



Economy, regulations and slots pose the biggest challenges for non-U.S. FBOs

by Jennifer Harrington-Snell

As with most segments of the business aviation industry, the FBO business has been in a state of flux for the past two years. From the economic high and subsequent crash in 2008, to the slow but steady recovery over the past year, FBOs around the world have had to adjust and respond to the changing market conditions.

The good news, however, is that the market is indeed recovering, and many FBOs are reporting an increase in business. Tag Farnborough, for example, saw an 11-percent drop in business between 2008 and last year, but the number of movements in February and March of this year increased 5 percent over last year's levels. Chief executive Brandon O'Reilly excluded figures from January, which were "severely impacted by the adverse weather conditions."

Similarly, Tag Geneva also saw a decrease, from 20,926 movements in 2008 to 18,589 last year. "Since May 2009 it's been picking up, and we're now averaging 50 to 60 movements per day," said handling manager Erturk Yildiz. "So the numbers

are improving and increasing."

Even with the drop in numbers, however, Tag retained a 50-percent share of the Geneva market. "We didn't lose those movements because we were bad; we lost them because the economy was bad," Yildiz said. "If we went from 50 percent of the market share to 30 percent, then we would have a problem. Then I would worry."

Signature Flight Support, which dominated the 2010 FBO Survey with eight facilities among the 29 that qualified for inclusion, also took a hit. According to the FBO's parent company, BBA Aviation, the "substantial declines" in the business and GA markets in the U.S. and Europe resulted in a 7-percent loss of organic revenue among the FBOs. Signature was also forced to cut 345 jobs.

However, the effect on the European market was much less than that in the U.S.; in fact, revenue among the European FBOs remained flat throughout the downturn. And in the BBA 2009 final results, released in February, the company said it saw "preliminary indications that [it was]

through the worst of the downturn."

"The industry has come through a cyclical downturn," said chief commercial officer David Best, who previously served as managing director for Europe, the Middle East, Africa and Asia. "But I think we've had a particularly resilient performance throughout this cycle. Good strong operators with high standards will always come through."

Sean Rafferty, managing director of Universal Aviation UK, said the Stansted Airport-based FBO "saw the same dip as everyone else." The number of movements has increased slightly over the past three or four months, however. "But it's not a rapid recovery," he said. "And I think it will take some time to get back to the levels of a couple of years ago."

On the flip side, the Universal Aviation FBO at Le Bourget Airport actually saw an increase in business. "We've seen an increase, even though the airport saw a decrease in traffic," said managing director Sandrine Jackson. "We closed our books in June with a 10-percent increase in traffic, and to date we are up by 12 percent this year [compared with the same period last year]."

Eccelsa General Aviation, located at Olbia Costa Smeralda Airport in Sardinia, saw only a "slight" decrease, according to the manager, Francesco Cossu. He attributed the relatively stable numbers to the fact that the FBO has no business aviation competitors. "An important consideration is the number of FBOs an airport has," Cossu said. "If there are too many, an FBO might find it difficult to survive."

In addition, Olbia is a luxury destination and generally sees 200 movements per day during the

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Frank Kusserow, director of FBO Services for Europe, the Middle East, Africa and Asia. "Europe had the largest drop in traffic figures, while the Middle East and Asia remained stable. They even had some growth."

International Traffic

The economic downturn resulted in a change in the customer base, according to a majority of the FBO managers surveyed. Specifically, many European FBOs experienced a decline in U.S. traffic and are only now beginning to see those numbers return to normal levels.

"American traffic dropped off during the downturn," Universal Aviation's Rafferty said. "You had this double-whammy: not only were you dealing with the economic situation, but there was also criticism of people flying in private jets."

Over the past few months, however, the Stansted FBO has seen a "significant" increase in the number of customers from the U.S. "I think people are starting to realize that corporate jets are valuable business tools," Rafferty said. "I think the attitude is starting to turn around now."

Tag Farnborough has also seen an increase in U.S. traffic. "A lot of our business comes from Europe, but we've seen an uptick in business from the U.S.,

summer months. "Other FBOs in Italy and Europe experienced a reduction in business," he said, "but we were lucky. During the summer, the busiest time of the year, we didn't have any problems."

On the other hand, ExecuJet Switzerland/Aviation Ground Services experienced a 20-percent drop in business. It was hardly the only one, however. A number of FBOs reported similar decreases in the 2009 FBO Survey.

Fortunately, the FBO has seen an increase over the past few months. "Business has been picking up since December," said Nicole Gut, director for European FBOs. The increase is due, in part, to the World Economic Forum, held every January in Davos-Klosters, Switzerland, which provides a surge in business at the beginning of the year.

