



AIN FBO SURVEY

Report by Curt Epstein, Data compiled by David Leach

2013 • THE AMERICAS

Bizjet operations are on the rise, FBOs are 'cautiously' optimistic

For the FBO industry, business last year looked a lot like it did in 2011 as hopes for a significant resurgence in business aviation were pushed back again. According to the FAA, the number of U.S. business jet flight operations last year continued its slow but steady climb since the start of the recession in 2008, but the count was still nearly 850,000 shy of the peak of 4,824,960 set in 2007.

While last year saw an increase of more than half a percentage point (equating to more than 25,000 operations), the meager gain was achieved in spite of a slight decline in domestic operations, following two years of increases. That was more than offset by international private jet flights, which grew by approximately 5.5 percent year-over-year. Over the past few months, however, those numbers received a boost. From November through January, domestic operations increased more than one percent over the same span 12 months earlier, while international flights rose by 6.5 percent.

Those totals correspond with the observations of the industry people AIN spoke with for this year's FBO survey report; they remain cautiously optimistic that this year could finally see business aviation gain some traction. "On a pure business metric, I would say the world is continuing to correct and uptick at a very low angle of attack," said Roger Woolsey, CEO of Million Air, who emphasized that the overall increase in flight operations was not experienced evenly across the board.

"When you've got a periscope a little higher out of the water, the way some of the chains do, you obviously see some markets that are doing really well, some markets that are doing OK, and you even have markets trending in the other direction, so I cannot say all 30 locations are marching to the same tune."

Looking ahead for the remainder of the year, FBO industry consultancy Aviation Business Strategies Group (ABSG) predicts that most FBOs could see moderate improvement. "We feel most FBOs have

an opportunity to expand their business in the range of four to six percent this year," said company principal John Enticknap. "Any FBO that achieves growth of six percent or more will be a star performer."

After the 2012 elections, which seemingly had the business community holding its breath, the business aviation industry is hoping for sustained growth, but several challenges remain, according to the major FBO chain executives. Despite recent stock-market gains that brought several indicators to record levels, uncertainty still lingers among business leaders, and that affects aircraft purchasing and usage. "The economy is still the biggest issue," said Landmark CEO Dan Bucaro. "It's sputtering along, and until it really gets to be consistent it's going to be difficult to see our industry as consistent."

Other industry leaders believe that private aviation still faces perception problems. "What goes on in Washington definitely trickles down to our industry," said Atlantic CEO Lou Pepper. "Some of the sentiments from the White House are really negative to our industry, and that's one challenge we are trying to face."

"I think it's been a bit unfortunate that we've had that artificial negative

influence on our ability to recapture the business that we should have recaptured post-recession," said Maria Sastre, Signature Flight Support's president and COO. "As an industry we have to work hard to counter that negative PR, but I also think that we have an incredible amount of opportunity going forward because commercial aviation does have its restraints." Landmark's Bucaro points to the recent consolidation between American Airlines and US Airways as a potential positive for private aviation. "It's going to take some time because the airlines are going to cut services to those places, but in the long run you are going to see some airports that you didn't expect turn into pretty good GA airports."

Another issue stemming from the economic downturn is the crunch on local governments facing budget cuts and fixing their gaze hungrily upon the FBO industry, which has already weathered several years of belt tightening. "A lot of the FBOs have made difficult but wise decisions to reduce overhead costs, but the volume hasn't recovered," said Steve McCullough, a senior v-p with fuel supplier Epic Aviation. With the recent implementation of the mandated federal budget

Contents	
Busy metro areas, by region	Pgs 21-25
Top-rated FBO profiles	Pg 21
Top-rated FBOs in the Americas	Pg 22
Most-improved FBOs	Pg 23
FBO survey by the numbers	Pg 25
FBO Chains: top five facilities	Pg 26
Above and beyond	Pg 27
Most-rated FBOs by state/country	Pg 28
Survey rules and methodology	Pg 30

sequestration, airport funding is likely to be stretched again, exacerbating an already tense situation. "We have [local] governments now that are desperately looking for funding and for revenue streams," said Woolsey. "They are looking to increase rents and they are looking at minimum gallon guarantees on fuel throughput, so there's a lot of pressure from our hosts, if you will, our airports of driving revenue to them, which in turn puts pricing pressures on the customers."

Against this backdrop, ABSG sees a shift in the FBO industry away from a price-sensitive business model to one based on providing exceptional customer service. "Customers don't defect because of price," company co-principal Ron Jackson told AIN. "What we found is they defect because of poor customer service." That corresponded with AIN's findings in this year's survey: 85 percent of the respondents selected "excellent customer service" as their top factor in selecting an FBO, while 71 percent listed "poor customer service" as a leading reason to avoid one.

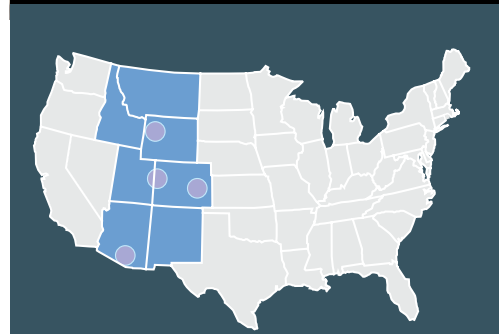
With approximately 3,000 FBOs operating in the U.S. and the large chains accounting for fewer than 400 of them, the chain chiefs view the field as ripe. "I think the older generations that have owned a lot of these individual family businesses are looking to move out if they can't find a way to easily transfer the inheritance to family members," said Signature's Sastre.

