O'Hare's Traffic Trajectory:

THE OUTLOOK FOR TRAFFIC GROWTH AT CHICAGO'S BUSIEST AIRPORT THROUGH 2032

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Passenger traffic at Chicago O'Hare International Airport is booming, but capacity issues will create headwinds to growth over the next seven years.

- O'Hare is substantially outperforming all other U.S. hubs for legacy airlines in 2025, with significantly more growth anticipated next year.
- The timely completion of the O'Hare 21 terminal program, including the O'Hare Global Terminal (OGT) in 2033, is even more critical now than when the deal to build it was struck last year.
- Without constraints on the number of gates available to accommodate growth, the number of passenger flights at the airport would likely be around 30% above 2024 levels by 2032.
- Even with a satellite concourse set to open in 2028, there is intense pressure to build the OGT in phases to lessen temporary gate losses. Still, significant flight reductions will likely be needed.
- There is a need to reexamine the sequencing of terminal construction, and, if the current plan is maintained, to explore temporarily increasing the density of gates in Satellite 1, incentivizing larger aircraft, and, where possible, shifting flights to Midway Airport.

Chicago O'Hare International Airport is at a crossroads. A remarkable bounce-back in passenger traffic this calendar year, buoyed by American's (AA's) and United's (UA's) renewed commitment to hub expansion, has led to surging passenger traffic. Work continues on the massive O'Hare 21 terminal program, which has already crossed numerous milestones, including the addition of new gates at Terminals 3 and 5, which we highlight in the endnotes.[1] This independently produced policy brief examines the outlook for O'Hare passenger growth, considering the ongoing terminal expansion plans, and draws entirely on publicly available data. The opinions expressed are solely those of the authors.

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PHOTO (ABOVE): American Airlines at O'Hare, August 2025
RESEARCH SUPPORT: Zaria Bonds, All photos by Chaddick Institute

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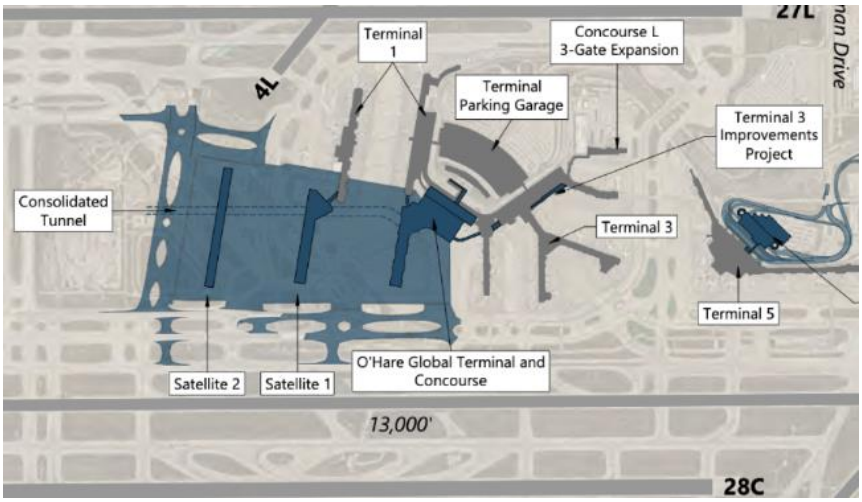
The primary focus of our analysis is the **interaction between flight activity and terminal expansion**. Terminal completion dates have been pushed back several years due to the lingering effects of the COVID-19 pandemic, concerns about airline costs, and other factors. Cost considerations have loomed large in airline negotiations. In 2024, Moody's warned that the cost per passenger enplanement could reach $40, more than double pre-pandemic levels and about twice that of Denver International (DEN), Dallas-Fort Worth (DFW), and other hubs.[2] Airlines cautioned that a lack of cost control could force them to prioritize other hubs.

O'Hare 21 Terminal Plans



An illustration of the terminal improvements part of the O'Hare 21 plans, showing the proposed satellite terminals and O'Hare Global Terminal and Concourse. This is one of many maps presented on terminal options (Source: chicagoyimby website,available here).

In 2024, OGT's projected completion was formally pushed back from the initial 2026 target to 2032. Rather than having two satellite terminals open before this facility's completion, the new ORDNext plan calls for building Satellite 1 (S1) first, then the OGT, prioritizing the latter's construction (now expected to open in 2033). The second satellite (S2) will come online, if needed, in 2034.

METHODS OF ANALYSIS

Our analysis is based on the following research activities:

- An evaluation of Bureau of Transportation Statistics (BTS) traffic data and FAA forecasts.
- Consultations with consultants about the impact of terminal construction.
- Original data collection, including estimates of the number of gates at hub airlines and flight activity by terminal at O'Hare. We refer to each terminal as "T," with Terminal 1 being T1, and so forth.

We draw five primary conclusions.

Finding 1: Brisk growth, fueled by 5.1% growth in passenger traffic and 11.2% growth in flights thus far this calendar year, reflects vigorous, rapid expansion by American Airlines and United Airlines. Since 2023, flights are up 18.9%. After an initially sluggish post-pandemic recovery, O'Hare is a hotbed for hub-focused expansion.

The traffic growth at O'Hare is arguably this year's most significant development in Chicago intercity transportation. By spring, AA's and UA's simultaneous expansion catapulted Chicago to the top among U.S. connecting hubs for legacy network airlines in year-over-year passenger

Chicago's Global Powerhouse

In September, OAG named O'Hare the U.S.'s most connected airport. The latest monthly results show O'Hare again the **busiest airport in terms of flight operations in the U.S.**—and likely the busiest in the world—and second only to ATL in passenger traffic. O'Hare is **#10 globally in seats of service** provided (*see discussion on page 12*).

traffic growth. AA's desire to expand prompted it to pursue legal action (which proved unsuccessful) against the City of Chicago after an administrative decision was made to relinquish four of its gates to other airlines.

