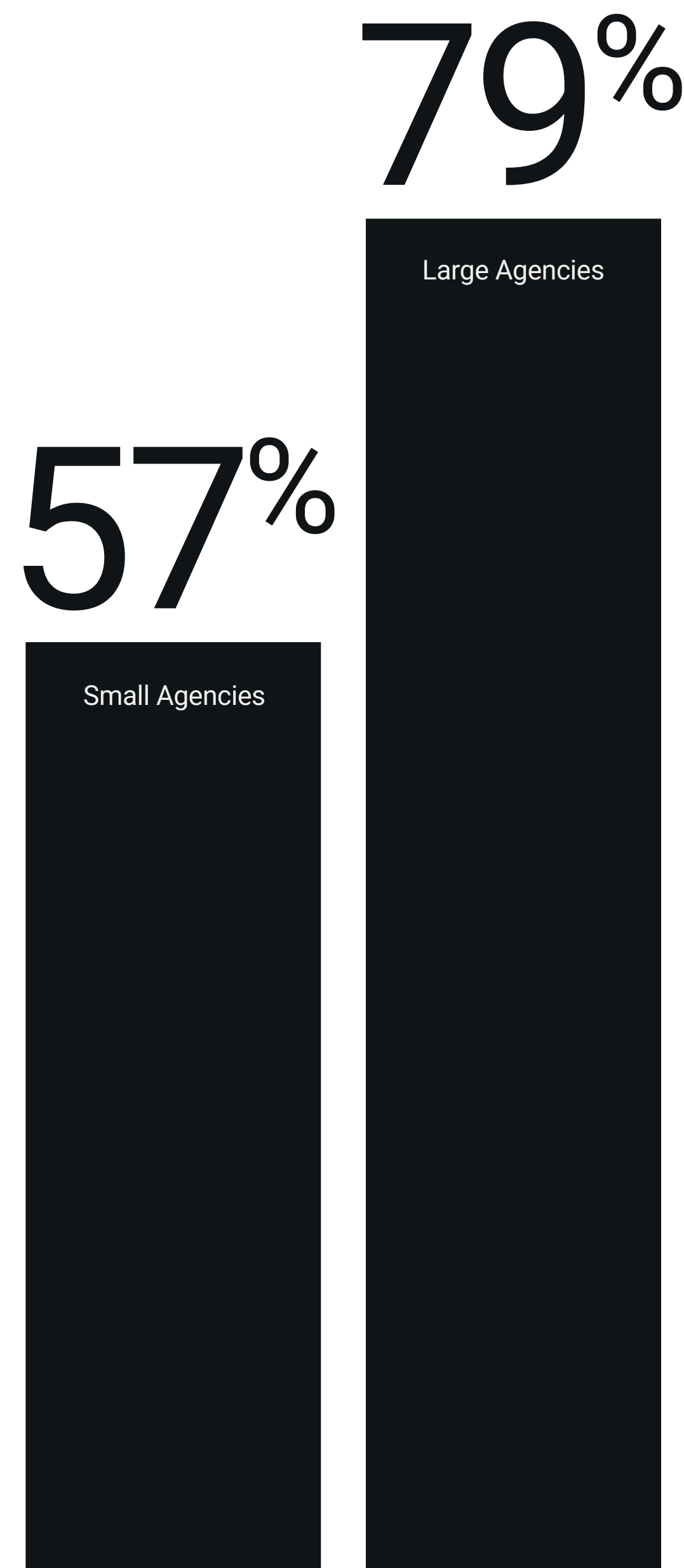
Notably, more than half of agencies report using seven or more systems, and over 10% now manage 10 or more — a clear signal of increasing system scope creep.



