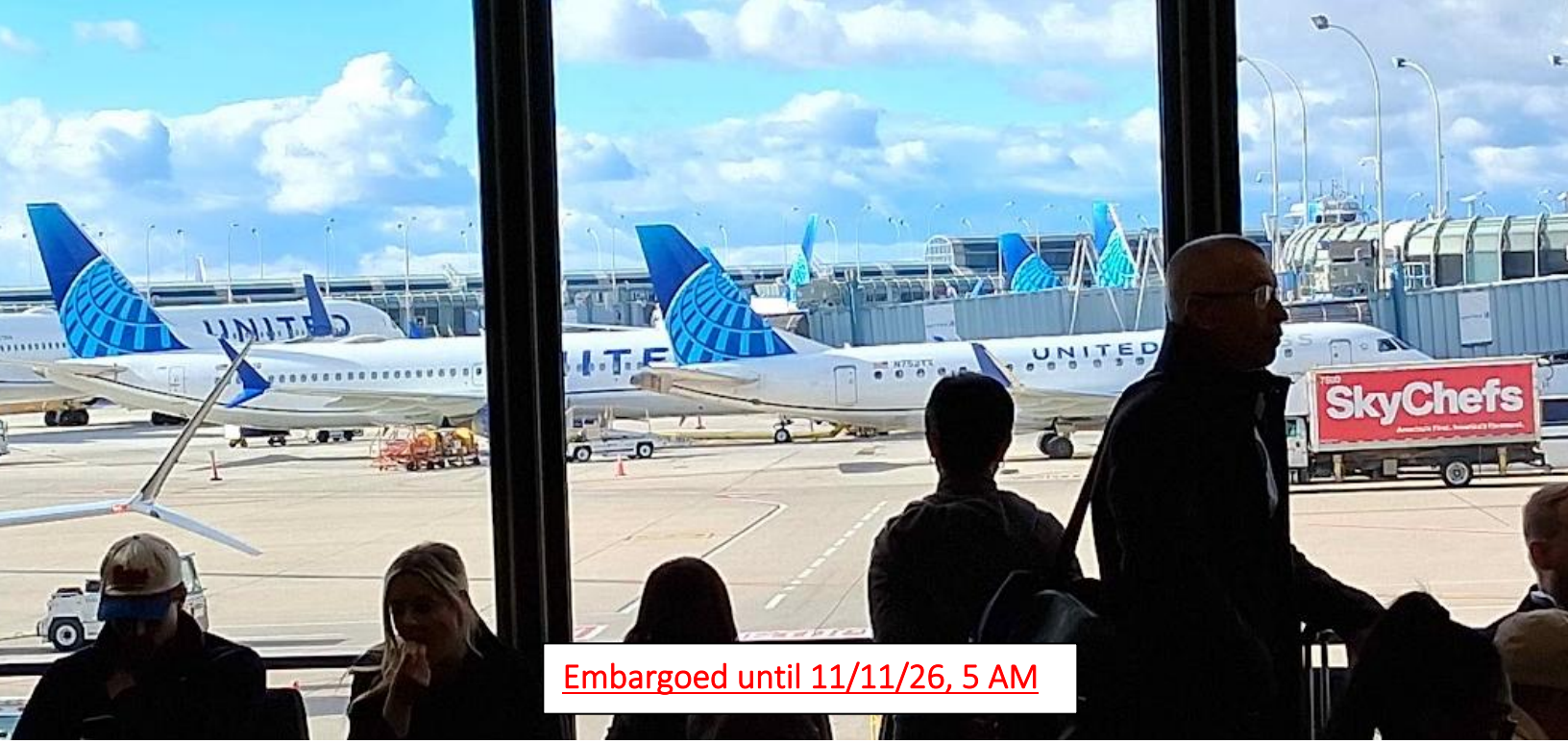


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Sky-High Expectations:

CHICAGO TREADS A TIGHTROPE AS IT WORKS TO IMPROVE O'HARE TERMINALS, WHILE OTHER AIRPORTS MAKE BIG GAINS

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By Joseph P. Schwieterman and Carrie Craig

O'Hare terminal upgrades, which lag behind those of other major hubs, have become urgent as global standards rise, yet significant challenges loom.

- O'Hare is the only one of the country's 25 largest airports that hasn't built a new terminal, concourse, or connected set of terminals of at least 500,000 sq. ft. or with 20+ gates, or completely redesigned one, in 25 years.
- O'Hare will be the only one of the world's 25 largest airports that hasn't built or redesigned a large terminal or concourse of this size in 25 years once Amsterdam opens a new terminal next year.
- The recent acceleration of the ORDNext construction timetable is highly beneficial. O'Hare 21 will create two new satellite concourses by 2030, followed by the O'Hare Global Terminal (OGT) in 2033.
- The next seven years will be highly challenging due to rising traveler expectations and construction-related impacts, resulting in concourse congestion and relatively long taxi times.
- The adoption of cost- and time-saving strategies, such as modular construction and level-entry vehicles taking passengers to remote stands, is needed to lessen the risk of delays and cost overruns.

This brief presents four findings from our analysis of O'Hare's terminal situation. Our findings indicate that although a recent agreement between the City of Chicago and hub airlines has improved the long-term

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PHOTO (ABOVE): *TERMINAL 2, O'HARE AIRPORT, OCTOBER 24, 2026*

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outlook by accelerating construction, the next seven or eight years will be unusually complex for maintaining high customer service standards. O'Hare Airport's passenger terminals are aging as traveler expectations for airport facilities rise rapidly while taxi times remain long. Airports worldwide are completing ambitious terminal upgrades. Large portions of O'Hare's Terminals 2 and 3 date to 1962, making them more than 64 years old.

Methods.