O'Hare has seen passenger traffic grow 5.1% and flight traffic grow 11.2% through September of this year. For our comparisons with other airports, however, we use only the *eight months* through August, the most recent month for which consolidated BTS data are available. Over this period, O'Hare's passenger boardings were up 5.3%, far more than at other U.S. hubs for legacy airlines (Figure 1). Second-place Detroit Metro (DTW) rose just 1.5%, while all other hubs fell. (We also show Los Angeles International [LAX] on the chart for comparative purposes). O'Hare is seeing robust growth in an otherwise challenging air-travel environment.

The number of *flights* through August leaped 10.7%, a rate surpassing all its peers (Figure 2), with only DTW close at 7.6%. (See Appendix A for 12-month growth rates.) Other notable findings, further described on pages 8–9, include the following:

A) Domestic seat-miles rose 7.1% through August, also the highest among the airports compared.

B) The number of passengers per departing flight rose to 105.9, up from around 93 in 2019, as its aircraft became larger.

C) O'Hare has risen to near the midpoint among the hubs evaluated with respect to its post-pandemic recovery, after previously considerably lagging (See Figure A2 in Appendix A). This year,

FIGURE 1: Growth in Passenger Enplanements, Year to Date, through August 2025

Major Connecting Hubs for Network Airlines

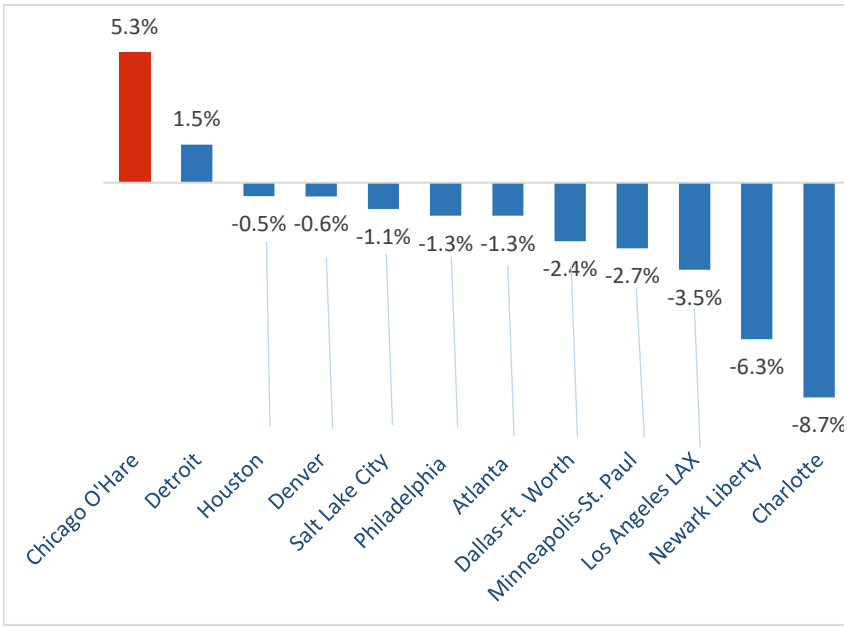
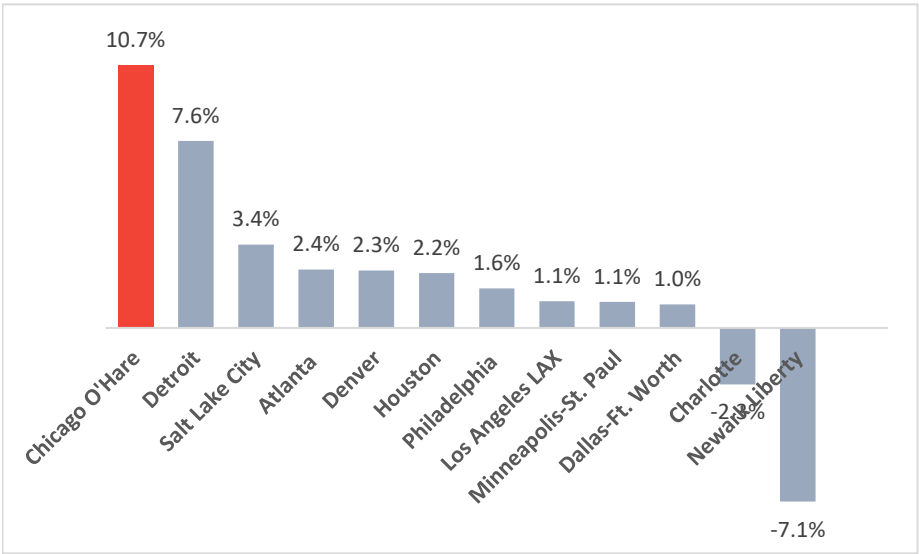


FIGURE 2: Growth in Flight Departures, Year to Date, through August



through August, traffic was 98.6% of 2019 levels. Although well below DEN, DFW, and Charlotte Douglas (CLT), which have grown by more than 10% since 2019, this is significantly above ATL, Minneapolis–St. Paul International (MSP), DTW, and LAX. In September, cumulative traffic at O'Hare rose above 2019 levels.

Mainline traffic on AA and UA (excluding regional partners) is up a combined 4.2% through August. Despite the AA legal battle over gates at O'Hare, we believe there is sufficient unused gate capacity to support growth above the forecasted national average through 2027. Eighteen new gates were brought online in T3 and T5 from 2018 to 2024. O'Hare grew to 201 gates, the most of any airport in the world.

