Fifteen years ago, one of my first assignments for AIN was to travel to the NATA Convention in Las Vegas. (You are now reading one of my last assignments.) The schedule called for me to arrive in Glitter Gulch on Friday, April 5, 1991, for the final day of the convention. Editor-in-chief Jim Holahan supplied me with a list of names of industry people to try to contact and a general overview of what AIN was looking for in the way of an industry snapshot.

This was a daunting prospect for a reporter whose primary view of the FBO industry was shaped by my experiences as a light airplane owner and pilot. My report to Holahan contained this sage observation: “It was tough to arrive at NATA on the last day and attempt to educate myself about the industry while finding out what was ‘new.’ That's difficult when you don't know too much about what’s old.”

I recently unearthed that four-page, single-spaced report to AIN that I wrote a decade-and-a-half ago, shortly after the first Gulf War. Looking at what was on NATA attendees’ minds back then provides some eye-opening perspective on what holds people’s attention this year.

Here are some of my comments to Holahan, measured against the intervening 15 years of experience reporting on that industry in a monthly column. As the French say, “Plus ça change, plus c'est la même chose.” (The more things change, the more they remain the same.)

From my report:

“I visited several fuel suppliers for their impressions on the future of fuel prices. The collective response was one big shrug of the shoulders after another. If there was a grand plan among any of the oil companies as far as pricing goes, they weren’t sharing it with me.”

That could have been written 15 days ago just as easily as 15 years ago. In between, oil companies largely sat out the dot-com boom times, struggling through as one of the few industry sectors not to prosper wildly through the 1990s. A scramble of mergers has consolidated what used to be a widely diverse industry to about half the number of players. As recent earnings reports have shown, the petroleum industry is now making up for lost time.

Talking Points Remain the Same

As my report to Holahan continued, I listed a series of talking points that jumped out to a rank amateur as keystones of the future building blocks.

I wrote:

“Generally speaking, there are some consistent subjects that seem to concern everyone in the airplane gas station business; be they large or small, specialized or general, supplier or deliverer, money people or airplane people, growth oriented or hanging on.”

Among the first of those subjects was wholesale fuel pricing. Back then, FBOs were uncertain about the future of fuel prices due to the recently waged Gulf War. This year, the most immediate concern stems from the aftereffects of Hurricanes Katrina and Rita. In 1991, as today, fuel prices were said to depend at least somewhat on the ups and downs of the general economy. With the stock market on an upswing, there is less pressure on oil companies to lower fuel prices, particularly retail sales of jet-A to business-aviation customers.

The next-most-important issue on the minds of FBO executives in 1991 was consolidation, “the anthem everyone was singing,” as I wrote in my report. But it meant something different 15 years ago. Back then, NATA was predicting that airports with five FBOs would soon have only two or three, and those with two or three would soon be down to one. That has proved not to be the case, despite an intervening down cycle as deep as any that business aviation has ever suffered. The number of FBOs has remained steady, and in fact, many top-tier bizav airports have seen more facilities rather than fewer.

Today, however, the word consolidation has a new meaning. Private equity financing has discovered the business-aviation service industry over the past five years or so. Administrators of these large sources of investment dollars view FBOs and maintenance shops as “fragmented” and ripe for the economy of scale and buying/ pricing leverage that single ownership can bring.

Investment houses such as CapStreet and The Carlyle Group have their collective eyes on acquiring independent...
FBOs are trying to diversify and protect themselves...hoping to ride the crests and lees of the wavy aviation marketplace.

As increasing pressure from state and local governments targets airports regarding noise issues, it is interesting to note that, in 1991, then-Atlantic Aviation president Mack Graham expressed hope that recently passed federal legislation would standardize noise requirements nationally, thwarting local efforts to take anti-noise legislation into their own hands. That legislation, the Airport Noise and Capacity Act, has held fast in many cases leading up to the present, but has also seen the levee breached in some instances, such as at Naples, Fla., and Van Nuys, Calif.

Some other 15-year-old observations on the FBO industry are also eerily true today. For example, in 1991 I wrote, “Diversification: like an investor seeking to render his portfolio ‘recession proof,’ so too are some FBOs trying to diversify and protect themselves...hoping to ride the crests and lees of the wavy aviation marketplace. The trick is to anticipate which areas of concentration complement each other. For example, when aircraft sales drop, charter and maintenance services increase.”

Fifteen years ago, EPA restrictions meant new regulations on underground fuel storage tanks and the specter of a ban on unleaded aviation gasoline. Today, the EPA touches FBO operations in myriad ways. Not only does the agency oversee efforts to reduce groundwater contamination from underground tanks, but it also keeps its eye on contamination from other sources such as de-icing fluid and even wash-water runoff.