And lastly, Jet Aviation also saw a decrease and then a subsequent recovery. "We had the same experiences as everyone else," said

#2 Signature Flight Support, Hong Kong



#3 Harrods Aviation, London Stansted

particularly corporate aircraft," O'Reilly said. "Maybe corporate America is starting to fly again."

Other operators are experiencing an increase in traffic from Eastern Europe, the Middle East and Russia. ExecuJet Switzerland, for example, has seen a large increase in the number of passengers from the Czech Republic and Slovenia. The number of customers from the U.S. remains small, however. "We don't operate in the U.S., so it's never been one of our main customer bases," Gut said. "They know the big names and go there. But the big names are not always the best ones."

Likewise, Eccelsa has seen an increase in the amount of Russian traffic. "We have passengers from all over the world, mainly Europe, the Middle East and the U.S.," Cossu said. "But in the past five or six years, the Russian commu-

nity has increased quite strongly."

Most FBOs have also seen a "moderate" increase in the number of charter flights—regardless of their point of origin. "Really wealthy people didn't stop flying during the downturn," Tag Geneva's Yildiz said. "But charter went down, even in our company. The people who normally use charter thought twice before using a private jet, and they were checking the prices at two or three different companies."

Along with the increase in traffic, FBOs are also seeing a decrease in slow-paying and delinquent customer accounts. Tag Farnborough said its debt situation improved over the past year and credits the customers. "We were pleased with the response from our customers," O'Reilly said.

Tag Geneva had "several" problems during the height of the downturn but has recently implemented a new payment policy



#4 Universal Weather & Aviation, London Stansted

and reduced the amount of credit it gives customers. "Now our policy is clear," Yildiz said. "It's like a gas station. If you're going to fill up your car, you have to pay immediately. It's the same at an FBO. If people are passing by, we give them the best service

possible, but we have to be able to get our money."

Universal Stansted also had some problems. "We did struggle in the early days," Rafferty said. "But now people are much more cost conscious and more aware of their budgets. They

won't fly the airplane if they can't afford to fly it. So some of our customers might be flying their airplanes less, but they are paying the bills."

Universal Le Bourget also had a few problems, but the situation

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Top International FBOs

Ranking	FBO	Airport	City	Line Service	Pax Amenities	Pilot Amenities	Facilities	Overall Average
1	Tag Aviation	Farnborough (EGLF)	Farnborough	8.41	8.61	8.33	8.71	8.52
2	Signature Flight Support	Hong Kong International (VHHH)	Hong Kong	8.38	8.16	7.87	8.06	8.12
3	Harrods Aviation	London Stansted (EGSS)	London	8.41	7.90	7.75	7.94	8.00
4	Universal Aviation	London Stansted (EGSS)	London	8.56	7.36	8.28	7.72	7.98
5	Eccelsa General Aviation	Costa Smeralda (LJEO)	Olbia	7.30	8.54	7.89	8.15	7.96
6	Signature Flight Support	Munich (EDDM)	Munich	8.12	7.68	7.85	7.64	7.82
7	ExecuJet Aviation	Zurich (LSZH)	Zurich	8.18	7.59	7.54	7.93	7.81
8	Universal Aviation	Le Bourget (LFPB)	Paris	7.91	7.41	7.91	7.73	7.74
9	Jet Aviation	Geneva (LSGG)	Geneva	7.92	7.80	7.52	7.68	7.73
10	Harrods Aviation	London Luton (EGGW)	London	7.20	7.93	7.68	7.91	7.68
11	Tag Aviation	Geneva (LSGG)	Geneva	7.64	7.72	7.30	8.03	7.67
12	Dassault Falcon Service	Le Bourget (LFPB)	Paris	7.55	7.71	7.56	7.59	7.60
13	Vienna Aircraft Handling	Vienna (LOWW)	Vienna	7.64	7.40	7.37	7.88	7.57
14	Signature Flight Support	London Luton (EGGW)	London	7.86	7.41	7.74	7.17	7.55
15	Signature Flight Support	London Heathrow (EGLL)	London	7.35	7.27	7.31	7.31	7.31
15	KLM Jet Center	Amsterdam (EHAM)	Amsterdam	7.65	7.08	7.23	7.28	7.31
16	Jet Aviation	Zurich (LSZH)	Zurich	7.71	7.12	7.29	6.90	7.25
17	Jet Aviation	Dubai International (OMDB)	Dubai	7.42	7.32	6.89	7.29	7.23
18	Gozen Air Services	Istanbul Ataturk (LTBA)	Istanbul	6.77	7.36	7.27	7.43	7.20
19	Signature Flight Support	Le Bourget (LFPB)	Paris	6.80	7.38	7.12	7.34	7.16
20	Signature Flight Support	Shannon International (EINN)	Shannon	8.00	6.66	7.37	6.50	7.14
21	Abelag Aviation	Brussels National (EBBR)	Brussels	7.29	7.04	6.89	7.00	7.05
22	Signature Flight Support	Athens International (LGAV)	Athens	7.36	6.97	7.12	6.66	7.03
23	Universal Aviation	Milan Linate (LIML)	Milan	7.39	6.56	7.15	6.94	7.02
24	Universal Aviation	Rome Ciampino (LIRA)	Rome	7.29	6.10	6.74	6.07	6.56
25	Swissport Executive Aviation	Nice-Cote d'Azur (LFMN)	Nice	7.22	6.24	6.57	6.08	6.53
26	Signature Flight Support/Aviapartner	Nice-Cote d'Azur (LFMN)	Nice	6.91	6.22	6.52	6.38	6.51
27	Cannes Airport Handling	Cannes-Mandelieu (LFMD)	Cannes	6.72	6.33	6.13	6.43	6.40
28	Vippot FBO/Vnukovo	Moscow Vnukovo (UUWW)	Moscow	5.53	6.26	5.02	5.23	5.51
29	Delta Aerotaxi	Peretola (LIRQ)	Florence	5.68	4.71	5.56	5.13	5.28