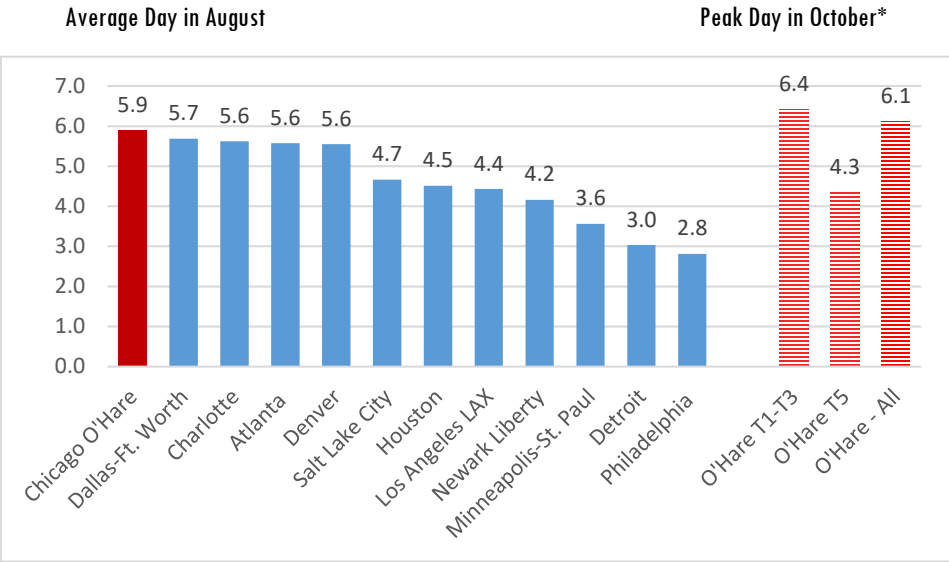
Finding 2. Gate utilization at O'Hare averaged 5.9 departures per gate in August 2025, the highest among U.S. hub airports. Such heavy utilization creates significant challenges to expansion. Nevertheless, we expect a 4% growth in flights in 2026 and 3% in 2027, in part due to capacity at T5.

The airport's prospects for short-term traffic growth are favorable. In late October, both American and United announced ambitious expansions. Notably:

- AA will have at least 4.2% more flights in July 2026 than this year.[3]
- UA will likely expand even faster following the acquisition of five new gates. It announced service to 10 new cities.

In August, O'Hare averaged 5.9 departures per gate daily, which is high but not extreme by national standards (Figure 3). ATL, CLT, DFW, and DEN all had rates of 5.6 or more. (DFW had a rate of 6.1 flights/gate in July before falling to 5.7 in August). These figures are based on our estimates of the number of gates available at these airports, as described in Appendix B.

FIGURE 3: Gate Utilization: Departures per Available Gate



Chicago O'Hare trails only Dallas Fort Worth, which will open a new terminal in 2027, in gate utilization among major hubs. T1–T3 have much heavier utilization than T5.
**The October average is higher than August partially because it reflects the protocol for many international flights to use two gates, one at arrival in T5 and another for departure, which is not reflected in the BTS data.*

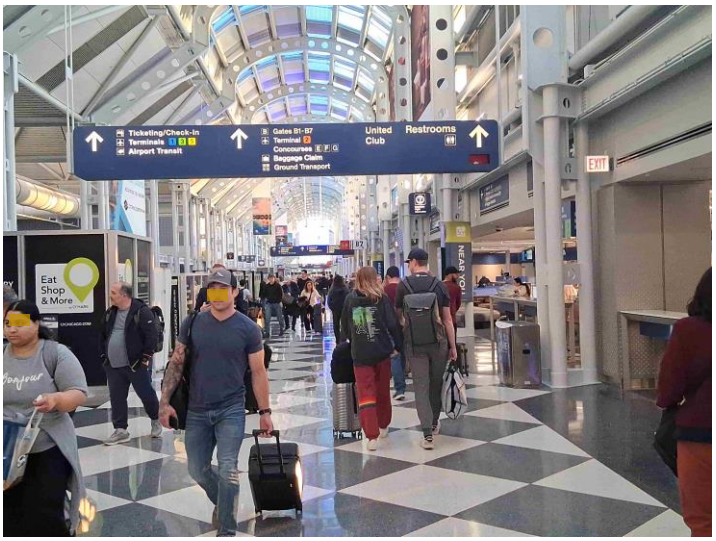
Yet O'Hare's gate utilization rate is far above that of six of the 10 other hub airports evaluated and LAX, which average 4.7 or less. All of the top four are planning large-scale gate additions. ATL added four gates this autumn, and DFW plans to add numerous gates by 2027. It is also significant that O'Hare's average has risen sharply over the past year, up from about 5.4 in August 2024.

Our analysis suggests that hub airports with rates of 6.5 or more departures per gate across their entire airfield on the *average day* are at risk of severe service-quality problems at peak times.[4] These risks are particularly high on Fridays and Sundays, when flight activity is highest, pushing rates even higher. Although O'Hare averaged 6.4 in 2018 and 6.3 in 2019, well above the gate utilization rate in 2025, circumstances were far different then, as discussed in the endnotes. Most notably, 30- to 50-seat regional jets, which could be clustered on the aprons and are well-suited for boarding and aligning without jetways—techniques that stretch gate capacity — are no longer prevalent.[5] In addition, O'Hare had severe reliability problems then, something airlines feel intense pressure to avoid today.[6]

Our evaluation found significant differences among O'Hare's terminals.[7] On Thursday, October 30, 2025, O'Hare averaged 6.1 daily flights/day. Terminals 1–3 averaged 6.4 daily flights per gate, whereas T5 averaged just 4.1.[8] (Our T5 estimate is based on *flight arrivals* because many international flights arrive there (so passengers can clear customs) but depart from other terminals, an atypical arrangement in U.S. aviation. The long dwell times at international flight gates and the larger aircraft being flown likely drive down T5's gate utilization. Even so, T5 can help alleviate shortages, though moving AA and UA domestic flights there would likely pose significant challenges for connecting passengers.

