



# Service is Still King

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## FBOs ready for '11 rebound

by Curt Epstein

**F**or the FBO industry, 2010 was a year of relative stability after the decline that began in 2008. Following nearly two years of reduced aircraft traffic and diminished fuel sales, last year saw the glimmerings of a rebound. "FBO operators were hit hard by the recent economic downturn," said Mike France, NATA's director of regulatory affairs. "However, in mid- to late 2010 many of our members began to express optimism about an economic recovery. Most FBO operators are looking to this year to be the time to return to growth."

According to statistics provided by business aircraft industry analyst Argus, 2010 saw an improvement in every month over the previous year, with an overall increase in the number of flights of 5.6 percent. More than one attendee at the recent Schedulers and Dispatchers conference noted there were fewer discussions about employment overheard at this year's event, which had an almost palpable enthusiasm.

The recent increases have sparked hopefulness among fuel providers as well. "I would say we see a positive return of 2007 volume, and we're optimistic about everything moving back to the way it used to be," said George Ball, president of Everest Fuel Management. "I think corporate flight departments are traveling more, charter is picking up; all that's a good indicator that the business is growing."

Based on these recent industry advances, the major FBO chains took a look back on the past year and weighed in on the future of the industry.

### Atlantic Aviation

"It's been a nice turnaround, considering the way it was in the prior three years," said Atlantic Aviation CEO Lou Pepper. "I like to say we've had the bounce and now the business is coming back, and we're optimistic and enthusiastic about going forward." With 67 facilities in the U.S., Atlantic has the largest domestic footprint among the large FBO chains. The company saw a relatively quiet year in 2010. "I'd say during the past year we've been pretty stable and static," said Pepper. "We haven't made too many changes."



Lou Pepper

Atlantic will be adding another location to its roster this year when its newly built Oklahoma City FBO opens at Will Rogers World Airport around the beginning of June. The new facility will supplement the Atlantic FBO at Wiley Post Airport. Another project over the past year involved adding 11 acres to the ramp at the company's Teterboro facility, making it one of the largest ramps on the East Coast. "Through the downturn we've been cautious with our capital, but every

project that we had committed to because of lease requirements, we have fulfilled using quite a lot of capital," said Pepper.

During the recent recession, the company, like most in the industry, adopted a conservative approach. "We didn't knee-jerk to the big downturn," Pepper noted. "Obviously we were more prudent and did some cost-cutting measures like everybody did to survive, but as far as the service we provided, and the amenities, they didn't change one bit." Among the cost-cutting measures was a reduction in staff that paralleled the reduced flight activity. As that has begun to reverse itself the company has started rehiring.

As the levels of flight activity increase, Pepper expects the recently dormant trend of consolidation in the industry to start to heat up again as well. "It went dark for a couple of years, with business down and values depressed." He said the combination of buyers facing a constricted capital market combined with sellers not wanting to sell at depressed values helped put the brakes on the race to grab locations. "We were the leaders of consolidation from 2004 until about 2007," Pepper told AIN, noting his company acquired 50 FBO locations during that time.

"I think [consolidation] is going to start back up again. I don't think it will be like it was in the early 2000s when we were all really galloping to put together large chains to improve our

footprints and to provide more service, but I think it will start coming back again," he said.

As for this year, based on the industry traction, the company expects to see continued growth. "We've seen more requests for hangar space, we've seen more transient activity and more general activity on the ramp, so it's affected us positively," said Pepper.

### Landmark Aviation

Although the FBO consolidation market has cooled considerably since the boom times several years ago, Landmark's recent acquisition of the U.S. Odyssey Aviation locations proves that major transactions in the FBO business are still lurking just around the corner. "It's a great fit for us," said Landmark Aviation CEO Dan Bucaro. "If you just look at the map of where we have locations, we had real voids in some of these areas and it gives us some really strong points in Ohio and Louisiana that help us a great deal, and help us with our customers and just building the network."



Dan Bucaro

The FBO provider is currently in the process of retraining the line service and customer service staffs and integrating the locations, which include Cincinnati and Columbus, Ohio; Chicago; Asheville N.C.; Charleston, S.C.; and New Orleans and Lafayette, La., into the Landmark brand.

The Houston-based chain, which currently lists 42 domestic locations (plus another three

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in Canada and two in Europe), purchased DB Aviation at Waukegan Regional Airport late last year, and will also be opening new facilities at Atlanta's Hartsfield International Airport in April, at Miami International Airport in June, and is waiting on the final vote of approval for a location in Tampa. "With the Odyssey transaction and the RFPs that we have won, we're going to add nine or ten locations already this year," said Bucaro. "I would tell you that I expect to add several more by the end of the year, but we are not at this point closing on any other transactions right now."

In addition Landmark recently performed major renovations at its FBOs in Dallas and San Antonio, Texas; Greensboro, N.C.; and Ocala, Fla., in preparation for possible market growth.

"I think in 2010 it was really a stabilizing period where you

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# Top 10 FBOs boast services and facilities

by Curt Epstein

## 1 J.A. Air Center Aurora Municipal Airport (ARR) Sugar Grove, Ill.

J.A. Air Center has been in operation at Aurora Municipal Airport for little more than two years, and the privately owned FBO's customer satisfaction ratings improved so much from the

canopy] has a 29-foot tail height so it can fit [aircraft] all the way up to the G650 when that airplane comes out." In addition to the canopy, the facility has approximately 100,000 sq ft of hangar space, and a 12,000-sq-ft terminal with a 5,000-sq-ft passenger lobby and 1,600-sq-ft pilots' lounge. The company does not have landing,



#1 J.A. Air Center

previous year that the facility catapulted itself not only onto the AIN FBO Survey's top-10 list, but squarely into the number-one spot.

Operating initially at DuPage Airport, J.A. Air Center (the J.A. stands for Joliet Avionics) in 1995 sold its fuel concession rights to the county airport authority, which formed the DuPage Flight Center. Randy Fank, now J.A. Air Center's operations manager, ran the J.A. FBO operation at DuPage, and left to manage the county-owned facility. He returned more than a decade later, when the company decided to reenter the FBO business, this time at Aurora, 13 miles away, and oversaw the construction of the \$9.5 million structure, which opened in December 2008.