Compiled by Jane Campbell with data provided by Forecast International of Newtown, Conn. Shaded area indicates FBOs with an overall average of 8.0 or higher. Source: AIN, 2010 Europe, Middle East and Africa FBO Survey. Overall average out of a possible 10.

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never escalated out of control. "Our procedures are strict," Jackson said. "If the customer doesn't have an account with the Universal group, we have to accept a cash payment. If you want to be healthy and offer good services and good prices, you have to be careful about the payments."

Customers have also been a lot more cautious about paying their bills, she said. "People are slower in paying the bills. They look at every line of the invoices."

And some FBOs, such as ExecuJet Switzerland, are still "chasing after money," Gut said. "There's been no improvement. The customers still aren't paying."

Increased Competition

The recession has also forced many FBOs to renew their focus on customer service. As one UK-based Challenger 604

#5 Eccelsa General Aviation, Olbia



pilot explained, customers are more willing to shop around to find the best service. "A lot of FBOs probably think this is easy money," the pilot said. "They charge but don't really provide. They're not prepared to think about the needs of the flight or the crew." But some FBOs, he said, "know the business is no longer there. They're more willing to work with us."

Most FBOs, such as Tag Farnborough, do recognize that the industry is built on service, O'Reilly said. "Although we have this unique, attractive facility and customers show a preference for wanting to come here, we never forget that there is good competition out there. There's intense competition in Southeast England, and we never forget that."

The Top Ten FBOs

Although the FBO Survey normally ranks the Top 40 international FBOs, only 29 FBOs received enough responses to be included this year. But even with the shortened list, the results were surprising: a handful of newcomers made the cut, while a number of other, better known names dropped from the list. The results suggest that customer preferences are in no way certain, and serve as a reminder that competition is still fierce—perhaps even more so in this changing economic climate.

Some things, however, stayed the same. For the third year running, Tag Farnborough took the top spot. Chief executive Brandon O'Reilly attributed the high ranking to three factors: the award-winning facility, the exclusivity of the airport, and the staff's commitment to high-quality service.

"This is a unique facility in that we're not just an FBO," O'Reilly said. "It's a full-service business aviation airport." The airport is owned by Tag Aviation, which offers aircraft management, charter and aircraft completion services, in addition to ground handling, hangar storage, aircraft maintenance and hotel accommodation at Tag's new purpose-built Aviator Hotel. In addition, the FlightSafety International Farnborough Learning Center is located on site. "So it's a different type of business aviation operation from what you would normally see at any other UK airport," O'Reilly said.

Furthermore, customers prefer Farnborough Airport because they don't have to compete



Tag Aviation, Farnborough

with commercial or training operators, O'Reilly said. "The airport is exclusive to business aviation. Every other airport in Britain is a hybrid."

Above all, the ranking is "a tribute to all of our employees, whether they're on the front line or in the back room," O'Reilly said. "They're all here to serve the customer in a 'no compromise' way, and I think that's what we're able to deliver. They're the best in the business."

There was no change in the second place spot, either; Signature Flight Support at Hong Kong International Airport took that honor. And although the group missed the top spot by less than half a point, it dominated the overall results. In addition to its number two spot, Signature also took spots number six (Munich International Airport), 14 (London Luton), 15 (London Heathrow), 19 (Le Bourget), 20 (Shannon International), 22 (Athens International) and 26 (Nice-Cote d'Azur).



