

AIN FBO SURVEY

2012 • THE AMERICAS

After

several down years, the private aviation industry looked to 2011 as the start of a rebound cycle, and for many aviation service providers the year did show some gains after a relatively flat 2010. “We loved 2011 a whole lot more than we did 2010,” was how the head of one major chain summed up the past year’s FBO business. Responses from FBO operators suggest that many saw modest increases in business in the 10-percent range, while a few even described 2011 as their best year ever.

The industry, however, faced several challenges over the past year beyond those related simply to aircraft traffic and the economy. Instances of alleged “[un-fair competition](#)” by airports possibly using public funds to compete directly against privately operated FBOs, lawsuits filed seeking to [end the sale of leaded av-gas](#) and even legislation drafted in an attempt to [ban the charging of ramp fees in the state](#) for customers who do not purchase fuel at an FBO were among the threats. Despite these issues, for most FBO operators there remains a sense of cautious optimism that this year will see further increases for the industry. Against this backdrop, **AIN** conducted its annual FBO survey. In this special report, along with an assessment of the industry from the executives of the four major FBO chains, we highlight the 15 FBOs that make up the top 10 percent of the Americas’ service providers as judged by our readers. Some of those selected such as Pentastar Aviation’s Detroit facility, Global Select (formerly City of Sugar Land) and Wilson Air Memphis have been perennial favorites, while relative newcomers such as XJet and JA Air Center continue to impress their customers. When asked in the survey what the most important factors were in their choosing an FBO, according to our readers, service still reigns supreme. An overwhelming 86 percent of our respondents said “excellent customer service” was their most crucial factor, followed by fuel pricing and passenger amenities, yet among those surveyed, there was surprisingly little loyalty displayed for FBO or fuel brand. Conversely, when asked why they would avoid using a particular FBO, the survey respondents cited poor customer service for passengers and having a run-down or unclean facility as the biggest factors prompting them to taxi on past the ramp entrance and take their business elsewhere.

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Top FBO facilities keep the focus on service

by Curt Epstein

Pentastar Aviation, Oakland County International Airport (PTK), Waterford, Mich.

9.3 With 11 FBOs on the field at Oakland County International Airport, in Michigan some might consider it an achievement to be the highest ranked FBO at the airport alone, yet Pentastar Aviation has been named

one of the highest rated service providers in the nation in AIN’s survey for the past six years. “The bar keeps getting raised higher,” said Bob Sarazin, Pentastar’s vice president of FBO services. “There are others ratcheting up the service level and facilities, so I think it’s become a little bit tougher competition if we look at it nationally.” Pentastar offers services ranging

XJet



Pentastar Aviation

from aircraft management and charter to a Part 145 Class IV maintenance facility. With nearly 230 employees across all of its groups, the FBO is not the least expensive at PTK, Sarazin acknowledges. "There are some individuals who might not be looking for the service; it might be about the pricing and we certainly understand that, but we try to let them know that we can be competitive and still provide all these things to them," Sarazin told AIN.

Unusual among its offerings is Fivestar Gourmet, Pentastar's in-house catering facility, which serves not only the company's own

customers but also those of other FBOs on the field.

As the Detroit automakers continue their revival, the aviation services provider expects its traffic to increase as well. "2011 wasn't a home run, but it certainly had its opportunities," noted Sarazin. He said the company experienced growth across its entire business. "Whether we will ever get back to where we were several years ago is unseen, but we're optimistic that there's some growth in the future."

Pentastar conducts a continuous internal survey process with the aim of finding out what customers would like to see at the facility. As a result of this ongoing self-assessment, the company scored the

highest overall in the pilot services and amenities category in this year's AIN survey.

Over the past year, the FBO refurbished the "Star Gate," a small private terminal left over from the days when Pentastar served as the flight department for Daimler-Chrysler. The building has its own jetway and serves to secure Pentastar's role as handler for nearly all the large charter aircraft at the airport.

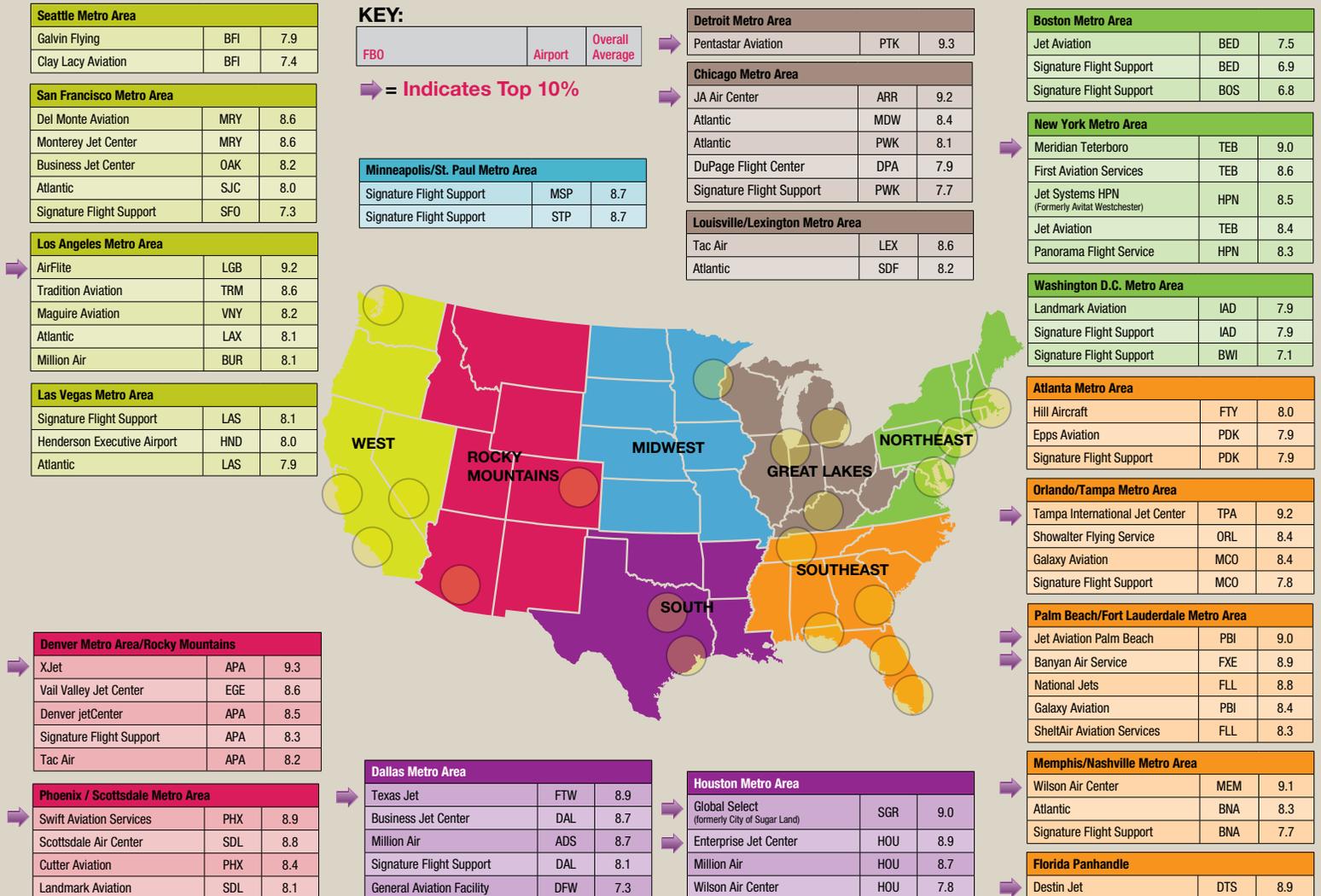
XJet, Centennial Airport (APA), Englewood, Colo.

9.3 With its catch phrase "It's not an FBO, it's XJet," the Denver-area service provider stands out again as one of the most

highly regarded FBOs in AIN's reader survey. The facility opened as a private club for a group of jet owners little more than five years ago. XJet employs a radically different business model—annual dues collected from its 14 club members cover the FBO's operating costs—so it does not have to rely heavily on fuel sale margins and can offer a competitive price in addition to its luxury facilities (including a climate-controlled "auto spa" where guests can leave their cars for maintenance). According to XJet founder and CEO Josh Stewart, guests at the FBO receive the same experience as its club members do. XJet garnered this year's top overall ratings for both passenger amenities and facilities.

Stewart told AIN that the

FBOs in U.S. Metro Areas with High Business Aviation Traffic



Note: FBOs with the same overall average are listed in alphabetical order. Only FBOs that received 30 or more responses are included.

company saw a topline revenue increase of 67 percent in 2010 and more than 50-percent growth last year, and its 50,000 sq ft of hangars are filled with member and transient aircraft. As a result, the company has launched a massive growth plan. Over the past year, XJet increased its ramp space by more than 50,000 sq ft and it expects to break ground soon on a more than \$10 million building project, which will more than double its seven-acre footprint, adding a pair of 25,000-sq-ft hangars and another 20,000 sq ft of terminal and office space.

To ensure the quality of its employees, over the last two years the company has developed the XJet Indoctrination Program, a three-month trial period before new hires are awarded their XJet “wings.”

