

atpco



SHOPPER SURVEY REPORT 2025

The foundation of modern airline retailing.

THE POWER OF A VISUAL EDGE IN FLIGHT SHOPPING: HOW LOOKS LAND BOOKINGS

ATPCO's 2025 flight shopper survey findings confirm what many in the industry have suspected: visuals have a measurable impact on purchasing behavior. Whether travelers are upgrading to premium cabins, selecting seats, or purchasing ancillaries, clear and compelling visuals influence their decisions at every step.

This report explores insights from 894 flight shoppers across 30 countries, revealing one key takeaway: when travelers can see the experience, they're more likely to buy it. Airlines and sales channels can use these insights to better understand how ATPCO's **Routehappy** enhances flight shopping and drives meaningful revenue results.



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INTRODUCTION: THE POWER OF VISUALS IN FLIGHT SHOPPING

Traditionally, travelers have prioritized price and schedule when booking flights. However, as digital commerce has evolved, transparency in the booking process and visual representations of products have become key factors in purchasing decisions. In industries like hospitality and e-commerce, consumers expect to see exactly what they are buying before they commit. The airline industry is no exception.

Survey participants included 894 travelers across **30** countries, all of whom:

- ✈ Took a minimum of three flights in 2024
- ✈ Booked a flight for business, leisure, or both in 2024



ATPCO's 2025 flight shopper survey sought to answer the following key questions:

- How do visuals impact a traveler's likelihood to book, upgrade, or purchase ancillaries?
- Do visuals create confidence in purchasing decisions?
- What role do visuals play in airline merchandising strategies?

Key findings revealed:

66%

66% of travelers say visuals of seat types increase their likelihood of paying for a better seat.

56%

56% of travelers are more likely to purchase ancillaries such as priority boarding, premium seating, baggage, or lounge access because of visuals.

76%

76% of travelers say visuals of in-flight services such as Wi-Fi and food influence their purchasing decisions.

The results of the survey clearly demonstrate the power of visual merchandising in travel decision-making. Travelers who can visualize their flight experience feel more confident in booking, upgrading, and adding ancillaries to their itinerary.

UNDERSTANDING THE 2025 SHOPPER SURVEY

What makes the 2025 survey unique?

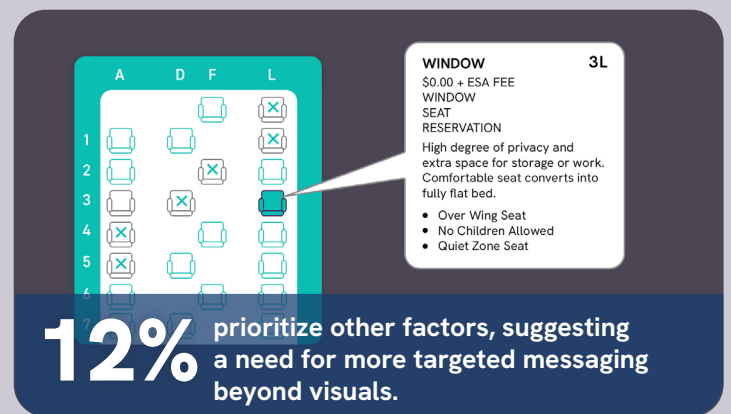
- ✈ **Largest sample size yet:** The 2025 survey included **894** respondents, ensuring a comprehensive dataset.
- ✈ **Visual-first methodology:** Travelers were evaluated based on their responses to visuals shown at various points in the booking experience.



KEY FINDINGS: THE IMPACT OF VISUALS ON PURCHASE BEHAVIOR

HOW VISUALS INFLUENCE BOOKING CHOICES

Upgrade decisions



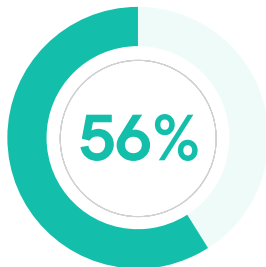
Key insight: While visual merchandising is influential, some travelers require additional messaging and education on premium benefits to increase conversions.