"We took an existing hangar, kept the steel beams and the roof and then gutted everything else out and rebuilt," said Fank. "Outside of that we put a 25,000-sq-ft arrival canopy for aircraft to park under. [The

ramp or overnight fees, charges Fank decries as "nickel and diming the customers."

The FBO provides aircraft charter, management and sales, a Part 145 repair facility, and one of the largest avionics shops in the country. Another offering is a separate aircraft detailing business that, according to Fank, has seen an approximately 70-percent increase in business over the last year, to go along with increases in the company's other divisions. "The phones have been getting a lot busier, aircraft sales have been busier, the charter calls have been up tremendously, and maintenance is doing well," said Fank. "FBO-wise we were up about 12 to 15 percent over the year before." The company saw a boost of 35 percent in FBO business in January, and despite a blizzard that buried the airport for three days in February, business for the month was up 17 percent over the previous year.

That comes as welcome news for an FBO that has had to cope

with the downturn since the moment it opened at Aurora. "We have adjusted to the current environment, but have not let anyone go or had any layoffs," Fank told AIN. "We simply have not hired when someone has left."

The airport's location west of Chicago on the I-88 corridor near the business centers of Naperville and Oak Brook (home of McDonald's) serves to fuel J.A. Air Center's enthusiasm for its growth. "We're almost what you would call a diamond in the rough or a sleeper airport," said Fank, who noted that the recent facility upgrades at the airport have drawn attention and even customers from DuPage. "As things continue to turn around, this airport is going to flourish over the next five years."

## 2 Global Select Sugarland Regional Airport (SGR), Sugarland, Texas

While the name might have changed, the high level of service has remained the same at the Sugarland, Texas FBO, which rebranded itself over the past year. "For years we were just known as the FBO at Sugarland Regional Airport," customer service and marketing manager Jodi Kaluza explained to AIN; "we were just nondescript."

After being voted to several consecutive top-10 finishes in the AIN survey, the operators of the city-owned service provider

chose to make a statement. "We decided it was really important to find a name that represents what we really are, something that felt a little bit more inclusive of the service that you are going to get when you come to Sugarland," Kaluza said.

For the past year, business has steadily increased at the Houston-area service provider, Kaluza noted. "We did not see the losses that a lot of the other FBOs were reporting because we're in the oil economy," she said. While the BP Oil platform explosion and subsequent spill that occurred a year ago was a disaster for much of the Gulf Coast, the FBO received a silver lining of sorts in the form of a steady stream of business aircraft traffic, shuttling BP executives and engineers from its U.S. headquarters in Houston to the response sites and back. "It was like a freeway from Houma, La., to Sugarland," said Kaluza. "Unfortunately, it's one of those things where you can't be too excited because it was absolutely horrible for the Gulf Coast, but it did keep us afloat when things were starting to look really bad for other people."

The FBO is currently home to approximately 50 turbine aircraft, and an \$8 million airport improvement project now under way is aimed at increasing that number. An additional taxiway (Juliet) will provide access to a new area of seven lease sites to make room for more corporate flight departments. "We are a corporate

airport, and one of my little taglines is 'air to chair in 15 minutes,'" said Kaluza. "We can get you into your meeting quicker than anywhere else because you are not going to be delayed."

As for the level of service that has earned the FBO its recent recognition, Kaluza says it developed naturally based on the initial promise to the Sugarland community that the airport and FBO would not be a drain on local tax dollars. "For years we just had to support ourselves on our customer-service philosophy: we just want to try to make sure we give the customers an experience they won't forget." That extends to working closely even with the outside vendors that do business with Global Select's customers. "Even when rental cars go wrong or hotels go wrong, it all comes back to the FBO, so we try to make sure that everybody is aligned with our philosophy," she told AIN. "It's really all about just meeting the customer's needs and always trying to be proactive. Once you are in a reactive state, you've already messed up, in our opinion."

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

Another relatively new FBO making its debut in the top 10, XJet describes itself as so radically different that its advertising slogan proclaims, "It's not

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#2 Global Select

## Top 40 rated FBOs – The Americas (according to overall average)

The annual **AIN** FBO Survey lists top-rated facilities according to the responses from pilots, dispatchers and users of FBOs. This year, the Top 40 FBOs in the Americas received overall averages of more than 8.00. The categories that users were asked to rate were line service; passenger amenities; pilot services; and facilities. Duplicate rankings indicate a tie.