what I take

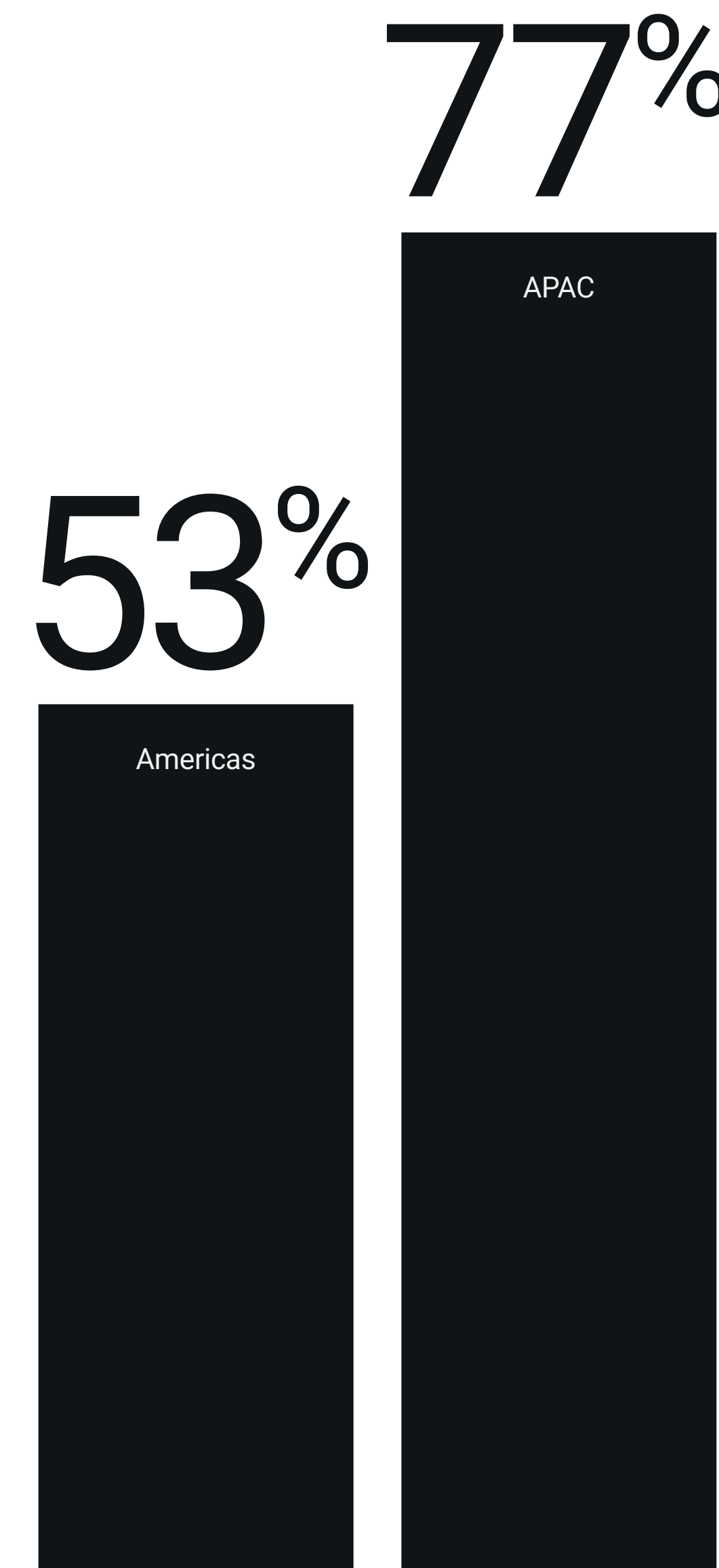
Booking system “stacking” has increased rapidly in the past three years.

Rather than consolidating these extra content sources to begin streamlining operations, research revealed agencies are instead continuing to add systems to gain access to more content – with over 70% reporting growth in system count over the past three years.



This is particularly prevalent among larger agencies and in APAC.

Larger agencies are more likely to report a rise in booking systems, with 74–79% seeing growth, compared to just 57% of small agencies. APAC experienced the largest system increase, with 77% reporting additional sources, versus only 53% in the Americas.





“Content fragmentation has stretched our resources, with agents spending 20% more time navigating systems.”

LILY AGONoy

Managing Director at Jebsen Travel Group
TMC, Wholesaler, Leisure and MICE in Hong Kong

Agencies of all sizes are juggling a wide range of system types to access content across air, hotel, car, and rail, reflecting the layered complexity of today's multi-source environment



TYPES OF SYSTEMS USED TO ACCESS CONTENT

82%

Use a global distribution system

81%

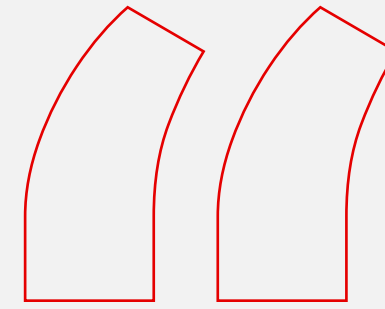
Use supplier-managed portals

76.2%

Use in-house proprietary booking systems

75.4%

Use third-party content aggregators



“Our clients expect a seamless experience. Fragmentation threatens that expectation—it can lead to missing content, inconsistent information, and, ultimately, a loss of trust.

GONZALO MARTINEZ ANGELLO
COO at Furlong Fox
TMC in Argentina

02 ADJUSTING THE APERTURE

Assessing content fragmentation's impact on travel agencies



what I see

Fragmentation is actively hurting agency performance.

