

SHOPPER SURVEY

2024



The foundation of modern airline retailing.

atpco

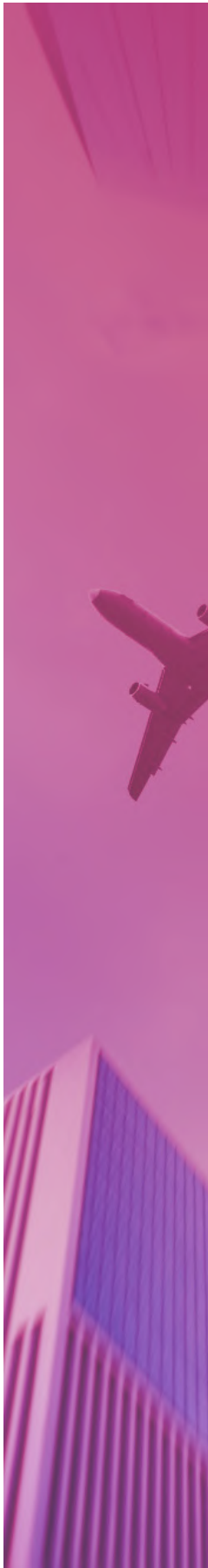
VISUAL HARMONY

Aligning visuals and consumer demand.

ATPCO's 2024 annual flight shopper survey showed that yet again, today's flight shoppers are already in the habit of paying for more—whether that's for seats, flexibility, or cabin upgrades. However, when booking flights or looking to purchase these extras, they are often met with a lack of visuals that they have come to expect from online merchandising. How can the airline industry give consumers the flight shopping experience they demand while also increasing revenue and attracting new customers?

CONTENTS

- 03 Introduction: The flight shopper survey and what it means for you
- 04 Answering your most sought-after questions
- 05 The proof is in the results
- 10 Business versus leisure
- 14 Results that matter, foundations for success
- 15 Conclusion: Take your strategy to the next level with visuals





The **flight shopper survey** and what it means for you.

What sets 2024's survey apart?

- ✈ **Results based on real purchase decisions:** In [previous surveys](#), respondents answered theoretical questions about how visuals might influence their purchasing decisions. The big difference this year was rather than being asked “would you,” survey respondents were asked “have you” to understand true behavior based on real-life experiences.
- ✈ **Diverse traveler personas responded:** [Routehappy's](#) merchandising content reaches several different types of customers. Considering this diversity affects how merchandising content is created, and the flight shopper survey explored exactly what each persona wants to see.
- ✈ **Tailored business versus leisure questions:** Would shoppers respond differently when looking for business or for leisure travel? We asked questions to understand these differences and their impact on results.

What is the flight shopper survey?

Annually, ATPCO surveys hundreds of flight shoppers to ensure the merchandising content we create with airlines resonates with what today's consumers want to purchase and how they want to purchase it. In 2024, we surveyed 520 flight shoppers from 30 different countries who traveled at least three times in 2023 and purchased a flight online for business or leisure. Survey respondents were ages 18 and up and split evenly between male and female. There were roughly 130 respondents from each region: Asia Pacific, EMEA, Latin America, and North America.



ANSWERING

your most sought-after questions.

Use these insights to take the next step toward meeting consumer demand and unlocking the power of true modern airline retailing. The results cover flight booking methods, how to increase upsell of paid seats, and behaviors and content that can make a significant difference:

Visual impact on purchasing decisions

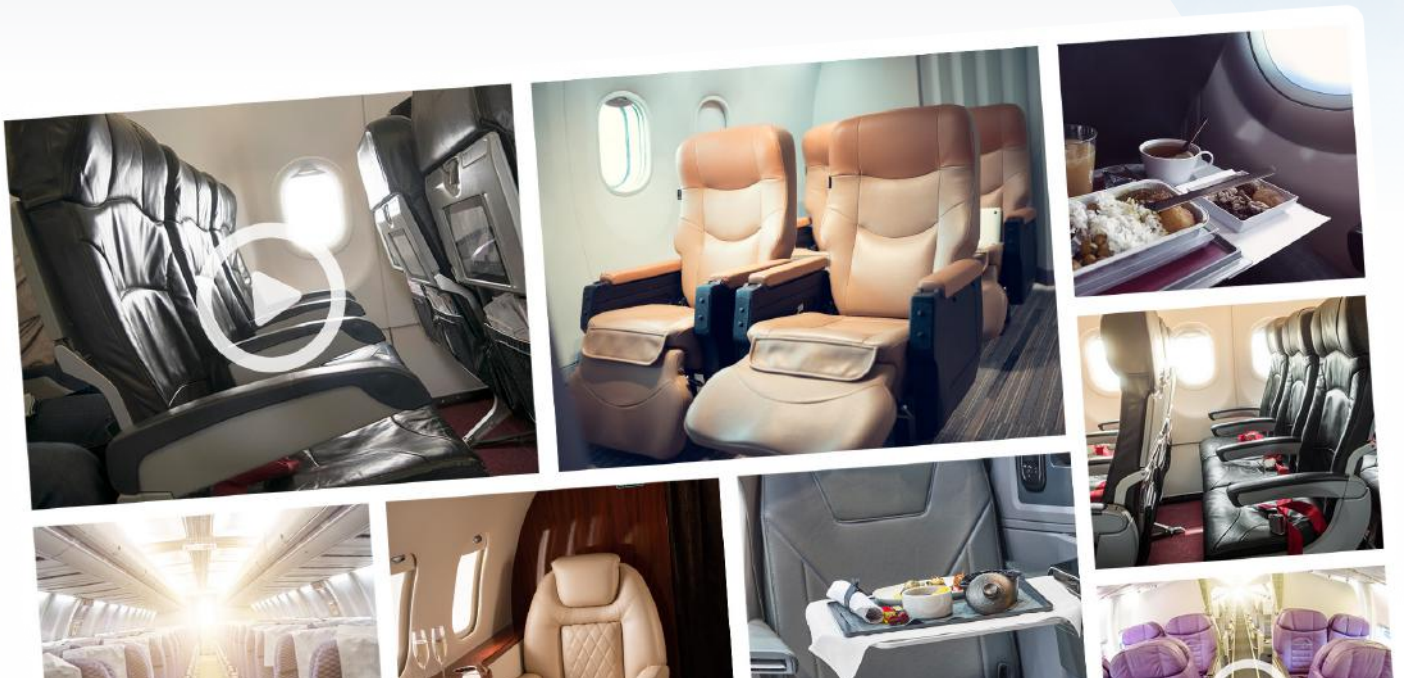


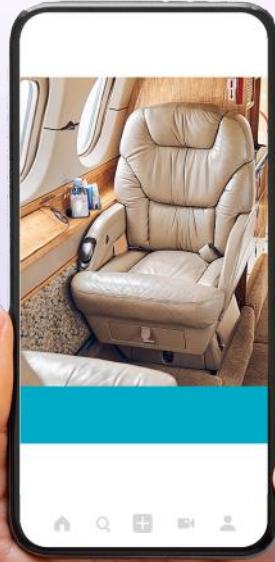
- ✖ Image carousels
- ✖ Seat photos and videos
- ✖ 360-degree tours

Business versus leisure



- ✖ Upgrade behaviors
- ✖ Preferred booking methods





THE PROOF IS IN THE RESULTS



When searching for a flight, how many images do flight shoppers want to see in a carousel?



Respondents prefer to see **four** to **six** images in a carousel when shopping for a flight.



Our takeaway: Focus on quality over quantity. Your customers want images, but showing them relevant, impactful content is preferred over too many images.

ATPCO's [2022 flight shopper survey confirmed](#) that 80% of shoppers said visuals influence them to make a booking, compared to no visuals at all. This year, survey respondents were shown four different flight search results each with a different number of images in a carousel. The carousel with four to six images in it was selected by 40% of respondents, while the remaining selections were divided between fewer than three images (25%), six to eight images (20%), and more than eight images (15%).

How ATPCO can help: Display visuals to differentiate your offers and increase conversions.

Routehappy Premium UPAs ([Universal Product Attributes](#)) open the door to endless merchandising opportunities for airlines and channels with images, videos, and targeted messaging. This content can be highly targeted by aircraft, cabin, route, time of day, fare, and more. Let ATPCO help you display the four to six images your customers want to see within a carousel.



Do flight shoppers want to view a short video about the flight while shopping?



76%

of respondents are more inclined to purchase a flight if they can view a short video about it during the shopping process.