How Routehappy can help:

Routehappy Visuals enable airlines and sales channels to show shoppers targeted images and videos, enhancing premium fare brand awareness and increasing conversion rates and upsell/ancillary sale opportunities.

Routehappy Attributes provide a clear, reliable view of in-flight experiences as well as fare benefits and restrictions, helping shoppers more easily make informed upgrade decisions.

Ancillary services



56% of travelers say visuals increase their likelihood of purchasing ancillaries such as priority boarding, premium seating, baggage, or lounge access.

- ✓ 1 carry-on bag
- ✓ 2 checked bags
- ✓ Extra legroom
- ✓ Lounge access

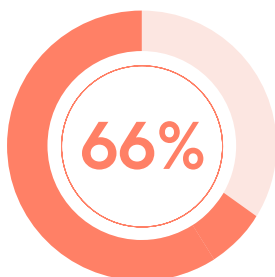


Key insight: Visuals make ancillary services more tangible, increasing perceived value and purchase intent.

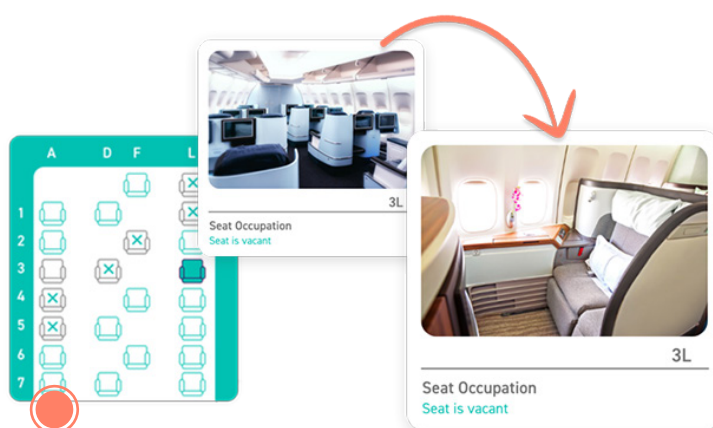
How ATPCO can help:

Airlines can leverage **Routehappy Visuals** to highlight and market ancillary add-ons more effectively at key booking touchpoints, increasing upsell potential.

Seat selection



66% of respondents say visuals of seat types increase the likelihood of paying for a better seat.

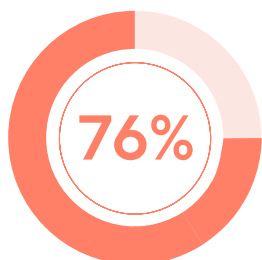


Key insight: Flight shoppers prioritize comfort and convenience, reinforcing the fact that showing visuals of different seat types is crucial for driving paid seat selection.

How Routehappy can help:

ATPCO's [Seat Characteristic Targeting](#) ensures airlines and sales channels can accurately display seat visuals, improving seat map clarity and optimizing seat selection pages. Having an improved method for selling seats leads to increased customer satisfaction and understanding, higher revenue, and greater conversion.

In-flight attributes



76% of respondents say visuals influence their decisions to purchase in-flight services such as food and Wi-Fi.

81% of business travelers and **63%** of leisure travelers are influenced by visuals that show these features.



Key insight: Flight shoppers respond strongly to visuals highlighting in-flight services—underscoring the need for targeted merchandising.

How Routehappy can help:

Routehappy Visuals allow airlines and sales channels to integrate visuals of cabin meals and onboard services, which can more effectively and positively influence purchase decisions to enhance the overall flight shopping experience.

HOW VISUALS DRIVE PURCHASE BEHAVIOR

Upgrade hesitation



19% of travelers never pay to upgrade to a higher cabin after selecting their flight.

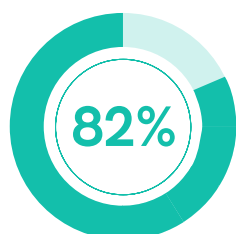


Key insight: Some travelers are skipping upgrades—possibly because they are unfamiliar with what premium options actually offer. Without clear information or visuals, the value isn't always obvious, which can limit upgrade consideration.