Given its success, XJet is primed to export its business model abroad. The company has an option on an 18-acre site at Paris Le Bourget Airport, where it expects to begin construction soon; and it is in the final stages of securing land for an even larger private club and FBO at the UAE’s Dubai World Central Airport. The company’s original Denver location will serve as “XJet University” and continue to train new employees in its service philosophy.

AirFlite, Long Beach Airport (LGB), Long Beach, Calif.

The [disbanding of the Aviat FBO network](#) last year did little to harm the ratings of former member AirFlite, which migrated to the newly established Air Elite group as a charter member in January. After the announcement that Exxon-Mobil would exit the general aviation fueling business, Long Beach-based AirFlite switched its provider to World Fuel, a



move that FBO general manager John Tary described as a positive change based on the enthusiasm the fuel distributor has shown and the customer programs it offers.

AirFlite—which has been owned by Toyota for the past 23 years and houses the automaker’s North American-based flight department—just spent more than \$100,000 renovating the lobby (the popular 600-gallon saltwater aquarium was retained), and through its new agreement with World it received a brand new fleet of refuelers, including two 7,000-gallon jet-A tankers and a pair of 1,200-gallon-capacity avgas trucks. As part of Toyota, the FBO offers 2012 Prius crew cars along with its Toyota shuttle vans.

A recent initiative at AirFlite is the expansion of its concierge services. The staff created a database of anything a pilot might require in a 50-mile radius, be it restaurants, recreation or shopping, in addition to the usual hotel requests. The FBO’s customer service staff then creates a custom package for each arrival based on where the clients are staying. If it’s people who have been to the facility previously, AirFlite’s staff can make personal suggestions based on the individual’s preferences. “It resonates with them because we are interested

in our customers and we want to show them that,” said Peggy Zaun, the FBO’s customer service manager.

AirFlite does have a secret weapon when it comes to learning what flight crews want and need. In addition to his other duties, Tary remains a pilot in the company’s flight department and logs approximately 100 hours a year at the controls of a Gulfstream G550. “I’ve been a corporate pilot for 20 years,” he said. “I’ve seen FBOs grow and change, what works and what doesn’t, and we try to take the best practices and use them to their fullest.” With a 10,000-foot runway at the airport, the FBO—which saw a 5-percent increase in traffic over the year—finds itself servicing anything from a Cessna Sky-catcher to the Antonov An-124 cargo hauler.

JA Air Center, Aurora Municipal Airport (ARR), Sugar Grove, Ill.

9.2 While most FBOs reported a slight improvement in their fortunes over the previous year, things were a little different for Chicago-area provider JA Air Center. “Business actually has been fantastic,” said company president Brad Zeman. “We’re up about 27 percent company-wide over the previous year.” JA began as Joliet Avionics and still has one of the largest avionics shops in the country, in addition to its own Part 145 aircraft maintenance facility, aircraft management and sales.

On the FBO side, the company—which earned the top spot in last year’s survey—reported a nearly 15-percent increase in fuel volume as users have discovered its convenience to Chicago’s western suburbs and the Windy City itself. “What we have seen is that people are figuring out that closer is not quicker,” Zeman told AIN. “The fact that Aurora sits on the western edge of Chicago O’Hare’s airspace makes it much quicker on the airside for people to get in and out.”

One policy at the facility that continues to endear itself to customers is the fact that JA eschews ramp and overnight fees. Operations manager Randy Fank noted he has often informed pilots who approach him with credit card in hand that



there are no charges. “Understanding the customer, you hope that they take that back and say, ‘Next time when I’m planning a trip through there I’ll plan on maybe just buying some fuel.’” That policy is just part of the company’s customer-service philosophy. “We like our customers,” Zeman told AIN. “They’re not people to turn upside down and shake the money out of their pockets; they’re our guests here, and I think when you have that attitude, it has a different feel to it.”

JA is looking forward to a bump in traffic from a major event headed to the Chicago area, the Ryder Cup golf tournament in September. “We’re expecting a good year, but obviously [for us as for] everybody [else] it depends on the economy,” said Zeman. “We would be disappointed if we were not up 15 percent at least.”

Tampa International Jet Center, Tampa International Airport (TPA), Tampa, Fla.

9.2 In operation for little more than seven years, Tampa International Jet Center (TIJC) has gained a loyal following that has put the FBO in the top of AIN’s

reader survey for more than half its existence. The reason for that tally is simple, according to company president Phil Botana: “We try to think of ourselves as an extension of the travel experience that the people in the back of the airplane want as opposed to just being a portal where they can get from their car to the airplane and vice-versa.”

That level of service involves having a customer’s car waiting on the ramp when the aircraft arrives, properly cooled or heated according to season. While TIJC is still down from the 40 turbine aircraft based at the FBO before the economic dive, the numbers are climbing back steadily, and it now has 35 based aircraft. “The last couple of months we’ve had a lot more phone calls and inquiries,” said Botana. “The more the phone rings, the better the odds are that something’s going to land, and we’re encouraged.”

Over the past year, the FBO has undergone two important affiliation changes, switching from Air BP to Avfuel—which he said has helped boost the FBO’s average uplift totals—and joining the [Paragon Aviation group](#), a

FBO SURVEY RULES AND METHODOLOGY

This report of AIN’s 2012 FBO survey covers FBOs in the U.S., Canada, Mexico, South and Central America and the Caribbean, in other words, the Western Hemisphere, or as we call it, “The Americas.” Next month’s report will cover FBOs in the Eastern Hemisphere, “The Rest of the World.”

Since 1981, AIN has been conducting surveys asking readers about the service that fixed-based operators provide their customers and publishing reports about the results from these surveys. Initially, we mailed paper survey questionnaires to our qualified subscribers in the U.S. (Qualified subscribers include pilots, corporate flight attendants, schedulers and dispatchers—in other words, people who use or make arrangements with FBOs.) In later years, we added qualified subscribers in the rest of North America and Europe.

In 2006 we decided to move the FBO survey online and engaged Forecast International of Newtown, Conn., to design the online survey questionnaire to AIN’s specifications, administer the survey and tabulate the results.

One unexpected benefit of offering the survey online was that survey respondents could add FBOs not already in the questionnaire, making these added FBOs immediately available for other respondents to evaluate. The following year this Web-based survey was expanded to include qualified subscribers throughout the world.

This year we decided to bring the entire survey process in house and build a completely new version of the survey website. This allowed us to make the online survey questionnaire easier to navigate, so respondents could fill it out more

quickly and more easily add FBOs that were not yet in the survey database, while still maintaining the same rating categories and methodology. Having the survey in house also gave us easier access to the survey results and better control over how they are tabulated.

As in previous FBO surveys, we invited our qualified AIN subscribers to participate in this one. Each invitee received a code that he or she used to enter the survey website, as a way to prevent respondents from completing the survey questionnaire more than once. The website remained open from January 3 to midnight on February 3.

As it has done since 1981, the survey questionnaire asked readers to evaluate FBOs they had visited during the last year in four categories: line service; passenger amenities; pilot amenities; and facilities. The respondent does this by indicating his or her perception of the service and quality of each FBO by assigning a rating from one to 10 (one being the lowest and 10 being the highest) in each category. The respondent can rate each FBO only once, but there is no limit to the number of FBOs a respondent may rate.

To determine the category averages of an individual FBO evaluated, the survey website’s computer separately adds the ratings in each of the four categories for that FBO and divides the sum obtained for each category by the total number of ratings received for each category.

An FBO’s overall rating is calculated by adding all the individual category ratings received by that FBO and dividing the resulting sum by the total number of all category ratings received by the FBO. In other words, if a particular FBO received evaluations from 50 people (and assuming that all these 50 respondents gave that FBO a rating in each of the four categories), then the FBO would receive a total of 200 category ratings. These 200 category ratings are added together and then their sum is divided by 200 to get the overall rating for this FBO. —R.R.P.

| Category and Overall Rating Averages of FBOs Evaluated | | |
|--|----------|-----------|
| Category | All FBOs | FBOs (30) |
| Line service | 8.0 | 8.3 |
| Passenger amenities | 7.5 | 8.0 |
| Pilot amenities | 7.5 | 8.0 |
| Facilities | 7.6 | 8.1 |
| Overall rating | 7.7 | 8.1 |

Note: “All FBOs” includes all 1,639 FBOs that received ratings from at least one respondent. “FBOs (30)” indicates the 125 FBOs, both in the Americas and the Rest of the World, that received ratings by 30 respondents or more.

| AIN’s 2012 FBO Survey by the Numbers | |
|--|---------------|
| Number of FBO evaluations provided by all respondents | 17,863 |
| Number of respondents who evaluated at least one FBO | 2,037 |
| Average number of FBOs evaluated per respondent | 8.8 |
| Number of FBOs evaluated by at least one respondent | 1,639 |
| Highest number of evaluations received by one FBO (Meridian, Teterboro) | 187 |
| Average number of evaluations received per FBO | 11.0 |
| Number of FBOs evaluated by only one respondent | 199 |
| Number of FBOs that received the requisite number of evaluations (30) to be included in the AIN FBOs of the Americas ratings tables | 115 |
| Number of FBOs that received the requisite number of evaluations (25) to be included in the AIN FBOs of the Rest of the World ratings tables | 17 |
| Number of countries having FBOs that were evaluated | 94 |
| Number of FBOs added to the survey questionnaire by respondents this year | 141 |

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network of independent premier FBOs, which Botana said has already begun to pay dividends in referred traffic. A change in the competition at TPA has also helped the FBO capture some additional business, according to Botana. “We know we have to be competitive to move the gallons, so we just try to continue to give our superior levels of service at a competitive price and it seems to be a value equation that works for us.”