Rank	FBO	Airport	Overall Average
1	J.A. Air Center	Aurora Municipal Airport (ARR)	9.52
2	Global Select (formerly City of Sugar Land)	Sugar Land Regional (SGR)	9.45
3	XJet	Centennial (APA)	9.16
4	Pentastar Aviation	Oakland County International (PTK)	9.14
5	Hangar 10	Charles B. Wheeler Downtown (MKC)	9.10
6	Tampa International Jet Center	Tampa International (TPA)	9.07
7	Wilson Air Center	Memphis International (MEM)	8.98
8	Fargo Jet Center	Hector International (FAR)	8.94
9	Wilson Air Center	Douglas International (CLT)	8.93
10	Banyan Air Service	Fort Lauderdale Executive (FXE)	8.90
11	Jet Aviation Palm Beach	Palm Beach International (PBI)	8.88
12	Meridian Teterboro	Teterboro (TEB)	8.87
13	AirFlite	Long Beach Airport Daugherty Field (LGB)	8.83
14	Del Monte Aviation	Monterey Peninsula (MRY)	8.72
14	Signature Flight Support	St. Paul Downtown-Holman Field (STP)	8.72
15	Business Jet Center	Dallas Love Field (DAL)	8.71
16	Irving Aviation Services	Gander International (CYQX)	8.70
17	Swift Aviation Services	Sky Harbor International (PHX)	8.69
17	Texas Jet	Meacham International (FTW)	8.69
18	Million Air	Indianapolis International (IND)	8.67
18	National Jets	Fort Lauderdale/Hollywood International (FLL)	8.67
18	Premier Jet	McClellan-Palomar (CRQ)	8.67
18	Scottsdale Air Center	Scottsdale Municipal (SDL)	8.67
19	Million Air	Addison (ADS)	8.60
19	Signature Flight Support	Minn./St. Paul International (MSP)	8.60
20	Million Air	Hobby (HOU)	8.58
21	Skyservice Avitat	Lester B. Pearson International (CYYZ)	8.55
22	Avitat Boca Raton	Boca Raton (BCT)	8.54
23	Million Air	Salt Lake City International (SLC)	8.53
24	Jet Aviation	Teterboro (TEB)	8.50
25	Cutter Aviation	Sky Harbor International (PHX)	8.44
26	Enterprise Jet Center	Hobby (HOU)	8.43
26	Monterey Jet Center	Monterey Peninsula (MRY)	8.43
27	First Aviation Services	Teterboro (TEB)	8.39
28	Galaxy Aviation	Witham Field (SUA)	8.38
29	Vail Valley Jet Center	Eagle County Regional (EGE)	8.36
30	Million Air	San Antonio International (SAT)	8.35
30	SheltAir Aviation Services	Jacksonville International (JAX)	8.35
31	Atlantic	Hobby (HOU)	8.34
31	Avitat Westchester	Westchester County (HPN)	8.34
32	Wilson Air Center	Hobby (HOU)	8.33
33	Denver jetCenter	Centennial (APA)	8.31
33	Galaxy Aviation	Orlando International (MCO)	8.31
34	Business Jet Center	Metropolitan Oakland International (OAK)	8.30
35	Tac Air	Centennial (APA)	8.29
36	DuPage Flight Center	DuPage (DPA)	8.27
37	Flightcraft	Portland International (PDX)	8.26
38	Million Air	Bob Hope (BUR)	8.24
39	Jet Aviation	Dallas Love Field (DAL)	8.22
39	Panorama Flight Service	Westchester County (HPN)	8.22
40	Atlantic	Chicago Midway (MDW)	8.19

Source: **AIN** 2011 Americas FBO Survey. Data compiled by Forecast International of Newtown, Conn.



#3 XJet

► *Continued from preceding page*  
an FBO—it's XJet." The service provider opened for business four-and-a-half years ago at Centennial Airport in Colorado as a private club for a group of wealthy jet owners, and was granted approval by the airport authority to begin offering FBO services soon after.

"What we did differently was we built the business model from the ground up on the [model of the] club for the based jet owner and pilot," said XJet founder and CEO Josh Stewart. "We have 14 members in Denver who pay a premium for two things and two things only: service and facilities." According to the company, the "dues" from those 14 members cover the FBO's operating costs, so the FBO does not have to rely on fuel sales, a revenue structure the company says gives it an advantage over the three other service providers on the field (a fourth caters specifically to helicopters).

While fuel is provided to the members at cost, XJet says it is able to charge non-members a margin small enough to make for attractive fuel pricing. "A traditional FBO, because it gets 90 percent of its revenue from fuel, is focused on fuel sales so it's really in the commodities business, whereas we're in the service and facilities business. It's a totally different business model," explained Stewart.

The company says it achieves its "7-star service" for members by creating lengthy dossiers for each aircraft owner, detailing their preferences and dislikes. "We leverage that great service, that great facility, and provide it to people who aren't club members so when you fly into Denver as a transient, you're really getting five-star service at a price better than our neighbors'," Stewart told **AIN**.

Among the amenities offered are a "plush lounge, ultra-modern work stations and conference rooms, climate-controlled vehicle parking, an art gallery and a five-star on-site restaurant." A concierge who greets each arriving aircraft extends the club atmosphere to all of the facility's customers. According to XJet vice president Tom Perkins, jets account for 98 percent of the FBO's traffic, the typical customer being a Part 91 corporate flight department in the energy or finance industries.

The airport's proximity to some of the country's most popular ski resorts also draws traffic, especially when weather hampers operations at Eagle County Regional Airport less than 100 miles away. "[Pilots] are typically en route when the

weather goes bad," he said, so they figure out how to get their passengers to Aspen and then worry about what they will do with the airplane. The FBO has seen a "tremendous" increase in traffic at the location over the past three months, and an increase of 50 percent over the past year. "As everybody else in these times has been cutting back on people and service, we've been increasing service," he said. The company says it is in the planning and development stages for expanding its business model into locations throughout the U.S. and internationally.

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

**AIN**'s readers have ranked Pentastar's Oakland County International Airport (PTK) location as one of their top-five FBOs in each of the last five years, and as one of 10 FBOs on the field, the company certainly can't rest on its laurels. "The battle that we have is from a pricing perspective," said Bob Sarazin, Pentastar's vice president of FBO services. "If you look from a national perspective we have a competitive price, but [to be] competitive on the airport it gets pretty difficult." Instead, the company has relied on its facilities and the quality of its service.



#4 Pentastar Aviation

"Many times [pilots] will step out and they will go to one of these FBOs and in short order they realize it's not appropriate for their passengers or for themselves and the service that they need and then they'll call back."

To that end, the company—which also operates an FBO at Van Nuys Airport—seeks client feedback for each handling. "One of the significant things we've done is focused on a customer survey process so that we can ask our customers what it is they would like to see from our FBO and all our other services," said Kellie

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#5 Hangar 10

**Top 40 Busiest Airports for Bizav**  
(according to number of responses)

Airport	Responses
Teterboro (TEB)	753
Palm Beach International (PBI)	337
Centennial (APA)	289
Westchester County (HPN)	278
Dallas Love Field (DAL)	266
Fort Lauderdale/Hollywood Int'l (FLL)	265
Chicago Midway Int'l (MDW)	263
DeKalb-Peachtree (PDK)	237
Scottsdale Municipal (SDL)	230
Van Nuys (VNY)	227
Hobby (HOU)	225
Paris Le Bourget (LFPB)	218
McCarran International (LAS)	214
Fort Lauderdale Executive (FXE)	198
Lester B. Pearson Int'l (CYYZ)	196
Washington Dulles Int'l (IAD)	193
Miami International (MIA)	191
Los Angeles International (LAX)	183
London Luton (EGGW)	173
Hanscom Field (BED)	172
San Francisco International (SFO)	172
Sky Harbor International (PHX)	156
Metropolitan Oakland Int'l (OAK)	147
Boeing Field/King County Int'l (BFI)	143
Orlando International (MCO)	140
Addison (ADS)	136
Monterey Peninsula (MRY)	136
John Wayne/Orange County (SNA)	135
Eagle County Regional (EGE)	134
Chicago Executive (PWK)	128
Long Beach Daugherty Field (LGB)	128
Boca Raton (BCT)	124
Austin Bergstrom Int'l (AUS)	123
San Antonio International (SAT)	123
Lindbergh Field (SAN)	120
Pierre Trudeau International (CYUL)	120
Bob Hope (BUR)	119
McClellan-Palomar (CRQ)	116
Logan International (BOS)	114
Geneva (LSGG)	113

Source: AIN 2011 Americas FBO Survey.  
Data compiled by Forecast International of Newtown, Conn.