How Routehappy can help:

Routehappy Visuals make it easy to showcase the value of premium experiences through compelling, easy-to-understand visuals. By clearly differentiating cabins and highlighting upgrade benefits, airlines can better communicate what travelers get for the extra cost.

Post-booking behavior



82% of respondents say visuals increase their likelihood of purchasing extras after booking.

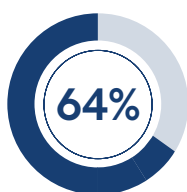


Key insight: Visuals significantly influence ancillary purchases when placed throughout the booking flow—not just at the start—by reinforcing value at key decision points.

How Routehappy can help:

Airlines can use **Routehappy Visuals** to convey the benefits of ancillaries within search results, seat maps, and throughout the booking flows, ensuring passengers see and understand add-on benefits earlier in their journey.

Seat selection behavior



64% of travelers report a moderate (25-49%) or significant (50-74%) increase in willingness to pay for a better seat when visuals are included.



Key insight: Visuals can make travelers more willing to pay for better seats by clearly showcasing the value of the upgrade.

How Routehappy can help:

Airlines and sales channels can use **Routehappy Visuals** to provide structured messaging and seat-specific visuals, helping travelers make more informed decisions about premium seating options. Routehappy merchandising can target corporate booking tools, so different messaging can be used for leisure versus business shoppers.

WHY TRAVELERS PREFER VISUAL MERCHANDISING

Why travelers purchase upgrade seats



Key insight: Travelers value comfort and convenience in different ways. This creates opportunities for airlines to tailor their messaging based on traveler type and priorities.

How Routehappy can help:

Airlines can use **Routehappy Visuals** and **Routehappy Attributes** to emphasize seat comfort for leisure travelers and priority boarding for business travelers, ensuring that targeted messaging aligns with traveler expectations.

Add-ons that travelers would buy with an extra USD 100

40%

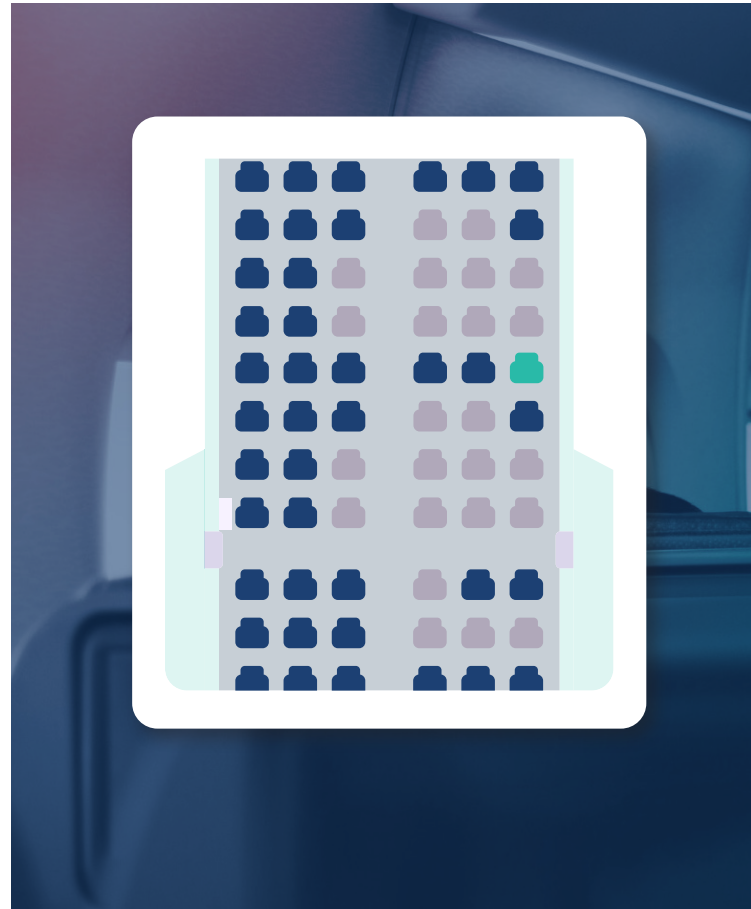
would spend on seat selection

18%

would purchase lounge access

17%

would buy priority boarding



Key insight: Seat selection is the top-valued add-on, but preferences for extras vary—highlighting the importance of offering and showcasing diverse ancillary options.