Tampa International Jet Center

In August, Tampa will host the Republican National Convention, and Botana and his staff are already planning for an influx of customers. “They say there will be 15,000 media personnel in town for the week, not counting any delegates, as opposed to the 2,500 they expect for a Super Bowl,” he noted.

Wilson Air Center, Memphis International Airport (MEM), Memphis, Tenn.

9.1 Wilson Air Center’s Memphis location has been a frequent top performer in AIN’s annual FBO survey, based on company president Bob Wilson’s philosophy that

all customers receive the same level of attention no matter what size aircraft they arrive in. “I’ve known a lot of people who run companies and fly as a hobby, and they might be in a Gulfstream one day and a Bonanza the next,” he said. “I’ve flown a lot of pistons in my life and it has always irked me when I’d land at a place and everybody would leave when a [large jet] comes in. That won’t happen here.”

Wilson’s philosophy of equality extends to all aspects of his operation, his staff

included. “I won’t ask them to pick up a piece of paper that I won’t pick up,” he said adding that the facility does not have any designated parking spaces for company executives. “Everybody asks ‘Why don’t you have one?’ and I say I’d rather the customer sit in it. I’m going to park wherever there’s [a spot] available.”

The Memphis location is part of a chain that includes facilities in Charlotte, N.C.; Houston; and Chattanooga, Tenn. The last was added during this past year. Despite flat traffic rates at the airport over the year, Wilson said the site’s newly refurbished nearly 80,000 sq ft of hangar space is at capacity with approximately



30 based turbine aircraft, and the company has plans to build an additional 40,000 sq ft of hangars on three acres recently acquired from the airport.

A popular feature at the Corporate Aircraft Association preferred facility is its 26,000-sq-ft canopy—tall enough to accommodate the Gulfstream G650 when it enters service—under which all passengers disembark. Wilson takes his FBO’s role as the front door of Memphis seriously. An electronic marquee above the airside entrance to the lobby gives personalized greetings to passengers as they enter the facility. “The University of Memphis went through a new coaching change in football and when he landed his name was in lights,” said Wilson. “We were the first thing he talked about at his press conference.”

Global Select, Sugar Land Regional Airport (SGR), Sugar Land, Texas

9.0 Owned by the city of Sugar Land, Global Select has not missed a beat after its [rebranding two years ago](#), according to

AIN’s readers. After the FBO scored several consecutive high finishes in the AIN survey, its operators decided to brand their level of service. “The branding was successful and that kind of changed who we are,” said customer service and marketing manager Jodie Kaluza. “It made people think there was a viable choice to the other Houston airports.”

Year-over-year business is up by 20 percent at the facility known previously as the FBO at Sugar Land Regional Airport. While overall traffic at the private-aviation airport was flat at approximately 95,000 operations per year, Sugar Land is seeing a higher percentage of bizjet traffic these days. “Although the numbers aren’t increasing dramatically, when you have 2,500 more jets per year land here, the increase in sales and everything else goes up dramatically,” said Phillip Savko, Sugar Land’s director of aviation. Based on current calculations, the airport is on track to exceed its annual fuel volume expectations. “We estimated about 2.4 million gallons but we’ll go to about 3 million,



Wilson Air Center Memphis

and that's on the conservative side," Savko noted.

Currently more than 50 based turbine aircraft are filling the FBO's hangars, according to Savko, and the facility has a waiting list of more than 20 jets, he added. To help alleviate that problem, the airport recently completed an \$8 million expansion project that includes the construction of a new taxiway thick enough to support the largest dedicated business jets and single-aisle bizliners. The airport expects up to seven new corporate hangars to be built along Taxiway Juliet, with construction of the first two to begin by year-end. Among the additions to its amenities, the FBO refurbished its lobby and installed a new café, which made its debut last month. The pilots' lounge was updated to include a "movie theater-type atmosphere." A new business center was also created. The FBO is in operation from 5 a.m. until 11 p.m. with after-hours call-out available. "We want to be a good neighbor to our community," said Kaluza. "We're obviously here to support our customers but we have that dual role with the community."

Jet Aviation Palm Beach, Palm Beach International Airport (PBI), West Palm Beach, Fla.

9.0

"At Jet Aviation, we pride ourselves on our well trained employees and aiming always to give customers five-star service," said John Langevin, general manager of Jet Aviation's West Palm Beach facility and the company's vice president of North American FBO operations. "We try to anticipate the needs of customers so they don't have to ask for anything, and we have a large array of services to meet their needs."

The Palm Beach facility employs 47 staff—most of whom

have worked at the location for 20 to 25 years—and is open 24/7/365. One of Jet Aviation's flagship locations, it is second only in size to the company's Teterboro (N.J.) FBO. The facility has a two-story, 10,000-sq-ft terminal—complete with crew and passenger lounges, newly updated pilot snooze rooms, weather and flight-planning room and conference room. The complex also includes five hangars and back shops/offices that offer almost 195,000 sq ft of space. Two of these hangars and accompanying back shops/offices were renovated over the past year.

Services offered include fueling, aircraft cleaning, aircraft charter and management and

crew staffing services (via sister company Jet Professionals). It also offers aircraft maintenance through the company's Jet Response Unit's two aircraft technicians who are based at the facility or at sister company General Dynamics Aircraft Services across the field.

Since West Palm Beach Airport sees a lot of transient traffic flying to and from South America, the field has a U.S. Customs and Immigration facility that is open daily from 6 a.m. to 11 p.m. (after hours on call).

The facility has about 50 based turbine aircraft year-round, and about 10 nest there over the winter peak months. According to Langevin, transient traffic is down approximately 10 percent from last year, "But based tenants are coming back strong. As we stand now, our hangar space is 20-percent oversubscribed."

Not resting on its laurels, the FBO will add ambassador and concierge services by year-end, said Langevin. The ambassador service will ensure that every arriving aircraft is met by a staff member who can take care of both crew and customer needs on the spot—what Langevin calls a "functional escort." The customer concierge service will be able to book hotel rooms and obtain tickets for shows and events, among other things.



Jet Aviation Palm Beach

FBOs Showing the Largest Increase in Overall Average from 2010 to 2012

| FBO | Airport | | 2012 Overall Average | 2010 Overall Average | Change 2010 - 2012 |
|------------------------------|---|-----|----------------------|----------------------|--------------------|
| KaiserAir-Oakland Jet Center | Metropolitan Oakland International | OAK | 7.3 | 5.1 | 2.2 |
| Landmark Aviation | San Antonio International | SAT | 7.9 | 6.6 | 1.3 |
| Atlantic Aviation | Garfield County Regional | RIL | 7.6 | 6.4 | 1.2 |
| Naples Airport Authority | Naples Municipal | APF | 7.9 | 6.8 | 1.1 |
| Tac Air | Blue Grass | LEX | 8.6 | 7.6 | 1.0 |
| Tac Air | Centennial | APA | 8.2 | 7.3 | 0.9 |
| Destin Jet | Destin-Fort Walton Beach | DTS | 8.9 | 8.2 | 0.7 |
| Signature Flight Support | DeKalb-Peachtree | PDK | 7.9 | 7.2 | 0.7 |
| Signature Flight Support | Fort Lauderdale/Hollywood International | PDK | 8.0 | 7.3 | 0.7 |
| Atlantic | Louisville International-Standiford Field | SDF | 8.2 | 7.6 | 0.6 |
| Signature Flight Support | Chicago Midway International | MDW | 7.2 | 6.6 | 0.6 |
| Signature Flight Support | Teterboro | TEB | 7.8 | 7.2 | 0.6 |
| First Aviation Services | Teterboro | TEB | 8.6 | 8.1 | 0.5 |
| Panorama Flight Service | Westchester County | HPN | 8.3 | 7.8 | 0.5 |

*Note: All FBOs with the same increase in overall average are listed in alphabetical order.
Source: AIN 2012 Americas FBOs Survey

Meridian, Teterboro Airport (TEB), Teterboro, N.J.

9.0

Of all the FBOs at bustling Teterboro Airport, Meridian, the last privately owned provider on the field, ranked the highest in our annual survey and likewise received the highest number of individual ratings by our readers. It is Meridian's third appearance in the top rankings in the last five years, and FBO president Steve Chandoha credits that performance to the personal touch his long tenured staff brings to the table. "With the longevity of

our employees, we can really get to know our customers well and customize the service packages that we offer them, so I would say that's the critical thing for us here," he said.

For Meridian, like most providers at Teterboro, last year was one of extremes, according to Chandoha, who cited the flood-



ing caused by [tropical storm Irene](#), which closed the airport for three days; 77 inches of snow that winter; days during the summer that reached a scorching 104 degrees; and even tremors from an earthquake that originated in Virginia. Despite these anomalies, the FBO pumped about 12 percent more fuel than in 2010 and added six jets to its management program.