As I wrote in 1991: “Butler espouses paying for each service performed and points to European FBOs that have adopted this strategy. Butler has tried it out at La Guardia and the program has met with stiff resistance...FBOs are very sensitive on the subject of pilots who use the facilities and don’t buy fuel or otherwise contribute to the coffers. The concept of so called ‘menu pricing’ was being floated as a fix for the FBO’s low capture ratio (the percentage of aircraft operators who visit and buy fuel versus those who stop but don’t buy).

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Concierges at many FBOs greet guests and get their requests under way.

Tackling Environmental Factors

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Some Issues Remain Unsettled

I also reported to Holahan that interest in how best to negotiate (and renegotiate) airport leases was strong at the NATA Convention, as was the issue of real estate and the FBO. I wrote, “Some say that the real estate equity of the FBO is an under-utilized resource.” For those in 2006 who are actively seeking to reverse the traditional FBO business plan, this is an ongoing truism. Bundling the lion's share of all profits into fuel sales becomes tougher and tougher as wholesale prices rise and increases in overhead (salaries, benefits, insurance, airport fees) squeeze profit margins ever further.

Among the more interesting observations to emerge from the 1991 NATA meeting was a conversation I had with then-Butler Aviation (now Signature) president Bill Boisture. Butler was in the midst of an experiment at its New York La Guardia Airport facility, in which so-called “menu pricing” was being floated as a fix for the FBO’s low capture ratio (the percentage of aircraft operators who visit and buy fuel versus those who stop but don’t buy).

As I wrote in 1991: “Butler espouses paying for each service performed and points to European FBOs that have adopted this strategy. Butler has tried it out at La Guardia and the program has met with stiff resistance...FBOs are very sensitive on the subject of pilots who use the facilities and don’t buy fuel or otherwise contribute to the coffers. The concept of so called ‘menu pricing’ was one of the big questions that will have to be answered over the coming months.”

After 15 years of keeping a weather eye on this corner of aviation, like everyone else, I’m still awaiting the final verdict on that one.

www.ainonline.com • April 2006 • Aviation International News
Wilson Air Center (MEM) | avg. score 9.052

It might come as no surprise to learn that Wilson Air Center’s Memphis, Tenn. FBO topped the AIN FBO Survey rankings for the sixth time in a row. (It’s actually seven years since Wilson Air Center ranked first; the first time was in a biennial survey.) Then again, perhaps FBO owners and general managers are wringing their hands and wondering just what it is about Wilson Air Center that encourages FBO customers to give it consistently such high marks in the survey.

There are no secrets, according to Bob Wilson, Wilson Air Center president and flying member of the family that owns the FBO and its sister locations in Charlotte, N.C., and Houston (Hobby Airport). Wilson said he is happy to accommodate employees of any FBO who’d like to visit Wilson Air Center to learn what makes the highest-ranked company in the annual AIN FBO Survey tick.

Those who think the distinctive Wilson Air Center canopy reaching over the ramp next to the terminal building or the comfortable lobby or the pilot business center or the VIP arrivals lounge are the secrets to Wilson Air Center’s success are mistaken.

“You can do anything with sticks and mortar,” said Wilson during AIN’s visit to the Memphis facility. What he means is that any company can build a physically great FBO facility, but that isn’t what counts. While this sounds trite, what makes the difference are the people who run the FBO. Wilson takes his commitment to employees seriously and spent during his time here talking about the line personnel, front desk customer service representatives and concierges who make Wilson Air Center special.

The Wilson family and Kemmons Wilson Companies, which created the Holiday Inn franchise and developed real estate throughout the U.S., built Wilson Air Center in 1996. Wilson said he planned to build a corporate hangar but decided that it was so much trouble to obtain approval that he might as well build an FBO.

He also never thought much of the service available at the airports he frequented, especially when he would arrive in a small airplane. What really made him “come apart” was when the line techs would immediately ignore him and his little airplane as soon as a Gulfstream pulled up or when he would be forced to place his fuel order at the front desk.

The effort to build a world-class FBO at Memphis Interna- tional Airport began in 1984, and it took more than 10 years to clear all the local red tape and finish Wilson Air Center. Wilson doesn’t take credit for the canopy concept. “We weren’t the first to build a canopy,” he said, “but we were the first to manage it. It can be your biggest asset or a nemesis.” The Wilson Air Center canopy measures 150 feet from the terminal entrance to the pillars that support the outer edge, and there is a 25-foot cantilever extending over the ramp outside the pillars.