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Rittenhouse, the FBO's director of customer relations. Over the past year, the company handed out more than 1,000 surveys to its customers. "We'd like to know that we are offering what it is they need, so that we can stay competitive with the other industry players and know that we are meeting the customer's needs."

The company, which began in 1964 as Chrysler's in-house flight department, has come a long way since then and can service aircraft up to a Boeing 757. Among its additional services, Pentastar offers a 130,000-sq-ft Part 145 repair station; an Argus Platinum-rated aircraft charter management department that currently oversees 15 business jets and has a round-the-clock dispatch center; Type I and IV de-icing; an aircraft brokerage; and Fivestar Gourmet, its own in-house catering company.

Since it occasionally hosts professional sports teams visiting Motor City, Pentastar has its own attached jetway for large aircraft that leads into a building staffed by U.S. Customs.

Located 45 minutes from Detroit, the FBO was hurt by the economic woes that befell the auto industry. "In the Detroit metro area we've had a relatively depressed time, and through some attrition we were able to keep the levels of personnel that we had there," Sarazin told AIN. I think we've moved to a little

bit more part-time workforce. But we're operating seven days a week, 24 hours a day, so this really works out for them."

As the fortunes of the automakers have improved, along with renewed activity and visitation from suppliers, Sarazin regards the FBO's future with optimism. "We see nothing but good things. If the auto industry is doing well in Detroit, it will slowly trickle down to the aviation component here locally."

**5 Hangar 10**  
Charles B. Wheeler Downtown  
Airport, Kansas City (MKC), Mo.

Certainly the newest of the aviation service providers to make this year's top-10 list, Hangar 10 at Kansas City's Charles B. Wheeler Downtown (MKC) didn't exist as a brick-and-mortar facility until this past October. "We moved from a five-wide trailer essentially," said general manager Brad Chandler, describing the company that was started in May 2009. "We called it a modular facility while we were in it, but now that we are out of it, it's OK to call it a trailer, I guess."

The new facility includes a 28,000-sq-ft terminal building, and its office space is overbooked. The 18 jets in its 29,000-sq-ft hangar and eight city-owned box hangars (which can accommodate aircraft up to a Hawker) represent 100 percent occupancy. Despite the facility having just opened, Hangar 10 plans to apply soon for permits to add another 22,000-sq-ft hangar and another 18,000 sq ft of garage and office space.

While airport volume at MKC has dropped off in the past three years, Chandler believes that the new alternative Hangar 10 presents could spur activity. "There are some competition advantages here because the price of jet fuel that everybody is paying across the board is probably 20 percent lower, everybody has got a nicer facility because they've either moved into ours or the facilities elsewhere on the field have been improved, and I think everybody's service level has improved quite a bit," he said. "I think there will be growth in airport volume because of the more competitive environment [we have created]."

Among the amenities offered at the new

facility is a large fitness center that occupies a prime portion of building real estate. "It's more than just an unleased office somewhere in the middle of the building," said Chandler. "That was as much a cultural thought process as anything else, to say, 'It's important that our people have the opportunity to take care of themselves. Our based customers have the opportunity to use it, and the transients—once they've been here and come back—start bringing their stuff so they can use it.'"

Another appealing feature is the company's own in-house catering department, which can prepare virtually anything for breakfast or lunch or even dinner, at a price it says is lower than those of most outside caterers. "The guy in the back of an airplane doesn't really know what a gallon of jet fuel should cost, but he knows he shouldn't be paying 40 bucks for a turkey sandwich," Chandler told AIN. "I don't want to have a Hangar 10 logo on something that he feels just ripped him off."

In keeping with that customer value theme, the company is eschewing ramp fees. "We'd rather not charge [customers] a ramp fee and see what kind of courtesy fuel load we can earn out of them over time," said Chandler. "We might not get something this time, but we'll almost always get something the second and the third time, and our courtesy fuel loads are higher than they would have been had we had mandatory fuel loads to waive a fee. People really feel good about that."

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

In business for just over six years, Tampa International Jet Center has spent half of its existence in the top 10 of AIN's survey rankings. Its clientele in the construction and real estate industry suffered during the recent downturn, according to company president Phil Botana, who saw the number of based aircraft at the FBO fall from a high of 40 in 2007 to between 25 and 30 today. Yet, like many airports in the country, Tampa International has experienced an increase in business

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#6 Tampa Jet Center



#7 Wilson Air Center (MEM)

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aircraft activity of late. “I think our airport’s total volumes were up about six or seven percent last year,” said Botana. “We enjoyed most of that so we were up about 15 percent over the year before.”

While the FBO has one immediate competitor on the field, the company now takes a more macro view of the playing field. “I think our industry is changing,” Botana told *AIN*. “Because the airplanes have become so efficient we find we’re competing as much with the location [the customer] left or where they are going to next, as well as with the guy next door, so we try to provide a high level of service,” he said, noting that the company has increased its market share at the airport in each of its six years of existence.

In explaining the success his company has experienced in a relatively short time, Botana views things from the perspective of his nearly four decades in the industry. “I think most FBOs think of themselves as a portal to get people from the airside

of the airport to the streetside of the airport. We like to think of ourselves as an extension of the travel experience of the people who are riding in the back of the airplane.” The company has developed a set of minimum service standards that is applied to every airplane that pulls up on its ramp, whether it’s a single-engine airplane or a large-cabin jet. “Then we constantly look for ways to differentiate ourselves to fulfill any particular need of any particular customer,” he added.