Our study team reviewed the status of terminal improvements at the 25 largest U.S. and global airports ranked by 2025 passenger volume. We have identified airports that, since 2001, have

- Opened a new passenger concourse, terminal, or connected terminal complex of 500,000 square feet of space or more, or 20+ jetway-equipped gates, OR
- Completely rebuilt and redesigned an existing terminal, involving large-scale floor plan changes and a new arrival or departure hall (or both) of at least 500,000 square feet. These projects typically require extended terminal shutdowns.

We included reconstruction projects only if they created terminals with design features that dramatically changed their layout, such as additional floors, large atriums, or substantially widened concourses. Incremental upgrades, such as raised ceilings, additional gate seating, and upgraded flooring and concessions—while important—did not qualify. Our analysis did not record *all* projects undertaken at the 25 airports that met our criteria; it focused only on some of the most recent qualifying ones. The study team also consulted with industry leaders about cost- and time-saving technologies, as noted in Finding 4.

Finding 1. O'Hare is the only one of the country's 25 largest airports that has not built a new concourse, terminal, or connected set of terminals, or completely redesigned an existing facility of more than 500,000 square feet or 20+ gates, in the past 25 years. O'Hare's last qualifying project was the opening of Terminal 5 in 1993, 33 years ago.



Terminal 2's Concourse E and F, built in 1962 and primarily used by United, see heavy passenger traffic on October 16, 2026. O'Hare Global Terminal will replace them, and construction will begin in 2029.

Among the 25 busiest U.S. airports, ranked by 2025 enplanements, all except O'Hare have had qualifying

projects (Figure 1). Twenty have built new terminals or concourses that meet the above thresholds, while others have focused on rebuilding and redesigning terminals that meet our size thresholds.

The six other airports besides O'Hare that rank in the top seven have completed transformational projects since 2012 exceeding our thresholds by a considerable margin, except for New York Kennedy (JFK), whose project dates to 2008. Several major ribbon-cuttings will take place before the end of the decade.

- **Atlanta Hartsfield–Jackson (ATL).** The Maynard H. Jackson Jr. International Terminal, a 1.2-million-square-foot facility with 12 widebody gates and a link to Concourse F, opened in 2012. The redesign of Concourse D, which has 39 gates, will greatly widen the concourse and add 60% more space. It was partially completed in 2026 (see page 12) and will be fully finished in 2029.
- **Dallas/Ft. Worth International (DFW).** Terminal D, with 28 gates, opened in 2005. The terminal was expanded to 33 gates and 2 million square feet in 2021. The first 15 gates of the new Terminal F will open in 2027, and its gate count will expand to 22 in 2028. This facility will have a new Federal Inspection Service facility for international arrivals.
- **Denver International Airport (DEN).** The airport opened in 1998, so all its facilities are less than 29 years old. Concourse A West Expansion, 530,000 square feet and 39 new gates across 3 concourses, opened in 2022.
- **Los Angeles International (LAX).** West Gates Concourse,750,000 square feet with 15 new gates, opened in 2021.
- **New York Kennedy International (JFK).** Terminal 5, opened in 2008 by JetBlue, comprises 635,000 square feet and has 26 gates. Terminal One, with 2.6 million square feet, 14 gates, and new arrival and departure halls, will open in 2027.
- **Orlando International (MCO).** Terminal C, comprising 1.8 million square feet and 15 gates, opened in 2022.



***Orlando International's Terminal C** opened in 2022, spanning 1.8 million square feet, and has a Brightline train station. Link. CC BY 4.0*

Among these six airports, all but ATL and JFK have not completed qualifying projects since 2020.[1] JFK's massive Terminal One will open next year, and ATL's Concourse D redesign will be fully finished in 2029. Among airports with less traffic, Seattle and Washington Dulles' qualifying projects are new terminal complexes comprised of two facilities, with Seattle's being contiguous and Dulles' being connected by a new Aerotrain (see details on page 14). Of the 25 airports, 18 have completed qualifying projects since 2010. All except O'Hare have completed a qualifying project in the past 20 years, while O'Hare's most recent, Terminal 5 (T5), was completed 33 years ago. T5 spanned 1.2 million square feet when it opened in 1993. Before that, United's Terminal 1 (T1) was completed in 1987.