But whether it's a buyer's market or a seller's market this year remains a matter for discussion. "I'd say neither," Bucaro told AIN. "I'd say it's a tough market, because you've got [operators] where the numbers are better than they were in 2008-2009, but they are certainly not back to where they were in 2006-2007, so expectations are still a little different." While FBO owners might believe their properties are worth the same as they were during the industry peaks several years ago, they may not find takers at that price. "You're not going to see the aggressiveness that there once was," said Woolsey. "I think people are going to be a little more cautious as they grow, but I think they are going to continue to grow." □

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BUSY METRO AREAS IN THE ROCKY MOUNTAIN REGION



DENVER		OVERALL AVERAGE	
XJET	KAPA	9.4	5%
SIGNATURE FLIGHT SUPPORT	KDEN	8.8	
DENVER JETCENTER	KAPA	8.5	
SIGNATURE FLIGHT SUPPORT	KAPA	8.3	
TAC AIR	KAPA	8.0	
PHOENIX/SCOTTSDALE			
SCOTTSDALE AIRCENTER	KSDL	9.1	10%
SWIFT AVIATION SERVICES	KPHX	8.9	
CUTTER AVIATION	KPHX	8.6	
LANDMARK AVIATION	KSDL	8.2	
GRAND JUNCTION AREA			
VAIL VALLEY JET CENTER	KEGE	9.1	10%
WEST STAR AVIATION	KGJT	8.6	
ATLANTIC AVIATION	KASE	7.6	
BOZEMAN (YELLOWSTONE)			
YELLOWSTONE JET CENTER	KBZN	9.1	10%

Note: FBOs with the same overall average are listed in alphabetical order. Only FBOs that received 20 or more evaluations are included. FBO information provided by Ac-U-Kwik.

Category and Overall Rating Averages of FBOs Evaluated		
Category	All FBOs	FBOs (>20)
Line service	8.2	8.5
Passenger amenities	7.7	8.2
Pilot amenities	7.7	8.2
Facilities	7.8	8.3
Overall rating	7.7	8.1

Note: "All FBOs" includes all 1,777 FBOs that received ratings from at least one respondent. "FBOs (>20)" indicates the 154 FBOs, both in the Americas and the Rest of the World, that received ratings by 20 respondents or more.

Top Rated FBOs in the Americas (by overall average)

FBO	Airport		Overall Average
JA Air Center	Aurora Municipal	KARR	9.5
AirFlite	Long Beach /Daugherty Field	KLGB	9.4
Fargo Jet Center	Hector International	KFAR	9.4
Global Select	Sugar Land Regional	KSGR	9.4
Tampa Intl Jet Center	Tampa International	KTPA	9.4
XJet	Centennial	KAPA	9.4
Banyan Air Service	Fort Lauderdale Executive	KFXE	9.3
Wilson Air Center	Memphis International	KMEM	9.3
Hangar Ten	Charles B. Wheeler Downtown	KMKC	9.2
Pentastar Aviation	Oakland County International	KPTK	9.2
Texas Jet	Fort Worth Meacham International	KFTW	9.2
Destin Jet	Destin-Fort Walton Beach	KDTS	9.1
Jet Aviation	Palm Beach International	KPBI	9.1
Meridian	Teterboro	KTEB	9.1
Monterey Jet Center	Monterey Peninsula	KMRY	9.1
Scottsdale AirCenter	Scottsdale	KSDL	9.1
Vail Valley Jet Center	Eagle County Regional	KEGE	9.1
Yellowstone Jet Center	Bozeman Yellowstone	KBZN	9.1
Business Jet Center	Dallas Love Field	KDAL	9.0
Del Monte Aviation	Monterey Peninsula	KMRY	9.0
Million Air	Addison	KADS	9.0
SkyService	Lester B. Pearson International	CYYZ	9.0
Jet Aviation	William P. Hobby	KHOU	8.9
Million Air	Indianapolis International	KIND	8.9
Premier Jet	McClellan-Palomar	KCRQ	8.9
Rectrix Aerodrome Center	Sarasota/Bradenton International	KSRQ	8.9
Swift Aviation Services	Phoenix Sky Harbor International	KPHX	8.9
Wilson Air Center	Charlotte/Douglas International	KCLT	8.9
Atlantic Aviation	Friedman Memorial	KSUN	8.8
Jet Systems	Westchester County	KHPN	8.8
Preferred Jet Center	Cobb County-McCollum Field	KRYV	8.8
Signature Flight Support	Denver International	KDEN	8.8
Boca Aviation	Boca Raton	KBCT	8.7
National Jets	Fort Lauderdale/Hollywood International	KFLL	8.7
Signature Flight Support	Minneapolis-St. Paul/Wold-Chamberlain	KMSP	8.7
Stuart Jet Center	Witham Field	KSUA	8.7
Base Ops At Page Field	Page Field	KFMY	8.6
Cutter Aviation	Phoenix Sky Harbor International	KPHX	8.6
Galaxy Aviation	Orlando International	KMCO	8.6
Galaxy Aviation	Witham Field	KSUA	8.6
Galaxy Aviation	Palm Beach International	KPBI	8.6
Jet Aviation	Teterboro	KTEB	8.6
Landmark Aviation	Charleston International	KCHS	8.6
Landmark Aviation	Waukegan Regional	KUGN	8.6
Landmark Aviation	Westchester County	KHPN	8.6
Million Air	San Antonio International	KSAT	8.6
Million Air	Albany International	KALB	8.6
Sheltair	Fort Lauderdale/Hollywood International	KFLL	8.6
Tac Air	Eppley Airfield	KOMA	8.6
West Star Aviation	Grand Junction Regional	KGJT	8.6