In addition to 108,000 sq ft of hangar space, the FBO features a 12,500-sq-ft canopy and on-site catering through a third-party vendor. Southern Air Systems, which operates a fleet of aircraft around the country and has its Part 145 MRO depot on the property, provides on-site maintenance services. Tampa International Jet Center recently ended its affiliation with AirBP, switching to Avfuel as its fuel provider, a move Botana hopes will help further increase his FBOs business. “We don’t strive to be the cheapest guy to do business with, but we try to provide competitive pricing. We feel if we can be competitive on the price and

we provide a superior level of service, we’re giving [customers] a better value than they can get somewhere else,” he said.

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

*AIN*’s readers regularly place Wilson Air Center’s Memphis facility on the top-10 list, due in no small part to a simple mandate from the company’s ownership. “We are not allowed to say no to a customer,” said Dave Ivey, Wilson Air’s vice president. “We try to accommodate the needs of the customer and not just say no. I challenge my employees to try to figure out how to do something, and we empower them to be able to make those decisions and [accommodate] special needs.”

Over the past year, the company, which has been at Memphis International Airport since 1996, made a “significant upgrade” to the entire facility, including a remodeled lobby. Recently added at all the Wilson locations were pilot “relaxation rooms,” a blend of pilot lounge and snooze rooms, with subdued lighting, soothing music and water features, ideal for reading or concentrating without the distraction of a television. Ivey told *AIN* he is so pleased with the design of the rooms that he remodeled his own home office to replicate them.

One of the most popular features at the FBO is its 26,000-sq-ft canopy. “It’s an extension of our lobby, and we can fit six jets underneath that canopy at any given time to keep you out of the rain, the hot sun or the snow. Every customer gets off at our front door because we pull [the aircraft] under the canopy,” said Ivey. When that cabin door opens, disembarking passengers

are greeted by an illuminated marquee welcoming them to Memphis by name. “People just love seeing their name up in lights,” he said.

Among the regular clients WAC Memphis serves is the music industry, which draws performers and other celebrities seeking to soak in the Blues. FedEx, which has its world headquarters in Memphis, has provided another draw for business aviation to the region, as major companies have established massive merchandise warehouses that require steady streams of management traffic to the area.

Despite these attractions, Ivey noted last year’s numbers at the facility were slow compared to other units in the chain. “Houston returned dramatically quickly, almost to pre-2008 levels, and Charlotte had some nice upticks in percentages, whereas Memphis has just been single-digit increases as opposed to

**8 Fargo Jet Center**  
**Hector International**  
**Airport (FAR)**  
**Fargo, N.D.**

“The facilities we’ve got in Fargo aren’t what you’d expect,” said Darren Hall, Fargo Jet Center’s (FJC) vice president of marketing. He’s come to expect the surprise of people landing at Hector International Airport (FAR), which serves a city of just 150,000 inhabitants. “It’s what you would expect if you were going to L.A. or Chicago or New York.” Because the upper Midwest airport boasts a 9,000-foot runway, 24-hour manned control tower and U.S. customs and a full-time crash rescue team (courtesy of the Air National Guard, which occupies part of the field) coupled with Fargo Jet Center’s FBO, one might be excused for mistaking it for one in a more cosmopolitan region.

Formed in 1995, the company



#8 Fargo Jet Center

getting back the 10- to 30-percent fuel volumes that most people around the country have lost over the recession.”

He noted that the facility currently is at full capacity, with approximately 25 turbine aircraft in its hangars and all office space rented. While some chain FBOs have cut back on on-site management in favor of regional managers to cut costs, the company has maintained senior staffers at each location and the facilities remain open 24 hours a day, seven days a week.

The chain recently began participating in the Shell AeroClass rewards program and has instituted a more aggressive fuel pricing program to boost business, according to Ivey. “We don’t just sell fuel on the airport; we compete with every FBO around the country,” he said.

competed against an existing provider that had served the airport for nearly two decades. FJC was initially supported by service contracts from its sister company Weather Modifications, which operates a worldwide fleet of atmospheric research aircraft. After several years of competition, the other provider on the field sold its facilities to FJC, which today is the sole aviation services company on the field.

FJC has an average of 55 movements per day and last year saw 23,000 passengers through its facility and had an increase of more than 13 percent in terms of jet-A gallons pumped over the previous year. “We certainly do a lot of business with aircraft coming to Fargo, but I would say a majority of our business is aircraft

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Top 10 Busiest FBOs (according to number of responses)		
FBO	Airport	Responses
Jet Aviation	Teterboro (TEB)	255
Meridian Teterboro	Teterboro (TEB)	197
Signature Flight Support	Miami International (MIA)	185
Signature Flight Support	San Francisco International (SFO)	172
Atlantic	Chicago Midway International (MDW)	163
Atlantic	McCarran International (LAS)	143
Denver jetCenter	Centennial (APA)	141
Vail Valley Jet Center	Eagle County Regional (EGE)	134
Epps Aviation	DeKalb-Peachtree (PDK)	132
Banyan Air Service	Fort Lauderdale Executive (FXE)	130

Source: *AIN* 2011 Americas FBO Survey. Data compiled by Forecast International of Newtown, Conn.



#9 Wilson Air Center (CLT)

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coming through Fargo and just doing a tech stop, going to Seattle or New York,” Hall told AIN. “When those people quit flying their airplanes we noticed that, but now we’ve noticed they are flying again because we’ve seen their quick turnarounds pick up in the last year.” Located on the great circle routes between the West Coast and Europe as well as Tokyo to the East Coast, the FBO at the “crossroads of the world” sees quite a bit of heavy iron such as Global Expresses and Gulfstreams.

Despite the quick turnarounds, the FBO’s staff still has time to show its stuff, according to Hall. “There’s a friendliness about the people who work here in taking care of people, not just airplanes. That makes our service a little bit different from somewhere else you may go, and that’s a Midwest thing. We really care about people and we want to take care of them, so we work hard at doing that, and we work hard at being professional at what we do.”