Wilson Air Center has fit as many as seven airplanes under the canopy at once. While the canopy is great for sheltering customers, it does have drawbacks such as APU noise, which tends to reverberate. Then again, that feature enhances the sound of the music that Wilson Air Center broadcasts under the canopy.

Operationally, the canopy is intended for customers to arrive sheltered from rain and hot sunshine. All arrivals are slotted into the canopy area, and line techs direct arriving flight crews to taxi on one of three white lines that guarantee wingtip clearance. The center line fits large business jets such as Gulfstreams and Global Expresses, while the outside lines allow two jets up to Challenger-size to fit under the canopy. As traffic permits, techs tow departing airplanes under the canopy so passengers can board in comfort and without having to walk or get driven to their airplane.

The challenge of the canopy is to keep the space available for arriving and departing customers. This means hiring more people to keep the airplanes moving. As soon as an arrival is taken care of, it must be moved to the ramp to make space for other arrivals and departures. Canopy space is always allotted first-come, first-served, and Wilson Air Center’s policy applies no matter the size of the airplane, from piston singles to the largest jet.

All arriving airplanes are greeted by a concierge, who expedites any requests, including getting fuel orders started. This allows customers to avoid lining up at the front desk to order fuel, something that Wilson desists.

Another Wilson FBO feature is that Wilson understands passengers’ and pilots’ needs after a trip, as they enter the terminal, they don’t want to line up at the front desk and what they are usually seeking is the bathroom. At Wilson Air Center, the bathrooms are straight across from the ramp entrance and they are doorless so that people carrying briefcases or bags don’t have to struggle with a door. Wilson attributes this consideration to his family’s experience in the hospitality business.

Other small touches show the careful thought put into the FBO. These include an open cabinet area for luggage in the lobby so that people don’t need to keep bags scattered around the chairs; the pilot business center, which offers pilots a quiet room with Internet-connected PCs and comfortable chairs equipped with laptop tables and wired network ports; weather room with a telephone hooked directly to clearance delivery to help expedite departures; and in the line shack refrigerator, boxes full of barbecue ribs slabs from the legendary Rendezvous restaurant available for customers to purchase on their way out.

Memphis is a popular destination for famous people, and Wilson Air Center offers a special way to accommodate their needs—a separate building with ramp access. Anybody who needs privacy can arrange with Wilson Air Center to taxi directly to the VIP arrivals area, which is roomy enough for VIP jets such as Boeing 757s. That ramp can be blocked off, which enhances security. The VIP building is also set up for the TSA security screening required for large charters. The VIP lounge is attached to a large hangar, so...
Continued from page 22

passengers can be driven into the hangar, go through screening, then onto their airplane.

When Wilson Air Center opened, Wilson said, “our employees were charged that they can’t say ‘no.’” While this may sound nice, Wilson is serious, and this attitude is a key part of the customer service training that Megan Hodges, regional customer service manager, delivers to new employees.

Hodges, who started as a customer service representative eight years ago, trains new employees at all the Wilson Air Center bases and travels frequently to provide recurrent customer service training. One of her specialties is “Wilson Air Jeopardy,” which helps employees learn how to handle the inevitable problems that crop up in the FBO business. She also teaches employees to learn customer names, a simple idea that makes the FBO more personable. Everyone is cross-trained so that when the ramp is busy, customers get what they need.

Wilson Air Center’s refurbished FBO terminal at Charlotte/ Douglas International Airport opened early last month, and the Houston Hobby facility is undergoing renovations. Even though Hobby has four competing FBOs, unlike Charlotte (zero competitors) and Memphis (one), Wilson feels that Hobby lacked an FBO with the level of service provided by his company. And there may be other parts of the country that could benefit from the Wilson Air Center brand, too. “We’re always looking,” he said. —M.T.

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Regal Aviation (DAL) | avg. score 8.761

You’ll like the way you look at Regal Aviation, and the owner guarantees it. That’s a paraphrase of George Zimmer’s television commercial tagline, and the owner of the Men’s Wearhouse clothing-store chain brings the same level of confident enthusiasm to his aviation operation. The result is a strong showing in this year’s AIN FBO survey.

Zimmer is not directly involved in the FBO. In 1998 he approached Dallas-area pilot David MacDonald to run his corporate flight operation. The program grew to include charter and aircraft management, which led to the establishment of an FBO.

Debbie MacDonald, David’s wife and the general manager of Regal Aviation, told AIN, “People asked, ‘Are y’all crazy? Does Love Field need another FBO?’ But we were building a new hangar to accommodate our charter aircraft so we went ahead and started offering line service for transients as well. My husband is a corporate pilot, so we approached the FBO business from that perspective and tried to offer what we knew pilots want to see.”