Note: FBOs with the same overall average are listed alphabetically. FBO information provided by Ac-U-Kwik.





JA Air Center

AIN FBO SURVEY

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TOP RANKED FBOs

9.5

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

The Chicago-area FBO made its debut as a top-rated FBO in our 2011 survey, taking the top spot. It reclaimed the highest score this year, led by a 9.8 rating for its upscale facilities (one of two locations with the highest individual category score in this year's survey) as well as the highest score for passenger amenities. The privately owned company saw a good year in 2012, reporting better-than-20-percent growth at an airport that FBO operations manager Randy Fank describes as a diamond-in-the-rough for aircraft heading to the Windy City.

"We have more and more new customers coming through every week, and that's just going to continue as we let people know there is another option out here," he told AIN.

The FBO provides aircraft charter and management services and has one of the country's biggest avionics shops. Indeed, the JA in its name stands for Joliet Avionics, harkening back to the company's roots at DuPage Airport. Recently the FBO received FAA Type IV certification for its maintenance facility as it turns its attention to catering to larger business jets. Last summer it opened an interiors shop and since then has installed cabins on nearly 20 aircraft up to a Bombardier Challenger 604. In describing his FBO's success, Fank summed it up thus: "It's not hard. Take care of the guy in the back of the airplane, get him on his way so you've actually accomplished what the pilots want done, then take care of the pilots."



AirFlite



Global Select

9.4

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

The Los Angeles-area FBO, which recently hosted its second NBAA Regional Forum, like many others is cautiously optimistic that it has weathered the worst of the recession. "The number of transient customers has increased," said general manager John Tary, "and the associated volume has increased slightly, but we're definitely more positive this year than the last couple."

One of the founding members of World Fuel's Air Elite network, AirFlite has been owned by Toyota since 1986, houses the automaker's North American-based flight department, and Tary's double duty as a company G550 pilot allows

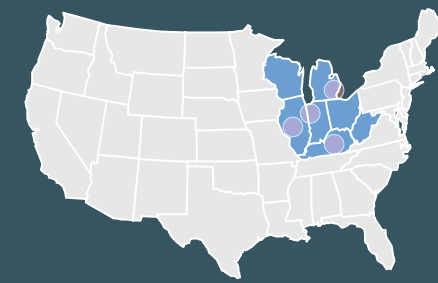
him to visit other FBOs to see and adapt what works. Recently added was hot and cold towel service for passengers and crew alike, depending on the weather. "Small things like that really make the difference," said Tary. The company is also proud of its in-house-designed customer service software, which keeps tabs on every step of service its customers require.

AirFlite recently completed a \$150,000 renovation of its lobby. The 14-acre facility has approximately 135,000 sq ft of hangar space available and is home to 20 bizjets, ranging from a Citation Mustang to a G450. Long Beach Airport is in the midst of a

What do some FBOs do that makes you avoid them?
respondents were asked to choose three

Poor customer service	71%
Rundown or unclean facility	52%
Unprofessional or improperly trained CSRs	47%
Poor care of aircraft	34%
Ramp fees	29%
Charging separately for services, such as coffee	23%
Lack of proper ground-handling equipment	17%
Adding a fee for handling of catering	8%
Billing errors	4%
Spilling fuel on aircraft	3%

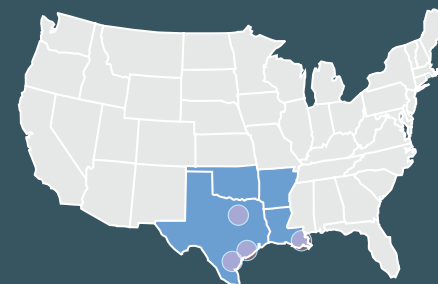
BUSY METRO AREAS IN THE GREAT LAKES REGION



CHICAGO		OVERALL AVERAGE
JA AIR CENTER	KARR	9.5 5%
LANDMARK AVIATION	KUGN	8.6
DUPAGE FLIGHT CENTER	KDPA	8.3
ATLANTIC AVIATION	KMDW	8.2
ATLANTIC AVIATION	KPWK	8.2
DETROIT		
PENTASTAR AVIATION	KPTK	9.2 10%
INDIANAPOLIS		
MILLION AIR	KIND	8.9
LOUISVILLE/LEXINGTON		
TAC AIR	KLEX	8.4
ATLANTIC AVIATION	KSDF	7.7

Note: FBOs with the same overall average are listed in alphabetical order. Only FBOs that received 20 or more evaluations are included.
FBO information provided by Ac-U-Kwik.