In addition to the approximately 170,000 sq ft of hangar space (more than half of which

is heated) that currently houses nine jets and 15 turboprops, FJC also has maintenance and avionics shops, a charter department, flight school and aircraft sales division. In 2009 the company switched its fuel provider to Avfuel after a long affiliation with Texaco.

**9 Wilson Air Center**  
 Douglas International Airport (CLT)  
 Charlotte, N.C.

Joining perennial top-10 list occupant Wilson Air Center’s Memphis location this year is another of the chain’s properties, which jumped from 19th place last year. The company’s Douglas International Airport (CLT) facility is the largest and busiest of the company’s three (soon to be four with the opening of Chattanooga later this summer) locations, with 32 jets and 17 turboprops based there.

“Business has been positive,” said general manager Vince Papke. “Each month, year over year we’ve seen an increase in our fuel sales and I was encouraged by that. We had gains in our gallons 12 months in a row starting last December, and it continues.”

The FBO, the only GA services provider on the airport, recently underwent an interior

refurbishment that saw a newly remodeled lobby, VIP lounge, conference rooms and pilot business center. The airport features runways up to 10,000 feet in length and in addition to catering to CLT’s general aviation needs, Wilson Air provides ground handling for charter airliner flights, servicing aircraft up to the size of Boeing 767s.

As at the other facilities in the chain, the effort at Charlotte has been on maintaining levels of customer service through the downturn. The facility remains open 24 hours a day, seven days a week, and Wilson Air has maintained senior management positions at each facility. “There’s only so much you can cut, and we feel we just don’t want to fall into that counting pennies [mode] when the big picture is more important to us,” said Wilson Air vice president Dave Ivey. “We want to keep our customers loyal, so that when business does pick back up again we have a solid customer base.”

Aircraft arrivals at the FBO are met on the ramp by shuttle vans that carry passengers directly to the terminal. True to its hotel chain heritage (the chain was started by Robert Wilson, son of the late Holiday Inn founder Kemmons Wilson), a uniformed hotel-style concierge greets each arrival. It’s details such as these that make the difference, according to Papke. “We have a concierge. His name is Dexter, he’s been in the business five years and everyone knows him. That’s the relationship you establish with these individuals, these flight departments, the pilots, the passengers. These individuals flying in the back seat know Dexter, and that’s what makes the difference between being a good FBO or a great FBO. It’s

the people; it’s the team.”

At the beginning of last year, Wilson Air also took over management of the former Wachovia flight department complex at CLT, boosting its hangar space to nearly 300,000 sq ft. Two of the three newly acquired hangars are currently serving as the temporary home of the Carolina Aviation Museum.

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

In late January last year, one of the 20,000-sq-ft hangars belonging to Fort Lauderdale-based Banyan resembled a cross between a medical supply warehouse and a Costco. Crates of medicines, boxes of surgical supplies, cases of bottled water, tents and other emergency goods were stacked 12 feet high in some cases, while forklifts raced to load pallets onto a nearly endless stream of business aircraft ranging from Caravans to Gulfstreams. As part of the emergency response to the Haiti disaster, company owner Don Campion offered



#10 Banyan Air Service

the use of his facility as a staging area for the loading of aircraft on mercy missions. “That was a really rewarding time to see corporate America step up,” said Campion. “For that period between January 12 and April 1 when there was no airline service, business aviation filled a gap and the world saw a tremendous blessing.”

Campion co-founded Banyan in 1979 and this year it makes its fourth straight appearance on AIN’s top-10 list. “In a way you could say Banyan is a customer-service company that happens to be in the aviation business,” Campion told AIN. “Our focus is to partner with our customers and to build relationships with them, not to be a job shop or just a gas stop.”

More than three decades later, after several building changes, Banyan features a new on-ramp restaurant, turbine engine

Busiest Regions for Bizav (according to number of responses)	
Region	Responses
United States	17,812
Europe	1,824
Canada	790
S. America, Central America & the Caribbean	623

Source: AIN 2011 Americas FBO Survey. Data compiled by Forecast International of Newtown, Conn.

shop, maintenance and avionics facilities, one of the largest pilot shops in the country, and is home to approximately 100 turbine-powered aircraft. The company recently leased two new 20,000-sq-ft hangars to supplement its existing space for transient customers.

“The last 12 months have been good for Banyan,” said John Mason, its recently appointed director of FBO services. “We’ve seen a significant increase in our South American business and our hangars are 120 percent oversold; that’s why we put on the additional hangar space.”

Before the recent economic downturn, the company invested in advertising in South America. That advertising paid dividends

as the resulting aviation traffic has helped sustain the FBO during the lean years. “As the U.S. economy continued to slow down, we continued to pick up because of our earlier marketing, which took us through 2009 and 2010 to much higher levels than we anticipated,” Campion told AIN. “Many of our South American customers call Banyan their home away from home.” To that end, the company’s repair station has Brazilian, Argentinean and Venezuelan certification. Banyan is also a gateway FBO to the Bahamas and works closely with the island chain’s ministry of tourism. □

Top 10 Rankings 2011 vs. 2010					
2011 Rank	FBO	Average	2010 Rank	FBO	Overall Average
1	J.A. Air Center	9.52	1	City of Sugar Land	9.13
2	Global Select (formerly City of Sugar Land)	9.45	2	Wilson Air Center (Memphis)	9.09
3	XJet	9.16	3	Tampa International Jet Center	8.97
4	Pentastar Aviation (Michigan)	9.14	4	AirFlite	8.93
5	Hangar 10	9.1	5	Pentastar Aviation (Michigan)	8.88
6	Tampa International Jet Center	9.07	6	Meridian Teterboro	8.85
7	Wilson Air Center (Memphis)	8.98	7	Banyan Air Service	8.79
8	Fargo Jet Center	8.94	8	Million Air Addison	8.72
9	Wilson Air Center (Charlotte)	8.93	9	Jet Aviation (Palm Beach)	8.69
10	Banyan Air Service	8.9	10	Business Jet Center Dallas	8.68

Source: AIN 2011 Americas FBO Survey. Data compiled by Forecast International of Newtown, Conn.