The FBO segment of Regal Aviation opened its doors in 2002, and MacDonald reports annual increases in market share and a tripling of business overall last year compared with 2004. “Our charter fleet is up to 18 aircraft, but what really tells us something is the increase in transient business at the FBO. That means we’re luring people from our competition on the field.”

And the level of competition at DAL is substantial. There are seven choices for buying jet fuel at the bustling business aviation airport, including the Business Jet Center, which also appears in this year’s Top 10 FBOs a scant 0.172 of a point behind Regal.

The newest FBO on the field, Regal accommodates contract fuel programs, does not charge ramp or overnight fees and participates in the Pilot Rewards Program. Regal has 400,000 sq ft of ramp space and an 85,000-sq-ft executive terminal with concierge services, fitness center, catering, crew cars, WSI weather center, on-site maintenance, pilot lounge and wireless high-speed Internet access.

And Regal Aviation listens to its customers. MacDonald said she conducts regular surveys of what Regal’s customers want and need in an FBO. Among the questions on the latest poll: “What aviation magazine offers the most news and information? What is a must-read?” The answer: Aviation International News.

AirFlite (LGB) | avg. score 8.652

AirFlite has ranked in the top 10 in the AIN North American FBO survey for the past 13 years, including a first-place finish after its first year of operation in 1994. AirFlite’s sound reputation is doubly impressive because crowded Long Beach, Calif., is not an easy location to operate a top-caliber FBO. AirFlite’s leasehold covers a mere 14 acres at LGB—postage-stamp size compared with some facilities. But the operation has managed to pack a generous amount of utility into its small campus.

Last year, AirFlite added an attractive 600-gallon saltwater fish tank to its oversize, glass-encased lobby. The high glass windows and cathedral ceiling create a sunny openness that is rare among FBOs. But AirFlite president Dudley Hawley emphasized that even top-level customer service and an attractive facility take a distant second place to safety when it comes to generating a priority list, not only for the FBO segment, but also for the rest of the operation.

Toyota Motor Co., AirFlite’s parent, bases its fleet at LGB, and the four-story terminal complex includes offices for the parent company on the top levels. Every year, the Flight Safety Foundation audits the carmaker’s flight department, and Hawley said the FBO is included in the exercise.

AirFlite is also the official FBO for the Toyota-sponsored Long Beach Grand Prix auto race, which takes place from April 7 to 9 this year. All the top racing teams’ flight departments use the facility as their destination at LGB. As a result, AirFlite hosts a pilots’ party during the race, with a large-screen television and ample food and beverages.

Hawley said that, while there is significant interest in the Grand Prix, it pales in comparison to the mania over Nascar racing. He said, “We’ll host 25 to 30 airplanes during the Grand Prix, but we also send some employees down to

Continued on page 26

Top-level customer service and an attractive facility take a distant second place to safety.
Continued from page 24

Texas when there’s a Nascar event, and they can have 600 on the ramp at once.” Hawley told AIN that you can expect to see a Toyota Camry on the Nascar circuit starting next year.

Though AirFlite has its share of celebrity traffic, Hawley reiterated last year’s characterization of the facility as primarily a corporate destination. With the Air Force’s Boeing C-17 produced in AirFlite’s backyard at Long Beach, visitors include a substantial array of vendors for the project and a sprinkling of high-level military personnel as well.

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Florida sunshine; on-site Hertz rental cars; the largest general aviation ramp in the Tampa market; and more than 80,000 sq ft of hangar space.

continuing on page 26

The most dramatic effect of transforming the annual AIN North American FBO survey to an Internet-based format came from write-in evaluations for FBOs not listed up front on the survey Web site. With the old format, which involved paper survey forms, respondents were urged to write in evaluations of FBOs that did not appear on the form.

Last year, survey respondents wrote in evaluations for about 320 FBOs that weren’t represented on the printed form. None received more than five write-ins.

This year, not only did the number of write-in facilities nearly double, but 17 of them received enough evaluations to be included in the final report (at least 40 evaluations for a U.S. FBO, 25 for a non-U.S. facility). It’s been several years since even one write-in FBO made that statistical cut using paper survey forms.

It would appear that most survey participants who wrote in evaluations did so with at least some consumer venom. Most of the evaluations came out on the negative side, with the General Aviation Terminal at JFK Airport in New York receiving a crumbling 3.927 rating out of a possible 10. Only the lowly airport facility operated by the City of Livermore, Calif., was rated worse. Of the 17 write-in facilities on the list, nine received average ratings lower than 7.

