



Executive Summary Concession Preference Survey Chicago O'Hare– Terminals 1 & 3

**For the Chicago Department of Aviation
Fall 2023**

Project Background

To help plan for new concessions at Chicago O’Hare International Airport (ORD), it is important to gather direct insight from passengers themselves by conducting an intercept survey. The purpose of the survey was to collect updated information regarding the ORD consumer market for Terminals 1 and 3. Five primary topics were covered:

- 1

Passenger Profile
- 2

Travel Characteristics
- 3

Concession Behavior
- 4

Concession Preferences
- 5

Interest in Ordering/ Service Options

The methodology for the study is described below.

METHODOLOGY

Data Collection

- Surveys were conducted via electronic tablets with programmed skip logic & branching – (passengers skip questions not relevant to their experience).
- Passenger surveys were conducted via intercept in September 2023.
- A stratified random sampling approach based on airline market share was used.
- Field staff approached departing passengers at airline gates and asked them to participate in a concession preference survey.

Analyze Results

- Upon completion of survey administration, Unison cleaned, verified, and analyzed the data collected.
- Frequency tabulation summaries were provided to CDA along with a comprehensive analysis of the market research.
- The key findings and results of the survey were presented to CDA leadership.

COMPOSITION OF SAMPLE

Sample Size

2,771

Margin of error \leq +/-1.9%
@ 95% confidence level

Terminal

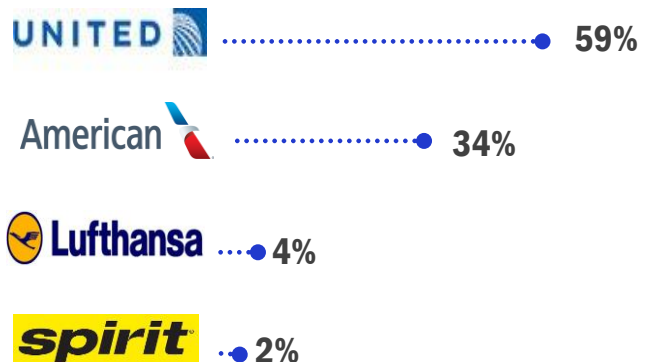


63%
Terminal 1



37%
Terminal 3

Airline



*1% other airlines

PASSENGER PROFILE

Demographic Characteristics

Gender

Female
54%



Male
45%

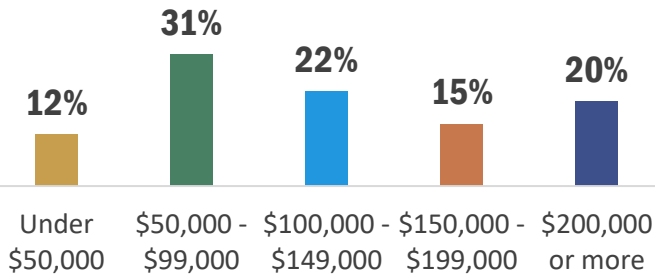
*1% nonbinary

Age Group*



- 15% Generation Z (1997-2012)
- 33% Millennials (1981-1996)
- 28% Generation X (1965-1980)
- 22% Baby Boomers (1955-1964)
- 2% Silent Generation (Before 1955)

Annual HH Income



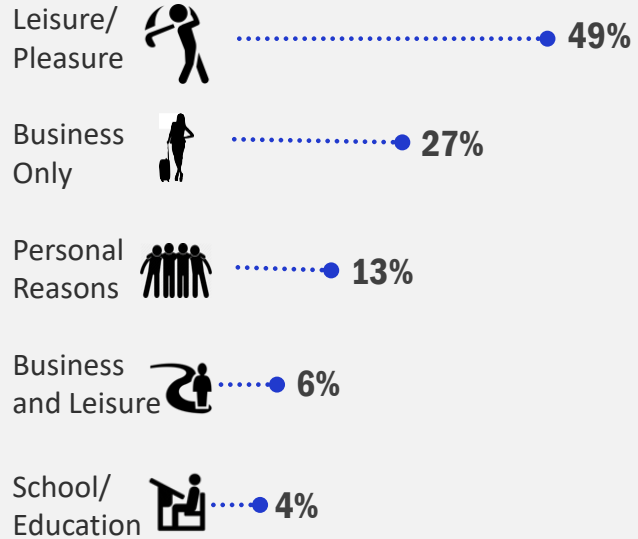
*Pew Research Center

Travel Characteristics

Age Group



Primary Trip Purpose



*1% military

NOTABLE CHARACTERISTICS



Local Residents

2023 - 21% ↓
2018 - 25%



Non-U.S. Residents

2023 - 11% ↑
2018 - 7%



Millennials

2023 - 33%
2018 - 33%



Female

2023 - 54% ↓
2018 - 56%



Income \$100k+

2023 - 57%
2018 - N/A



Originating

2023 - 51% ↓
2018 - 52%



Leisure Travel

2023 - 66% ↑
2018 - 63%



Dwell Time + 2 hours

2023 - 42% ↓
2018 - 46%



Layover + 2 hours

2023 - 62% ↑
2018 - 52%

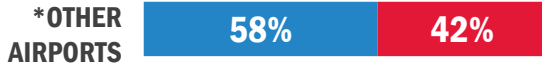


Travel w/ Others

2023 - 30% ↓
2018 - 42%

CONCESSION PURCHASES

Food & Beverage Purchases



■ Yes ■ No

Retail Purchases



■ Yes ■ No

Larger % making F&B purchases at ORD:

- Business travelers (73%)
- Originating passengers (73%)
- Passengers traveling with others (73%)
- Non-U.S. residents (73%)
- Passengers with dietary/food restrictions (75%)

Larger % making Retail purchases at ORD:

- Terminal 1 (13%)
- Passengers traveling with others (14%)
- Baby Boomers (16)

Source: Unison internal data – median % from 6,000 surveys at medium and large hub airports.