BUSY METRO AREAS IN THE SOUTH



AUSTIN/SAN ANTONIO		OVERALL AVERAGE
MILLION AIR	KSAT	8.6
ATLANTIC AVIATION	KAUS	8.0
LANDMARK AVIATION	KSAT	7.9
SIGNATURE FLIGHT SUPPORT	KAUS	7.9
DALLAS/FORT WORTH		
TEXAS JET	KFTW	9.2 10%
BUSINESS JET CENTER	KDAL	9.0
MILLION AIR	KADS	9.0
SIGNATURE FLIGHT SUPPORT	KDAL	8.2
CORPORATE AVIATION	KDFW	8.0
HOUSTON		
GLOBAL SELECT	KSGR	9.4 5%
JET AVIATION	KHOU	8.9
MILLION AIR	KHOU	8.5
WILSON AIR CENTER	KHOU	8.2
ATLANTIC AVIATION	KHOU	7.9
NEW ORLEANS		
ATLANTIC AVIATION	KMSY	8.0
LANDMARK AVIATION	KNEW	7.8

Note: FBOs with the same overall average are listed in alphabetical order. Only FBOs that received 20 or more evaluations are included.
FBO information provided by Ac-U-Kwik.



Global Select

\$150 million renovation program aimed at increasing its visibility and viability among Southern California travelers.

9.4

Fargo Jet Center, Hector International Airport (KFAR), Fargo, N.D.

While it's one thing to provide excellent line service when it's 80 degrees and sunny, it's another thing to do it when the temperature is 20 below zero in a blizzard, notes Darren Hall, Fargo Jet Center's vice president of marketing. "Times when you can't see someone walking across the parking lot we have guys out taking care of customers who have flown in or are trying to depart," he said. A

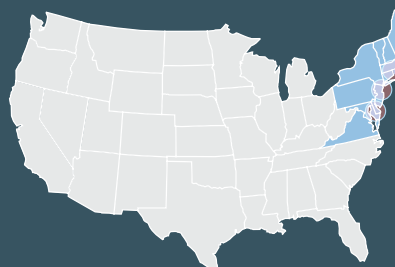
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FBOs Showing the Largest Increase in Overall Average from 2012 to 2013

FBO	Airport		2013 Overall Average	2012 Overall Average	Change 2012 - 2013
Signature Flight Support	San Francisco International	KSFO	7.6	6.4	1.2
Signature Flight Support	Denver International	KDEN	8.8	7.7	1.1
Signature Flight Support	Chicago O'Hare International	KORD	8.0	7.0	1.0
Corporate Aviation	Dallas/Fort Worth International	KDFW	8.0	7.3	0.7
Lane Aviation	Port Columbus International	KCMH	8.5	7.8	0.7
Atlantic Aviation	John Wayne Airport-Orange County	KSNA	8.3	7.7	0.6
West Star Aviation	Grand Junction Regional	KGJT	8.6	8.0	0.6
Boca Aviation	Boca Raton	KBCT	8.7	8.2	0.5
Monterey Jet Center	Monterey Peninsula	KMRY	9.1	8.6	0.5 10%
Signature Flight Support	Boca Raton	KBCT	8.4	7.9	0.5
Vail Valley Jet Center	Eagle County Regional	KEGE	9.1	8.6	0.5 10%

*Note: FBOs are listed in order of change in overall averages from 2012 to 2013. Those with the same overall average are listed alphabetically.
Source: AIN 2013 Americas FBOs Survey. FBO information provided by Ac-U-Kwik.

BUSY METRO AREAS IN THE NORTHEAST



BOSTON		OVERALL AVERAGE
JET AVIATION	KBED	7.9
SIGNATURE FLIGHT SUPPORT	KBED	7.2
SIGNATURE FLIGHT SUPPORT	KBOS	7.1
NEW YORK		
MERIDIAN	KTEB	9.1 10%
JET SYSTEMS	KHPN	8.8
JET AVIATION	KTEB	8.6
LANDMARK AVIATION	KHPN	8.6
FIRST AVIATION SERVICES*	KTEB	8.5
WASHINGTON, D.C.		
LANDMARK AVIATION	KIAD	8.2
SIGNATURE FLIGHT SUPPORT	KIAD	8.1
SIGNATURE FLIGHT SUPPORT	KBWI	7.3

Note: FBOs with the same overall average are listed in alphabetical order. Only FBOs that received 20 or more evaluations are included.
FBO information provided by Ac-U-Kwik.
*First Aviation Services was acquired by Landmark Aviation in December 2012.

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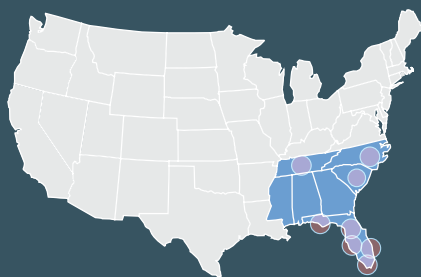
noted tech stop for aircraft headed to and from Canada, Europe and Asia. Fargo Jet says it specializes in quick turns, and a new \$1 million U.S. Customs facility attached to the FBO is nearing completion. Last year, Fargo Jet welcomed more than 600 aircraft operators who had never visited its facility before.