Signature Flight Support, Athens

Chief commercial officer David Best credits the company's renewed focus on "building relationships and tailoring services to meet the needs of the customer," as well as its commitment to high standards. "We have structured and established standards for service and safety, and we have been applying them consistently throughout the whole network," he said.

Harrods Aviation slid into the third and 10th spots (see sidebar on next page), while Universal Aviation moved from number nine (Paris Le Bourget) to spots four and eight (London Stansted and Le Bourget, respectively). "I guess

we're doing something right," said Sandrine Jackson, managing director of the Le Bourget location. "Over the years we have established some good relationships with clients. We've built trust and confidence, and I think that's important."

Sean Rafferty, managing director of Universal Aviation UK, added, "We get to know the customer. We don't just look at the airplane and say, 'Well that's a GIV. How do we handle that?' We say, 'Well that's XYZ Company. Where is the head office? What do they like on their aircraft?' We try to get to know them, so when they come here we're already prepared."



Eccelsa General Aviation, Olbia

The number five spot went to Eccelsa General Aviation, which jumped 21 places since last year's survey. The FBO is located at Olbia Costa Smeralda Airport in Sardinia and is only minutes away from the Olbia town center and the Porto Cervo marina. Its location, along with a new \$30 million terminal and 25 acres of ramp space, propelled it to this year's top 10.

"We have a fantastic terminal and offer all types of services, from restaurants and shopping, to catering, hotel accommodation and luxury car rentals," said managing director Francesco Cossu. And to accommodate the significant air traffic, which totals more than 200 movements per day during the summer months, the FBO also has a number of extra parking spaces on the new ramp. "We never turn anyone away. We accept every single flight that comes to us in the summer time," Cossu said.

Accordingly, many FBOs have added services while maintaining pricing levels, in spite of the downturn. The Farnborough FBO, for example, has added a full front-of-house concierge service, whereby every customer is met at the curbside and escorted into the building. "We're enhancing that service this year by recruiting additional concierge employees so we can be sure to offer that service," O'Reilly said.

Tag Geneva, which dropped from fifth place in last year's survey to 11th this year, believes "service is everything." Yildiz, however, doesn't believe the survey results reflect Tag's overall performance. "We think our level of service continues, but some customers have been unhappy," he said. "My interpretation is that it was a few individual cases. Our service hasn't changed. We want to make our customers feel at home, and we want to give them the best service possible."

Even so, Tag intends to address the issue and improve its relationship with the



Nicole Gut, ExecuJet Aviation

ExecuJet Aviation stayed in the top 10, although it dropped three places to number seven this year. Even so, the FBO is still "passionate and motivated about the job," according to Nicole Gut, director for European FBOs. "We still treat our VIPs as VIPs, including the crew. And most of the time the crewmembers are more important than the passengers."

The FBO has a newly refurbished pilot lounge, with Internet access and shower facilities. It also provides its own services, including refueling, lavatory and water services, towing, marshalling and parking. "We do everything ourselves," Gut said.

Finally, Jet Aviation (Geneva) took the ninth slot. Last year the company's Dusseldorf and Biggin Hill locations took seventh and eighth places, respectively. The company also took spots 16 and 17 with its Zurich and Dubai FBOs. According to Frank Kusserov, director of FBO services for Europe, the Middle East, Africa and Asia, Jet Aviation has increased its efforts to improve services and is working much more closely with the customer.

The company is also looking to bring some services, such as lavatory and water services, in-house. "That's a strategy we're really enforcing now, to have everything in-house to set us apart from the competition," Kusserov said. The new services, coupled with existing offerings such as maintenance and line service, will result in an increased turnaround time and satisfied customers.

And like Tag Farnborough, Jet Aviation also credits its employees for its place in the top 10. "We've been established a long time, and we have people who have been working for us for 20 or 25 years," Kusserov said. "It's the people that make a difference." —J.H.S.

#6 Signature Flight Support, Munich



customers. "I'm not worried, but it's better to be in the top 10 than number 11," Yildiz said. "So we need to see how we can improve our approach to the pilots. They have to be entirely satisfied."

Signature, meanwhile, has introduced a number of new programs and initiatives, including the Signature Promise, which ensures that every customer receives "a warm, friendly Signature greeting; consistent, exceptional service; line support that's expert, safe and ready on the ramp; clean, comfortable, well furnished facilities; customer service representatives who go the extra mile for your passengers and crew; competitive pricing in every market; and the Signature QuickTurn service for demanding travel schedules."

The company also launched the Signature Status program, which gives customers additional benefits, such as crew cars and preferred parking and hangar space, as a reward for loyalty. The program is based on the percentage of visits a customer makes to Signature FBOs, based on publicly available FAA tower records for airports where the company has a base.