More than half of agencies surveyed believe booking across multiple systems:



Creates unwanted **complexity**



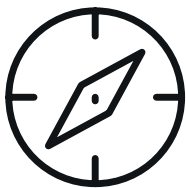
Drives up operational and tech **costs**



Makes consistent customer experience **harder**



Slows onboarding for new agents



Makes it **harder** to find the best travel options



Contributes to agent **frustration** and impacts retention



what I take

02 ADJUSTING THE APERTURE

Unsurprisingly, smaller agencies are most likely to report negative impacts from system fragmentation, with 71% citing unwanted complexity, compared to 60% of mid-sized agencies and just 44% of large agencies. Research revealed similar results regarding cost, service consistency, onboarding, and retention, suggesting larger agencies are better equipped to absorb the challenges of complexity.

Interestingly, this data was largely consistent across regions and business types.



Small Agencies

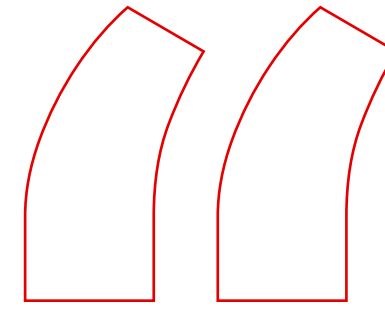


Mid-sized Agencies



Large Agencies





“Integrating data seamlessly across disparate systems has become increasingly complex—adding to consultants’ workloads and increasing the potential for inefficiencies.”

TATANG TABRANI
Managing Director at Global Travel
Corporate Agency in Singapore

The connectivity tech burden is accelerating, especially via APIs.

While APIs offer a modern, “lightweight” way to connect to content, **almost 90% of agencies surveyed manage four or more integrations**, indicating a heavy technical burden tied to managing content access.

Nearly two-thirds of agencies surveyed have increased API integrations over the past three years and over half of all agencies claim managing multiple API connections has become a burden, highlighting the operational strain that comes with technical fragmentation.



2/3 of agencies have increased API integrations over the past 3 years



APAC shows the highest proportion of agencies managing 10+ APIs, while the Americas skew leaner, with over half still in the 4–6 range.



“The current fragmentation of the technological ecosystem—with multiple APIs and platforms—poses an operational challenge that can shift our focus away from our core mission: guiding and supporting the client in every travel decision.”