TABLE 1: TERMINAL PROJECTS AT 25 BUSIEST AIRPORTS IN THE UNITED STATES

Ranked by 2025 passenger traffic

	Airport	Annual Psgrs (Millions)	Notable Projects
1	Atlanta Hartsfield–Jackson (ATL)	106	**Maynard J. Jackson Jr. International Terminal**, 1.2 million-sq.-foot, with 12 widebody gates and link to Concourse F, opened in 2012. Concourse D resdesign to be completed in 2029. (See detail on page 3)
2	Dallas/Ft Worth (DFW)	85.7	**Terminal D** with 28 gates, expanded to 33 in 2021 and 2 million square feet opened in 2005. **Terminal F**, with 15 gates, will open in 2027, expanding to 22 in 2028, along with a new Federal Inspection Service facility for international arrivals. (See page 3).
3	Chicago O'Hare (ORD)	84.9	*First qualifying project, Satellite Concourse 1, with 19 gates to open in late 2028.*
4	Denver (DEN)	82.4	**Concourse A West Expansion** 530,000 square feet completed in 2022. Part of 39 new gates built at 3 concourses 2020-22.
5	Los Angeles (LAX)	73.7	**West Gates Concourse**, 750,000 sq. feet, with 15 new gates completed in 2021.
6	New York Kennedy (JFK)	62.6	**Terminal 5** opened in 2008, 635,000 square feet, with 26 new gates. **Terminal One**, with 2.6 million sq. ft. and 14 gates, and new arrival and departure halls, will open in 2027
7	Orlando (MCO)	57.7	**Terminal C,** 1.8 millon square feet, with 15 new gates opened in 2022.
8	Miami (MIA)	55.3	**North Terminal Development (Concourse D)**, with new 39 gates completed in 2014.
9	Las Vegas - Reid (LAS)	55.0	**Terminal 3** opened, 1.9 million square feet, with 14 gates in 2012.
10	San Francisco (SFO)	54.5	**Terminal 1** completely rebuilt, with 25 gates and new check-in lobby (arrival hall) in 2024, renamed in honor of Harvey Milk.
11	Charlotte Douglas (CLT)	53.6	**Concourse E** opened in 2002, adding 32 gates; 10 more added in 2022.
12	Seattle-Tacoma (SEA)	52.7	**Concourse A** opened in 2004, with 14 gates, later expanded to 16; the concourse is fully integrated and contiguous with new 450,000 sq. ft. int'l arrival hall opened in 2022 (See page 14). **North Satellite** refurbishment finished in 2019, adding 8 gates.
13	Phoenix-Sky Harbor (PHX)	51.6	**Terminal 3** modernization completed in 2020 with major upgrades, new Grand Hall, and a new south concourse with 15 gates.
14	Houston Bush Intercontinental (IAH)	48.1	**Terminal B's South Concourse** was opened in 2013 with 26 new gates. **Terminal B North Concourse**, 765,000 sq. ft. and 22 gates, opened in October 2026 for United.
15	Newark Liberty (EWR)	47.0	**Terminal A,** with 33 gates and 1 million sq. feet, opened 2023.
16	Boston Logan (BOS)	43.3	**Terminal E** rebuilt, with enhanced ticketing hall and international arrivals area, in 2023., Terminal A opened in 2005 with an 11-gates a 10-gate satellite terminal.
17	Minneapolis/St Paul (MSP)	36.1	**Terminal 1** expansion added 27 gates in Concourses A & B, in 2002. General terminal revamp completed in 2025.
18	Detroit Metropolitan Wayne County (DTW)	33.4	**Evans Terminal** opened in 2008 with 29 gates, 824,000 sq. ft.
19	New York - LaGuardia (LGA)	32.8	**Terminal B** fully reconstructed with 35 getes, and Terminal C, with 38 gates, completed in phases, mostly between 2019-2022.
20	Ft Lauderdale-Hollywood (FLL)	32.2	**Terminal 1** first opened in 2001. Complete reconstruction of terminal, with 493,000 sq. ft. of new construction, incl. new Concourse A and federal inspection facililty, 2017-2022.
21	Philadelphia (PHL)	30.1	**International Terminal A-West**, 800,000 sq. ft. with 13 gates, opened in 2003, **Terminal F**, with 38 gates, was opened in 2001.
22	Washington Dulles (IAD)	28.7	**Concourse B** expansion added 4 gates in 2003, followed by 15 more in 2008, adding 371,000 sq. ft., and linked by new AeroTrain to International Arrival Hall expansion that added 205,000 sq. ft., completed in 2011 . **Concourse E,** with 14 gates, 420,000 sq. ft., opened in 2026). See discussion in endnotes, pg. 14.
23	Salt Lake City (SLC)	28.2	**Concourses A and B** opened in 2025 and expanded to 47 and 36 gates, respectively.
24	Nashville (BNA)	25.7	**International Arrivals Facility** with Grand Hall and adjacent shopping area, 760,000 sq. ft. with six gates, opened in 2023, Concourse A is being fully reconstructed with 374,000 sq. ft. and 16 gates to open 2028.
25	San Diego (SAN)	25.3	**Terminal 1** fully replaced, first phase with 940,000 sq. ft. and 19 new gates, completed in 2025. Three times larger than older terminal.

Cumulatively, O'Hare has added enough gates to its terminals since 2015 to meet the 20+ gate threshold. However, its initiatives are split across multiple noncontiguous areas, none meeting the square-foot or gate threshold. The airport lacks new arrival or departure halls with the spacious (and in some cases majestic) features common to newer facilities. The airport's relatively recent T5 expansion of Concourse M, completed in 2023, has 10 widebody gates (expandable to 15 narrowbodies) and encompasses around 350,000 square feet; the relatively new Terminal 3 (T3) Concourse L, completed in 2018, has eight gates. These upgrades are significant, as are those in the Elevate T3 program. However, no single project since 2001 has matched the scale of those at the other 24 airports.

Finding 2. Among the world's 25 busiest airports, only Amsterdam Schiphol and O'Hare haven't built large new terminals or concourses or completely redesigned existing terminals on a scale meeting our criteria in the past 25 years. Amsterdam's new Pier A facility will open in April, making O'Hare the sole outlier.

Table 2 shows our summary of qualifying projects at the world's 25 busiest airports based on 2025 passenger traffic. O'Hare ranked sixth during this period. All airports except Amsterdam Schiphol and O'Hare have a qualifying project. Paris Charles de Gaulle is an example of an airport whose quality project involved redesigning existing terminal facilities rather than building an entirely new terminal.

The five busiest airports outside the U.S. are described below.

- **Dubai International (DXB).** Concourse D opened in 2016, adding 21 contact stands and 11 virtual stands. An entirely new airport will open in 2032.
- **Tokyo Haneda (HND).** Terminal D opened in 2005 with 28 gates; it expanded to 33 gates in 2021 and spans around 2 million square feet.
- **Shanghai Pudong (PVG).** The South Satellite Terminal, which added 90 boarding gates, including a main terminal and S1 and S2 concourses connected by train, opened in 2019.
- **London Heathrow (LHR).** Queen's Terminal opened in 2014, with 28 gates, replacing a 1955 terminal. It spans 1.1 million square feet.
- **Istanbul (IST).** This new airport opened in 2019 with 166 gates across five piers.