Our takeaway: Including videos in your flight shopping display is a clear advantage.

How ATPCO can help: Visually bring to life the experience of the flight with Routehappy Premium UPAs. Whenever possible, capture short videos about the products and services on specific flights.



Do flight shoppers pay to select a seat?

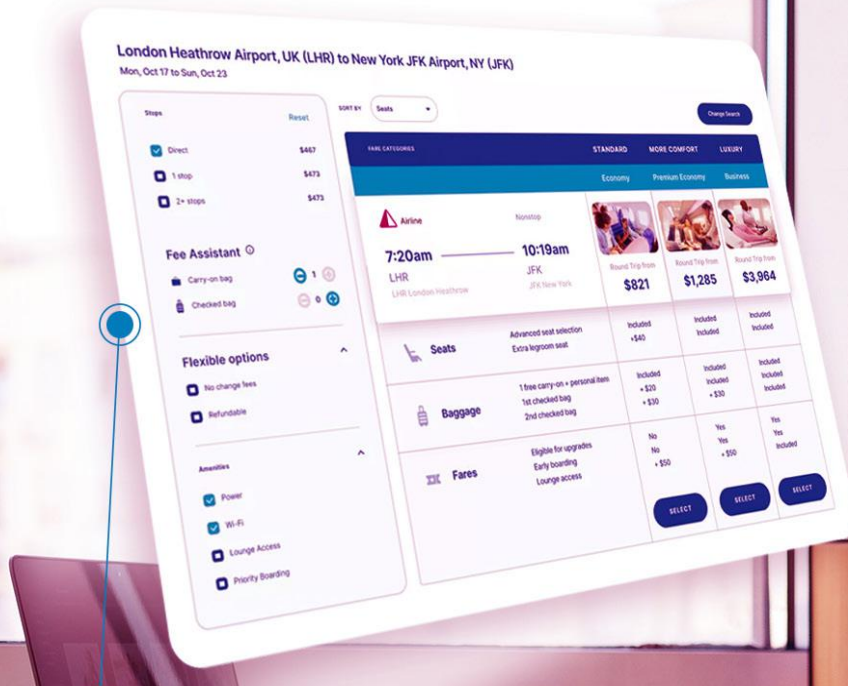
83%

of respondents have paid to select a seat when booking a flight.



Our takeaway: If given the option, passengers will pay more for seats that meet their preferences.

- ✖ From window and aisle seats to business class and bulkheads, customers take advantage of the ability to pay more to get the exact seat they want.



Do flight shoppers prefer to see a visual of the seat while shopping?



80%

of respondents prefer to see a visual of the seat when paying to select a seat for a flight.



Our takeaway: Add visuals to promote specific seat types.

✖ As we expected, not only have passengers paid to select their seat, but they also prefer to see their seat before they book.

How ATPCO can help: Clearly display seat options through seamless integration.

Seat Characteristic Targeting: This feature enables airlines to display seat-specific visuals within a cabin.

✖ With **Seat Characteristic Targeting**, UPAs can be highly targeted and customized with actual visuals of seats and positions in specific aircraft and cabins. Display private window seats, center section "honeymoon" seats, bulkhead seats, exits seats, extra legroom economy seats, and more. The opportunities are endless.

✖ Hey, channels! These UPAs have seamless and consistent integration across platforms, including seat maps, so channel partners can also benefit from these visual displays.



Do flight shoppers want to see a 360-degree tour of the cabin?

83%

of respondents want to see a 360-degree tour of the aircraft cabin when selecting a seat.



Our takeaway: Virtually step on board!

✈ When selecting a seat or viewing a seat map, flight shoppers prefer interactive 360-degree tours that allow them to see their exact seat location. This advanced visual media helps manage expectations and reduces surprises or disappointments when boarding, enhancing customer satisfaction.

How ATPCO can help: Start with [Premium UPAs!](#) Where possible, capture 360-degree tours of new and existing aircraft. ATPCO is working to create a scalable solution to support these types of tours so they can be leveraged in the booking flow or when flight shoppers are selecting seats.



BUSINESS VS. LEISURE



Do business and leisure flight shoppers have the same upgrade behaviors?

From Basic Economy to Standard Economy?