How Routehappy can help:

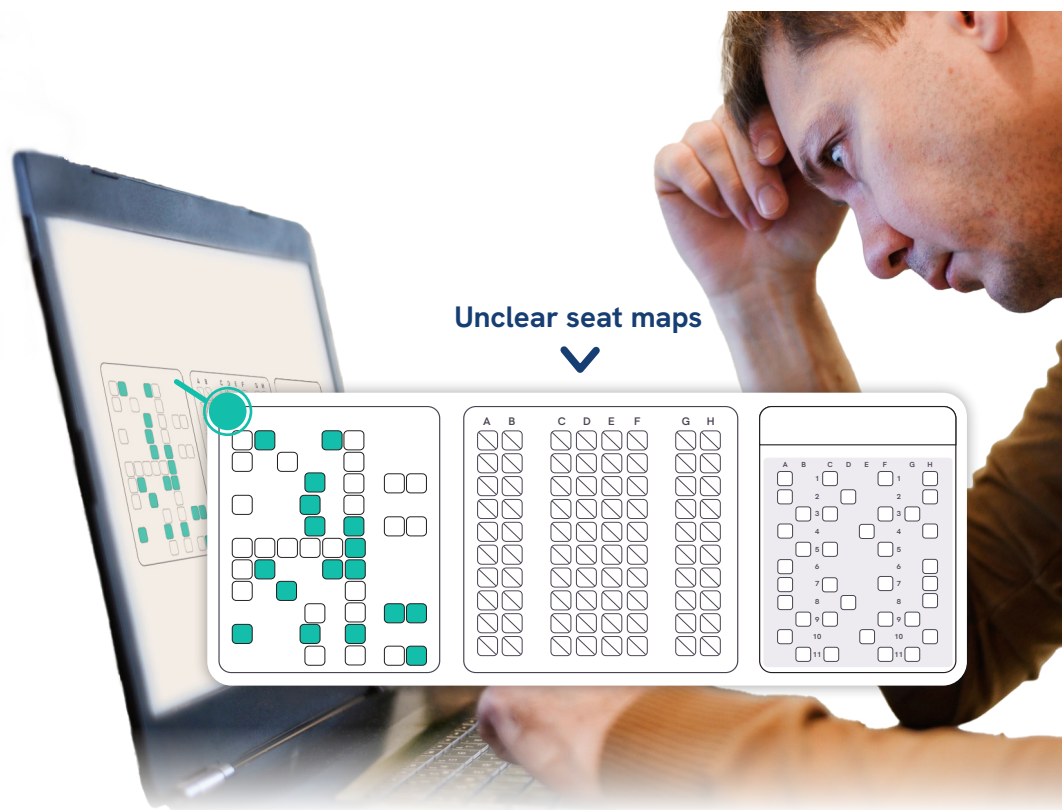
Airlines can use [*Routehappy Visuals*](#) to promote seat upgrades and experience-enhancing add-ons, particularly during the point of sale, to drive incremental revenue.

WHERE VISUALS MATTER THE MOST IN BOOKING

Overcoming inconsistent seat map information

43%

43% of travelers rely on prior knowledge when seat map details are inconsistent, outdated, or inaccurate.



17%

17% of travelers abandon seat selection entirely when faced with inconsistent seat map information, which equates to lost revenue opportunities.



Key insight: Inconsistent and missing seat details at the time of booking erode trust. Conversely, high-quality visuals restore confidence and improve decision-making. Premium seat content enhances shopper engagement, leading to higher conversion rates and revenue growth.

How Routehappy can help:

Routehappy Visuals provide accurate, real-world images of seats and attributes, creating the transparency that builds customer confidence and increases conversion rates.

Strategic placement for visuals



64%

64% of travelers value visuals outside of search results.



27%

27% value visuals in pre-departure/check-in emails.



21%

21% value visuals on seat map selection pages.



16%

16% value visuals on the flight confirmation page.