Still, on the other end of the scale was Manny Aviation at Adolfo Lopez Mateos International Airport in Toluca, Mexico. With 31 write-in evaluations, Manny Aviation received an average rating of 8.473, enough to place eighth among the 245 FBOs that appear in the final report.

The survey is not intended as a Michelin Guide to every FBO that provides jet fuel. There are some 4,500 FBOs in the U.S. alone, far more than can be reasonably surveyed for business aircraft operators.

The annual AIN survey is geared toward rating the most visited FBOs in a format that can serve aviation professionals. Those who provided the ratings this year have done their colleagues a great service by taking the time to complete the survey, and especially by including those non-listed FBOs they considered worth talking about, for better or worse. —M.P.

One bad encounter with an FBO employee will stick in your mind for years, no matter how good the FBO has been in the past. Rude, unfriendly and unhelpful associates will kill an FBO faster than anything. The FBOs that make you feel like you’re the most important aircraft on the field are the ones I remember forever.”

Rich Burris, team leader/captain

“A rigid ‘can’t do’ attitude. A cold, sterile, indifferent environment and an unwillingness to help the crew with their special needs coupled with poor crew facilities.”

Harlan Hoff, aviation manager

“‘I go to great lengths to notify an FBO of my arrival and requests. If I get there and I seem to be a surprise, nobody is there to marshal me in and out, and/or I’m dealing with people who don’t seem to know anything about aviation, then I get a bit disappointed.”

Keith Gordon, owner

Tampa International Jet Center (TPA)

To compete with an already successful FBO, a facility needs to set its sights high when it comes to service and amenities.

Stepping in as the second facility on a one-FBO field can be fraught with peril. When Tampa International Jet Center (TJIC) drew up plans to build from the ground up on Tampa (Fla.) International Airport (TPA), general manager Phil Botana was aware it would take a premium facility to wrest market share away from the competition. Raytheon Aircraft Services has a well respected operation at TPA, with an already successful FBO, a facility needs to set its sights high when it comes to service and amenities.

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This is the case with Tampa Jet Catering; a 12,500-sq-ft canopy to shield jet passengers from either the heat or those downpours of “liquid Florida sunshine”; on-site

Continued from page 24

Texas when there’s a Nascar event, and they can have 600 on the ramp at once.” Hawley told AIN that you can expect to see a Toyota Camry on the Nascar circuit starting next year.

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The Americas’ 40 Top-rated FBOs

The annual AIN FBO Survey lists top-rated facilities according to the survey responses from pilots, dispatchers and users of FBO facilities. This year, the Top 40 FBOs received overall scores of more than 8,000. The top score and many other scores are higher than last year because the survey rating scale was changed to a 1-to-10 scale (previous years used a 0-to-9 scale). The categories that were added to rate remain the same: line service, passenger amenities, pilot amenities, and facilities.

1. Wilson Air Center Memphis, Tenn. 9.052
2. Regal Aviation Dallas, Texas 8.761
3. AirFlite/Avitat Long Beach, Calif. 8.652
4. Tampa Int’l Jet Center Tampa, Fla. 8.628
5. Business Jet Center Dallas, Texas 8.589
6. Million Air Minneapolis, Minn. 8.557
7. Monterey Jet Center Monterey, Calif. 8.518
8. Manny Aviation Toluca, Mexico 8.473
9. Jet Aviation/Avitat West Palm Beach, Fla. 8.471
10. Avitat Boca Raton Boca Raton, Fla. 8.467
11. Million Air Dallas, Texas 8.462
12. Pentastar/Million Air Pontiac, Mich. 8.455
13. National Jets Fort Lauderdale, Fla. 8.438
14. Scottsdale Air Center Scottsdale, Az. 8.436
15. Avitat Skyservice Toronto, Canada 8.419
16. Avemex Toluca, Mexico 8.400
17. Southern Jet Raleigh-Durham, N.C. 8.384
18. Million Air Monterey, Calif. 8.382
19. Vail Valley Jet Center Vail, Colo. 8.351
20. Business Jet Center Oakland, Calif. 8.329
21. Denver Jet Center Denver, Colo. 8.311
22. Jet Aviation/Avitat Teterboro, N.J. 8.267
23. Sun Air Jets Camarillo, Calif. 8.260
24. Peterson Aviation/Avitat Van Nuys, Calif. 8.236
25. SheltAir Aviation Services Fort Lauderdale, Fla. 8.215
26. Swift Aviation Phoenix, Ariz. 8.203
27. Irving Aviation Services Gander, Canada 8.147
28. Showalter Flying Service Orlando, Fla. 8.114
29. Avitat Winnipeg Winnipeg, Canada 8.107
30. Yellowstone Jet Center Bozeman, Mont. 8.088
31. Raytheon Aircraft Service Tampa, Fla. 8.074
32. Million Air Vancouver, Canada 8.050
33. Carolina Air Center Hilton Head, N.C. 8.049
34. Avitat Vancouver Vancouver, Canada 8.037
35. McKinley Air Akron, Ohio. 8.017
36. Million Air Houston, Texas 8.015*
36. Signature Flight Support Windsor Locks, Conn. 8.015*
36. Sun Valley Aviation Hailey, Idaho 8.015*
39. Jet Source Carlsbad, Calif. 8.005
40. Corporate Jets Scottsdale, Ariz. 8.004