YES!
CLOSELY ALIGNED

76% of leisure travelers and **75%** of business travelers paid to upgrade to a higher fare from Basic Economy to Standard Economy.



Our takeaway: Travelers, both business and leisure, are willing to pay to get their preferred flight experience. The fact that both types of travelers are ready to spend on upgrades shows the need to clearly present their upgrade options during the flight shopping flow to make it easy for them to make that decision.

How ATPCO can help: Display your different branded fare groups effectively and consistently across channels.

- ✈ Utilize and showcase [Branded Fares with Premium UPAs](#) to clearly present options during the flight shopping journey. Airlines can bundle and display various flight options and features into distinct fare families that can be visually showcased on channels, helping shoppers choose the experience that best fits their preferences. This approach leads to better-educated shoppers, increased upsell potential, stronger differentiation from competitors, and enhanced brand recognition. [Branded Fares](#) are included at no additional cost for over 440 airlines.

From Standard Economy to Premium Economy?



Here, behaviors differed slightly: **80%** of business travelers said they have paid to upgrade to Premium Economy, but only **62%** of leisure travelers have.



Our takeaway: Fewer leisure passengers have paid to upgrade to Premium Economy, but they still number more than half of shoppers.

How ATPCO can help: Make upgrade opportunities easy and more attractive with clear, branded, and visual displays using [Routehappy](#) content.





Do business and leisure travelers have the same preferred booking methods?

Direct or Indirect?



CLOSELY ALIGNED

while business and leisure travelers are booking through each method, they **both** indicated they **prefer booking direct**, with **84%** leisure and **79%** business.



Our takeaway: Loyalty leads

- ✖ Airlines should continue to encourage loyalty and deliver personalized, visual shopping experiences that passengers are seeking so they know they will have a consistently great booking experience every time.
- ✖ Indirect sales channels should continue to explore new opportunities to “wow” shoppers in their shopping journeys. Additionally, they should strive to maintain consistency with the airline’s visuals and messaging so shoppers can expect a clear, consistent, and informed experience wherever they shop.

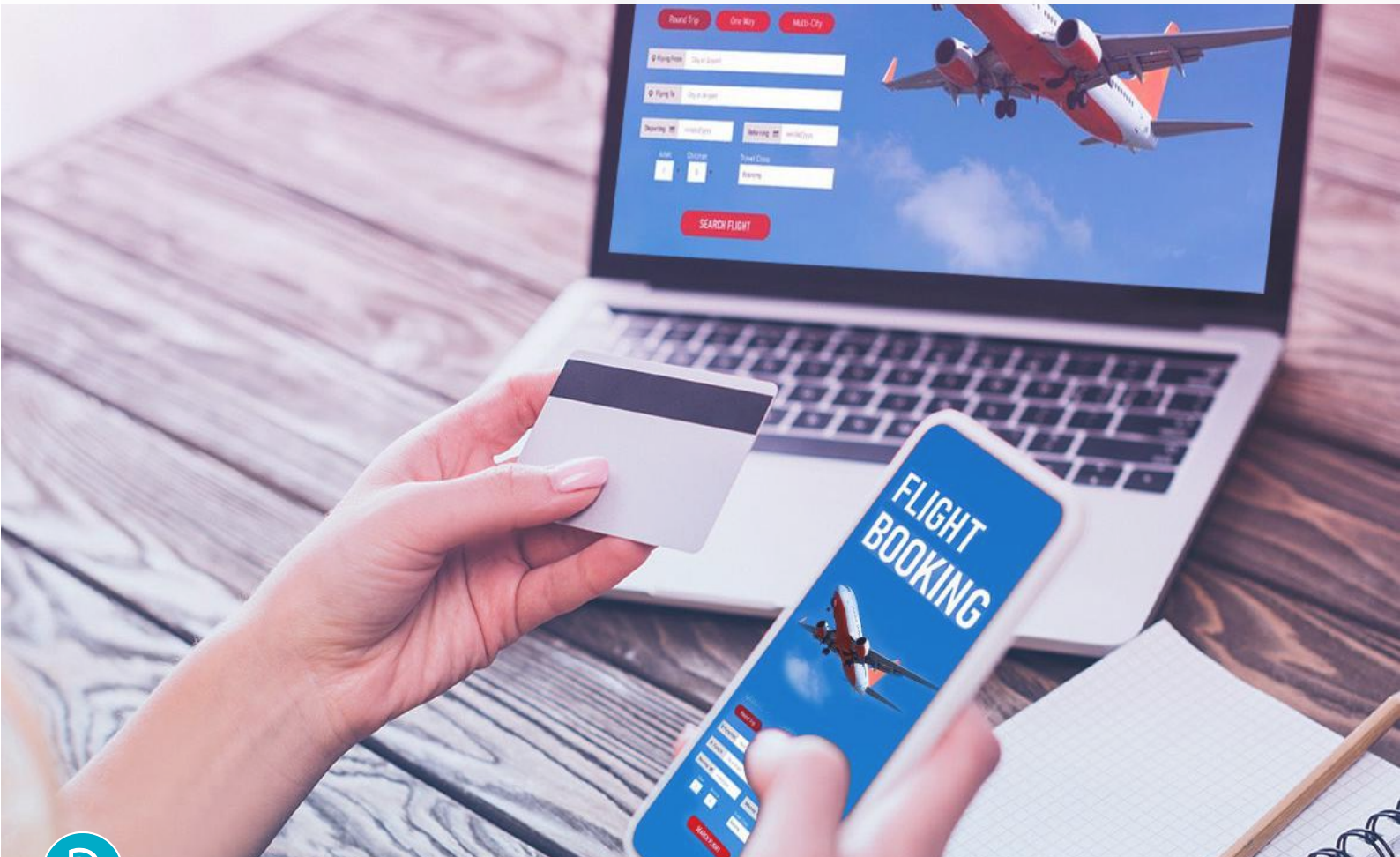
How ATPCO can help: Build trust with customers by keeping offers consistent everywhere they shop.