"Business aviation is a barometer of the economy, and as we see our business strengthen, I think that's a good sign that the economy is doing the same, so we're optimistic at this point," said Chandoha. The FBO president acknowledges that customers walk a fine line between cost and value. "Today everyone is so price conscious," he said, "that [customers] want to make

sure they get good pricing but are also concerned about superior service, so fair pricing and great service is the motto at this point."

Currently the location is home to 16 jets, the largest a Gulfstream IV in its 60,000 sq ft of hangar space, which makes for an occupancy rate of around 80 percent. Chandoha said the company will start work this summer on a \$2 million project to rede-

velop its fuel farm. In addition to its charter department (which recently received a platinum rating from Argus) Meridian also offers a Part 145 repair station and aircraft sales at its Shell Aviation branded facility.

**Banyan Air Service,
Fort Lauderdale Executive
Airport (FXE),
Fort Lauderdale, Fla.**

8.9 South Florida's Banyan Air Service makes its fifth straight appearance as one of the most highly rated FBOs in our annual survey. "We pride ourselves in thinking ahead of the customer and making Banyan [a] home away from home," said company owner Don Campion. "We build relationships



with our customers as opposed to being reactive and just meeting their needs." Through customer relations management software, Banyan's CSRs can log client preferences to be better prepared for their next arrival.

With more than 130 based

turbine aircraft, the FBO's 200,000 sq ft of hangar space is full to the point that Banyan will be breaking ground later this year on three more 20,000 sq ft hangars.

While the facility sees approximately 100 departures a

40 Busiest Airports for Bizav

(based on number of survey responses)"

| Airport | | Responses |
|---|------|-----------|
| Teterboro | TEB | 586 |
| Centennial | APA | 252 |
| Palm Beach International | PBI | 221 |
| Dallas Love Field | DAL | 212 |
| Fort Lauderdale/Hollywood International | FLL | 205 |
| Hobby | HOU | 197 |
| Fort Lauderdale Executive | FXE | 172 |
| Westchester County | HPN | 166 |
| Chicago Midway International | MDW | 160 |
| McCarran International | LAS | 152 |
| Scottsdale Municipal | SDL | 149 |
| Washington Dulles International | IAD | 145 |
| Van Nuys | VNY | 143 |
| Metropolitan Oakland International | OAK | 137 |
| DeKalb-Peachtree | PDK | 131 |
| Le Bourget International, France | LFPB | 130 |
| London Luton, England | EGGW | 118 |
| Eagle County Regional | EGE | 115 |
| Los Angeles International | LAX | 114 |
| Pitkin County/Sardy Field | ASE | 113 |
| Boca Raton | BCT | 109 |
| Hanscom Field | BED | 106 |
| Austin Bergstrom International | AUS | 103 |
| Monterey Peninsula | MRY | 102 |
| Meacham International | FTW | 99 |
| Bob Hope | BUR | 98 |
| Addison | ADS | 97 |
| Long Beach Airport Daugherty Field | LGB | 96 |
| Norman Mineta San Jose International | SJC | 95 |
| Miami International | MIA | 95 |
| Boeing Field/King County International | BFI | 95 |
| John Wayne/Orange County | SNA | 92 |
| San Francisco International | SFO | 91 |
| San Antonio International | SAT | 87 |
| Orlando International | MCO | 87 |
| Chicago Executive | PWK | 86 |
| Morristown Municipal | MMU | 84 |
| Memphis International | MEM | 81 |
| Naples Municipal | APF | 81 |
| Sky Harbor International | PHX | 81 |

Source: AIN 2012 Americas FBO Survey

day, Champion said fuel volume has been relatively flat over the past year. “We do pump a lot of fuel relative to other FBOs but at the same time [the amount we

pump is] not really growing,” he said. “With the price of fuel it’s worrisome as to how much people are going to feel comfortable flying unless they really need to.” One area where the company has noticed an increase in traffic is from Latin and South America, the result of years of marketing and relationship building. The company has four representatives who visit customers in Latin and South America and attend all the aviation shows in the region.

To further its appeal to international customers, Banyan’s Part 145 repair station earned certification from the civil aviation departments of Brazil, Argentina, Venezuela and Bermuda, and while Banyan has recently enjoyed an influx of Central and South American customers seeking aircraft maintenance, this past year was a milestone. “In [the past, business in] our technical areas was 40 percent South American and 60 percent domestic, and now that’s flipped,” said Champion. To meet the demand, over the past year the FBO hired 15 more technicians and its maintenance department moved into an additional 20,000-sq-ft hangar (for a total of 80,000 sq ft of maintenance and avionics space) and is now open until midnight Monday through Friday.

In addition to aircraft sales and management divisions, the location also features one of the largest pilot shops in the nation and a ramp-side Jet Café.

**Destin Jet,
Destin-Fort Walton Beach
Airport (DTS), Destin, Fla.**

8.9 In the three years that Destin Jet Center has been in operation as the second FBO at Destin Airport in Northwest Florida, it has captured more than 70 percent of traffic at the field. The independently owned FBO, which is open 24/7/365, is the facility of choice for three of the four major fractional aircraft providers and the CAA-preferred FBO on the field, attesting to the high ranking it received in this year’s survey.

With transient traffic accounting for a significant portion of the movements at Destin, general manager Bill Blackford said he and his staff always need to provide exceptional service to keep customers coming back. “We’re in the hospitality business; an FBO is no longer just a fuel station,” he told AIN. “We aim for personalized service. Our customers are our friends. This means little things like knowing what a customer’s favorite drink is and having it ready and waiting for him when he walks into the facility.”

For crews, Destin Jet’s 6,000-sq-ft terminal building features multiple widescreen TVs, computer workstations, free Wi-Fi, recliners, couches, game table, two quiet rooms, showers, flight-planning room and closed-circuit TV monitoring to see passengers arriving on the

land side. Crew cars and complimentary hotel shuttle service are also available, as are rental cars. For passengers, there are lounges, full business center services, conference rooms and valet parking, among many other amenities.

Destin Jet also has 10 hurricane-rated hangars on property with a combined floor space of 40,300 sq ft, about half of which is reserved for transient aircraft. It is also an Avfuel-branded FBO, pumping both 100LL and pre-blended jet fuel.

Peak traffic in the Florida panhandle is mid-March (spring break) through Labor Day, the opposite of the lower portion of the Sunshine State. As the FBO readies for this increase it will also be preparing for its own third birthday bash, a barbeque cookout luncheon at the facility on April 27.

**Enterprise Jet Center,
William P. Hobby Airport
(HOU), Houston, Texas**

8.9 At an airport heavily populated by the major chains, Enterprise Jet Center received the highest rankings from our readers in this year’s tally. Just after our survey closed, the FBO, which had been in receivership, was [sold to Zurich-based Jet Aviation in a cash transaction](#), making it the aviation service provider’s sixth U.S. location and its second in Texas.

At Hobby since 1979, the FBO’s current facility opened in 2006. Among its offerings is a 28,500-sq-ft terminal/office building, featuring conference rooms and private dressing facilities for passengers as well as theater, reading and snooze rooms for pilots. Private showers and an on-site laundry service are also available. “Houston is the fifth most active U.S. business aviation airport and many of our customers fly there. It made sense for us to establish an FBO presence,”

| Busiest States/Countries for Bizav (based on number of responses) | |
|---|------------------|
| Country/State | Responses |
| Florida | 1,853 |
| California | 1,727 |
| Texas | 1,307 |
| New Jersey | 804 |
| Colorado | 799 |
| Illinois | 516 |
| New York | 455 |
| Georgia | 378 |
| CANADA | 370 |
| Arizona | 368 |
| BRAZIL | 333 |
| Virginia | 314 |
| North Carolina | 285 |
| Massachusetts | 283 |
| Tennessee | 253 |
| Nevada | 232 |
| Michigan | 223 |
| Pennsylvania | 211 |
| Ohio | 200 |
| Indiana | 192 |
| Mexico | 190 |
| Minnesota | 190 |
| Missouri | 158 |
| Louisiana | 147 |
| Alabama | 136 |
| Wisconsin | 133 |
| Washington | 132 |
| Arkansas | 126 |
| Kansas | 126 |
| Hawaii | 121 |
| South Carolina | 119 |
| Connecticut | 110 |
| Montana | 107 |
| Idaho | 98 |
| Oregon | 97 |
| Kentucky | 87 |
| Nebraska | 85 |
| Utah | 84 |
| New Mexico | 83 |
| Wyoming | 81 |

Source: AIN 2012 Americas FBO Survey



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said Gary Dempsey, president of Jet Aviation's U.S. aircraft services.

The facility, which pumps approximately 2.5 million gallons fuel a year, also has a 10,000 sq ft "drive-thru" canopy—the only canopy at the airport—and 127,000 sq ft of hangar space that shelters the 55 aircraft based there.

In 2010, the FBO opened a dedicated 30,000-sq-ft hangar to

back to where we were before the economic downturn. I think most of the decline was U.S.-based aircraft and now they are coming back."

The facility has approximately 300,000 sq ft of hangar space (one third of which is leased to private flight departments). All of that space is occupied, according to the company. More than 30 jets are based there, including several Bombardier Globals and Gulfstream G550s. The site also has 30,000 sq ft of office space and a 20,000-



Enterprise Jet Center

house its FAA Part 145 maintenance station. The facility services Bombardier, Cessna, Dassault and Hawker Beechcraft aircraft and is open 24 hours a day. The FBO also operates Hobby Sky-clean, the area's largest aircraft cleaning company.