Signature has also received a license for into-plane fueling at Shannon International Airport, which will increase turnaround and ground handling time. In

Europe, unlike in the U.S., many FBOs rely on airline fuel trucks for refueling, adding time on the ramp for business aircraft. In addition, the company will be able to offer U.S. pre-clearance services onsite, following negotiations between Shannon Airport and the U.S. Customs and Border Protection Agency. The new procedure will allow customers who have been cleared to fly directly from Shannon to an approved U.S. destination, without having to stop at a gateway airport. The approval currently applies only to Part 91 operators; EBAA is urging authorities to approve the procedure for Part 135 operators as well.

Many of the changes Signature has made over the past year were not in response to the downturn; rather, they were initiated by the company's new CEO, Michael Scheeringa, former CEO of Flight Options. "He is focused on customers, so it was an internal drive, as opposed to a response to market conditions," Best said, adding that the company undertook extensive market research in the first quarter of the year.

The research focused on finding out who the typical customer is, and learning more about his needs, Best said. The

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#7 ExecuJet Aviation, Zurich

Harrods Aviation weathers the storm

by Charles Alcock

Harrods Aviation's two London-area FBOs at Stansted and Luton airports have consistently done well in the AIN international FBO survey, and this year both are well placed in the top 10 rankings. But the company has not rested on its laurels, having recently unveiled a comprehensive redesign and refurbishment of its FBO at London Stansted Airport. In work spanning six months, the company has spent more than \$1.5 million.

The facility now offers two large customer lounges—one of which is equipped for VIP use and the other a more general business lounge. The building also has a separate lounge with its own washroom to provide complete privacy for passengers, including heads of state.

According to the company, the makeover has made better use of the existing structure, with a significant emphasis on strong, robust soft furnishings and improvements to the heating and air conditioning system. On both the ground- and airside of the facility, the design now shows a clear connection to the branding of the Harrods retail group, of which Harrods Aviation is a subsidiary.

In another new development, Harrods now has its own fuel trucks at Stansted and London Luton Airport. This has meant that it can avoid delays in refueling customer aircraft that would otherwise have to wait for airline fuel trucks to be brought across from the other side of the airport.

Harrods is a firm believer in investing in its own ground support equipment to avoid being dependent on other service providers. Its inventory includes large, covered steps suitable for widebody airliners and a snowplow.

Redevelopment work has also had to take account of the latest security rules (as part of the European Union's EC300/2008 regulations) to ensure that all requirements for passenger and crew screening can be met while minimizing any inconvenience. Harrods has paid to have immigration and customs clearance available on its own premises after UK officials decided that arriving passengers and crew would otherwise have to be processed in the main airport terminal.

Last year, Harrods made significant investments at the Luton base, which now boasts two large hangars. The company built a new hangar at Stansted a few years ago and, at the same time, extended the ramp.

The Luton FBO is similar in layout to that at Stansted, with one large lounge area and two separate VIP suites (one of which has its own washroom). There is direct airside access and ample parking for both aircraft and cars.

After an industry-wide dip in traffic volumes last year, Harrods reported that the early months of this year have seen a positive—but not major—increase in

business. The company's FBOs now are busier than they were during the same period last year and it describes itself as "cautiously optimistic" about this trend continuing. The Harrods FBOs have noted a general increase in the average size of aircraft they handle even throughout the downturn period.

According to Harrods, the secrets to its success as a business aircraft handler are that it has continued to invest in hiring, training and retaining the best staff. It trains its personnel to be sensitive to the varying requirements and preferences of a diverse client base of pilots and passengers.

The company has developed an extensive in-house training program for staff and encourages them to plan on building a career there. It has not had to lay off any personnel during the current recession, preferring to use quiet times to conduct training.

In recent years, the Harrods team has found operators to be far more proactive in terms of wanting detailed assurances about what services will be provided and at what price. These operators, many of which are U.S.-based, are less inclined to hand everything over to a flight planning firm and want to be sure that they get value for every aspect of the trip. The FBO group told AIN that some operators now do a full cost analysis of each trip and are finding ways to cut costs, such as transporting flight crew in a minibus rather than ordering additional limousines.

"In some respects this means that the industry has grown up and has sharpened its pencil," commented a spokesman. "FBOs are now working harder for their money and there is more legwork to be done in securing business." In particular, the Harrods team has noticed that flight attendants are now seeking more assistance with arrangements beyond those relating directly to the flight, such as hotel and restaurant reservations.