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## FBO Survey Rules and Methodology

This report of AIN's 2011 FBO survey covers FBOs 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 publishing reports of the results from these surveys since 1981. Initially, AIN mailed a paper survey questionnaire to qualified subscribers in the U.S. (Qualified subscribers include 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 Europe were added.

In 2006, AIN moved the FBO survey online and engaged Forecast International of Newtown, Conn., to design the 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.

AIN invites all qualified subscribers to participate in the survey via Web site. Each invitee receives a code that must be used to enter the Web site, to prevent individuals from filling out the survey questionnaire more than once. The Web site was open from January 1 to midnight on February 7 for subscribers in the Western Hemisphere and until midnight on February 28 for subscribers in the Eastern Hemisphere.

The survey questionnaire asks readers to evaluate FBOs they have visited in the last 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 sums are then divided by the total number of responses received for each rating.

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 get the overall average for this FBO.

### AIN's 2011 FBO Survey By the Numbers

- ▶ Number of FBO evaluations provided by all respondents: 23,452
- ▶ Number of respondents who evaluated at least one FBO: 1,970
- ▶ Number of FBOs evaluated by at least one respondent: 1,718
- ▶ Number of FBOs evaluated by only one respondent: 236
- ▶ Highest number of evaluations received by one FBO (Jet Aviation, Teterboro): 255
- ▶ Number of FBOs that received the requisite number of evaluations (30) to be included in the AIN FBO ratings tables: 187
- ▶ Number of FBOs added to the online survey questionnaire by respondents this year: 177
- ▶ Average number of evaluations received per FBO: 13.4
- ▶ Average number of FBOs evaluated per respondent: 11.9

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didn't see declines in volume anymore," Bucaro told AIN. "We actually saw year-over-year increases in volume starting in March and that has continued this year. While it is a far cry from where we were in 2007, it is in stable and modest growth period right now."

In addition to the boost in FBO business based on increased flight activity, the company has also noted a recent uptick in its charter management division as well. "We manage more than 70 aircraft today and since the last quarter of 2010 and up until currently it's been strong, which we think is a leading indicator of people getting back into the industry and private travel," said Bucaro.

That growth period is welcome after the harsh climate the industry faced

between 2008 and early 2010 that forced Landmark-like most chains—to make some unpleasant decisions. "We did all the things that were difficult," noted Bucaro. "We reduced our staffing levels, we froze all wage increases and bonuses, we discontinued our 401K matching [all since reinstated]."

Despite his company's own latest acquisitions, Bucaro doesn't see the FBO merger market returning to its recent frothiness. "Today the buyers are more prudent in their approach; they are disciplined in how they are looking at it and I think there is still some variation between the expectations of the buyer and the seller, so while I do think there is going to be increased consolidation and more activity, I don't think we are going to see it at the levels of 2006 and 2007."

### Million Air

"Million Air actually continued to grow over the last two years, in spite of what took place," said Roger Woolsey,

president and CEO of Million Air. "I think I can speak for every line service and customer service person in my chain: we all worked hard in 2010. Everybody is doing more with a little bit less."

Despite any belt tightening the company might have endured, its bullish spirit was evidenced by the addition of several locations to the Million Air roster over the past year, including FBOs at San Bernardino International Airport in California, Grant County International Airport in Moses Lake, Wash., and Yuma, Ariz. Currently under construction are new facilities in Gulfport, Miss.; Reno, Nev.; and Calgary, in



Roger Woolsey

Charles, La. FBO, the aviation services provider spent more than \$1 million, adding new entrances, lobby, weather and briefing rooms. The Houston-based company also plans to break ground soon on a new \$12 to \$15 million facility to replace its FBO at

hometown William P. Hobby Airport.

"My competitors are really strong today," Woolsey explained to AIN. "On one hand I love to say it, on the other hand I hate to say it, but they've done a really great job upgrading their facilities and making the investments. I think that's the wave of the future, as opposed to an airport having seven gas stations and all of them are fighting and starving for market share where they can barely pay the lights and the rent. I think it's better to have two or three really healthy FBOs that can put on a good face for the flying public."

Looking to the future, Woolsey believes that consolidation by the major chains will start again but perhaps at a slower pace as companies become more cautious. "I felt at the time, back when [the market] was heated before collapsing around us, that a few of them were being a little too aggressive in what they were paying and their growth rate," he said. "Million Air did not follow that...I'm trying to go at a much slower, more controlled pace."

In the current economic climate, the company, the smallest of the four major U.S. FBO operators, has found that the tighter availability of financing has served as an unintended brake on its expansion plans. "It's been a little slower than we'd like," said Woolsey.

### Signature Flight Support

Signature Flight Support is the world's largest FBO operator, with 104 locations, 60 of them in the U.S. "We've seen encouraging signs over the past year," said COO David Best. "We've enjoyed seeing the market solidify and grow." During the recent economic woes, the company made changes to cope with the new realities. "We obviously managed the business proactively, and we were managing our labor supply to our business demand at the time," said Best. "During the downturn we worked hard at building our interface with our customers." To that end Signature established a commercial sales department to engage with major customers



David Best

### Most Improved FBOs (by overall average)

The vast amount of information that AIN readers supply in their careful completion of the annual FBO survey forms is distilled into a mountain of data from which analyst Forecast International derives the numerical evaluations presented in this report. As we synthesize some of that data, we find indications that users perceive signs of marked improvements either in facilities themselves or in staff. It seems worthwhile, therefore, to note that in the chart below 16 FBOs that apparently have made great efforts to improve their offerings. The column at the right shows the increase in overall average points scored between 2008's survey and the current results.