* tied for 36th place

Source: AIN 2006 American FBO Survey.
Data compiled by Forecast International of Newtown, Conn.

Continued on page 28
Bizav's Most Popular Destinations?

The purpose of AIN’s annual FBO survey report is to provide readers with an unbiased group appraisal of the FBOs most used by business aviation. With 1,983 respondents rating an average of 15 of the 742 FBOs listed or added to the list (a total of 29,596 FBO ratings), a good amount of data about these FBOs was generated. But the survey data also provides a look at some other aspects of business aviation.

The information shown here is based on all the responses received, including those for the FBOs that did not receive enough responses to have their ratings reported. The tinted states on the map of the continental U.S. indicate which 10 states, when all the responses to all the FBOs in each particular state were combined, received the most responses. Similarly, the map and Table 1 show the 40 airports whose FBOs obtained the most responses. Finally, the 40 individual FBOs that obtained the most responses are shown in Table 2.

From this data, one could infer that these states, airports and FBOs are the ones frequented by the most AIN readers and by extension business aviation in general. This hypothesis requires the assumption that in the majority of cases the number of survey respondents who rated any given FBO corresponds proportionally to the total number who actually used that FBO last year. For example, if 100 respondents rated FBO X and 50 rated FBO Y, then one could assume that FBO X had more business aviation pilots using it than used FBO Y. We think this is a reasonable assumption, based on the composition of our circulation and the response rate to the survey.

A related hypothesis—that this data also indicates the level of business aviation traffic at states, airports and FBOs—requires the assumption that the number of survey respondents who rated any given FBO corresponds proportionally to the total number of business aviation movements at that FBO. Though we think this is a reasonable assumption, too, it is conceivable that FBO X could have been visited on average two times last year by 1,000 pilots (therefore, 2,000 visits) and that 100 of these pilots rated it in the survey, while FBO Y could have been visited on average four times last year by 1,000 pilots (4,000 visits), but that only 50 of these pilots rated it. However, we suspect it is more likely that there is a proportional relationship between the number of survey responses an FBO received and its amount of business aviation traffic.

In case you are interested, the 10 states whose FBOs were rated by the fewest number of respondents are (in reverse order) West Virginia (3 responses), Delaware (12), Vermont (13), South Dakota (63), New Hampshire (69), North Dakota (71), Mississippi (75), Maine (109), Iowa (111) and Wyoming (141).—R.R.P.