Skyservice Aviat Toronto, Lester B. Pearson International Airport (TEB), Toronto, Canada

8.9

The only non-U.S. FBO to make the top of the Americas list was Skyservice Aviat's Toronto facility. The flagship of Skyservice's group of Canadian FBOs, it has been at Lester B. Pearson International since 1993, and the facility pumps approximately 4 million gallons of fuel annually, according to Russell Payson, CEO and founder of the company. While most American FBOs are still looking up to the levels they were at in 2008, Payson said his facility is already there. "We have not been affected nearly as badly as the U.S. has been," he told AIN. "We're pretty well

sq-ft terminal with onsite Canadian customs, equipped with amenities such as a large audio-visual-equipped conference room and crew shower rooms. "I always look at it this way," noted Payson. "Sometimes you judge a restaurant by its washrooms; we have pretty immaculate washrooms and shower facilities."

The facility, which sees approximately 70 movements a day, is currently branded as an Aviat, but following the dismantling of that network in the U.S., Skyservice finds itself with some decisions to make. "They have left [their branding] a little longer in Canada, so we are working with ExxonMobil to come up with a solution, and



Skyservice Aviat Toronto



Swift Aviation Services

we're looking at a variety of options right now," said Payson.

In addition to its FBO services, the company offers aircraft management and charter and has its own maintenance facility, which can handle heavy maintenance on aircraft up to and including regional jetliners. Skyservice also operates its own air ambulance fleet.

One of three service providers on the field, Skyservice claims approximately 60 percent of the private aviation traffic. "We have always tried to bring the highest levels of service to everything we do," said Payson. "We set high standards, and bring high standards of safety in a reasonably priced environment."

Swift Aviation Services, Phoenix Sky Harbor International Airport (PHX), Phoenix, Ariz.

8.9

Known for its massive canopy as well as its service, Swift Aviation's current facility has been on the south side of Sky Harbor Airport since 2004. Covering more than half a football field's worth of real estate, and able to shelter

as many as six aircraft at a time, the canopy certainly catches the arriving customer's eye. "It's still to our knowledge the largest in the United States," said Steve Silvestro, the company's director of FBO services. "We can get a Global, a GV, anything under the canopy as far as the corporate world goes." Given the searing heat in Arizona, space under the canopy is often at a premium. "We've become pretty creative in how we position aircraft," said Silvestro. "Different times of the day the canopy puts shade in different areas, and the guys outside have done a great job working that shade to the best of their ability."

Swift has an 18,000-sq-ft terminal that features a lobby decorated with an eclectic array of aircraft parts: a Boeing 747 engine nacelle is a window, a section of DC-9 fuselage serves as a counter, and a suspended DC-3 elevator above the reception area adds a decorative touch. Two 40,000-sq-ft hangars house the facility's 16 based jets, including a GIV and some Embraer Legacy 600s, as well as a handful of turboprops, among them a DC-3T conversion.

The FBO pumps an average of 4 million gallons of fuel each year using two 10,000-gallon and four 5,000-gallon capacity jet-A tankers and a pair of 1,200-gallon avgas trucks all equipped with wireless data transmitter systems. Such capacity was tested last summer when Phoenix's Chase Field hosted Major League Baseball's All Star Game. According to Tim Vallowe, manager of FBO services, Swift received the majority of

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traffic and handled approximately 40 jets beyond its usual traffic for the event. Such events contributed to Swift's bottom line, according to Silvestro. "I would say movements are up at least 10 percent over last year, which in this economy is pretty good."

Texas Jet, Meacham International Airport (FTW), Fort Worth, Texas

8.9 Last year marked the best year for Texas Jet in its 34-year history, according to founder and president Reed Pigman. Dallas hosted the Super Bowl, and the facility saw an influx of more than 120 aircraft in town for the big game. "There was a

What do some FBOs do that makes you avoid them?

respondents were asked to choose three

| | |
|--|-----|
| Poor customer service for passengers | 74% |
| Rundown or unclean facility | 51% |
| Unprofessional or improperly trained CSRs | 43% |
| Poor care of aircraft | 37% |
| Ramp fees | 31% |
| Charging separately for services, such as coffee | 24% |
| Lack of proper ground-handling equipment | 17% |
| Adding a fee for handling of catering | 10% |
| Billing errors | 3% |
| Spilling fuel on my aircraft | 3% |

What are the three most important factors you look for when choosing an FBO?

respondents were asked to choose three

| | |
|---|-----|
| Excellent customer service | 86% |
| Fuel pricing | 68% |
| Passenger amenities | 40% |
| Pilot amenities | 29% |
| Cleanliness | 29% |
| Line service training program participation | 14% |
| FBO infrastructure & décor | 14% |
| Loyalty and reward programs | 10% |
| Fuel brand | 2% |

vacant 747 hangar that I leased for the week and at one time we had two Globals, a GV and eight other jets in that hangar," recalled Pigman.

Later in the year the company bought competing FBO Fort Worth Flight Support, acquiring 63,000 sq ft of hangarage and a 6,000-sq-ft executive terminal in the process. Along with two newly built hangars, this brought the service provider's tally up to 410,000 sq ft, spread over 22 buildings. "It's a lot of real estate, and the good thing is [the buildings] are basically full," said Pigman. About 120 aircraft, including 57 jets and 29 turboprops, currently call the facility home. Texas Jet focuses solely on the meat-and-potatoes FBO services of fueling and storing aircraft. It fuels approximately 10,000 aircraft a year.

Several years ago, the company introduced a Ritz-Carlton customer service program, which emphasizes employee individuality, a process Pigman has taken to heart. "When our employees have become micro-brands so that our customers know their names, then I consider that a success," he told AIN. Every year Pigman has one-on-one interviews with each employee where he listens to suggestions on how to improve the FBO's service. Just when he believes there are no more good suggestions left, he is surprised. In the latest go-round, 49 improvement suggestions were implemented. "[Employees] really buy in, and because of that they are able to give such super service to our customers," he said.

Texas Jet also takes suggestions from its customers seriously. After hearing that the crew lounge was too small, Texas Jet doubled its size last year, in effect creating two lounges, a cinema room with theater seating and surround sound, and an oasis/quiet room with saltwater aquariums, subdued lighting and lounge chairs. □



Top Rated FBOs in the Americas (by overall average)

| FBO | Airport | | Overall Average |
|---|------------------------------------|------|-----------------|
| Pentastar Aviation | Oakland County International | PTK | 9.3 |
| XJet | Centennial | APA | 9.3 |
| AirFlite | Long Beach Airport Daugherty Field | LGB | 9.2 |
| JA Air Center | Aurora Municipal Airport | ARR | 9.2 |
| Tampa Int'l Jet Center | Tampa International | TPA | 9.2 |
| Wilson Air Center | Memphis International | MEM | 9.1 |
| Global Select (formerly City of Sugar Land) | Sugar Land Regional | SGR | 9.0 |
| Jet Aviation Palm Beach | Palm Beach International | PBI | 9.0 |
| Meridian Teterboro | Teterboro | TEB | 9.0 |
| Banyan Air Service | Fort Lauderdale Executive | FXE | 8.9 |
| Destin Jet | Destin-Fort Walton Beach | DTS | 8.9 |
| Enterprise Jet Center | Hobby | HOU | 8.9 |
| Skyservice Avitat | Lester B. Pearson International | CYYZ | 8.9 |
| Swift Aviation Services | Sky Harbor International | PHX | 8.9 |
| Texas Jet | Meacham International | FTW | 8.9 |
| National Jets | Fort Lauderdale/Hollywood Int'l | FLL | 8.8 |
| Scottsdale Air Center | Scottsdale Municipal | SDL | 8.8 |
| Business Jet Center | Dallas Love Field | DAL | 8.7 |
| Million Air | Addison | ADS | 8.7 |
| Million Air | Hobby | HOU | 8.7 |
| Signature Flight Support | St. Paul Downtown-Holman Field | STP | 8.7 |
| Signature Flight Support | Minn./St. Paul International | MSP | 8.7 |
| Del Monte Aviation | Monterey Peninsula | MRY | 8.6 |
| First Aviation Services | Teterboro | TEB | 8.6 |
| Monterey Jet Center | Monterey Peninsula | MRY | 8.6 |
| Tac Air | Blue Grass | LEX | 8.6 |
| Tradition Aviation | Jacqueline Cochran Regional | TRM | 8.6 |
| Vail Valley Jet Center | Eagle County Regional | EGE | 8.6 |
| Wilson Air Center | Douglas International | CLT | 8.6 |
| Denver jetCenter | Centennial | APA | 8.5 |
| Jet Systems HPN (Formerly Avitat Westchester) | Westchester County | HPN | 8.5 |
| Atlantic | Chicago Midway International | MDW | 8.4 |
| Cutter Aviation | Sky Harbor International | PHX | 8.4 |
| Galaxy Aviation | Palm Beach International | PBI | 8.4 |
| Galaxy Aviation | Orlando International | MCO | 8.4 |
| Jet Aviation | Teterboro | TEB | 8.4 |
| Million Air | Salt Lake City International | SLC | 8.4 |
| Million Air | Albany International | ALB | 8.4 |
| Showalter Flying Service | Orlando Executive | ORL | 8.4 |
| Skyservice Avitat | Calgary International | CYYC | 8.4 |
| Skyservice Avitat | Pierre Trudeau International | CYUL | 8.4 |