***London Heathrow International Airport's** Queen's Terminal (Terminal 2), spanning 1.1 million square feet.* Link to image CC BY-SA 3.0

All five airports have had qualifying terminal projects since 2014, as have 15 of the busiest airports. Four of the busiest 25

TABLE 2: TERMINAL PROJECTS AT 25 BUSIEST AIRPORTS IN THE WORLD

Ranked by 2025 passenger traffic

	Name	Annual Psgrs (millions)	Examples of Major Projects
1	Atlanta Hartsfield–Jackson (ATL)	106.3	**Maynard J. Jackson Jr. International Terminal,** 1.2 million sq. ft., with 12 widebody gates and a link to Concourse F, opened in 2012. **Concourse D** resdesign to be completed in 2029 (more info on pg. 3).
2	Dubai International (DXB)	95.2	**Concourse D** opened in 2016, adding 21 contact stands & 11 virtual stands. Shift to new airport, which will be the world's largest, starts in 2027.
3	Tokyo Haneda (HND)	91.7	**Terminal 3** opened in 2010, adding 20 gates, spanning 2.5 million sq. ft.
4	Dallas Fort Worth (DFW)	85.7	**Terminal D** with 28 gates, expanded to 33 in 2021 and 2 million sq. ft. opened in 2005. **Terminal F**, with 15 gates, will open in 2027, expanding to 22 in 2028. (More info on pg. 3).
5	Shanghai Pudong (PVG)	85.0	**South Satellite Terminal** opened in 2019, adding 90 boarding gangways along with S1 and S2 satellite, 6.7 million sq. ft, world's largest satellite at time
6	Chicago O'Hare (ORD)	84.9	*First qualifying project, Satellite Concourse 1, with 19 gates to open in 2028, 560,000+ sq. ft.*
7	London Heathrow (LHR)	84.5	The **Queens Terminal** opened in 2014, with 28 gates, 1.1 million sq. ft.
8	Istanbul (IST)	84.4	**New airport** opened with full passenger traffic in 2019 166 gates across five piers.
9	Guangzhou Baiyun (CAN)	83.6	**Terminal 3** opened in 2025, adding 87 jetways (jet bridges).
10	Denver (DEN)	82.4	**Concourse A West Expansion**, 530,000 sq. ft. completed in 2022. Part of 39 new gates built at 3 concourses 2020-22.
11	New Delhi Indira Gandhi (DEL)	78.1	**Terminal 1** redevelopment completed in 2024, added 1.7 million sq. ft., new arrivals hall, and 27 parking stands, more than doubling capacity.
12	Seoul Incheon (ICN)	74.1	**Terminal 2** with 37 new gates completed in 2018, now 7.4 million sq. ft.
13	Los Angeles (LAX)	73.7	**West Gates** concourse, 750,000 sq. ft., with 15 new gates completed in 2021.
14	Paris Charles de Gaulle (CDG)	72.0	**Terminal 2B and 2D** were both completely rennovated and updated with 2B reopening in 2021 and 2D reopening in 2023. See discussion in endnotes (pg. 14).
15	Beijing Capital (PEK)	70.7	**Terminal 3D,** added 14 landing spots in 2013, now 980,000 sq. ft.
16	Singapore Changi (SIN)	70.0	**Terminal 4** completed in 2017, adding 29 gates, now 2.1 million sq. ft.
17	Amsterdam Schiphol (AMS)	68.8	**Pier A**, 592,000 sq. ft., will begin operations in April 2027 and have three floors, security and border control areas, and eight new gates.
18	Madrid–Barajas Suárez (MAD)	68.1	**Terminal 4** and its 4S satelline opened in 2006, adding 20 gates, now 8.1 million sq. ft.
19	Shenzhen Bao'an (SZX)	66.5	**Terminal 3**, 5.4 million sq. ft., opened in 2013, 63 contact gates and 15 remote stands.
20	Kuala Lumpur (KUL)	63.4	**Terminal 2** opened in 2014, with 68 "aero bridge" bays and 10 remote bays
21	Frankfurt (FRA)	63.2	**Terminal 3** opened in 2006, with Concourses H and J, adding 24 gates.
22	Bangkok Suvarnabhumi (BKK)	62.9	**This airport** opened in 2006. A new satellite terminal opened in 2024, adding 28 gates.
23	New York Kennedy (JFK)	62.6	**Terminal 5** opened in 2008, 635,000 sq. ft., with 26 gates.
24	Hong Kong (HKG)	61.0	**New airport** opened in 1998; **Terminal 2** depatures facility opened in 2026.
25	Orlando (MCO)	57.7	**Terminal C**, 1.8 millon sq. ft., with 15 new gates opened in 2022.

airports opened since 1998: Bangkok Suvarnabhumi (2006), Denver (1998), Istanbul (2019), and Shanghai Pudong (1998). A new Dubai airport will open in 2032.

Rapid growth in air traffic outside North America partly explains the comparatively fast pace of terminal upgrades abroad. Most new terminals cover over a million square feet. Chicago's two new satellite concourses and OGT (slated to open in 2033), discussed below, will help close the gap with these airports.

Amsterdam Schiphol's efforts to modernize and expand its terminals have been nearly as vexing as O'Hare's. However, Pier A, spanning 593,000 square feet and standing three stories high, will open in April 2027 and become the airport's first new terminal in decades. The self-contained terminal, with border checkpoints for

Schengen, non-Schengen, screened, and unscreened passengers, will have eight new gates, expandable to 10 with narrowbodies. This will make O'Hare the world's only top-25 airport that has not built a new concourse, terminal, or complex of connected terminals, or completely redesigned an existing facility of more than 500,000 square feet or 20+ gates in the past quarter-century.