Finding 3: The probable loss of gates from Terminal 2's demolition for the new O'Hare Global Terminal will create strong headwinds to traffic growth after 2028, even if the new Satellite 1 concourse is finished on schedule. The expansion of passenger traffic creates pressure for a phased approach to building the OGT. The grandiosity of its architecture would need to be scaled to reflect budget and timeline realities. Even then, reductions in flight activity would likely be necessary.

O'Hare planners face a conundrum: They must build new terminals and concourses reflective of our City's lofty aviation status while minimizing construction impacts and vigorously containing costs. Favorably, 19 new gates are slated to become available at S1 in late 2028. These will be superior to most existing gates at O'Hare and capable of handling a wide range of aircraft types.

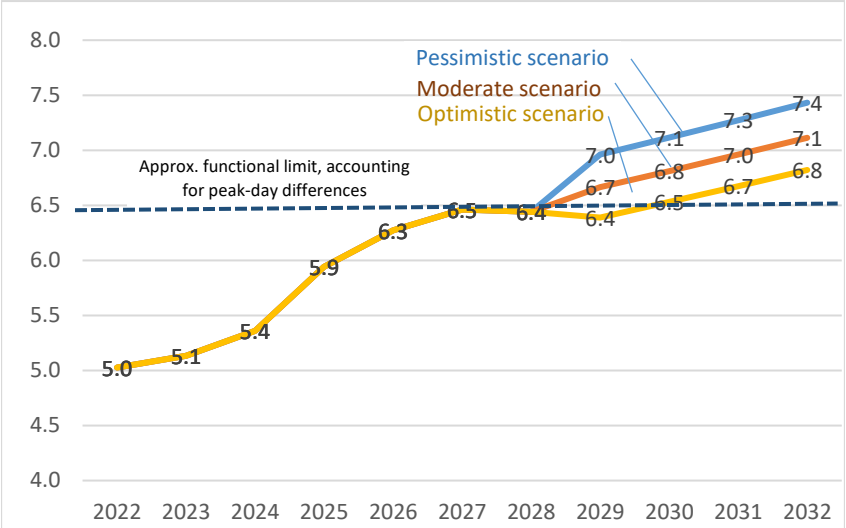


Concourse C at O'Hare, part of the United Airlines hub, sees heavy traffic in November 2025

S1's pleasing architecture will lift the passenger experience, and gates will be generously separated, thereby expanding seating. (Space is allocated among airlines based on linear frontage rather than the number of gates. However, gates closely correlate with capacity.) Furthermore, contractors worked intensively during the pandemic and afterward on infrastructure to support terminal construction.

Less favorably, three gates on the B Concourse of T1 and two T2 gates were at least temporarily lost due to work on S1 and a connecting tunnel. Even more importantly, a sizeable share of T2's 43 gates will likely be lost for extended periods. Although construction details for OGT have not been announced, airlines must brace for temporarily diminished capacity. The need to create spacious customs facilities and an international check-in area, more extensive retail space, and other amenities, all built mainly on T2's footprint, will make it challenging to keep most gates open during phasing.

FIGURE 4: Estimated Peak Season (Summer) Departures per Available Gate, through 2032



The forecasted utilization of gates surpasses the functional limit in all three scenarios

We expect the City to consider remote stands (parking aircraft away from terminals) that are reachable by shuttle buses, where feasible. The tightly synchronized scheduling required at connecting hubs, which often gives passengers less than 45 minutes to make transfers, will, however, limit the practicality of this approach. In the long run, larger planes have great potential to reduce gate needs. Before the early 2030s, however, the ability to "up-gauge" will be limited, in part because of long queues for new Airbus and Boeing planes.

To gain insight into the different outcomes for 2028–32, we evaluate three scenarios:

1. Optimistic Scenario. Construction of the OGT is phased, and mitigation strategies will be used so that O'Hare loses no more than the equivalent of 30% of T2's 43-gate capacity from 2029–32. This will necessitate a carefully phased approach, drawing upon the lessons learned at New York LaGuardia (LGA).
2. Moderate Scenario. Same as above, but the equivalent of half of T2's gate capacity is lost during the period.
3. Pessimistic Scenario. Same as above, but the equivalent of 70% of T2's gate capacity is lost.

We estimate gate utilization through 2032, accounting for anticipated gate changes, including S1's 19 gates slated for late 2028 (see Appendix B). Our project is based on the following:

- *10% growth in flights for 2025*, which is below the 11.2% rate through September. We exclude the effects of FAA-mandated flight cuts, which we consider anomalous.
- *4% growth in 2026*, reflecting announced expansions, and *3% growth in 2027*.
- *2027 onward*, we assume the 2.2% annual growth, reflecting the FAA's official forecasted rate (see our detailed discussion in Appendix C).

Figure 4 shows the average number of departures per gate on an average day during the summer season. In all scenarios, the number of departures per gate rises to 6.5

or higher by 2028, which we consider the practical limit. Under the optimistic scenario, utilization increases to 6.5 in 2030 and 6.8 in 2032, while in the pessimistic scenario, it rises to 7.1 and 7.4, respectively. The moderate scenario falls in between, peaking at 7.1.

An American and Japan Airlines plane at T3's K Concourse.

The outcome may be a mix of the above scenarios, with the loss varying from month to month or year to year. No gates may be lost during the 2029–30 period before OGT's construction accelerates. However, dramatic month-to-month changes in gate availability pose serious operational challenges for airlines, whose schedules are developed at least five months in advance. Regardless of the scenario, using remote stands will likely be critical.

In each scenario, however, gate utilization in 2030 and beyond exceeds what we regard as the practical limit. In pessimistic and moderate scenarios, the problem is less acute before 2030, but even then, airlines will need to limit their growth or contract.