The 23-acre FBO is the lone provider at FAR. "Just about anything you want to do with airplanes, we do it," Hall told AIN. Among the offerings are a Part 135 charter operation, a Part 145 repair



Fargo Jet Center

BUSY METRO AREAS IN THE SOUTHEAST



ATLANTA	OVERALL AVERAGE
PREFERRED JET CENTER KRYV	8.8
ATLANTIC AVIATION KPDK	8.4
EPPS AVIATION KPDK	8.0
SIGNATURE FLIGHT SUPPORT KFTY	7.6
SIGNATURE FLIGHT SUPPORT KPDK	7.2

CHARLOTTE	OVERALL AVERAGE
WILSON AIR CENTER KCLT	8.9
LANDMARK AVIATION KAVL	8.1

ORLANDO/TAMPA	OVERALL AVERAGE
TAMPA INTL JET CENTER KTPA	9.4 ^{5%}
RECTRIX AERODROME CENTER KSRQ	8.9
GALAXY AVIATION KMCO	8.6
SIGNATURE FLIGHT SUPPORT KMCO	8.1
LANDMARK AVIATION KTPA	7.7

FORT MYERS/NAPLES	OVERALL AVERAGE
BASE OPS AT PAGE FIELD KFMY	8.6
NAPLES AIRPORT AUTHORITY KAPF	8.2

PALM BEACH/FORT LAUDERDALE	OVERALL AVERAGE
BANYAN AIR SERVICE KFXE	9.3 ^{5%}
JET AVIATION KPBI	9.1 ^{10%}
BOCA AVIATION KBCT	8.7
NATIONAL JETS KFLL	8.7
STUART JET CENTER KSUA	8.7

MIAMI	OVERALL AVERAGE
MIAMI EXECUTIVE AVIATION KOPF	8.0
LANDMARK AVIATION KMIA	7.8
ORION JET CENTER KOPF	7.2

MEMPHIS/NASHVILLE	OVERALL AVERAGE
WILSON AIR CENTER KMEM	9.3 ^{5%}
ATLANTIC AVIATION KBNA	8.2
SIGNATURE FLIGHT SUPPORT KBNA	7.6

FLORIDA PANHANDLE	OVERALL AVERAGE
DESTIN JET KDTS	9.1 ^{10%}

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station and avionics repair station, aircraft sales, a flight school and a weather modification business. The Avfuel-branded dealer has the fueling contract for the airport and pumped approximately 6.5 million gallons last year. The company recently announced plans to open another FBO at Sloulin Field International Airport in Williston, N.D.

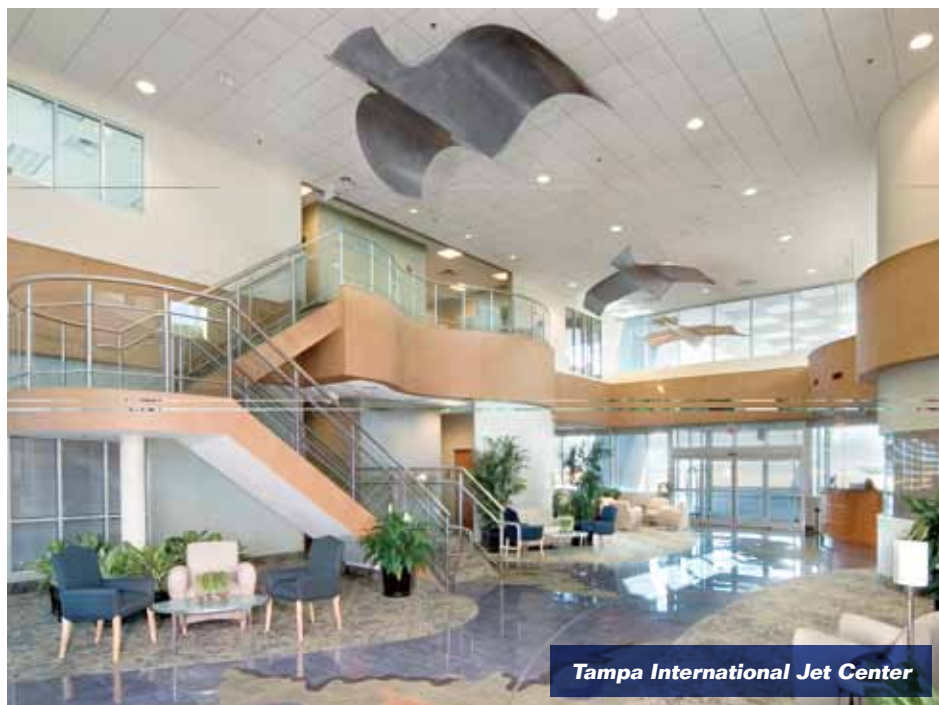
category score awarded by our readers this year), the facility added a new café and business center over the past year, as well as new valet parking areas, including a covered secure lot. The movie and pilot's lounges were upgraded, the latter with the addition of full-body massage chairs, which occasionally attract a line of waiting customers.