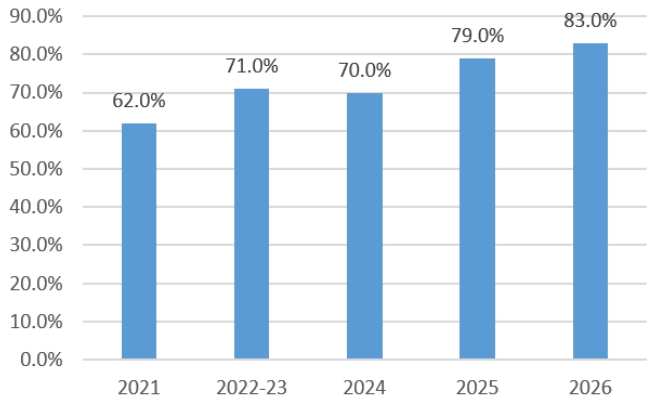
Finding 3. Passenger satisfaction ratings at other U.S. "mega airports" have risen much faster than those at O'Hare because of their ambitious facility upgrades. O'Hare's ratings have risen modestly, which is impressive given its growing terminal congestion, but its relative standing among mega airports has fallen sharply.

O'Hare's terminal rating in the JD Power Airport Ratings has recently risen above the 569 score it earned in 2024, to 586 in 2025 and 585 in 2026. (The most well-liked airports tend to have scores above 650). O'Hare's modest rise is still impressive given the sharp increase in airline traffic that has added to both groundside and airside congestion. It reflects many incremental upgrades and gate additions mentioned above. However, mega airports across the U.S. (currently defined by JP Power as the largest 20) have seen much larger gains since 2024 as ribbons have been cut on far more extensive terminal projects. For example, Houston Intercontinental, Newark Liberty, Salt Lake City, and San Francisco have all had major upgrades since 2023, with LaGuardia experiencing a complete transformation several years earlier. This has pushed average scores for mega airports up from 602 in 2024 to 609 in 2024 and 621 this year. A new JD Power rating system was introduced in 2024, preventing comparisons of scores with earlier periods.

FIGURE 1: SATISFACTION WITH GLOBAL AIRPORTS

% Satisfied with their Airport Experience

Survey Results by Airport Dimensions



Satisfaction with airports globally has risen sharply, but O'Hare's rating in the JD Power survey has risen more slowly.

In the JD Power survey, the average score of 24 U.S. mega airports, excluding O'Hare, rose 13 points from 2025 to 2026, while O'Hare fell 1 point. Every airport's score except DFW and O'Hare rose or remained flat over this interval.[2] Accordingly, O'Hare's rank slipped from 15th in 2023 to 18th in 2024, inched up to 16th in 2025, and then fell to 19th/20th (tied with Newark Liberty for last place) this year.

Global airports are also earning high passenger scores thanks to facility upgrades. The latest Airport Dimensions report shows that airport satisfaction jumped from 62% in 2021 to 79% in 2025 and 83% in 2026. Airport Dimensions does not publish results for individual airports. However, it concludes that "[a]s satisfaction reaches new highs, traveler expectations are evolving just as quickly, with passengers becoming more deliberate in how they spend their time, engage with services, and define value."[3] The study makes it clear that stepped-up concessions, spacious lounges, airy atriums, and comfortable waiting environments are becoming the norm.

We present these results with the acknowledgment that comparing airport satisfaction scores is challenging (see discussion in endnotes).[4] However, the ratings underscore how O'Hare's relative standing has fallen.

Finding 4: Pursuing cost- and time-saving strategies, including modular construction and advanced vehicles to bring passengers to remote gates with level-entry boarding, can help meet budgetary goals and reduce risks of delaying the OGT's completion past 2033. These strategies, along with increased use of T5, can enhance the travelers' experience while reducing the impacts of irregular operations during the difficult seven years of construction ahead.

In August 2026, ORDNext, the largest terminal expansion plan in the airport's history, was revised to build the two satellites on a more ambitious timetable than had previously been planned. Under the new plan, the first satellite (S1) is scheduled for completion in 2028, and the second (S2) will open in two parts, in 2030 and 2034, while the OGT's completion was moved up to 2033. S1 will have 19 modern, roomy, and efficient gates and a spacious multi-floor design. Coupled with the ongoing Elevate T3 project, this will deliver significant benefits over the next two years.

This acceleration in construction is a welcome change—and a credit to City leadership. However, the new S1 gates will account for only about 11% of the total T1, T2, and T3 gates. The number of new gates will rise again when the first 14 of S2's 24 gates become available in 2030. Even so, the biggest jump in O'Hare's image won't come until the OGT's ribbon-cutting.



An American Airlines gate in Terminal 3 at O'Hare. The shuttle to T5 requires descending one level and using conventional shuttles without level boarding.

Before then, the airport will likely face magnified challenges driven by anticipated growth in American and United passenger traffic, making it critical to avoid losing linear terminal airside frontage during construction (see our analysis of uncertainty in flight growth on page 11). Linear frontage is the primary measure used to determine gate capacity.) The OGT will almost certainly be built in phases, requiring travelers to navigate an airport undergoing heavy construction. United will face the biggest challenges because it relies more heavily on T2, which will be demolished.

At the same time, the City is on a budgetary tightrope, driven by concerns about costs by the two hub airlines. O'Hare's costs are already well above those of most other U.S. mega hubs, reducing its ability to pass on cost overruns. If costs rise to levels the airlines deem unacceptable, the entire project could stall.

Several strategies should be explored to minimize construction impacts and the risk of cost escalation.