*Note: FBOs with the same overall average are listed alphabetically. Source: AIN 2012 Americas FBO Survey

| State/City | Airport | FBO | Airport Code | Line Service | Pax Amenities | Pilot Amenities | Facilities | Overall Average |
|-------------------|---|--|--------------|--------------|---------------|-----------------|------------|-----------------|
| Alabama | | | | | | | | |
| Birmingham | Birmingham International | Atlantic | BHM | 7.2 | 6.2 | 6.4 | 6.5 | 6.6 |
| Arizona | | | | | | | | |
| Phoenix | Sky Harbor International | Cutter Aviation | PHX | 8.6 | 8.2 | 8.3 | 8.5 | 8.4 |
| | | Swift Aviation Services | PHX | 8.9 | 8.7 | 8.8 | 9.0 | 8.9 |
| Scottsdale | Scottsdale Municipal | Landmark Aviation | SDL | 8.5 | 7.9 | 8.1 | 8.0 | 8.1 |
| | | Scottsdale Air Center | SDL | 8.7 | 8.7 | 8.8 | 8.9 | 8.8 |
| Alabama | | | | | | | | |
| Little Rock | Adams Field | Central Flying Service | LIT | 7.7 | 7.6 | 7.4 | 7.4 | 7.5 |
| California | | | | | | | | |
| Burbank | Bob Hope | Atlantic | BUR | 7.9 | 7.8 | 7.9 | 7.8 | 7.8 |
| | | Million Air | BUR | 8.1 | 8.0 | 8.1 | 8.3 | 8.1 |
| Long Beach | Long Beach Airport Daugherty Field | AirFlite | LGB | 9.2 | 9.3 | 9.2 | 9.3 | 9.2 |
| Los Angeles | Los Angeles International | Atlantic | LAX | 8.2 | 8.0 | 7.9 | 8.2 | 8.1 |
| | | Landmark Aviation | LAX | 8.2 | 7.5 | 7.6 | 7.4 | 7.7 |
| Monterey | Monterey Peninsula | Del Monte Aviation | MRY | 8.9 | 8.5 | 8.5 | 8.4 | 8.6 |
| | | Monterey Jet Center | MRY | 9.0 | 8.4 | 8.5 | 8.6 | 8.6 |
| Napa | Napa County | Bridgeford Flying Service | APC | 7.8 | 6.0 | 6.4 | 6.4 | 6.7 |
| Oakland | Metropolitan Oakland International | Business Jet Center | OAK | 8.3 | 8.1 | 8.2 | 8.2 | 8.2 |
| | | KaiserAir-Oakland Jet Center | OAK | 7.9 | 7.0 | 7.2 | 6.8 | 7.2 |
| Palm Springs | Jacqueline Cochran Regional | Tradition Aviation | TRM | 9.7 | 8.1 | 8.5 | 8.0 | 8.6 |
| | Palm Springs International | Atlantic | PSP | 8.4 | 7.8 | 8.0 | 7.9 | 8.0 |
| San Diego | Lindbergh Field | Landmark Aviation | SAN | 7.3 | 6.4 | 6.2 | 5.8 | 6.4 |
| San Francisco | San Francisco International | Signature Flight Support | SFO | 6.9 | 7.4 | 7.4 | 7.5 | 7.3 |
| San Jose | Norman Mineta San Jose International | Atlantic | SJC | 8.3 | 7.8 | 7.9 | 7.9 | 8.0 |
| Santa Ana | John Wayne/Orange County | Atlantic | SNA | 8.0 | 7.5 | 7.7 | 7.6 | 7.7 |
| | | Signature Flight Support | SNA | 8.2 | 7.9 | 7.9 | 8.0 | 8.0 |
| Santa Monica | Santa Monica Municipal | Atlantic | SMO | 7.2 | 6.7 | 6.9 | 6.9 | 6.9 |
| Van Nuys | Van Nuys | Maguire Aviation | VNY | 8.5 | 8.2 | 8.0 | 8.3 | 8.2 |
| | | Signature Flight Support | VNY | 8.1 | 7.4 | 7.7 | 7.6 | 7.7 |
| Colorado | | | | | | | | |
| Aspen | Pitkin County/Sardy Field | Atlantic | ASE | 8.2 | 7.8 | 7.4 | 7.8 | 7.8 |
| Denver | Centennial | Denver jetCenter | APA | 8.7 | 8.4 | 8.5 | 8.3 | 8.5 |
| | | Signature Flight Support | APA | 8.2 | 8.2 | 8.2 | 8.5 | 8.3 |
| | | Tac Air | APA | 8.5 | 8.1 | 8.0 | 8.3 | 8.2 |
| | | XJet | APA | 9.4 | 9.3 | 9.2 | 9.4 | 9.3 |
| | Denver International | Signature Flight Support | DEN | 7.5 | 7.6 | 7.9 | 7.9 | 7.7 |
| | Rocky Mountain Metropolitan | Denver AirCenter | BJC | 7.8 | 7.7 | 7.6 | 7.8 | 7.7 |
| Eagle | Eagle County Regional | Vail Valley Jet Center | EGE | 8.5 | 8.6 | 8.3 | 8.8 | 8.6 |
| Grand Junction | Walker Field | West Star Aviation | GJT | 7.9 | 8.0 | 7.8 | 8.3 | 8.0 |
| Rifle | Garfield County Regional | Atlantic Aviation | RIL | 8.2 | 7.3 | 7.5 | 7.4 | 7.6 |
| Florida | | | | | | | | |
| Boca Raton | Boca Raton | Boca Aviation | BCT | 8.6 | 7.9 | 8.1 | 8.2 | 8.2 |
| Boca Raton | Boca Raton | Signature Flight Support (formerly Avitat Boca Raton) | BCT | 7.7 | 7.9 | 7.8 | 8.1 | 7.9 |
| Destin | Destin-Fort Walton Beach | Destin Jet | DTS | 8.9 | 8.9 | 8.7 | 9.2 | 8.9 |
| Fort Lauderdale | Fort Lauderdale Executive | Banyan Air Services | FXE | 9.0 | 8.9 | 8.7 | 9.1 | 8.9 |
| | Fort Lauderdale/Hollywood International | National Jets | FLL | 9.3 | 8.5 | 8.7 | 8.6 | 8.8 |
| | | SheftAir Aviation Services | FLL | 8.3 | 8.2 | 8.2 | 8.4 | 8.3 |
| | | Signature Flight Support | FLL | 8.2 | 7.8 | 7.9 | 8.0 | 8.0 |

Blue shaded area indicates FBO with an overall average of 8.0 or higher. * All FBOs at the same airport are listed in alphabetical order.