9.4

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

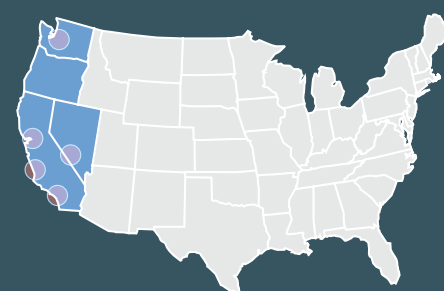
The only airport-owned and -operated FBO in the top 20 percent, Global Select (formerly the FBO at City of Sugar Land Regional Airport) continues to turn on its ear the commonly held belief that only a privately owned FBO can provide superior service. Perennially highly regarded (it was the other FBO to earn a 9.8 for facilities, sharing the highest individual

What are the three most important factors you look for when choosing an FBO? respondents were asked to choose three	
Excellent customer service	85%
Fuel pricing	68%
Passenger amenities	37%
Cleanliness	31%
Pilot amenities	28%
Line service training program participation	17%
FBO infrastructure and décor	15%
Loyalty and rewards programs	8%
Fuel brand	1%



Tampa International Jet Center

BUSY METRO AREAS IN THE WEST



LOS ANGELES	OVERALL AVERAGE
AIRFLITE KLGB	9.4 ^{5%}
ATLANTIC AVIATION KSNA	8.3
MILLION AIR KBUR	8.3
MAGUIRE AVIATION KVNK	8.2
ATLANTIC AVIATION KLAX	8.0
PENTASTAR AVIATION KVNK	8.0

SAN DIEGO	OVERALL AVERAGE
PREMIER JET KCRQ	8.9
LANDMARK AVIATION KSAN	6.3

LAS VEGAS	OVERALL AVERAGE
SIGNATURE FLIGHT SUPPORT KLAS	8.2
ATLANTIC AVIATION KLAS	8.1
HENDERSON EXECUTIVE KHND	7.8

SAN FRANCISCO	OVERALL AVERAGE
MONTEREY JET CENTER KMRY	9.1 ^{10%}
DEL MONTE AVIATION KMRY	9.0
BUSINESS JET CENTER KOAK	8.1
ATLANTIC AVIATION KSJC	7.8
SIGNATURE FLIGHT SUPPORT KSFO	7.6

SEATTLE	OVERALL AVERAGE
GALVIN FLYING SERVICES KBFI	7.9
CLAY LACY AVIATION KBFI	7.8

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The airport FBO, which has 24-hour U.S. customs available, sold 2.8 million gallons of fuel last year, and is on track to break the 3-million-gallon mark this year. During an energy industry conference last year, the FBO hosted 97 aircraft on one day and pumped nearly 25,000 gallons of fuel.

"We're never content with what we do," said Phillip Savko, Sugar Land's director of aviation. "We're always looking at how we can do things better for our customers, and when you're a city-run FBO, that's difficult at best, but we seem to be able to do it."

9.4

Tampa International Jet Center, Tampa Int'l Airport (KTPA), Tampa, Fla.

Now in its eighth year of operations, Tampa International Jet Center (TIJC) has spent most of its existence in the top rungs of AIN's annual survey. The Florida FBO has seen a recent uptick in business with several newly added tenant aircraft, including a GIV and a Challenger 300 joining the more than

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PHOTO: JET AVIATION AND HAWTHORNE GLOBAL AVIATION SERVICES AIRCRAFT PROVIDED BY GOLDFIRST AVIATION

ALL HANDS ON DECK

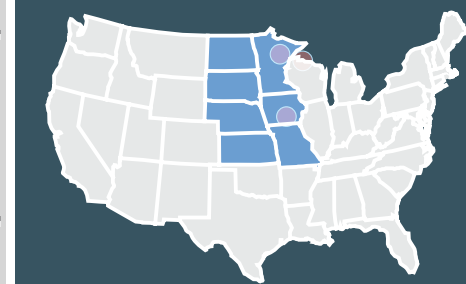
Special events provide an opportunity for FBOs to showcase their customer service, as business aircraft pack the ramp while their passengers head out to high-profile events such as the Super Bowl (which filled the ramp at New Orleans Lakefront Airport, above) or political conventions, to name a few. Lakefront Airport's Hawthorne Global Select (AIN Survey rating 7.6), Landmark Aviation (7.8) and FlightLine First (8.2) began planning and preparation for the influx of traffic more than a year out.

AIN's 2013 FBO Survey by the Numbers

- 12,647 Number of FBO evaluations provided by all respondents
- 2,103 Number of respondents who evaluated at least one FBO
- 6 Average number of FBOs evaluated per respondent
- 1,777 Number of FBOs evaluated by at least one respondent
- 207 Highest number of evaluations received by one FBO (Meridian, KTEB)
- 7 Average number of evaluations per FBO
- 113 Number of FBOs evaluated by only one respondent
- 135 Number of FBOs that received the requisite number of evaluations (20) to be included in the AIN FBOs of the Americas ratings tables
- 19 Number of FBOs that received the requisite number of evaluations (20) to be included in the AIN FBOs of the Rest of the World ratings tables
- 89 Number of countries having FBOs that were evaluated



BUSY METRO AREAS IN THE MIDWEST



MINNEAPOLIS/ST. PAUL	OVERALL AVERAGE
SIGNATURE FLIGHT SUPPORT KMSP	8.7
SIGNATURE FLIGHT SUPPORT KSTP	8.4

FARGO	OVERALL AVERAGE
FARGO JET CENTER KJAR	9.4 ^{5%}

OMAHA	OVERALL AVERAGE
TAC AIR KOMA	8.6

KANSAS CITY	OVERALL AVERAGE
HANGAR TEN KMKC	9.2 ^{10%}

Note: FBOs with the same overall average are listed in alphabetical order. Only FBOs that received 20 or more evaluations are included. FBO information provided by Ac-U-Kwik.