1. Modular technology to construct key components of new terminals. Modular construction moves more work off-site and away from congested terminal areas. It is being used successfully at ATL, DFW, LAX, and Portland International (PDX). (See details in Appendix B). A 2025 Purdue University study concluded that modular construction accelerates project timelines, lowers costs, enables faster delivery, reduces

overhead and operational downtime, and lowers security hurdles.[5] Off-site fabrication reduces routine on-site security checks and inspections and limits terminal disruption by creating a quieter, more contained work environment. The technique has strong potential at O'Hare, although one consequence might be reduced grandeur in the OGT's gate areas—where modular construction is most practical—while the arrival and departure hall could still have path-breaking design, built in a traditional ("stick-built") way. This can be coupled with microphasing to limit the number of gates out of service at any one time.[6]

Modular Construction at Dallas/Fort Worth International (DFW)

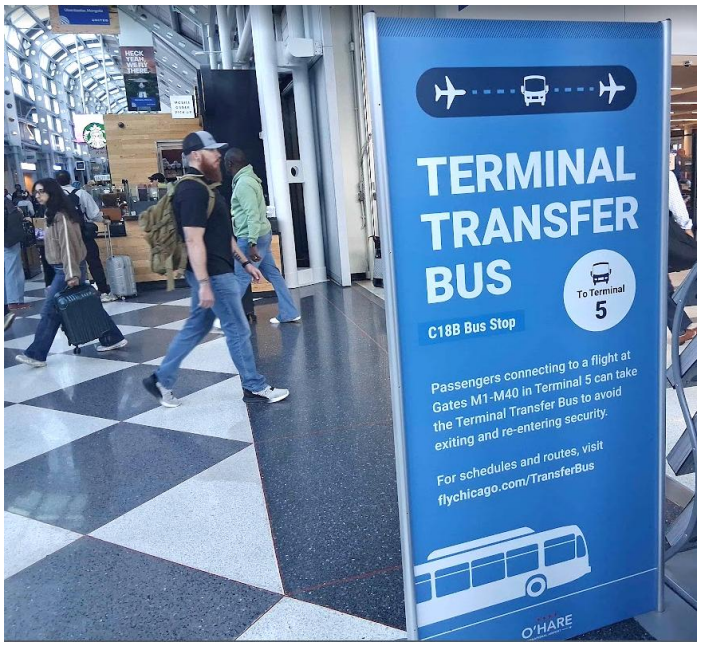


DFW's Terminal C expansion and the construction of its new Terminal F are moving forward using massive, preassembled building sections. Known as "megamodules," these sections, nearly the length of a football field, were manufactured at an off-site location on the airport grounds. Teams moved the modules across closed runways and active taxiways overnight using self-propelled transport vehicles. Contractors successfully positioned all six on Terminal F's new 15-gate concourse on their permanent foundations in less than two weeks, minimizing airport security challenges and passenger delays. See other examples in Appendix B.

2. State-of-the-art electric vehicles that allow for level-entry boarding from terminal concourses to move seated passengers to remote parking stalls comfortably. This technology offers a promising solution for keeping terminal construction moving quickly while maintaining strict cost control. These newly designed, emission-free vehicles can carry up to 100 seated passengers to aircraft parking locations away from terminals while providing level-entry boarding from both concourses and onto aircraft, much like jetways, making them very different from conventional shuttles. By eliminating ramps or stairs, allowing passengers to board and alight aircraft from two doors, and providing seating like regular aircraft gates, they create a more seamless experience while reducing conflicts in congested terminal areas. These vehicles can either be used temporarily or permanently at O'Hare, perhaps even being used primarily during irregular operations. The vehicles are far more advanced than their predecessors at Washington Dulles International. A private firm, Eero Nexus, is working with major airports nationwide on possible deployment. A link with images and animation of these vehicles is here.

3. Using O'Hare's Centralized Deicing Facility for remote aircraft parking, accessed by ground shuttles, to boost capacity, manage irregular operations, and shorten taxi times. This location, already used as a holding area and able to accommodate more than a dozen narrow body planes, could reduce airside congestion during construction. It could also reduce longer taxi-time increases due to construction and the need for flights to wait for gate access when operational irregularities occur (see our analysis on page 14-15, which shows how O'Hare's taxi-times have risen).[7]

These problems are likely to worsen after the OGT's construction begins in 2029. The level-entry vehicles described in #3 could support this approach. The area could remain open for deicing during the peak of winter, when traffic slows.



A banner for the existing shuttle service from T1 to T5 at O'Hare.

4. Increasing use of T5 by hub airlines. T5's gates (Concourse M) have available capacity due to Southwest's withdrawal from O'Hare and other factors. Relocating flights there, particularly from T3, supported by enhanced passenger shuttles, holds much promise. Our analysis indicates that T5's gates are far less heavily utilized than other O'Hare gates (see our gate-utilization analysis in the endnotes).[8] Currently, passengers must leave secure areas to ride the Airport Transit System (ATS), often called the "people mover", or ascend/descend one level to access shuttles serving T5. Shuttle vehicles lack level entry, so passengers must lift bags. An enhanced shuttle running every few minutes during bus times from T3's concourse level could make transfers faster and less burdensome. Even without level-entry or concourse-level boarding (which would greatly facilitate terminal transfers), we believe enhanced shuttles would allow for minimum connecting times between T3 and T5's westernmost gates to be as little as 45 minutes.

Finally, the City can also provide cooperation needed to facilitate the O'Hare Flyer. This proposed privately funded high-speed train to downtown could dramatically improve the passenger experience and improve O'Hare's image. The service could be operational by 2031, linking Chicago Union Station's vicinity to an airport stop outside the future OGT and ATS. The Flyer would greatly improve airport access and give O'Hare a faster downtown rail link than any other U.S. airport. However, the Flyer can't be built without extensive cooperation with and in-kind support from the Department of Aviation

Metropolitan Chicago's health depends heavily on O'Hare's remaining a global aviation leader. The City, however, is on a terminal-enhancement tightrope, contending with aging facilities whose use has been prolonged by longer construction timelines and budget constraints resulting from the costs of past airport improvements. Pushing the OGT's completion past 2033 would aggravate the airport's terminal challenges. As this brief shows, cost- and time-saving strategies can support the airport's terminal modernization and expansion, helping it close the gap with other global hubs.