Key insight: Visuals must be strategically placed at multiple touchpoints throughout the booking journey to maximize customer engagement and revenue. Only 36% of travelers find visuals most influential in search results, so it's clear that purchase decisions happen at various stages—meaning visuals must be present beyond just the initial search.

How Routehappy can help:

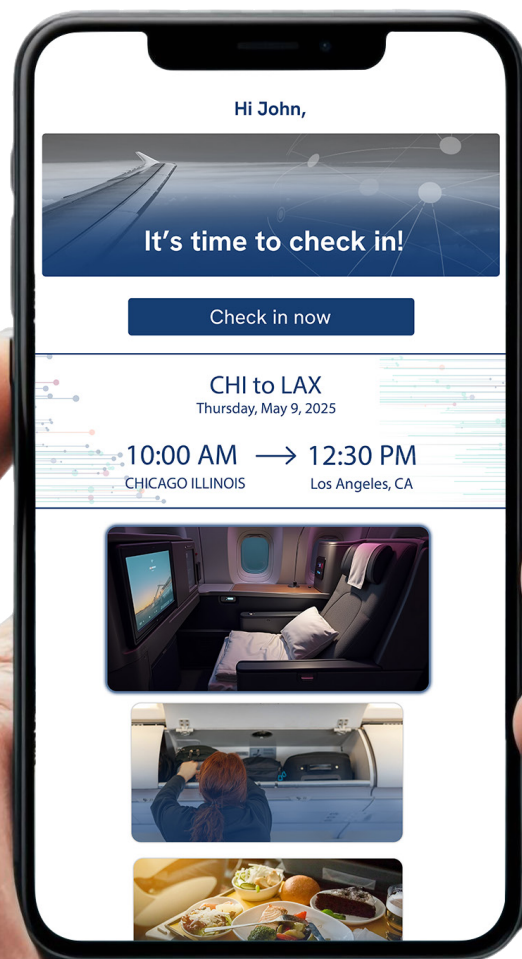
Routehappy enables airlines and sales channels to seamlessly integrate visuals across booking multiple touchpoints, allowing for increased engagement and driving conversion.

HOW POST-BOOKING VISUALS REINFORCE CONFIDENCE

40%

40% of respondents rank seat visuals as the most important feature in check-in reminder emails.

Wi-Fi availability, baggage allowance, and food and beverage options are also key priorities.



Key insight: Post-booking visuals reinforce purchase confidence, encourage last-minute upgrades, and improve the travel experience.

How Routehappy can help:

Routehappy Visuals allow airlines to enhance post-booking communications, ensuring travelers are well-informed, reassured, and presented with additional purchasing opportunities.

FROM BROWSING TO BUYING: VISUALS DRIVE RESULTS

Travelers don't just want engaging content at the start of their shopping journey—they expect it throughout the booking flow, especially when choosing paid extras like seats, bags, Wi-Fi, or priority boarding. If visuals aren't present when it's time to decide, airlines and sales channels risk losing revenue and customer trust. To stay competitive, airlines and sales channels should consider these upgrades:

- ✈ Ensure images and seat details appear at key decision-making moments (like in flight search, seat selection, and pre-departure emails).
- ✈ Tailor visual merchandising to highlight comfort and convenience for both leisure travelers and business travelers.
- ✈ Leverage targeted messaging to highlight premium cabin upgrades, in-flight features, and ancillary services at key touchpoints in the traveler journey.

Airlines and sales channels that adopt visual-first merchandising strategies set themselves apart from the competition, enhance traveler confidence, and increase revenue.

Unlock higher conversion rates and traveler confidence with [Routehappy](#).





Scan or click the QR code
to connect with an **ATPCO**
merchandising expert.

The background of the lower half of the page is a photograph of an airplane wing in flight, viewed from the passenger's perspective. The wing is white and extends from the left side of the frame. Below the wing, a landscape with mountains and a body of water is visible. The sky is filled with clouds. The entire image has a blue color overlay.

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The foundation of
modern airline retailing

A decorative horizontal band consisting of many thin, parallel, light blue diagonal lines.

The foundation of modern airline retailing.