All the phase-construction scenarios will likely bring risks of cost escalation. This will likely necessitate shying away from a path-breaking architectural design (as evident in a 2018 depiction by Gang Studio) in favor of a more conventional yet still impressive structure.

Finding 4. The City should pursue strategies to prevent sharp reductions in flight activity during construction. Reassessing the costs and benefits of changing the sequencing of new terminals is necessary. If the current sequencing is maintained, increasing the density of gates in S1, shifting more flights to T5, and incentivizing relocations to Midway Airport warrant consideration.

The City will face the difficult balancing act of meeting cost and schedule goals while ensuring passengers have a reasonable, favorable experience. The passenger experience suffered during construction at LGA, pushing the airport to the bottom of customer satisfaction rankings in a J.D. Power survey in 2019.[9] O'Hare will face additional challenges due to not doing work during the pandemic-related downturn and to its status as a central connecting hub, which limits airlines' scheduling flexibility.

Fortunately, the City has a strong record of completing projects on budget, as evidenced by the OMP and the first phases of O21. Several strategies can be explored to make the 2028–32 period as smooth as possible and achieve the results of the Optimistic Scenario.

The first step should be to conduct analyses, in consultation with airlines, of the ramifications of resequencing terminal construction, with a fresh

review of the possibility of building both S1 and S2 before the OGT. Reports indicate the City is already considering this in light of the profound changes underway, which could not be fully anticipated by airlines or the City when the current deal was struck.[10] It would shed light on whether this is cost-effective and would substantially delay OGT's completion, or pose financial risks to airlines and the City in the event of an unexpected downturn.

If revised sequencing proves unfeasible, other actions should be considered.

1) Temporarily making Satellite 1's gates more compact while still being suitable for Regional Jets (RJs). S1's spacious dimensions may be ideal for having more than 19 gates on an interim basis. Although designed to support the eventual transition to larger planes, smaller RJs will likely remain dominant through 2032. Given the linear frontage, S1 can likely handle at least two dozen RJs simultaneously with a higher gate density. Similarly, using air stairs (mobile staircases for outdoor boarding) may also be an option at existing terminals. At Denver, Frontier Airlines uses them in place of jetways on some flights. Outdoor boarding was used at O'Hare in 2019.

2) Leveraging Terminal 5. Although moving airlines with a smaller presence to T5 will be critical to lessening disruption, this will be difficult for hub operators. Several airlines that are not AA or UA code-share affiliates could, however, be relocated there.

3) Incentivizing the use of larger planes through fee adjustments. Airports can adjust fees or gate allocations based on efficiency factors. This could include landing fee discounts to encourage larger planes and incentives to shift flights to periods when gate demand is low. Airports in Düsseldorf, Germany, and Jeju, Korea, have successfully raised landing fees to encourage the use of larger aircraft.[11]

4) Tapping Midway's potential. Midway's flight activity is around 10% lower than in 2019. Midway has seen a drop proportional to about five gates' worth of departures since 2023, primarily due to Southwest's downsizing.[12] Delta and Southwest use both Midway and O'Hare, making them particularly well positioned to reroute some flights to the smaller airport temporarily. Arrangements could be made to ensure flights can return to O'Hare after the OGT's completion.

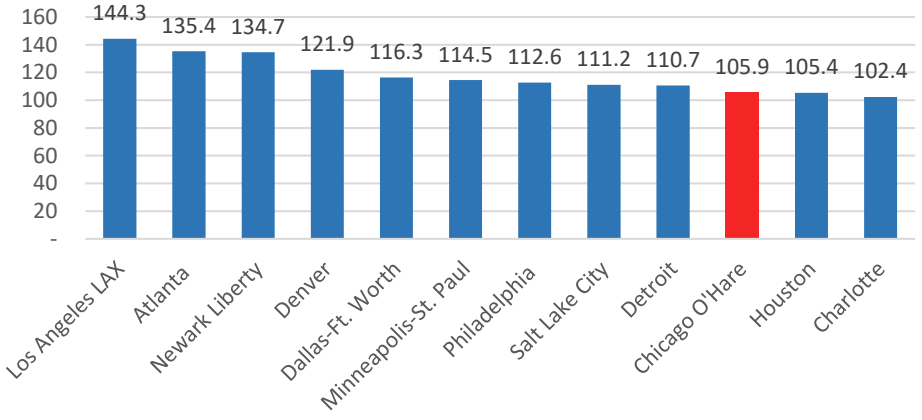
5) Encouraging specialized motorcoach substitution, as AA has done with Landline, in place of short-hop flights. Instead of flights to Rockford, IL, and South Bend, IN, AA uses Landline buses departing from behind security at Gate L28. Passengers receive airline-style boarding passes. Ground substitution is particularly suitable on routes under 175 miles, as AA has done extensively with Landline in Philadelphia.

5) Compensate for challenging terminal conditions during construction by improving complementary ground services, including rail links downtown. The airport's expanding air traffic will put tremendous pressure on passenger pickup and drop-off areas. Enhancing rail and bus links to local destinations, of course, won't lessen gate shortages, but it will give travelers a smoother travel experience during and after construction.