APPENDIX A

HOW FAST WILL O'HARE'S FLIGHT ACTIVITY GROW? FOUR UNCERTAINTIES

O'Hare's terminal expansion is taking place amid higher-than-normal uncertainty about the airport's long-term needs. The three factors listed below are driving this particularly high uncertainty. None, however, diminishes the urgency of the terminal upgrades.



Concourse L – Stinger at O'Hare in October 2026

1. How fast will aircraft "upgauging" occur? O'Hare's flights are more heavily composed of relatively small jets than flights at most other large hubs, which has magnified gate needs and air-traffic challenges. A consulting report prepared for the City predicts the average number of seats per departure will rise fairly slowly, from 123.1 in 2026 to 130.5 in 2035.[9] We find this projection reasonable. It suggests that large-scale upgauging will likely not occur until well after the OGT's completion. However, the pace could quicken if jet-fuel prices remain high or O'Hare's dual-hub status changes; both discussed below.

2. How will the dual-hub arrangement evolve? O'Hare's current arrangement, with American and United each having large hubs, appears unlikely to change much over the next several years. However, over the long term, the relative scale of American and United could significantly shift. One possibility is that United will increasingly dominate, a point United's CEO Scott Kirby recently made while presenting technical evidence about the two-hub arrangement. The downsides of the dual hub include the prevalence of smaller regional jets and challenges in developing international routes (see discussion on page 15).[10] Conversely, American has given no indication that it is calling into question its O'Hare hub. Over the long term, a downward shock, such as the 2001 terrorist attacks, the 2008–09 Great Recession, or the COVID-19 pandemic, could nonetheless result in significant shifts in O'Hare traffic mix.

3. Will jet fuel prices remain abnormally high for an extended period? This could slow traffic growth or even reduce traffic volumes. Futures contracts suggest that today's high prices will be transitory, with forward contracts falling below $74 by April 2028, close to the long-term inflation-adjusted average.[11]

4. Will the FAA lift its mandated flight cuts in October 2027 and, if so, will United move forward rapidly with its announced expansion to 1,000 flights? There is growing concern that the FAA will extend the roughly 12% cut in flight activity imposed at O'Hare this spring past its announced October 2027 deadline. This could cause traffic growth to fall far short of recent projections. Even if the mandate is lifted, however, it is unclear how quickly, if at all, United will move ahead with its publicized plan to expand from around 650 daily flights to 1,000 and whether American will respond to protect its market share. If rapid expansion occurs before 2029, older, less attractive gates, such as those in T2, will be used more intensively, straining concourses and operations and making the OGT's construction more challenging.

These uncertainties **make flexible designs and cost-containment imperative to reduce financial risk**. Completing terminal upgrades on time and on budget reduces the chance that the airport's cost will fall outside industry norms, particularly if traffic growth lags expectations.

APPENDIX B
NOTABLE U.S. TERMINAL PROJECTS USING MODULAR CONSTRUCTION

At least three large U.S. airports, in addition to Dallas/Ft. Worth (DFW), described earlier in this report, have completed large projects using modular construction. More details on modular construction applications at airports can be found in the study by Purdue University's Sarah Hubbard here.

Atlanta Hartsfield–Jackson International (ATL)

Atlanta is using modular construction for its Concourse D widening, saving airlines an estimated $500 million in revenue that would otherwise be lost due to extended gate closures. The approach has saved the airport more than 40 weeks of gate closures and reduced total gate downtime by 20% compared to a traditional construction approach. By working modules and foundations simultaneously, the airport has greatly compressed the project schedule.

Los Angeles International (LAX)

The modular units for the Midfield Satellite Concourse South were delivered in nine segments as part of a "fabrication-to-foundation solution" that reduced disruption and compressed the schedule to just three weeks. Workers built these modules in parallel, with each one measuring approximately 140 feet x 80 feet, and delivered them complete with curtain walls, interior partitions, and partial mechanical, electrical, and plumbing systems. The MSC spans 146,000 square feet.



At Los Angeles International (LAX), *a module for the Midfield Satellite Concourse is being moved in October 2024.* *Image from lawa.org*

Portland International (PDX)

This airport built its Main Terminal Expansion using massive, prefabricated modules that approached the size of a football field. The airport remained fully operational as crews moved each module across the airfield and installed it overnight. A massive 400-by-1000-foot roof over a ticketing and market area was constructed in three large sections. Airport officials noted that this approach also improved quality and worker safety while reducing risk.

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Hannah Hatfield

Please click here for our previous transportation brief, O'Hare's Traffic Trajectory, released in December 2025, which has extensive airport trend analysis.

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ENDNOTES & SUPPLEMENTAL ANALYSIS

[1] Several airports' qualifying projects are connected terminal complexes with construction details too extensive to be adequately summarized in Tables 1 and 2.