Airport	FBO	Overall Average				Change
		2011	2010	2009	2008	
Teterboro (TEB)	First Aviation Services	8.39	8.07	7.06	6.37	2.02
Orlando International (MCO)	Galaxy Aviation	8.31	7.88	7.59	7.00	1.31
London Luton (EGGW)	Harrods Aviation	8.17	7.68	7.52	6.86	1.31
Baltimore/Wash. Int'l/Thurgood Marshall (BWI)	Signature Flight Support	7.44	7.17	6.86	6.20	1.25
Nice-Cote d'Azur (LFMN)	Swissport Executive Aviation	7.58	6.53	6.20	6.44	1.14
Los Cabos International (MMSD)	Aero Center	7.26	6.85	6.36	6.23	1.03
Minn./St. Paul International (MSP)	Signature Flight Support	8.60	8.37	7.87	7.64	0.96
Westchester County (HPN)	Signature Flight Support	7.10	6.78	6.67	6.22	0.88
Southwest Florida International (RSW)	PrivateSky Aviation	7.98	7.72	7.63	7.11	0.86
Opa-locka Executive (OPF)	Miami Executive Aviation	7.73	7.47	7.16	6.87	0.86
Westchester County (HPN)	Panorama Flight Service	8.22	7.75	7.35	7.37	0.84
Tampa International (TPA)	Tampa Int'l Jet Center	9.07	8.97	8.64	8.24	0.83
Naples Municipal (APF)	Naples Airport Authority	7.21	6.77	6.37	6.39	0.82
Savannah/Hilton Head International (SAV)	Signature Flight Support	7.10	6.67	6.64	6.33	0.77
Louisville International-Standiford Field (SDF)	Atlantic	8.04	7.59	7.77	7.28	0.76
Logan International (BOS)	Signature Flight Support	6.75	6.74	6.28	5.99	0.75

Source: AIN 2011 Americas FBO Survey. Data compiled by Forecast International of Newtown, Conn.

one-on-one and develop custom solutions to their needs.

As part of that strategy the company has focused attention on internal improvements. Among those newly introduced capabilities are new point-of-sale systems that allow planeside checkouts. The company rolled out the new system through the first quarter of the year.

In another improvement, the company partnered with the Ritz-Carlton hotel chain to create a new customer-service training course for its employees titled "Training with a Leading Edge."

Last year, the company introduced its Signature Status customer loyalty program, which includes benefits such as guaranteed crew cars, preferred aircraft parking, daytime hangar usage, even waivers of quick-turn handling charges (for platinum-level customers). Other benefits through sister company Dallas Airmotive offer free engine trend monitoring and, for upper-tier members, free engine field service. In a cross-promotion, Signature Status members can also take advantage of a free 1,000 gallons of fuel if they commit to major engine maintenance events with Dallas Airmotive six months in advance. "The reception [for the program] has been good, and it's obviously driving a change in behavior in our customers, as people aim to increase their loyalty to our business," said Best.

In terms of expansion, Signature last month announced the acquisition of its newest property, the Yellowstone Jet Center at Gallatin Field Airport in Montana. The FBO will maintain its own name but operate as a full member of the company's network. Best still sees many other opportunities for growth by the major chains. "I think we still have a fragmented market within the industry," he told AIN. "As economic activity picks up I see continued consolidation of that market. We've expressed that opinion before and stand by it."

Another recent focus of the company is in expanding traffic to its Reagan National Airport (DCA) facility, which Signature recently refurbished in anticipation of increased activity. General aviation access to the airport is controlled through

FBO Chains Top Five Facilities 2011 vs. 2010		
FBO	2011 Average	2010 Average
<b>Atlantic Aviation</b>		
Houston Hobby	8.34	8.08
Chicago Midway	8.19	8.06
Louisville International	8.04	7.59
Austin	8.03	7.90
Nashville	7.97	7.91
<b>Landmark Aviation</b>		
Raleigh-Durham	7.98	7.53
Dallas	7.95	N/A
Scottsdale	7.92	7.88
Dulles	7.84	7.52
Westchester County	7.72	6.78
<b>Million Air</b>		
Indianapolis*	8.67	N/A
Addison	8.60	8.72
Houston Hobby	8.58	8.27
Salt Lake City	8.53	8.41
San Antonio	8.35	N/A
<b>Signature Flight Support</b>		
St. Paul Downtown	8.72	8.64
Minneapolis-St. Paul	8.60	8.29
Centennial Colorado	8.07	7.81
Chicago Executive	7.97	7.77
John Wayne Orange Cty.	7.94	7.76
<small>N/A: location did not have enough responses to be included in last year's survey results. *Bought from Hawker Beechcraft in November 2009. Source: AIN 2011 Americas FBO Survey. Data compiled by Forecast International of Newtown, Conn.</small>		

the Transportation Security Administration. "We're looking at investing in those areas where we can assist the customers best and that is helping them through the DASSP [DCA Access Standard Security Program] process," said Patrick Sniffen, Signature's v-p of marketing. In an effort to drive traffic to DCA, Signature has dedicated several staffers at its facility there to assist potential customers. "We'll actually help guide them through the paperwork, keep tabs on the progress and really hold their hand all the way through and make it less cumbersome," said Sniffen. □

### American Express Gift Card Winners

The following 20 people who participated in the FBO survey were randomly selected to receive a \$100 American Express gift card:

**David Gagliardi**  
corporate pilot, Olser Systems

**Paulo Rivetti**  
director, Rivetti Aviacao

**Peter McParland**  
managing director  
Quarry and Mining Equipment

**Henk Schimmelpenninck**  
pilot, ExecuJet

**Jessica Sheridan**  
flight support supervisor  
Western Flight Services

**Jane Horst**  
aircraft manager  
CitiGroup Aviation Service

**Nathan Hover**  
chief pilot, Plato Woodwork

**Jennifer Doles**  
flight attendant, McDonald's

**Michael Henriquez**  
COO and founder, PrimeJet

**Rich Broyles**  
captain, Nestle Purina Pet Care

**Randy Meyer**  
line captain, Premier Charter

**Adrian Bonilla**  
captain, Flight Options

**Allen Lambert**  
chief pilot, Cambata Aviation

**Andrew Miller**  
captain, Penn National Gaming

**Allan Ball**  
manager OIA, NetJets Aviation

**Jack Berkshire**  
chief pilot, Scheffer

**David Regan**  
chief pilot, Q3 Capital Services

**Kevin Lagace**  
senior captain, Travelers Indemnity

**Linda Valenzuela**  
dispatch manager, AirFlite

**Luke Krepsky**  
corporate pilot, Orion Energy