JOSE SMITH
Manager at Continental Travel
TMC in Peru

03 NARROWING THE FOCUS

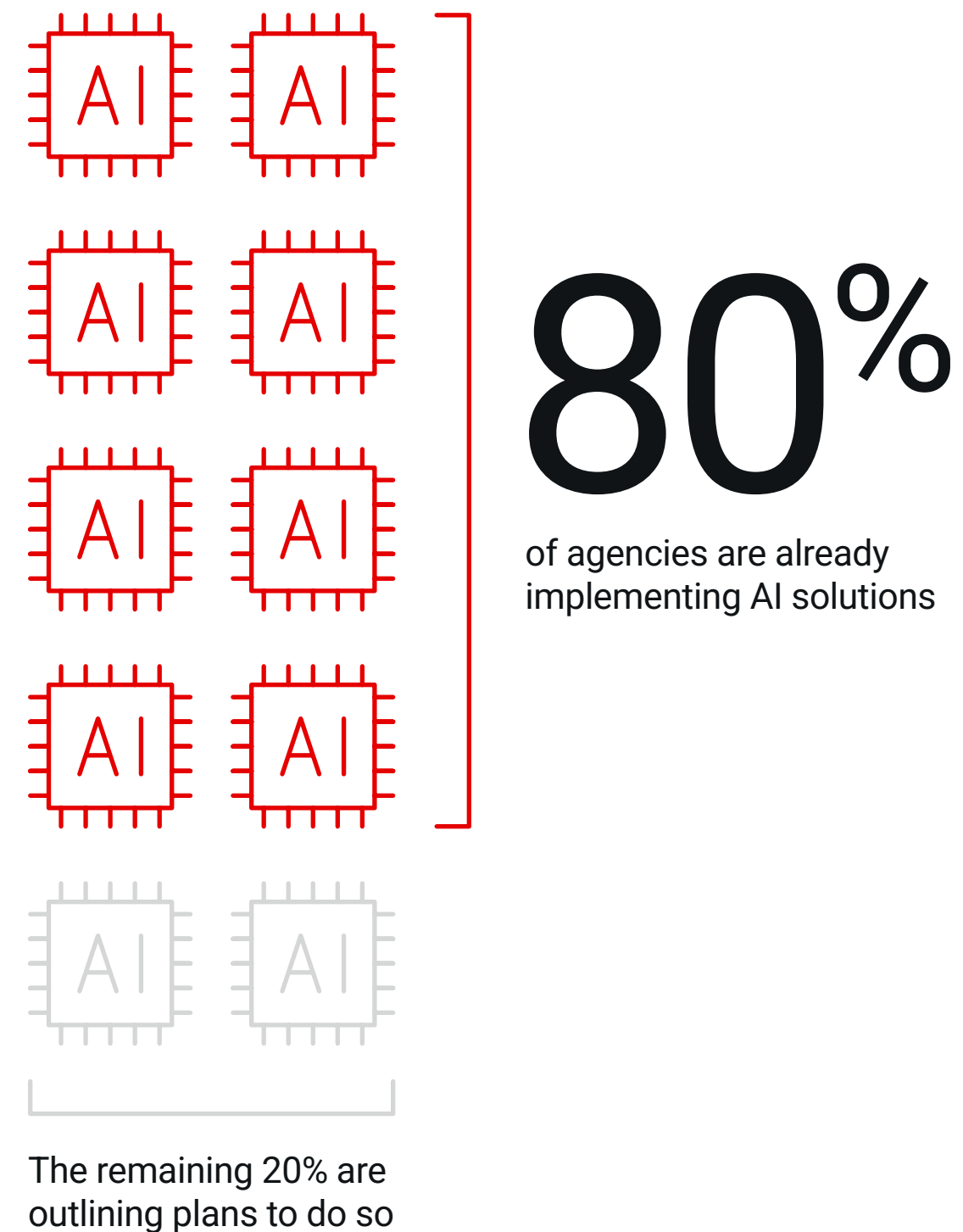
Artificial Intelligence as a viewfinder



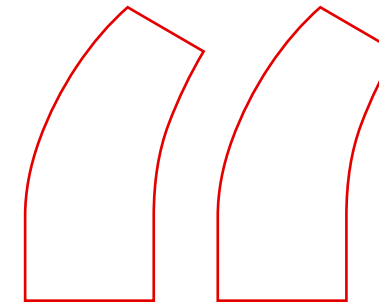
The role of AI in solving content fragmentation woes cannot be understated.

AI is becoming foundational, with nearly 80% of agencies already implementing AI solutions, and the remaining 20% outlining plans to do so.

Agreement is nearly unanimous on the perceived benefits of AI: Over 91% of agency leaders believe AI will enhance both agent efficiency and the customer experience, underscoring AI's dual role as a productivity booster and service enhancer. Of those using AI, almost 40% are already seeing an impact on agent productivity.

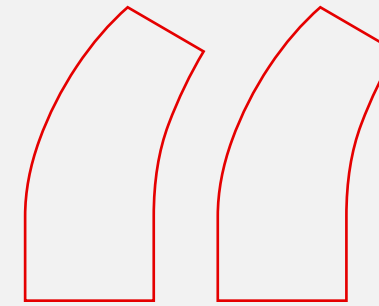


what I take



“Content fragmentation complicates audience engagement, but AI can unify data for personalized experiences.”