Harrods has looked at opportunities to expand its FBO brand at other locations but has so far not been tempted to follow through. "Some FBOs come up for sale, but you have to ask what stopped these businesses from weathering the storm. You can do this [buying FBOs that are closing or being sold] but only if they have the right business model. Picking up failed businesses does not make sense," said a spokesman. □

For a downloadable PDF of the 2010 AIN FBO Report—Rest-of-the-World, go to www.ainonline.com/resource-center/. See the April issue of AIN for the Americas FBO Report and Survey results.

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#8 Universal Weather & Aviation, Le Bourget

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results prompted the company to become more customer-centric and to focus on building relationships with the customer. "That changing view has obviously reflected well in your ratings," he said.

Universal Aviation has also been adding services, including the ability to clear passengers through Shannon Airport using the new CBP clearance procedure. "Universal never sits still," Rafferty said. "That's why I like the company; it's always thinking and always developing new ideas."

Universal Stansted, for example, recently installed software that allows the FBO to print its own newspapers. "It allows us to print newspapers from all around the world, so if we get an aircraft in from Chicago or Dubai, the customer can get the local newspaper here," Rafferty said, adding, "It's not in response to the downturn. It's just trying to keep up with good ideas."

The Le Bourget facility will be adding a maintenance center later this year.

Above all, however, Rafferty believes customers choose Universal for its commitment to safety. The company is at present the only FBO in Europe to receive the NATA Safety 1st professional line service training certificate. "Customer service has always been paramount, but discerning crews see the safety of people and aircraft as one of the highest priorities when selecting an FBO," Rafferty said. "I think

safety is becoming more of an important issue for aviation, and to see an investment in safety is an advantage for the FBO."

Although smaller than some of the other FBOs, Eccelsa also has much to entice its customers—including a new \$30 million terminal and 10 additional ramp spaces. The location is also a big draw: passengers are only minutes from the Olbia town center and the Porto Cervo marina. "In five minutes a customer can be on his yacht without any problems at all," Cossu said. "There is nowhere else in Europe that a customer can land in his private jet, jump in a car and be on the seaside in minutes."

ExecuJet Switzerland has also added services and amenities, such as its newly refurbished pilot lounge. As Gut explained, "It's the right thing to do. In a crisis you need to increase service and do a better job than you usually do."

And according to Jet Aviation's Kusserow, it's "the long-term relationship between the company and the customer that speaks for the success of an FBO." People rely on those relationships, he said, adding that the personal aspect of the business is the most important type of service.

Security and Slots

Security remains one of the major concerns of most operators, especially in light of the European Commission's "common basic standards for aviation safety," which were scheduled to go into effect April 29 on the continent and at a later date in the UK.

"There are changes coming, and it will be tougher," Rafferty said, adding that the measures are

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Up-and-Coming International FBOs*

FBO	Airport	City	Total Responses
Jet Aviation	Basel-Mulhouse (LFSB)	Basel	24
Luxair	Luxembourg/Findel Airport (ELLX)	Luxembourg	24
Mallorcair	Palma de Mallorca (LEPA)	Palma de Mallorca	24
Salzburg Airport Services	Salzburg (LOWW)	Salzburg	24
Universal Aviation Spain	Madrid Torrejon (LETO)	Madrid	24
Signature Flight Support	Dublin (EIDW)	Dublin	23
Fraport Executive Aviation	Frankfurt Main (EDDF)	Frankfurt	22
Jet Aviation	Dusseldorf (EDDL)	Dusseldorf	22
Flughafen Innsbruck	Innsbruck (LOWI)	Innsbruck	21
Grafair Jet Center	Bromma (ESSB)	Stockholm	21
Signature Flight Support	Toulon Hyères (LFTH)	Hyères	21
Biggin Hill Executive Aircraft Handling	London Biggin Hill (EGKB)	London	20
Jet Aviation	London Biggin Hill (EGKB)	London	19
Sky Services	Milan Linate (LJML)	Milan	19
Euralair Airport Services	Le Bourget (LFPB)	Paris	17
General Aviation Terminal	Ferihegy International (LHBP)	Budapest	17
Jet Aviation	King Abdul Aziz International (OEJN)	Jeddah	17
Jet Aviation/Deer Air	Capital International (ZBAA)	Beijing	17
Jetex	Le Bourget Airport	Paris	17
Lyon-Bron FBO	Lyon Bron (LFLY)	Lyon	17
Shanghai Airline Operations	Pudong International (ZSPD)	Shanghai	17
Abelair Aviation	Larnaca (LCLK)	Larnaca	16
Ali Transporti Aerei	Milan Linate (LJML)	Milan	16
IGS Ground Services	Keflavik (BIKF)	Keflavik	16
Service People	Hamburg (EDDH)	Hamburg	16
Signature Flight Support	Edinburgh (EGPH)	Edinburgh	16
Signature Flight Support	London Gatwick (EGKK)	London	16
ACM Air Charter	Karlsruhe-Badenbaden Airport (EDSB)	Baden-Baden	15
ExecuJet	Berlin Schoenefeld (EDDB)	Berlin	15
Jet Aviation	King Khaled International (OERK)	Riyadh	15
Landmark Aviation	Nice-Cote d'Azur (LFMN)	Nice	15
Pulkovo Aircraft Services	Pulkovo (ULLI)	St. Petersburg	15
Save General Aviation	Venice (LIPZ)	Venice	15