### Table 1: The Busiest 40 Airports Based on the Number of Responses

<table>
<thead>
<tr>
<th>AIRPORT</th>
<th>RESPONSES</th>
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<th>RESPONSES</th>
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<tr>
<td>Teterboro (TEB)</td>
<td>1,033</td>
<td>Metropolitan Oakland Int'l (OAK)</td>
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<td>Palm Beach International (PBI)</td>
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<td>Los Angeles Int'l (LAX)</td>
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<td>Naples Municipal (APF)</td>
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<td>Orlando Int'l (MCO)</td>
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<td>San Francisco Int'l (SFO)</td>
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<td>Centennial (AP)</td>
<td>445</td>
<td>John Wayne/Orange County (SNA)</td>
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<td>Lore Field (DAL)</td>
<td>440</td>
<td>San Diego Int'l (SAN)</td>
<td>232</td>
</tr>
<tr>
<td>Washington Dulles Int'l (IAD)</td>
<td>421</td>
<td>Norman Mineta San Jose Int'l (SJC)</td>
<td>224</td>
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<tr>
<td>Scottsdale Municipal (SDL)</td>
<td>413</td>
<td>Memphis Int'l (MEM)</td>
<td>224</td>
</tr>
<tr>
<td>McCarran Int'l (LAS)</td>
<td>408</td>
<td>Boca Raton Airport (BCT)</td>
<td>222</td>
</tr>
<tr>
<td>Hobby (HOU)</td>
<td>353</td>
<td>Oakland County Int'l (PTK)</td>
<td>219</td>
</tr>
<tr>
<td>Fort Lauderdale/Hollywood Int'l (FLL)</td>
<td>350</td>
<td>Tampa Int'l (TPA)</td>
<td>214</td>
</tr>
<tr>
<td>Sky Harbor Int'l (PHX)</td>
<td>322</td>
<td>Orlando Executive (ORL)</td>
<td>211</td>
</tr>
<tr>
<td>Van Nuys (VNY)</td>
<td>301</td>
<td>Austin Bergstrom Int'l (AUS)</td>
<td>210</td>
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<tr>
<td>Fort Lauderdale Executive (FXE)</td>
<td>299</td>
<td>Addison (ADS)</td>
<td>206</td>
</tr>
<tr>
<td>Bob Hope (BUR)</td>
<td>290</td>
<td>Daugherty Field (LGB)</td>
<td>205</td>
</tr>
<tr>
<td>Miami Int'l (MIA)</td>
<td>285</td>
<td>Eagle County Regional (EGE)</td>
<td>204</td>
</tr>
<tr>
<td>Monterey Peninsula Airport (MRY)</td>
<td>278</td>
<td>Morristown Municipal (MMU)</td>
<td>203</td>
</tr>
<tr>
<td>Pearson Int'l (CY2)</td>
<td>267</td>
<td>Pikes Peak/Sandy Field (ASE)</td>
<td>203</td>
</tr>
<tr>
<td>Hanscom Field (BED)</td>
<td>259</td>
<td>McClellan-Palomar (CRQ)</td>
<td>200</td>
</tr>
</tbody>
</table>

Note: Airport locations are approximate. Top 10 states are tinted and their number of responses are listed on the right.

### Table 2: The Busiest FBOs Based on the Number of Responses

<table>
<thead>
<tr>
<th>AIRPORT</th>
<th>FBO</th>
<th>TOTAL RESPONSES</th>
<th>OVERALL AVERAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teterboro (TEB)</td>
<td>Jet Aviation/Avitat</td>
<td>398</td>
<td>8.267</td>
</tr>
<tr>
<td>Centennial (APA)</td>
<td>Denver Jet Center</td>
<td>274</td>
<td>8.311</td>
</tr>
<tr>
<td>Miami Int'l (MIA)</td>
<td>Signature Flight Support</td>
<td>265</td>
<td>6.840</td>
</tr>
<tr>
<td>Scottsdale Municipal (SDL)</td>
<td>Corporate Jets</td>
<td>249</td>
<td>8.004</td>
</tr>
<tr>
<td>Teterboro (TEB)</td>
<td>Million Air</td>
<td>243</td>
<td>6.305</td>
</tr>
<tr>
<td>San Francisco Int'l (SFO)</td>
<td>Signature Flight Support</td>
<td>237</td>
<td>6.907</td>
</tr>
<tr>
<td>Teterboro (TEB)</td>
<td>Atlantic Aviation</td>
<td>237</td>
<td>7.444</td>
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<tr>
<td>McCarran Int'l (LAS)</td>
<td>Atlantic Aviation</td>
<td>235</td>
<td>7.055</td>
</tr>
<tr>
<td>Washington Dulles Int'l (IAD)</td>
<td>Landmark Aviation</td>
<td>232</td>
<td>7.262</td>
</tr>
<tr>
<td>San Diego Int'l (SAN)</td>
<td>Jimsair Aviation Services</td>
<td>232</td>
<td>5.226</td>
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<tr>
<td>Midway (MDW)</td>
<td>Atlantic Aviation</td>
<td>230</td>
<td>7.816</td>
</tr>
<tr>
<td>Palm Beach Int'l (PBI)</td>
<td>Jet Aviation/Avitat W. Palm Beach</td>
<td>228</td>
<td>8.471</td>
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<tr>
<td>DelKalb-Peachtree (PDK)</td>
<td>Epps Aviation</td>
<td>213</td>
<td>7.536</td>
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<tr>
<td>Westchester County (HPN)</td>
<td>Avitat-Westchester</td>
<td>213</td>
<td>7.228</td>
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<tr>
<td>Eagle County Regional (EGE)</td>
<td>Vail Valley Jet Center</td>
<td>204</td>
<td>8.351</td>
</tr>
<tr>
<td>Pklkin County/Sandy Field (ASE)</td>
<td>Trajin FBO Network</td>
<td>203</td>
<td>7.745</td>
</tr>
<tr>
<td>Pearson Int'l (CY2)</td>
<td>Avitat SkyServ</td>
<td>202</td>
<td>8.419</td>
</tr>
</tbody>
</table>

Note: List includes FBOs that received 200 or more responses.