Survey respondent at a TMC in the United States



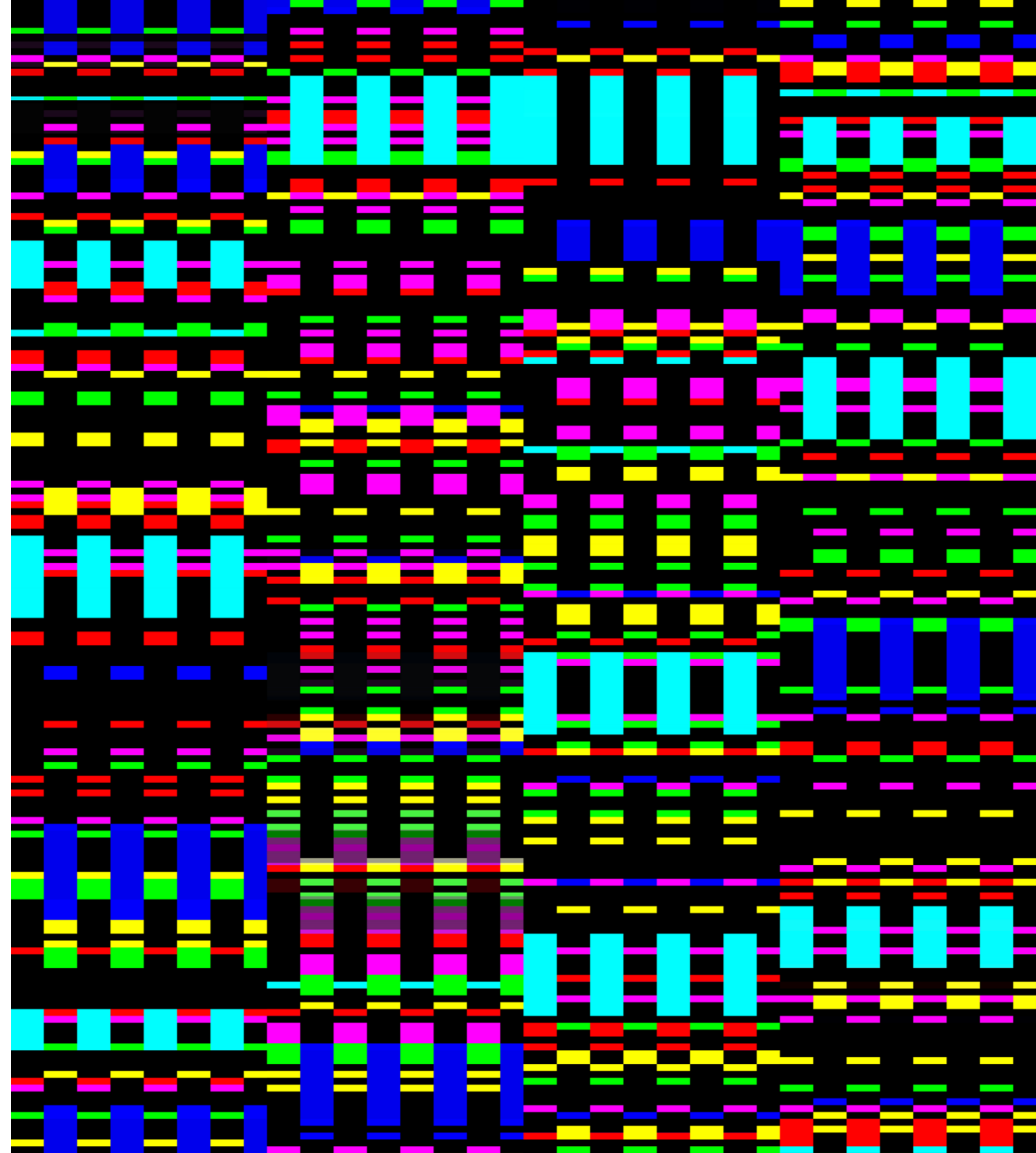
“By analyzing customer data, we can provide more personalized rewards programs and enhance customer stickiness.”

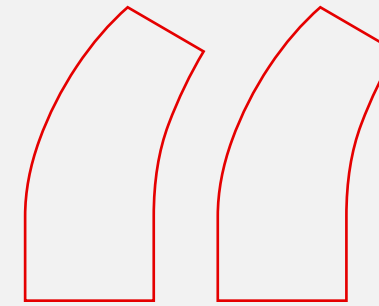
Survey respondent at a TMC in New Zealand

However, not all AI is created equal, and it's critical to select the right solutions.

AI is seen as a powerful tool for managing complexity, but also as a potential contributor to the problem. Many responses reflect the current duality of AI:

It helps organize, but it can add noise and confusion if poorly implemented.