| State/City | Airport | FBO | Airport Code | Line Service | Pax Amenities | Pilot Amenities | Facilities | Overall Average |
|----------------------|---|--|--------------|--------------|---------------|-----------------|------------|-----------------|
| Florida (cont'd) | | | | | | | | |
| Fort Myers | Southwest Florida International | PrivateSky Aviation | RSW | 8.4 | 8.0 | 8.0 | 8.3 | 8.2 |
| Key West | Key West International | Island City Flying Service | EYW | 6.2 | 4.1 | 4.0 | 4.0 | 4.6 |
| Miami | Miami International | Landmark Aviation (formerly Signature Flight Support) | MIA | 7.8 | 7.6 | 7.7 | 7.9 | 7.8 |
| | Opa-locka Executive | Miami Executive Aviation | OPF | 8.1 | 7.5 | 7.6 | 7.5 | 7.7 |
| Naples | Naples Municipal | Naples Airport Authority | APF | 8.2 | 7.7 | 7.6 | 7.9 | 7.9 |
| Orlando | Orlando Executive | Showalter Flying Service | ORL | 8.7 | 8.1 | 8.3 | 8.5 | 8.4 |
| | | Galaxy Aviation | MCO | 8.4 | 8.3 | 8.3 | 8.5 | 8.4 |
| | | Signature Flight Support | MCO | 7.9 | 7.7 | 7.8 | 7.8 | 7.8 |
| Tampa | Tampa International | Tampa International Jet Center | TPA | 9.3 | 9.0 | 9.2 | 9.3 | 9.2 |
| West Palm Beach | Palm Beach International | Galaxy Aviation | PBI | 8.8 | 8.3 | 8.4 | 8.3 | 8.4 |
| | | Jet Aviation Palm Beach | PBI | 9.0 | 8.9 | 8.9 | 9.0 | 9.0 |
| | | Signature Flight Support | PBI | 8.2 | 7.4 | 7.6 | 7.5 | 7.7 |
| Georgia | | | | | | | | |
| Atlanta | DeKalb-Peachtree | Epps Aviation | PDK | 8.6 | 7.7 | 7.7 | 7.7 | 7.9 |
| | | Signature Flight Support | PDK | 7.9 | 7.9 | 7.9 | 8.0 | 7.9 |
| | Fulton County-Brown Field | Hill Aircraft | FTY | 8.5 | 7.7 | 7.9 | 7.9 | 8.0 |
| Illinois | | | | | | | | |
| Chicago | Aurora Municipal Airport | JA Air Center | ARR | 9.0 | 9.2 | 9.1 | 9.4 | 9.2 |
| | Chicago Executive | Atlantic | PWK | 8.3 | 8.2 | 8.0 | 8.1 | 8.1 |
| | | Signature Flight Support | PWK | 8.0 | 7.6 | 7.6 | 7.6 | 7.7 |
| | Chicago Midway International | Atlantic | MDW | 8.6 | 8.4 | 8.4 | 8.3 | 8.4 |
| | | Signature Flight Support | MDW | 7.6 | 7.3 | 7.1 | 6.8 | 7.2 |
| | DuPage | DuPage Flight Center | DPA | 7.7 | 7.8 | 8.0 | 8.2 | 7.9 |
| O'Hare International | Signature Flight Support | ORD | 6.7 | 7.1 | 7.1 | 7.2 | 7.0 | |
| Kentucky | | | | | | | | |
| Lexington | Blue Grass | Tac Air | LEX | 8.3 | 8.7 | 8.6 | 8.8 | 8.6 |
| Louisville | Louisville International-Standiford Field | Atlantic | SDF | 8.2 | 8.1 | 8.1 | 8.2 | 8.2 |
| Maryland | | | | | | | | |
| Baltimore | Baltimore/Wash. Int'l/Thurgood Marshall | Signature Flight Support | BWI | 6.6 | 7.4 | 7.1 | 7.3 | 7.1 |
| Massachusetts | | | | | | | | |
| Bedford | Hanscom Field | Jet Aviation | BED | 7.8 | 7.5 | 7.5 | 7.4 | 7.5 |
| | | Signature Flight Support | BED | 7.4 | 6.6 | 6.8 | 6.8 | 6.9 |
| Boston | Logan International | Signature Flight Support | BOS | 6.7 | 6.8 | 6.6 | 6.9 | 6.8 |
| Michigan | | | | | | | | |
| Pontiac | Oakland County International | Pentastar Aviation | PTK | 9.3 | 9.1 | 9.3 | 9.3 | 9.3 |
| Minnesota | | | | | | | | |
| Minneapolis | Minn./St. Paul International | Signature Flight Support | MSP | 8.7 | 8.6 | 8.7 | 8.8 | 8.7 |
| | St. Paul Downtown-Holman Field | Signature Flight Support | STP | 9.1 | 8.6 | 8.5 | 8.7 | 8.7 |
| Nevada | | | | | | | | |
| Las Vegas | Henderson Executive Airport | Henderson Executive Airport | HND | 8.0 | 8.0 | 8.0 | 8.1 | 8.0 |
| | McCarran International | Atlantic | LAS | 8.0 | 7.8 | 7.8 | 7.9 | 7.9 |
| | | Signature Flight Support | LAS | 8.0 | 8.0 | 8.0 | 8.3 | 8.1 |
| New Jersey | | | | | | | | |
| Morristown | Morristown Municipal | Signature Flight Support | MMU | 7.5 | 7.5 | 7.5 | 7.6 | 7.6 |
| Newark | Newark Liberty International | Signature Flight Support | EWR | 7.9 | 7.1 | 7.2 | 7.2 | 7.3 |

Blue shaded area indicates FBO with an overall average of 8.0 or higher. * All FBOs at the same airport are listed in alphabetical order.

| State/City | Airport | FBO | Airport Code | Line Service | Pax Amenities | Pilot Amenities | Facilities | Overall Average |
|----------------------------|--|---|--------------|--------------|---------------|-----------------|------------|-----------------|
| New Jersey (cont'd) | | | | | | | | |
| Teterboro | Teterboro | Atlantic | TEB | 8.2 | 7.4 | 7.6 | 7.3 | 7.6 |
| | | First Aviation Services | TEB | 8.3 | 8.8 | 8.6 | 8.9 | 8.6 |
| | | Jet Aviation | TEB | 8.1 | 8.5 | 8.5 | 8.7 | 8.4 |
| | | Meridian Teterboro | TEB | 8.8 | 8.8 | 9.1 | 9.2 | 9.0 |
| | | Signature Flight Support | TEB | 7.8 | 7.8 | 7.8 | 7.8 | 7.8 |
| Trenton | Trenton Mercer County | Ronson Aviation | TTN | 6.8 | 5.5 | 5.9 | 5.5 | 5.9 |
| New York | | | | | | | | |
| Albany | Albany International | Million Air | ALB | 7.7 | 8.5 | 8.6 | 8.6 | 8.4 |
| White Plains | Westchester County | Jet Systems HPN (Formerly Avitat Westchester) | HPN | 8.9 | 8.5 | 8.2 | 8.6 | 8.5 |
| | | Panorama Flight Service | HPN | 8.5 | 8.3 | 8.3 | 8.3 | 8.3 |
| North Carolina | | | | | | | | |
| Charlotte | Douglas International | Wilson Air Center | CLT | 8.8 | 8.5 | 8.5 | 8.5 | 8.6 |
| Raleigh-Durham | Raleigh-Durham International | Landmark Aviation | RDU | 7.9 | 7.8 | 7.7 | 8.0 | 7.8 |
| Ohio | | | | | | | | |
| Columbus | Port Columbus International | Lane Aviation | CMH | 8.3 | 7.5 | 7.8 | 7.4 | 7.8 |
| Pennsylvania | | | | | | | | |
| Philadelphia | Philadelphia International | Atlantic | PHL | 7.4 | 7.7 | 7.8 | 7.9 | 7.7 |
| Pittsburgh | Pittsburgh International | Atlantic | PIT | 8.0 | 7.8 | 8.0 | 8.0 | 7.9 |
| Tennessee | | | | | | | | |
| Memphis | Memphis International | Wilson Air Center | MEM | 9.2 | 9.1 | 9.0 | 9.1 | 9.1 |
| Nashville | Nashville International | Atlantic | BNA | 8.5 | 8.3 | 8.1 | 8.3 | 8.3 |
| | | Signature Flight Support | BNA | 8.2 | 7.6 | 7.7 | 7.4 | 7.7 |
| Texas | | | | | | | | |
| Addison | Addison | Million Air | ADS | 8.7 | 8.7 | 8.6 | 8.6 | 8.7 |
| Austin | Austin Bergstrom International | Atlantic | AUS | 8.4 | 8.1 | 8.0 | 8.2 | 8.2 |
| | | Signature Flight Support | AUS | 7.8 | 7.7 | 8.0 | 8.1 | 7.9 |
| Dallas | Dallas Love Field | Business Jet Center | DAL | 8.5 | 8.8 | 8.7 | 8.9 | 8.7 |
| | | Signature Flight Support | DAL | 8.4 | 8.0 | 8.0 | 8.1 | 8.1 |
| | Dallas/Fort Worth International | General Aviation Facility | DFW | 7.3 | 7.5 | 7.0 | 7.6 | 7.3 |
| Fort Worth | Meacham International | Texas Jet | FTW | 9.3 | 8.7 | 9.0 | 8.8 | 8.9 |
| Houston | Hobby | Enterprise Jet Center | HOU | 8.9 | 8.7 | 8.9 | 9.1 | 8.9 |
| | | Million Air | HOU | 8.9 | 8.5 | 8.7 | 8.5 | 8.7 |
| | | Wilson Air Center | HOU | 8.8 | 7.3 | 7.8 | 7.3 | 7.8 |
| San Antonio | San Antonio International | Landmark Aviation | SAT | 8.2 | 7.9 | 7.6 | 7.9 | 7.9 |
| Sugar Land | Sugar Land Regional | Global Select (formerly City of Sugar Land) | SGR | 8.3 | 9.1 | 9.1 | 9.4 | 9.0 |
| Utah | | | | | | | | |
| Salt Lake City | Salt Lake City International | Million Air | SLC | 8.6 | 8.2 | 8.3 | 8.4 | 8.4 |
| Virginia | | | | | | | | |
| Sterling (Dulles) | Washington Dulles International | Landmark Aviation | IAD | 7.8 | 8.1 | 7.7 | 8.2 | 7.9 |
| | | Signature Flight Support | IAD | 7.8 | 7.8 | 7.9 | 8.1 | 7.9 |
| Washington | | | | | | | | |
| Seattle | Boeing Field/King County International | Clay Lacy Aviation | BFI | 7.9 | 7.3 | 7.1 | 7.2 | 7.4 |
| | | Galvin Flying | BFI | 8.7 | 7.5 | 8.0 | 7.5 | 7.9 |
| Canada | | | | | | | | |
| Calgary | Calgary International | Skyservice Avitat | CYYC | 8.2 | 8.4 | 8.4 | 8.5 | 8.4 |
| Montreal | Pierre Trudeau International | Skyservice Avitat | CYUL | 8.3 | 8.4 | 8.2 | 8.6 | 8.4 |
| Toronto, Ontario | Lester B. Pearson International | Skyservice Avitat | CYYZ | 9.0 | 8.8 | 8.8 | 8.9 | 8.9 |

Blue shaded area indicates FBO with an overall average of 8.0 or higher. * All FBOs at the same airport are listed in alphabetical order.