The City of Chicago's ambitious plans to expand O'Hare's terminal capacity are critical for the region's economic future. O'Hare's near- and long-term growth prospects are excellent. These and other strategies for the transitional 2028–32 period can help sustain momentum at this critical transportation facility. ■

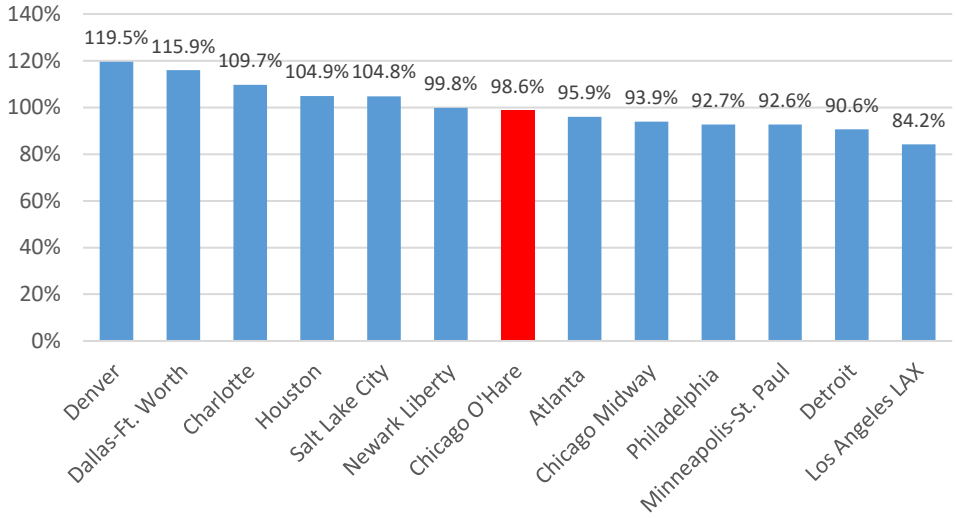
APPENDIX A: OTHER METRICS OF O'HARE'S PERFORMANCE

FIGURE A1: Average Number of Passengers per Departure, August 2025



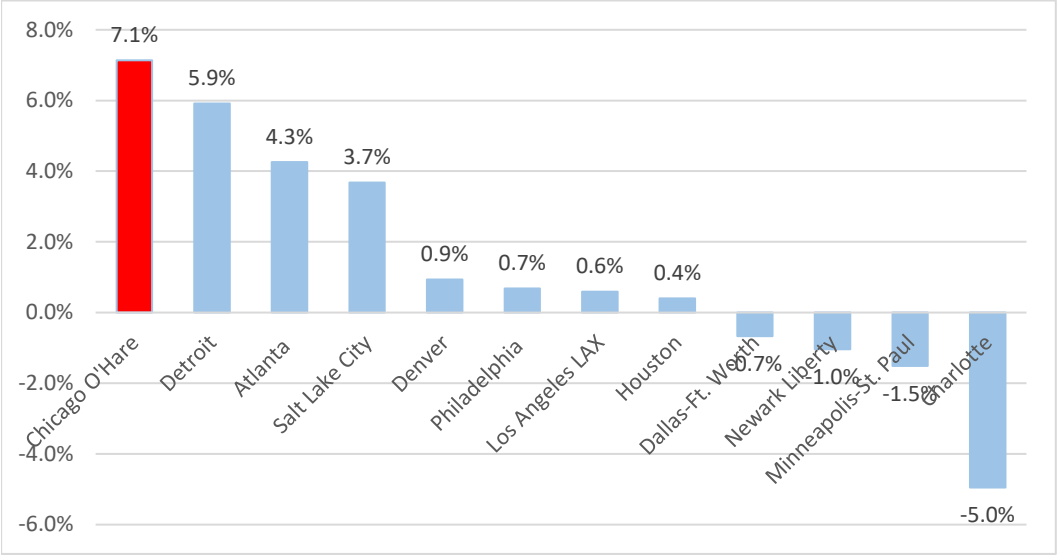
The number of passengers per departure has steadily risen at O'Hare and reached 105.9 in August. O'Hare has passed Houston (IAH) and was several percentage points ahead of Charlotte, which previously had nearly identical average passenger counts.

FIGURE A2: Passenger Traffic vs. 2019, January–August 2025



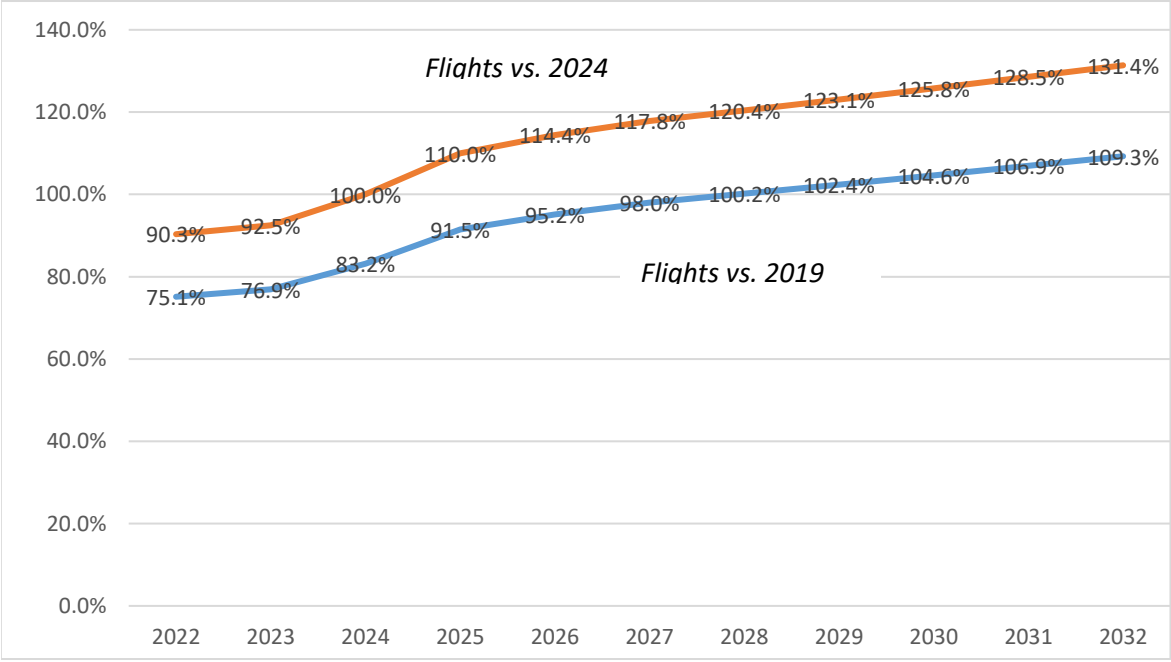
O'Hare has risen to near the midpoint among legacy airlines' connecting hubs with respect to its post-pandemic recovery. Traffic over the eight-month period ending in August 2025 was at 98.6% of pre-pandemic levels. Denver and Dallas-Ft. Worth have enjoyed the sharpest gains since 2019, but as shown in Figure 1, their traffic has declined this calendar year. In September, year-to-date traffic inched above 2019 levels, although comparative data for other airports is not yet available.