**“AI is helping organize this mess,
but sometimes it feels like it’s adding to
the problem by creating more content.”**

Survey respondent at an OTA in Singapore



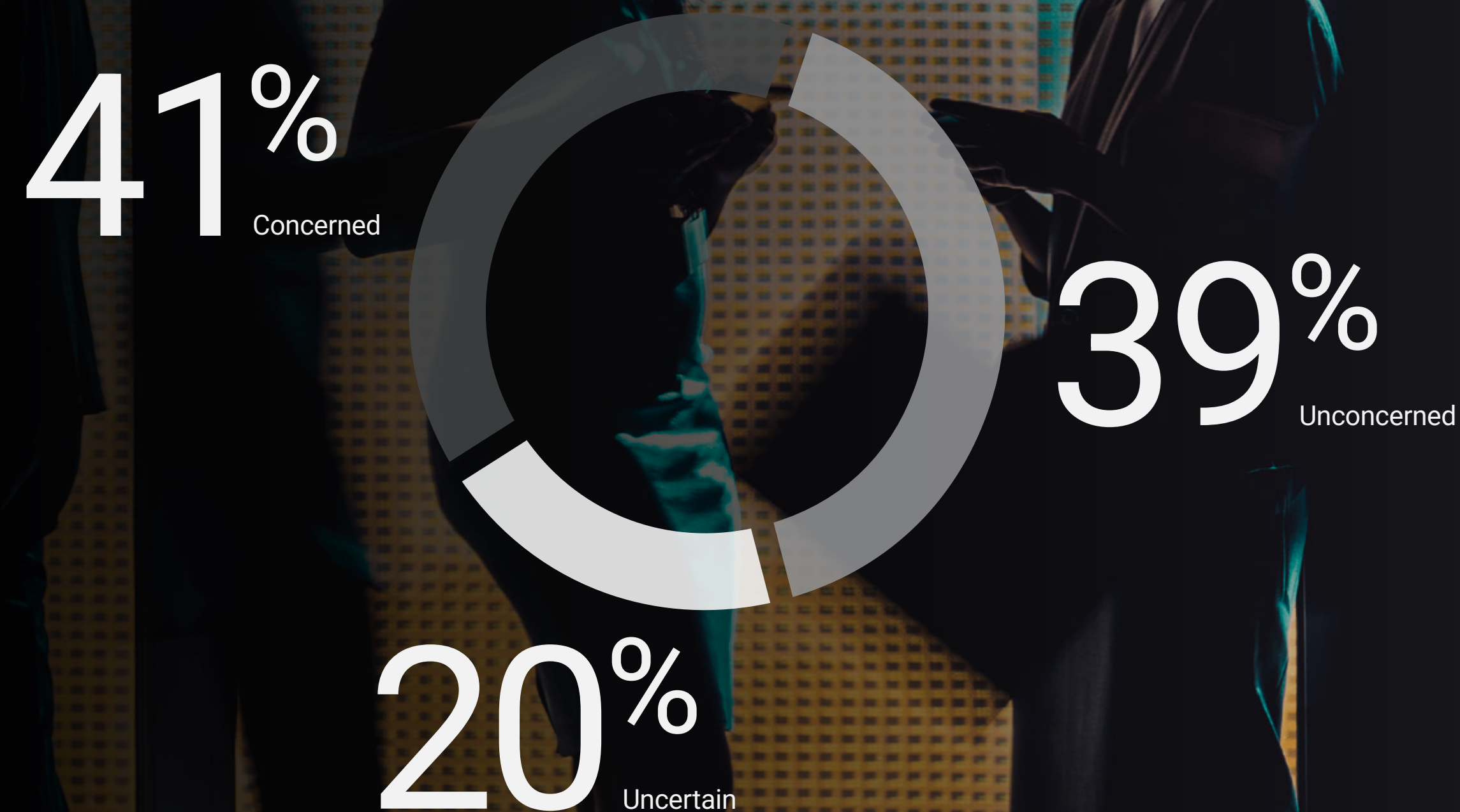
“AI can be a double-edged sword. It helps me keep up with fragmented content across platforms, but it also contributes to the noise.”

Survey respondent at a travel agency in Australia

03 NARROWING THE FOCUS

While most agencies are optimistically embracing AI, 41% worry about AI's impact on job security in the agent sector. Nearly as many said they are unconcerned and the balance 20% are uncertain – reflecting conflicting industry views of AI's long-term implications for staffing.

AI IMPACT ON JOB SECURITY AMONG AGENCY STAFF



These findings underscore that AI is not a one-size-fits-all solution, and its impact varies based on how it is implemented. Agencies are looking for solutions that genuinely streamline—rather than further congest—and for tools that don't replace employees, but instead free them up to excel at the more human side of the business.

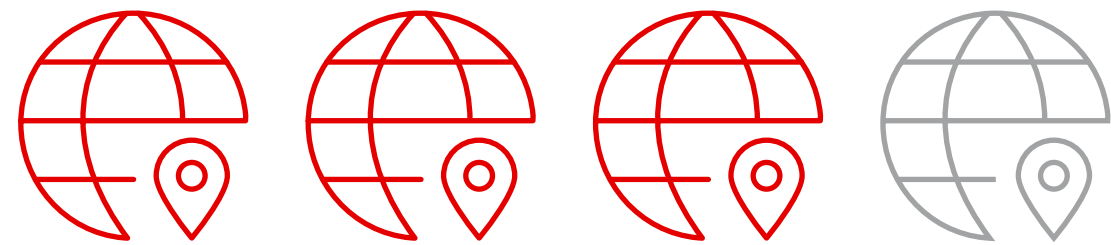
04 NAILING THE SHOT



**Content unification
is a clear priority,
not just a
preference.**



The need for a wide breadth of multi-source content remains great, but the desire for unified API access is overwhelming.