*FBOs that received 15 to 24 survey responses. Twenty-five responses were required for an FBO to be listed in the FBO survey results. Compiled by Jane Campbell with data provided by Forecast International of Newtown, Conn. Source: AIN, 2010 Europe, Middle East and Africa FBO Survey.



#9 Jet Aviation, Geneva

FBO survey rules and methodology

This year's Survey of International FBOs marks the 23rd time that AIN has asked readers to express their opinion about the FBOs that they frequented during the previous year. FBOs covered in the results of AIN's survey in this issue are located in Europe, the Middle East and Africa. The survey is conducted entirely online and was designed and administered by Forecast International of Newtown, Conn.

For this year's survey, AIN and Forecast International opened the online rating form on December 21 and closed the survey on February 2, to make sure that those invited to participate had plenty of time to render their ratings. Only those invited can fill in the online form, and they include AIN readers who are aviation department managers, chief pilots, pilots, schedulers/dispatchers and corporate flight attendants who work for corporate flight departments and charter/air-taxi and fractional-share companies.

Each invitee receives a code that must be used when filling out the ballot, and that code can't be used by anyone else, thus preventing ballot-box stuffing and ensuring that only those invited to participate can post their opinions.

The AIN FBO Survey asks readers to rate FBOs that they frequent in four key categories: line service; passenger amenities; pilot amenities and services; and facilities. For each of the four categories, the survey participant can assign a number from one to 10, one being the lowest and 10 the highest rating. To arrive at the averages for the categories, each FBO's ratings for each of the four categories are added, and the resulting sum is divided by the number of responses received for that FBO. The overall average for that FBO is computed by adding the FBO's four category scores and dividing that sum by the total number of responses received in all four categories.

Forecast International received 1,679 completed survey returns, down from last year's 2,661. The completed return rate was 11.7 percent compared with 18.1 percent last year and 13.3 percent the year before, possibly a reflection of the large number of jobs lost in the business aviation industry last year.

Readers provided a total of

23,007 FBO ratings, which averaged to 14.5 FBOs per survey respondent. Last year respondents averaged 15 FBOs each, and the 2008 number was slightly

higher at 16.

While the survey asks AIN readers to rate FBOs and handlers worldwide, this issue includes results for Europe, the Middle East and Africa. The results covering the Americas FBOs can be

found in the April issue of AIN, and in full at www.ainonline.com/resource-center/.

Survey participants added 118 FBOs to this year's list by writing in their ratings. Write-in FBOs are added to the final results if they

receive enough ratings, and they are also added to the list for next year's FBO survey. To be included in the survey results, U.S. FBOs must receive at least 40 responses; those in the remainder of the world must receive at least 25. □

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Customers Speak Up

Efficiency and superior customer service skills are by far the two most important traits of a good FBO, according to a majority of the pilots and other aviation professionals who responded to this year's FBO Survey. As one UK-based NetJets pilot explained, "The holy grail among FBO staff is a combination of friendliness and efficiency/competence. It is amazing how often you get one without the other."

In terms of efficiency, pilots expect a good FBO to be "proactive, not reactive," according to David San Agustin, the director of operations at Biggin Hill-based Golden Falcon 348 A.V.V. Good FBOs, he said, singling out Tag Farnborough, Jet Aviation and Executive Flight Centre in Dubai, are "a one-stop shop. They're highly professional, and always on top of everything. They go above and beyond what an FBO would normally do."

Furthermore, an efficient and professional FBO, according to one UK-based Challenger 604 pilot, should be willing to prepare weather and flight plan packages, along with whatever else a flight crew needs, without being asked. "[A good FBO] is super-efficient," he said. "You never have to ask for anything; it just happens. They're aware of what we want to do and look after us after we arrive."

The top FBOs also place a great deal of importance on customer service, according to a UK-based G550 pilot who believes the services at Jet Aviation in Geneva are among the best in Europe. "Everyone on their staff is professional and efficient," he said. "They make their customers feel important, and the facilities are run professionally. And everything's done with the minimum amount of fuss."

One Melbourne, Australia-based pilot echoed those thoughts: A good FBO, he said, is "always thinking of my passengers as if they are clients to be pampered and retained."