FIGURE A3: Change in Domestic Seat Miles, 2025, January–August 2025



Domestic seat-miles of service at O'Hare rose 7.1% in the eight months ending in August compared to the same period the previous year. Only O'Hare and Detroit had domestic seat-mile growth greater than 5%, with four of the peer airports having declines. This chart focuses on domestic traffic because minor changes in long-haul international flying can disproportionately affect results.

FIGURE A4: Projected Growth in Passenger Flights vs. 2019 and 2024 Without Substantially Worsening Gate Shortages



We project that O'Hare flight activity would rise to around 30% above 2024 levels and 8.0% above 2019 levels by 2032 if gate availability remained similar to current levels. Prior to 2020, a significant number of departures involved 50-seat (or fewer) regional jets that did not use jetways, which eased gate constraints.

APPENDIX B: AVAILABLE GATES AT O'HARE

The following table shows our estimate of the number of available gates at the start of each year, based on reports of gate openings and closings. Before 2020, some flights departed without using jetways, using air stairs involving outdoor boarding, which allowed some gates to handle several smaller aircraft, a practice now largely discontinued. We recognize that our figures are estimates to compensate for the lack of an official archive of available gates.

		----Change during year ----				
Year	Gates at Start of Year*	T1	T2	T3	T5	Estimated Gate Opening and Closing Timeline
2018	185			+5		First five gates of Concourse L in T3 completed.
2019	190					
2020	190					Approx. end of non-jetway boarding
2021	190					
2022	190					
2023	190				+10	10 new T5 gates dedicated (some opened in 2022)
2024	200			+3, -2		L Concourse, 3 new gates opened. 2 existing T3 gates closed due to construction. Excludes L28, which is used for the Landline bus service
2025	201	-3		The		The flychicago.com website shows 201 gates at the start of 2025. B1–B3 were closed over the course of the year due to S1 construction, but we assume they were open in our August 2025 gate utilization analysis.
2026	198					
2027	198	+3		+2		We assume that gates B1-B3 and the two T3 gates reopen this year.
2028	203	+19				19 new gates in S1 late in the year
2029	222					See note below
2030	222					See note below
2031	222					See note below
2032	222					OGT opens, number of gates TBA
*The count assumes no loss of dates due to construction on OGT after 2025						

Note: The number of gates assumed available by scenario during 2029-32 is as follows: *Optimistic*: 209.1, *Moderate*: 200.5, Pessimistic: 191.9.

Gates at Other Airports. Our estimates of gates at other hub airports are summarized here.

APPENDIX C: FORECAST DETAILS

Our flight activity and gate utilization estimates are based on the following research-informed assumptions.

Forecast for 2025. Our projection of 10% growth in flight activity in 2025 is based on FAA traffic statistics for O'Hare from January to September. We assume growth rates for October–December mirror the September rate rather than the higher rate observed earlier in the year. Our estimate reflects *scheduled flights*, which we consider more relevant for forecasting than *operated flights.* The latter are affected by the recent mandatory FAA cutbacks due to air traffic control constraints, which we view as temporary and not affecting long-term growth trends.

Forecast for 2026. Our 4.0% projection for flight-activity growth in 2026 is based on announced expansions by AA and UA (including their regional airline partners) and applying FAA average-growth estimates for other carriers. AA will place considerable emphasis on O'Hare, with flight activity rising at least 4.2% between the summers of 2025 and 2026. We expect UA to expand at a similar rate, or even faster, facilitated by the five new gates acquired through a gate reallocation, which will give it roughly 5% more gate capacity. Our 4.0% growth estimate is based on a weighted average of the market shares of UA and AA (together, 86% of the market), which we project will grow 4.3%, and other airlines (14%), which we expect to grow closer to the FAA's 2.2% average U.S. rate. (The FAA forecasts passenger traffic will grow 2.6% annually, but aircraft will become 0.4% larger annually, resulting in an approximately 2.2% increase in flights.

Forecast for 2027. We project 3.0% growth in flights, marginally above the 2.2% FAA average, driven by evidence that both AA and UA will continue to build their O'Hare hubs, where traffic is still roughly at pre-pandemic levels, despite domestic air traffic generally above that level. Questions about whether AA has a long-term commitment to O'Hare were answered when CEO Robert Isom remarked in October, "[We] have just an incredible base of customers that are waiting for us to really get back in the marketplace. As we look out into the future, we anticipate that Chicago will return to its rightful place as one of our largest and most profitable hubs."[13] UA has also noted it will prioritize Chicago.

The forecast for 2028–2032 is based on a 2.2% annual growth rate for flights, equal to the FAA national average. The FAA forecasts that, nationally, passenger traffic will rise from 987 million in 2024 to 1,310 million in 2035 (page 89).

Our projected flight activity in 2032 is far below the estimate in the Terminal Air Plan (TAP) assessment report (see Appendix B, part 1) from September 2022, showing passenger flights rising to 973,592 in 2030. Our forecasts show 906,064 flights in 2030. Although the TAP report anticipates just 0.9% annual growth in flights, it applies this rate to a much larger base of flights and thus forecasts much higher volumes.