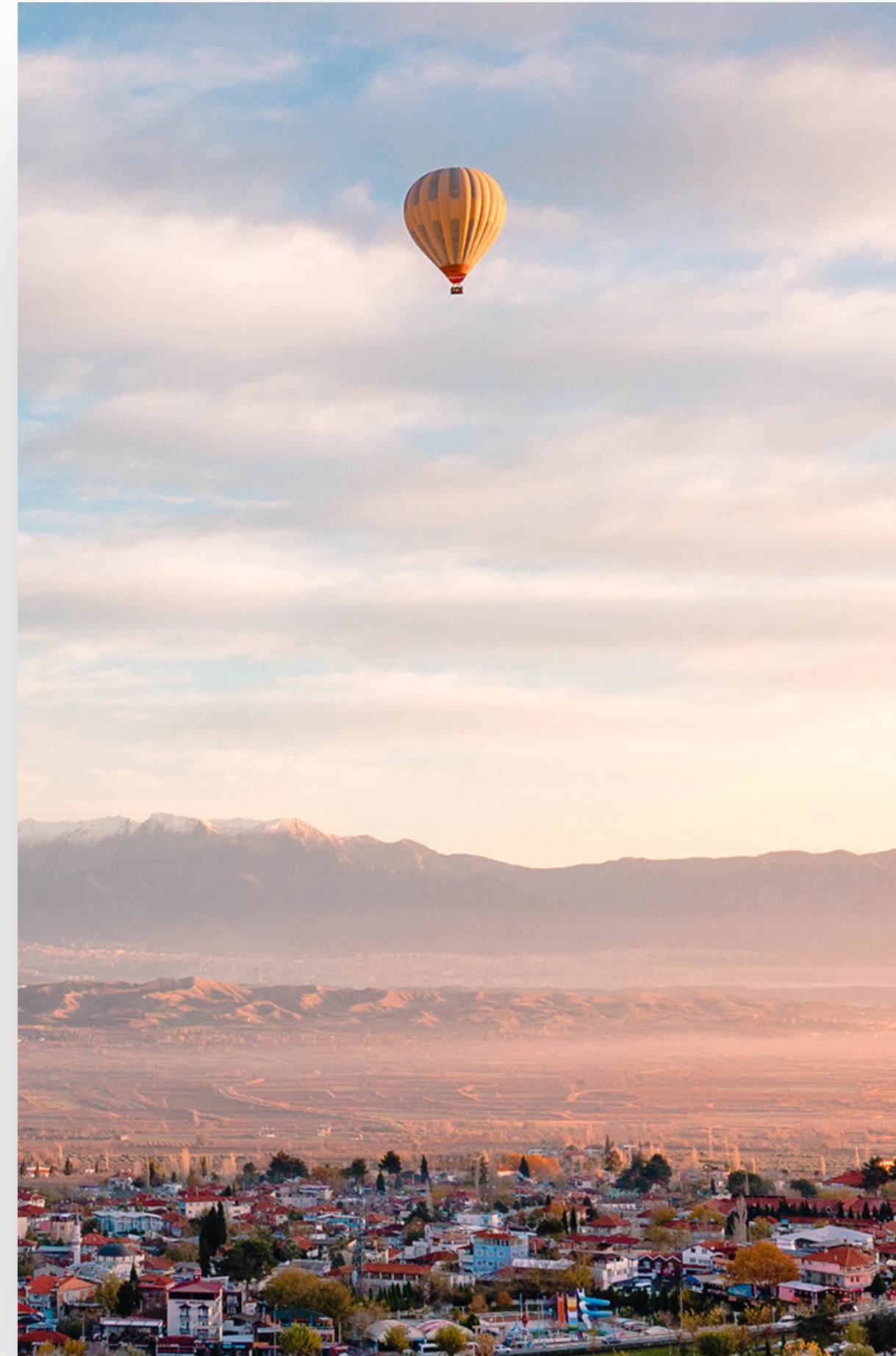


3/4

of agencies believe that a single booking system would lower costs

Over 80% of agencies say that unified access via a single connection would reduce tech costs — a clear signal that simplification is not just preferred, but is seen as a strategic cost-saving move.

80%

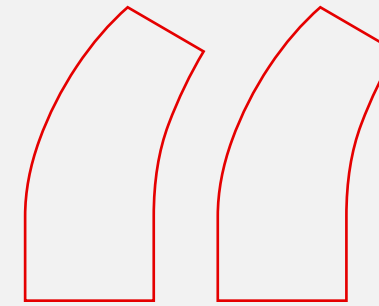


what I take



**“We believe the key lies in
integrating tools that centralize
and structure content sources.”**

RENAUD MARRACHE
Deputy Managing Director at Group FRAM Karavel
Online Tour Operator in France



“In our view, the ideal way forward is a more unified, open, and connected ecosystem—where content flows seamlessly, regardless of its source.”

GONZALO MARTINEZ ANGELLO
COO at Furlong Fox
TMC in Argentina

Agencies overwhelmingly favor simplified access to a broad array of options — not fewer content sources, but fewer systems and integrations

We believe fragmented content from a variety of sources is here to stay, and artificial intelligence, when implemented properly, can lead agencies to the precise offer their customers are seeking.