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50 turbine aircraft that fill the facility's 108,000 sq ft of hangar and office space.

"We're seeing more and more people calling about space and asking for quotes," said TIJC president Phillip Botana. "I think there are some signs that there is going to be some growth in the months and

years ahead finally." Based on that optimism, Botana is considering plans to add another 32,000 sq ft of hangar and office space in the next year or so, and will embark on a lobby refurbishment project soon. Customer feedback is driving the facility to make constant minor improvements, such as upgrading the recliner chairs in the pilot lounge.

The facility is a member of the Paragon Aviation Group, and



Botana has noted some increased referral traffic. "They've added a lot of good quality independent operator locations, so that's started to give us more recognition in the marketplace." Last summer's Republican National Convention, which was held in Tampa, saw an influx of more than 130 jets, causing Botana to reach out to some FBO industry friends for reinforcements. "A big turnout like that was kind of gratifying," he said. "We had a couple of really good days."

FBO Chains: Top Five Facilities (by overall average)

FBO/Airport	Overall Average
Atlantic Aviation*	
Friedman Memorial (KSUN)	8.8
DeKalb-Peachtree (KPKD)	8.4
John Wayne Airport-Orange County (KONA)	8.3
Chicago Executive (KPWK)	8.2
Chicago Midway International (KMDW)	8.2
Nashville International (KBNA)	8.2
Jet Aviation	
Palm Beach International (KPBI)	9.1
William P. Hobby (KHOU)	8.9
Teterboro (KTEB)	8.6
Bedford (KBED)	7.9
Landmark Aviation	
Charleston International (KCHS)	8.6
Waukegan Regional (KUGN)	8.6
Westchester County (KHPN)	8.6
Washington Dulles International (KIAD)	8.2
Scottsdale (KSDL)	8.2
Million Air	
Addison (KADS)	9.0
Indianapolis International (KIND)	8.9
Albany International (KALB)	8.6
San Antonio International (KSAT)	8.6
William P. Hobby (KHOU)	8.5
Signature Flight Support	
Denver International (KDEN)	8.8
Minneapolis-St. Paul / Wold-Chamberlain (KMSP)	8.7
Boca Raton (KBCT)	8.4
St. Paul Downtown Holman Field (KSTP)	8.4
Fort Lauderdale/Hollywood International (KFLL)	8.3

* Six FBOs included due to multiple tied at 8.3. FBO information provided by Ac-U-Kwik.

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9.4

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

Established initially as a private club of wealthy jet owners (the dues from those 15 members cover the operating costs of the FBO), XJet has been a highly rated FBO on the AIN survey for the past three years. The facility claims to provide seven-star service, and among its most

popular amenities is an auto spa where customers can leave their cars for cleaning, detailing and scheduled maintenance.

"Truly we do live for that connection with the customers and we're constantly seeking feedback on how we can do things better," said company founder and CEO Josh Stewart, who describes his creation as a new paradigm in FBO operation. Over the past year, the company became debt-free and negotiated a 20-year lease extension with the airport



Banyan Air Service

ABOVE AND BEYOND

For the first time this year, AIN's FBO Survey asked respondents to identify specific FBO employees or teams that routinely go above and beyond when it comes to customer service. We received more than 500 responses to this question. Below we have highlighted 10 individuals who were repeatedly recognized, but we encourage further exploration of this list at ainonline.com/above-and-beyond-2013.

Name	FBO	Airport Code
Melissa Thompson	Million Air	KADS
Henning Schymek	XJet	KAPA
Shalene England	JA Air Center	KARR
Eddie Queen	Signature Flight Support	KEWR
Beverley Patton	Sheltair	KFLL
Holly Hopkins	Texas Jet	KFTW
Giselle Nieves	Banyan Air Service	KFXE
John Tary	AirFlite	KLGB
Seth Mager	Galaxy Aviation	KPBI
Marcee Means	Global Select	KSGR
Jean Ballou	Galaxy Aviation	KSUA
Betsy Wines	Meridian	KTEB
Julie Silberman	Tampa Jet Center	KTPA

that will take it out to 2055.

Currently using only six acres of its 18-acre leasehold, the company is planning to proceed with a Phase II expansion that will approximately double the size of the facility, adding 50,000 sq ft of hangar space.

"There are certainly some consistent signs for recovery and with being debt-free and those long-term lease extensions, we're definitely positioned now to meet those long-term objectives," Stewart said. Last year XJet sold approximately 1.4 million gallons of fuel and boosted its top-line revenues by 12 percent over the previous year.