-Dulles International Airport. This airport has fundamentally changed the passenger experience from check-in to takeoff through two closely linked projects: an International Arrival Hall expansion in the Main Terminal (adding 205,000 square feet, completed in 2011) and two extensions to Concourse B (371,000 square feet, 2003 and 2008). Their complementarity is exemplified by an underground walkway with moving sidewalks (approximately 40,000 sq feet) and the AeroTrain connecting them, both completed 2009-10. Even without the AeroTrain, this added roughly 600,000 square feet of space. The AeroTrain's Main Terminal station alone, including a security mezzanine, spans more than 250,000 square feet.
-Paris Charles de Gaulle International. The airport reconstructed Terminals 2B and 2D in a coordinated manner and linked them with a new connector building. Terminal 2B was closed for over eight years, from April 2013 until it reopened in June 2021, while Terminal 2D was closed for roughly three years and reopened in April 2023. During this period, the airport completely transformed the buildings, adding a second floor to Terminal 2 B dedicated entirely to arrivals and an extra floor to Terminal 2D. Together, these facilities span more than one million square feet.
-Seattle-Tacoma International Airport. This airport's Concourse A and International Arrivals Facility (IAF) are contiguous and complementary. Concourse A opened in 2004 with 14 gates and was later configured to 16. The concourse was later upgraded to support greater international traffic. The concourse is contiguous with the new 450,000 sq. ft. IAF that opened in 2022. Concourse A's size is not published, but our estimates indicate it is more than 140,000 sq. ft. Because the two projects are integrated, share a common wall, and have direct connections between them (see map), we treat them as an integrated terminal complex, with a cumulative size greater than 590,000 sq. ft. The IAF has the International Skybridge (pedestrian walkway) to Concourse S.

[2] Changes in JD Power Score, 2024-26. We compiled results from annual editions of the JD Power airport surveys. We calculated average scores for the 20 airports listed as "Mega Hubs" in the 2026 survey. In 2026, New York LaGuardia replaced Toronto Pearson, so we did not include Pearson's scores.

[3] Airport Dimensions. (2026). *The Airport Experience Study 2026: AX26* [Annual global traveler insight report]. https://www.airportdimensions.com/ax26

[4] Rankings of airports suffer from several methodological challenges. The largest airports in a category tend to rank relatively low, partly because their sheer size creates hardships for travelers, such as long walk times and difficulties reaching the gates. Uncontrollable factors, such as weather, are likely to also hamper O'Hare's ratings. However, the general trend of rising airport scores underscores the urgency of O'Hare terminal initiatives.

[5] Modular Construction Study. Hubbard, S. (2025). Modular construction to support airport sustainability at US airports. *Future Transportation*, *5*(3), Article 109, page 6. This report notes that O'Hare's Multimodal Facility was built using modular construction. https://doi.org/10.3390/futuretransp5030109

[6] Microphasing. This approach, which involves meticulous sequencing of new-gate construction or installation, is often paired with modular construction to limit service disruption to a few days. Like modular construction, this

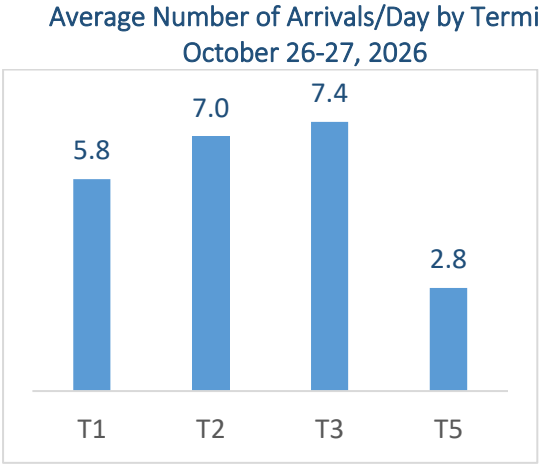
approach works best when gate areas are designed in a relatively conventional way.

[7] Taxi Time Analysis. Our analysis indicates the taxi times have risen far more sharply at O'Hare than at other top 30 airports. The dramatic increases since 2023 suggest construction has contributed significantly. The 2026 numbers reflect six-month totals through June from the FAA.. O'Hare has the highest average taxi times (28.34 minutes outbound and 19.81 minutes inbound) in 2026 among the top 30 airports, measured by annual passenger volume. New York JFK's outbound time in 2026 (29.21) was only slightly below O'Hare's, but the closest airport to O'Hare for inbound flights is Charlotte Douglas International at 13.98.

Average Taxi Times (in minutes)

	Outbound Flights				Inbound Flights		
	2019	2023	2026		2019	2023	2026
O'Hare	23.39	22.48	28.34	O'Hare	13.91	14.08	19.81
All top 30	19.33	19.3	20.83	All top 30	9.22	9.52	10.49

[8] Gate Analysis of O'Hare Terminals. Our analysis of flight arrivals on two sample days (October 26 and 27, 2026), using flight information from flychicago.com, shows that gate utilization is much lower at T5 than at T1, T2, and T3. T5 averages are likely to be naturally lower because international flights require more gate time than domestic flights. However, the disparity remains significant, and our analysis indicates that T5's relatively new gates, used primarily for domestic traffic, also have below-average utilization.



[9] Report of the Airport Consultant, The technical report is part of an August 21, 2026 bond document entitled "$1,312,710,000 City of Chicago, Chicago O'Hare International Airport, General Airport Senior Lien, Revenue and Revenue Refunding Bonds," starting on page 107. Prepared by Ricondo & Associates, Inc. (Ricondo), Appendix E of Official Statement for the City of Chicago. It offers an extensive technical perspective on trends at O'Hare and highlights favorable trends in flight and passenger activity. (Report is behind a paywall)

[10] United Airlines CEO Scott Kirby argues that maintaining dual hub operations for both United and American at O'Hare wastes critical airspace capacity on redundant regional feeder ("catchment") flights. This structural inefficiency prevents carriers from optimizing high-demand long-haul and international routes that better serve the local economy. Ultimately, Kirby argues, transitioning to a single-hub structure would enable greater global connectivity and more efficient use of airport resources. *Crain's Chicago Business* summarizes his position here.

[11] If oil prices are inordinately high, above $95/barrel, for the next several years, which would be unusual in historical terms, O'Hare will likely see only modest (or perhaps no) traffic growth. However, analysts project—and futures contracts suggest—that prices will significantly decline within a year. At this writing, the futures contracts price of oil (WTI) will fall to below $74 by April 2028.