Sidebar discussion (page 2):

O'Hare's status as the county's busiest airport in terms of flight operations is evident in August 2025 data, which shows it having substantially more than any other U.S. airport that month. Results for non-U.S. airports are not available, but none ranked higher than 8th globally (Shanghai) in 2025, suggesting that O'Hare likely had more flights in August than any other airport worldwide. O'Hare's status as #10 in seats is based on OAG's December schedule estimates, shown here.

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TECHNICAL SUPPORT BY THE CHADDICK INSTITUTE'S RESEARCH TEAM

Zaria Bonds

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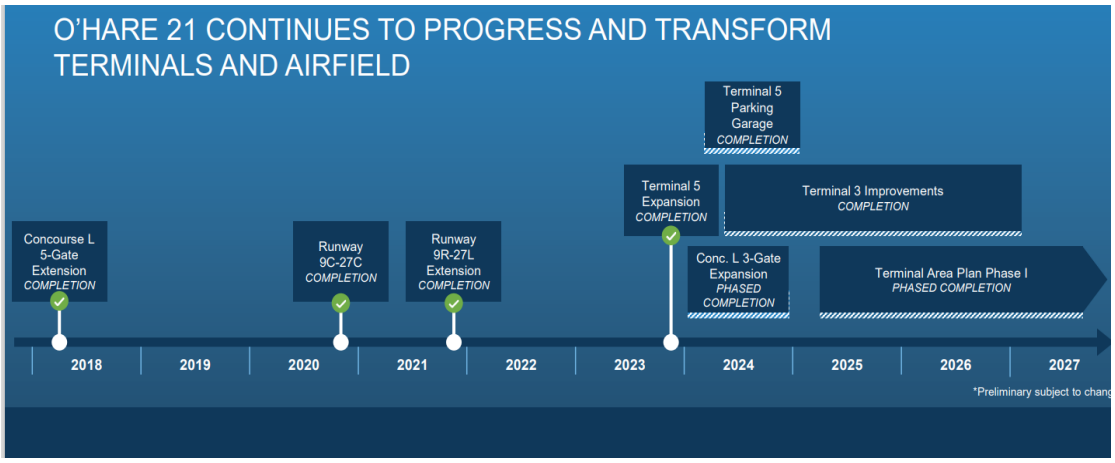
ENDNOTES

[1] O'Hare 21 Key Components. The highlights of the O'Hare 21 program are summarized in a graphical timeline on the official website.



[2] Moody's Analysis. For a discussion of Moody's concerns, see this *Crain's Chicago Business* article.

[3] American Airlines O'Hare expansion. For details, refer to this article by The Points Guy and this article on the expansion through Summer 2026 by John Pletz at Crain's Chicago Business, who reports that the number of AA flights will rise from 460 in summer 2025 to more than 500 in summer 2026.

[4] Gate Analysis Details. We analyzed pre-pandemic and post-pandemic gate utilization at major hub airports. We found that all airports with average rates above 6.3 flights/day per gate view terminal expansion as a significant and pressing priority. We could not find examples of hub airports consistently having flights above this rate. See endnote 6 for a discussion of the problem O'Hare experienced in 2018. An earlier version of this brief reported O'Hare's August utilization as 6.0; it has been revised to 5.9 due to a lower estimate of available gates. We could not ascertain when several dates went out of service.

[5] Gate Utilization in 2019. The average number of departures per available gate was substantially higher in 2019 at 6.33 than it is today, based on our estimates. This high rate could be achieved due to several factors that no longer exist. First, a substantially larger share of planes in 2019 were regional jets (including smaller 30- and 50-seaters, which are mainly gone today), which did not use jetways for boarding and were parked on tarmacs for outdoor boarding. Several planes could often be parked in the same apron. The average number of passengers per departure was also much lower, around 92 compared to nearly 106 in August 2025; this makes outdoor boarding more difficult and increases gate requirements. Second, airlines have felt enormous pressure from the U.S. Congress and other bodies to avoid large-scale service disruptions, such as those that occurred at Southwest Airlines in 2022–23. It is unlikely they are willing to risk the problems that come with permanently having such high gate usage.

[6] Reliability issues in 2018. This article summarizes O'Hare's performance in 2019, ranking it last among major airports, despite OMP runway improvements being largely complete.

[7] Shuttle Bus Service to T5. There is now a bus shuttle from T1 to T5. However, this is best suited for international transfers with 90+ minutes of connecting time.

[8] Gate Utilization by Terminal. BTS does not report flight data organized by terminal or date. Our estimate is based on counting flights on a flight board that lists arrivals and departures by gates. To be conservative, we reduced the number of flights by 1% to account for the approximate cancellation rate on the day sampled. Our figures should be regarded as estimates.

[9] New York LaGuardia Airport. For the JD Power results for 2019, click here.

[10] Ongoing Work on the Phasing of OGT Construction. A document entitled "Preliminary Official Statement dated November 21, 2025, City of Chicago, O'Hare International Airport," prepared in connection with bond financing, indicates that the City is already exploring phasing options, noting that this could increase project costs. It also notes that airlines have yet to agree to a phasing or re-sequencing plan. The document is available here. See page 4.

[11] Incentives for Larger Planes. For a review of incentives for larger aircraft, see this article in the *Journal of the Korean Society of Aviation and Aeronautics*, which concludes that these initiatives can be successful.

[12] Midway International Airport. Midway has seen passenger and flight numbers decline during the first eight months of 2025. Passenger traffic is down 11.8%, and flight traffic is down 7.3%. The decline is partially due to Southwest's strategic restructuring, which has reduced seat miles nationwide. Midway's traffic through August was 93.9% of pre-pandemic levels. Although all gates appear to be in use, and Southwest's dominance complicates gate reallocations, the reduction in traffic since 2023 is equivalent to the loss of four gates' worth of flight activity.

[13] AA Expansion. See endnote 2. V4