Million Air (STP) | avg. score 8.557

“...and Million Air has cemented its alliances...”

Note: Continued from page 28
The Survey’s Busiest FBOs

The survey is geared toward rating the most visited FBOs in the system. To present a statistically valid evaluation of a facility, AIN has maintained that it is necessary to have a minimum of 40 evaluations, so it’s likely there are some first-rate FBOs in operation that simply don’t get the traffic necessary to make it into the AIN final report.

Conversely, there is an element of even greater validity to ratings—good and bad—of those facilities that received the largest numbers of responses. For example, Jet Aviation at West Palm Beach, Fla., received the most evaluations (228) among those rated in the top 10 FBOs in the survey. Its overall average was 8.471 (compiled from four survey categories—for a full description of the survey methodology, see the back page of the rating chart insert) out of a possible perfect 10. On the down side, Atlantic Aviation at Chicago Midway was rated by 230 unhappy survey participants, who tallied an average 5.226 rating for the Windy City facility.

It’s a bit hard to judge the effect of this year’s Internet format on how many evaluations each FBO receives. Last year, using the old-fashioned paper survey forms, Piedmont Hawthorne (now Landmark Aviation) at Washington Dulles International Airport received the most evaluations, by far, with 420. It was followed by Las Vegas (LAS) Executive Air Terminal (since acquired by Atlantic Aviation) with 339 and Corporate Jets at Scottsdale (Ariz.) Airport with 307.

This year, Jet Aviation at Teterboro (N.J.) Airport received the most evaluations with 398—the only facility to break the 300 barrier. The next most frequented facility was Denver Jet Center at Centennial Airport with 274, followed by Signature Flight Support at Miami International Airport with 265. In all there were 17 FBOs with 200 or more evaluations.

Among these busiest locations, six were rated with scores of 8 or better, placing them among the top 40 in the survey. Four of the 17 FBOs earned ratings of less than 7. –M.P.
Monterey Jet Center, which finishes among the top-ranked FBOs in AIN’s survey again this year, is expected to break ground on a new 50,000-sq-ft hangar next month. That’s an indicator of just how good business has been at the California location, which ties much of its success to those who would strike a small white ball around a large green course. For example, president and general manager Nate Young told AIN that February’s AT&T golf week saw some 100 jets at MRY, and Monterey Jet Center pumped 80,000 gallons of jet-A in those seven days alone.

The FBO was originally conceived in the mid-1990s as a sort of gated hangar village for private owners and operators, similar to the Quail development at Las Vegas International Airport. But when the original partners, who were involved in commercial real estate in the Monterey area, asked to build a private fuel farm, the airport authority insisted the facility be open to the public. So the project became an FBO.

The partners broke ground in June 1997 and the first hangars were occupied that September. Original plans called for a total of 70,000 sq ft of hangar floor area under roof, but that number has since doubled—and all the space is occupied.

The new hangar will bring the total available space to nearly 200,000 sq ft. Included in the complex is a two-story main office/terminal building of 10,000 sq ft, with 14 offices leased upstairs and two more downstairs, a pilot lounge, conference room and flight-planning area with a WSI weather kiosk. Wireless Internet access is available throughout the building.

Young is a veteran of seven years with Clay Lacy Aviation at Van Nuys, and Galvin Flying Service in Seattle, before that. Young told AIN, “Both operations emphasized service.” He said he learned that an exemplary facility was only a small part of the equation. Without a strong service mentality, the shiniest metal and glass mean little.

That philosophy figures into the physical floor plan of Monterey Jet Center, said Young. The customer-service desk and the line-service desk are adjacent to each other. “That kind of hand-to-hand capability is important,” he said. “And the kitchen is right next to the line-service area for the same reason.”

Golf remains one of the primary draws for jet traffic to MRY. Nearby courses include Pebble Beach, Spyglass and the private Del Monte course, the oldest golf course west of the Mississippi. Speaking of the AT&T golf tournament, the communications giant is a good customer, said Young.

Based customers at Monterey Jet Center range from Cessna 182s to a Bombardier Global Express. The airport recently added a Hawker to its roster of tenants. Of Monterey Jet Center’s 25 hangar customers, 20 are turbine-powered, including two Gulfstreams, several Citation Xs and a pair of Falcon 900s.