WHAT I SEE VS WHAT I TAKE



what I see

So, back to the TikTok photography trend:

While vastness can certainly be overwhelming, should you let the scale of Yosemite's El Capitan or the immensity of Rome's Pantheon prevent you from taking a breathtaking detail shot?

While there is much to admire in these sprawling environments, there's also something powerful in finding beauty in a perfectly framed snapshot.

WHAT I SEE VS WHAT I TAKE

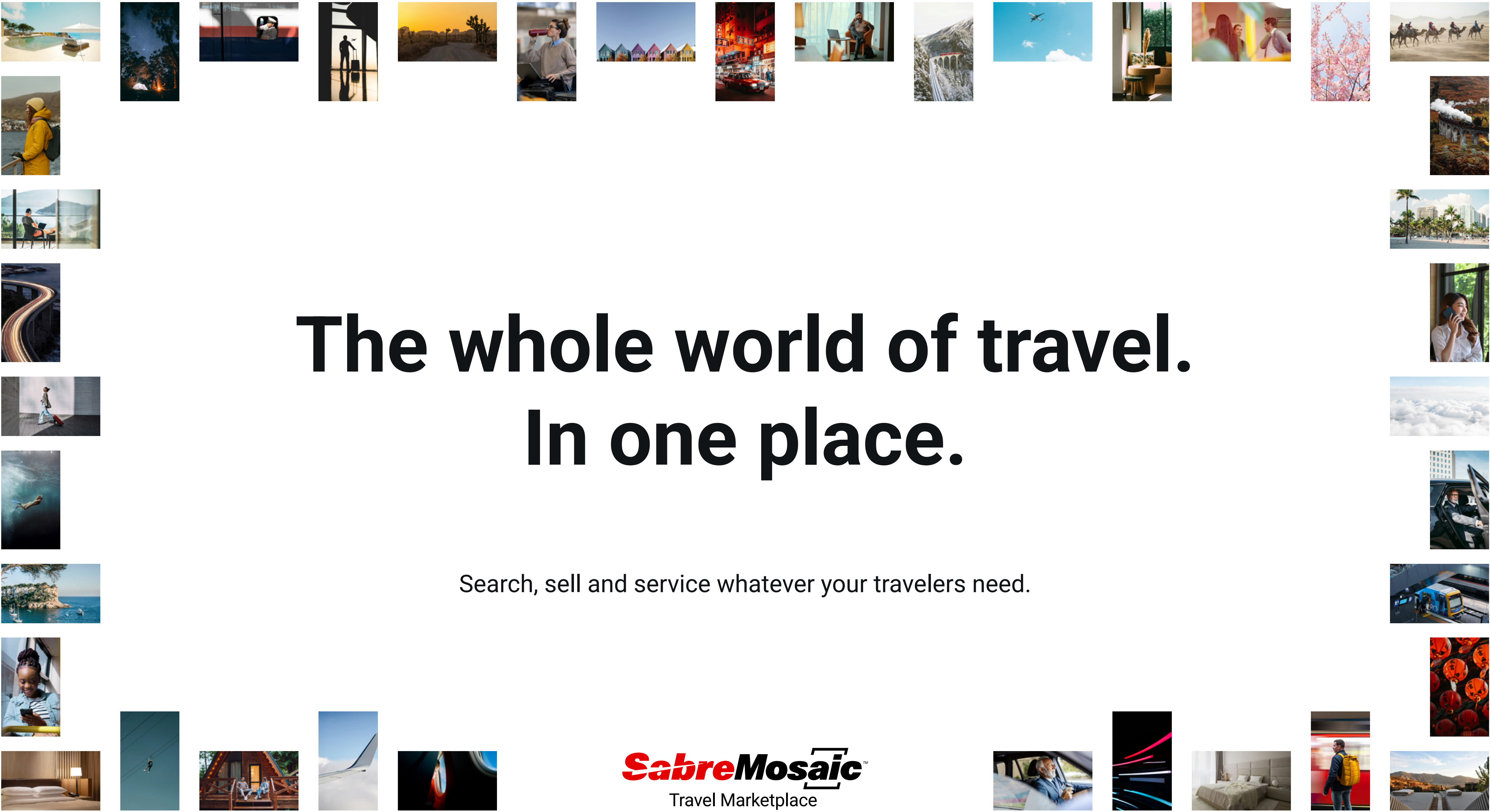
Or, in a world of
fragmented content,
finding the offer you seek.

SOURCE

Content Fragmentation Study conducted by Qualtrics between 22 April and 1 May 2025 in Australia, Austria, Brazil, France, Germany, India, Italy, New Zealand, Saudi Arabia, Singapore, Spain, Switzerland, United Kingdom and the United States. Supplemented with qualitative insights from customer interviews.



what I take



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