- ✖ Airlines – Try the Loyalty Rewards UTA ([Universal Ticket Attribute](#)) to expand content with detailed benefits and restrictions for mileage accrual, enhancing the flight booking experience by helping shoppers choose loyalty-rewarding fares. Strengthen customer loyalty and satisfaction, promote upsell, and create a more enticing booking offer.
- ✖ Indirect sales channels – Create that “wow factor” for your flight shoppers by integrating [Premium UPAs](#) in your displays to effectively merchandise airline products and services.

Desktop or mobile?



Business travelers slightly preferred mobile **(57%)** while **leisure** slightly preferred desktop **(54%)** for flight shopping.



Our takeaway: Airline and channels need to deliver great shopping experiences on both mobile and desktop.

How ATPCO can help: Create a consistent visual experience on both desktop and mobile with Routehappy content

RESULTS THAT MATTER.

Foundations for success.

It should come as no surprise ATPCO is just as interested in these results as our airline and channel partners. [Routehappy](#) continues to provide a standardized way to present detailed information about airline products and services, allowing airlines to effectively merchandise their offerings across distribution channels.

UPAs ([Universal Product Attributes](#)) give consumers detailed information about flight amenities like seat type, Wi-Fi, and in-flight entertainment.

These results from flight shoppers help us drive our development and provide our partners the best experiences for your customers.



Conclusion: Take your strategy to the next level with visuals.



The survey results show just how crucial visual content is for enhancing the flight shopping experience. Here's what to remember:

Traveler behavior

- ✗ Both business and leisure travelers are willing to pay for seat selection and upgrades.

Traveler preferences

- ✗ Seat visuals, videos, and 360-degree cabin tours are in high demand.
- ✗ Travelers value detailed visual information for booking decisions.
- ✗ Flight shopping is preferred equally on mobile and desktop, but direct is preferred over indirect.

With all these insights, what's next? How can you turn what flight shoppers say they want into what they actually start to see when booking with you?

If you're ready to start meeting the needs of today's flight shoppers—including both business and leisure travelers—with visual content, it's time to upgrade to Routehappy Premium UPAs. ATPCO's Routehappy merchandising solution gives you

the ability to create and display customer-centric content that is in high demand.

Start reaping the benefits of targeted information, messaging, visuals, videos, and more to differentiate and showcase your offers. Visual content has gone from optional to expected in flight booking. Join the 45 airlines and 39 channels who are already seeing the results Routehappy's Premium UPAs deliver.

Scan (or click) the **QR code** below to talk to an ATPCO merchandising expert.

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The foundation of modern
airline retailing.



Scan me
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