While most of the top FBOs in this year's survey were once again single establishments such as AirFlite, or part of small groups like Skyservice Avitat, the major FBO chains (Atlantic Aviation, Landmark Aviation, Million Air and Signature Flight Support) combined operate more than 200 facilities in the Americas, and they serve to provide a broad sample of the industry. If business aviation is truly a barometer of economic health, then the heads of these chains hope that the recent upturn in several financial indicators will translate into increased flight activity and more FBO visits as the year progresses.

FBO chains predict uncertain 2012

Atlantic Aviation

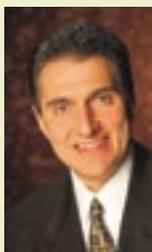
"We enjoyed the growth rate that we kind of projected and could see coming a year ago," said Lou Pepper, president and CEO of Atlantic Aviation. The chain has 65 locations, the largest domestic footprint of any of the major service providers.

Atlantic reported an increase in gross profit of 3.5 percent compared with 2010. The company attributes the improvement to overall growth in the number of GA flight movements in the U.S., and higher volume of fuel sold.

Along with those increases, Pepper noted a rise in the number of based aircraft in the network. "We have considerably more tenant aircraft than we had, which is something that people don't talk a lot about," he said.

A year ago, Atlantic expanded its service into the Pacific Northwest when it purchased Oregon-based provider Flightcraft, which operated the sole FBOs at Portland International Airport and at Mahlon Sweet Field in Eugene.

The company sold its facilities at Hayward Executive Airport in California and at Burlington International Airport in Vermont to competitors



Lou Pepper

on the field. "Typically it's our objective to prevail and kind of combine and remain there, but there are certain locations where the competitor has made a huge investment and it just made sense to divest to them," he said. Atlantic faces a similar situation this fall when its lease ends at Gulfport-Biloxi International Airport, where a new Million Air recently opened.

The chain remains interested in further expansion, and Pepper believes the purchase market may begin to heat up. "I still think there are some consolidation opportunities for us...with values coming back and business firming up," he said.

Pepper expects similar growth in 2012. "We feel that people who have aircraft are flying them a bit more, the economy is picking up and business is picking up," he told AIN. "We just feel that with the depressed prices of some of the used aircraft, some people who haven't been buying them will start buying. When they start putting those into service, the rising tide will raise all boats."

Landmark Aviation

Last year, Landmark Aviation

hit the milestone of 50 FBO locations when it purchased the Falcon Trust Air facility at Kendall-Tamiami Executive Airport. The year was an active one for the chain, which added 11 new locations to its network for a current total of 51 worldwide. In February, Landmark—the incumbent FBO operator at San Diego International Airport—was awarded a 37-year lease extension in return for agreeing to build a new FBO complex.



Dan Bucaro

While Landmark plans to remain aggressive in the acquisition arena, CEO Dan Bucaro believes that an uneven 2011 cooled the consolidation market slightly. "I think everybody was hoping that 2011 was going to be really consistent and it wasn't," he told AIN. Despite that assessment,

Bucaro said there are still some potential blockbuster deals in the marketplace and he expects further announcements from Landmark during the year.

Over the past year, the company committed more than \$5 million to improvements. A terminal remodel along with hangar repairs will be completed this month at the company's Roanoke, Va. facility, while remodeling will soon commence at Miami, Tampa and Norfolk. The Asheville, N.C. location will receive a fuel-farm upgrade aimed at increasing storage capacity, along with an interior upgrade of the terminal. The site will also receive ramp repairs, as will Landmark's Atlanta FBO. Around the end of the year, the company expects to break ground on

FBO Chains: Top Five Facilities (by overall average)

| FBO | Airport | Overall Average |
|---|---------|-----------------|
| Atlantic Aviation | | |
| Chicago Midway International | MDW | 8.4 |
| Nashville International | BNA | 8.3 |
| Austin Bergstrom International | AUS | 8.2 |
| Louisville International-Standiford Field | SDF | 8.2 |
| Chicago Executive | PWK | 8.1 |
| Landmark Aviation | | |
| Scottsdale Municipal | SDL | 8.1 |
| San Antonio International | SAT | 7.9 |
| Washington Dulles International | IAD | 7.9 |
| Miami International | MIA | 7.8 |
| Raleigh-Durham International | RDU | 7.8 |
| Million Air | | |
| Addison | ADS | 8.7 |
| Hobby | HOU | 8.7 |
| Albany International | ALB | 8.4 |
| Salt Lake City International | SLC | 8.4 |
| Bob Hope | BUR | 8.1 |
| Signature Flight Support | | |
| Minn./St. Paul International | MSP | 8.7 |
| St. Paul Downtown-Holman Field | STP | 8.7 |
| Centennial | APA | 8.3 |
| Dallas Love Field | DAL | 8.1 |
| McCarran International | LAS | 8.1 |

*Note: FBOs with the same overall average are listed alphabetically.
Source: AIN 2012 Americas FBO Survey

a new terminal and hangar project at Cleveland's Burke Lakefront Airport.

Bucaro gave the past year a grade of "OK." "We were on target for what our expectations were until the fourth quarter, which got a little soft," he noted. Based on that performance the company is taking a wait-and-see approach for this year. "I think we're cautious like everyone else is," he said.

Million Air

For Million Air, despite some gains over the past year there were still headwinds, according to company president and CEO Roger Woolsey. "As we started out the first part of the year it seemed like business was really starting to pick up...but the second half of the year seemed to lose that momentum a bit."



Roger Woolsey

Despite the sluggish economy, the company continued to improve and add to its portfolio of FBOs. Last fall the chain opened a new facility at Gulfport-Biloxi International

Airport. Million Air is expanding its Addison Airport facility and expanded the Salt Lake City FBO through the purchase the Salt Lake jetCenter.

Later this year construction will begin on a new \$20 million FBO at Nevada's Reno/Tahoe International Airport. Also this year the company will break ground on a facility at Calgary International Airport.

This summer the company will begin a reconstruction project that will see the demolition of eight hangars to make more efficient use of its real estate at William P. Hobby Airport. The new FBO there will be home to the chain's personnel training center.

Woolsey said the company will continue to eye further expansion with a degree of caution. "There are still airports out there that would like to see major [FBO] brands, but then they put these minimum rents on the FBO because they think it's such a cash cow...but at the end of the day what's that FBO left to do but turn around and put it in the price of the fuel," he told AIN. "We are being extremely

careful not to get ourselves in that corner."

Signature Flight Support

In the 2011 AIN Americas FBO Survey report, the BBA Aviation subsidiary had but a single addition to its network. This year Signature—which operates the world's largest chain of service providers—added eight locations, bringing its stable to 110. The company began operations at Germany's Frankfurt Main International Airport and at Edinburgh Airport in Scotland and purchased Tropical Aviation's facility at Isla Grande-Fernando L. Rivas Dominicali Airport in Puerto Rico, and a majority stake in Arrindel Aviation Services' FBO at Princess Juliana International Airport in St. Maarten.

Closer to home, the Orlando, Fla.-based company acquired FBOs at Boca Raton Airport, Mobile Regional Airport, Mobile Downtown Airport and Eppley Field. In addition, a new FBO at Chicago O'Hare is expected to be completed next month, while

construction on a new facility at Newark Liberty International Airport is set to commence.

Against this growth, Signature lost three FBOs when it was outbid in the request for proposal process at Miami and Tampa, and exited Spirit of St. Louis Airport when Tac Air acquired the Signature-operated facility there.

"Signature is focused on growth and our desire to double our network, and we haven't wavered from that," said Maria Sastre, Signature's COO.

Sastre told AIN that several factors need to coalesce before private aviation can return to the heights of just a few years ago. "I think the major challenge in the industry

right now is due somewhat to the volatility of the economic environment," she told AIN. "The business is softer than the overall industry would like to see, and we always ascertain that we are able to directly correlate it to economic stability and consumer confidence, and we're hopeful that over this coming year and in 2013, those two entities will strengthen and the outcome will be a much stronger industry." □



Maria Sastre

AMERICAN EXPRESS GIFT CARD WINNERS

As an incentive to have our readers participate in the FBO Survey, we randomly selected 20 survey participants and awarded them each a \$100 American Express gift card:

- Thomas Windham, aviation department manager, VCMI
- Steve Waller, president, Florida Aircraft Acquisitions
- Daniel Deweese, chief pilot, JM Aviation
- Rick Dougherty, captain, NetJets
- Jack Gore, chief pilot, Air Orange
- William Hall, line captain, NetJets
- William Wyman, president, Wyman Consulting Associates
- Gary Orner, president, Go Air
- Selwyn House, v-p/director of operations, CTP Aviation
- Kenneth Pingel, senior line captain, Monsanto
- Jorge Lara, flight operations director, Corbantrade
- Gary Hopkins, managing director, Vectra Bank Aviation
- Robert Cotner, captain, Hill-Rom
- Ludwig Van Sprang, captain, NetJets
- Joe Gomez, captain, Kelin Tools
- Robert Morgan, owner, B&B Morgan
- William Tanner, captain, Heliflite Shares
- T. Buchanan, director of flight operations, AT&T
- Steve Widman, chief pilot, Taubman Air Terminals
- Eric Baquero, chief pilot, Allen Transport