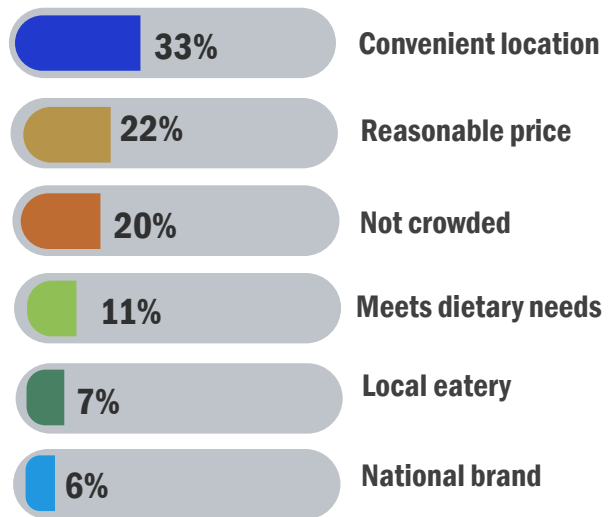
PURCHASE DECISION

If no purchase, why?



*3% other

Top consideration for purchase...



DIETARY RESTRICTIONS



■ Yes ■ No

Type of Restriction



Vegetarian
26%



Gluten Intolerance
20%



Dairy Intolerance
19%



Nut free
8%



No seafood
8%



Religious (Kosher, Halal)
8%



Vegan
7%

CONCESSION PREFERENCES

Preferred Type of Food Service & Top Preferences by Category

2023 - 46% ↑
2018 - 41%

Other Airports - 35%



**Fast casual/
Quick service**

Burgers
Sandwiches/Deli
Fresh salads/Healthy
Café/Bakery style
Chicken

2023 - 29% ↓
2018 - 30%

Other Airports - 35%



**Snack/
Food to go**

Fresh fruit/ Vegetables
Nuts
Pastries/ Baked goods
Smoothies
Popcorn

2023 - 18% ↑
2018 - 17%

Other Airports - 20%



**Sit-down/
Table service**

All American Diner
Mexican/ Latin
Italian
Pizza
Steakhouse

2023 - 8% ↓
2018 - 12%

Other Airports - 11%



**Brewhouse/
General bar**

Brewhouse/ Craft beer
General bar
Wine bar
Distillery/ Spirits tasting

COFFEE PREFERENCE*

Aside from Starbucks & Dunkin', what is your preference for coffee...

35%



25%



9%



9%



7%



7%



5%



3%



*31% are not interest in coffee

ORDERING/ SERVICE OPTIONS

% Likely or Very likely...

Ordering Options

59% **Yes**

Use online ordering platform

44% **Yes**

Order from virtual "ghost" kitchen

43% **Yes**

Order for gate delivery

37% **Yes**

Call in pre-order via phone

20% **Yes**

Service Options

78% **Yes**

"Just walk out" check-out free

60% **Yes**

Use robot/machine that makes custom orders

46% **Yes**

Purchase retail from vending machine

42% **Yes**

GENERATIONAL DIFFERENCES

Gen Z (15%) 1997-2012

- High preference for fast casual/ quick service, especially burgers and pizza
- High interest in robots/ machines for custom drinks/ food
- Less likely to purchase retail

Gen X (28%) 1965-1980

- Equally interested in snacks/ foods to-go and sit-down service
- Greater interest in bars than other groups
- High preference for healthy snacks

Silent Generation (2%) Before 1955

- High preference for sandwiches/ deli foods and Italian cuisine
- Less interested in bars, healthy foods, and ordering/service options



Millennials (33%) 1981-1996

- Most likely to purchase food & beverages
- High preference for fast casual/ quick service
- Most likely to use ordering and service options compared to others

Baby Boomers (22%) 1955-1964

- Most likely to make retail purchases
- Top food preferences include sit-down All-American Diner and healthy snacks

KEY HIGHLIGHTS

Layover Times

Layover times are longer compared to 2018. Also, connecting passengers have a greater preference for sit-down service.

Concession Purchases

The percentage of passengers making food & retail purchases is similar to results in 2018. Convenient locations and reasonable prices are important.

Diet Restrictions/ Food Allergies

A larger percentage of passengers with diet restrictions/ food allergies made food & beverage purchases than those without restrictions.

Preferences for Bars

There is a greater interest in brewhouses, especially among T-1 passengers.

Food Preferences

Top preferences for cuisine are similar to our findings from 2018 survey and among T-1 and T-3 passengers

Future Considerations



Review sit-down options for terminals with larger connecting market.



Provide the most convenient purchasing options and value priced offerings.



Ensure concessions continue to accommodate special food diets.



Assess the feasibility of adding brewhouses.



Variety of food options is needed for all tastes



HEADQUARTERS

150 N. Michigan Ave., Suite 2930

Chicago, IL 60601

312.988.3360

www.unison-ucg.com