9.3

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

Having 200,000 sq ft of hangar space and still no room for new aircraft is a problem most FBO operators would love to face, but most don't have the approximately 450 based aircraft, 100 of them turbine-powered, that Banyan Air Service has. The service provider, one of five at FFXE, expects to break ground soon on another 20,000-sq-ft hangar to provide transient aircraft shelter.

The facility has a staff of 175

and provides maintenance, avionics, parts sales, aircraft sales, ramp-side café and one of the biggest pilot shops in America. Business was up 10 percent last year, according to owner Don Campion, who noted that his company earns customer loyalty by anticipating their needs and delivering more than it promises. "Our primary measure of success is when our customer leaves and tells someone else how great we are," he told AIN.

During the recent downturn, the company's strategy was to develop strong ties with Central and South American business aircraft operators, and that focus

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has continued to pay dividends for Banyan. “They are our best ambassadors,” said Campion. “They tell their friends and we get new airplane after new airplane coming in here making this their home away from home.”

The company has secured aircraft maintenance certifications from Argentina, Brazil, Colombia and Venezuela.



9.3

Wilson Air Center, Memphis Int'l Airport (MEM), Memphis, Tenn.

The flagship of the Wilson Air Center chain since it began in 1996, the Memphis facility continues to earn high scores from our readers as a result of founder and company president Bob Wilson's dedication

Continues on page 30 ►

Most-rated States and Countries in the Americas
(based on number of responses)

Country/State	Responses
Florida	1,362
California	1,129
Texas	1,010
New Jersey	740
Colorado	552
Illinois	388
Canada	334
New York	331
Georgia	313
Virginia	311
Arizona	305
North Carolina	262
Tennessee	231
Massachusetts	201
Nevada	195
Pennsylvania	174
Minnesota	158
Michigan	157
Ohio	153
Washington	149
Missouri	145
Indiana	141
Louisiana	141
Brazil	138
South Carolina	108
Wisconsin	100
Arkansas	95
Alabama	95
Oregon	92
Oklahoma	84
Montana	83
Idaho	82
Kansas	80
Utah	79
Kentucky	71
Mexico	68

American Express Gift Card Winners

As an incentive to participate in the 2013 FBO Survey, we offered to randomly select four survey respondents and award each with a \$400 American Express gift card. Below are the winners:

- **Nathan Faul**, chief pilot, Tyler, Texas
- **Craig Moore**, chief pilot, Orange Park, Fla.
- **Gurden Barnett**, line pilot, Omaha, Neb.
- **Daniel Danella**, pilot, Norristown, Pa.

► Continued from page 28

to customer service. “Basically we teach our employees that they are not allowed to say no to a customer,” said vice president David Ivey. “They have to figure out how to make something happen in a positive way.”

While many providers lowered service levels during the recession, Wilson refused to cut back on offerings such as the chain’s noted concierge service, leading the company to explore new revenue streams such as securing the airport de-icing contract, handling fueling for cargo aircraft from locally based Federal Express,

and even earning TSA screening certification for large-cabin charter aircraft under the Private Charter Security Screening Protocol Program.

The Eastern Aviation/Shell dealer claims approximately 65 percent of the market share at the airport and pumps more than 3 million gallons of fuel a year, according to Ivey, who

noted that the company’s dedication to safety includes not only NATA Safety 1st line service training, but also monthly recurrent training as well. Wilson Air Center’s concierge employees are readily identified by their hotel-style uniforms. “When customers...have a question...they know that’s the go-to person,” said Ivey. □

FBO SURVEY RULES AND METHODOLOGY

This report of AIN’s 2013 FBO survey covers fixed-base operations in the U.S., Canada, Mexico, South and Central America and the Caribbean—in other words, the Western Hemisphere. Next month’s report will cover FBOs in the Eastern Hemisphere.

AIN has been conducting surveys asking about the service that FBOs provide their customers and providing reports of the results from these surveys since 1981. Initially, AIN sent out a paper survey questionnaire by mail to qualified subscribers in the U.S., these being pilots, flight attendants and dispatchers—the people who use or make arrangements with FBOs. In later years, qualified subscribers in the rest of North America and the rest of the world were added.

In 2006, AIN moved the FBO survey online. AIN continued to add more and more FBOs each year, but we knew we did not have the entire population of FBOs. This year for the first time Ac-U-Kwik of Overland Park, Kan., provided its comprehensive list of 4,040 FBOs worldwide to AIN for use as the survey’s FBO population.

Via e-mail, announcements in AIN’s e-newsletters and a cover wrap on the January issue of Aviation International News, AIN invited all qualified AIN subscribers to participate in the survey. Each invitee receives a discrete code to enter the survey website, to prevent individuals from filling out the questionnaire more than once.

The questionnaire asks readers to evaluate FBOs they visited the previous year in four categories: line service; passenger amenities; pilot amenities; and facilities. For each of these categories, the participant is asked to assign a number from one to 10, one being the lowest and 10 being the highest.

To arrive at the averages for the categories, each FBO’s ratings in each of the four categories are added separately and the resulting four sums are then divided by the total number of responses received for each respective category.

An FBO’s overall average 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 was evaluated by 50 people (and assuming that all these 50 evaluators 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 the sum is divided by 200 to arrive at the overall average for this FBO. —R.R.P.

All FBO information was provided by Ac-u-Kwik, “business aviation’s most respected flight planning resource.”