Another pilot, who is based in Luxembourg, said a flight crew and the passengers should "feel welcome for more reasons than just the platinum credit card."

Unfortunately, a number of FBOs



don't meet the customer service standards that flight crews and passengers have come to expect.

"Certain FBOs lack consideration for the passengers," the G550 pilot said. "We're looking for an FBO that gives the airplane a VIP service. We don't want to be taken for granted, and we want an FBO that treats the passenger like he's the most important passenger of the day. A customer should always feel as though he's getting top priority."

Other FBOs charge too much for inefficient service, the Challenger 604 pilot said. "Quite a lot of the time, nobody knows what is going on," he said. "And a lot of these FBOs charge a lot of money. At one FBO in Cairo, we paid \$2,600 for landing and handling, and the service was disgraceful. You don't want that. You want to pay a fair price, get efficient service and go."

On another occasion, a well known FBO in Miami lost his laundry. "It's criminal to do that. And [the FBO was] awkward about the whole situation, so I've never been back there since."

Everybody has a role to play, and some FBOs simply don't have a team approach to the whole operation, San Agustin said. "It's almost as if you're fighting constantly. I'm sure the intent is there, but the execution isn't."

On a good note, however, the economic downturn appears to have led to a positive change in the FBO business. "If any-

thing, FBOs are introducing new services," the G550 pilot said. "They're trying to improve services, which goes against the economic trend. They're investing money. In Geneva they've opened a new hangar, and Signature also seems to be investing in its FBOs and infrastructure."

FBOs are also more willing to negotiate prices, according to the Challenger 604 pilot. "I find that I can negotiate with an FBO before I get there, and I have gotten prices knocked down. They know the business is no longer there, so they're more willing to work with us. They know that if we don't stay with them, we'll go somewhere else." —J.H.S.



Economy, regulations and slots pose the biggest challenges for non-U.S. FBOs

▶ Continued from page 26

a continued response to 9/11 and other terrorist attacks. "It's not as easy as it used to be, but a good FBO will make it as smooth and as comfortable as it can be."

Additionally, new security measures "slow operations in every airport," Cossu said. "We try to be respectful of all the rules and regulations, but we also strive to make it easy for the customers. We try to get them through the terminal as quickly as possible."

Likewise, Kusserow said security is "something we can see increasing and being even more costly."

Airport capacity and slot availability also top the list of FBO concerns. Tag Farnborough has already reached maximum capacity on the weekends, and is inching ever closer to its annual capacity limit of 28,000 movements. "There will be a significant increase in demand over the next 10 years, and it will be more difficult to find airports

and FBOs that can handle them," O'Reilly said. "Many airports are full or close to full, and at airports where commercial aviation is served, we don't want business aviation coming out second."

Tag Geneva is also experiencing problems with slot availability. "Parking limitations have a direct impact on our operations," Yildiz said. "We have lost some movements because people have gone elsewhere. But we have to cope with it. We have no other choice."

Jet Aviation's Kusserow added other European initiatives, such as SMS requirements, to the list. "This could potentially affect the small FBOs," he said, adding that smaller FBOs don't always get the publicity they should. "There are a lot of small FBOs providing great service, but they simply don't get the voice or the forum because they don't have the same amount of traffic. Some of the smaller FBOs are real jewels in the way they work and dedicate themselves to the customer. And that should be recognized." □

The report on Americas FBOs appeared in the April issue of AIN.

British University Offers FBO Training Course

London Metropolitan University has teamed with business aviation specialists to launch a new course to provide basic training for FBO staff and flight dispatchers. The UK college is aiming to start the first of the Web-based distance learning course next month. It will be presented in two modules with tutor support at a price of £2,000 (\$3,000) per student.

"We are aiming to standardize training so that all FBOs and dispatchers are training to a world standard," said Graham Stephenson, an aviation consultant who was formerly head of handling services at ExecuJet Aviation, who is now advising London Metropolitan. "We want to be sure that every FBO can afford to train its staff, and this is one reason we are doing it through distance learning."

The courses will be organized on the basis of ongoing enrollment, with new courses starting every few months. The first module would take no more than a month or two to complete and would cover basic aviation concepts and terms, and the different types of aircraft. Subsequent modules would go into more depth about how aircraft fly, the principles of flight and aircraft performance, and legal requirements. The exam at the end of the course requires a 75 percent to pass.

To help develop the course content, the London Metropolitan team worked a shift at the London City Airport Jet Centre to identify specific topics that need to be covered. The college is considering introducing a second-year option that would lead directly into its existing foundation degree in aviation management.

Peter Knapp, head of training with London Metropolitan's Centre for Civil Aviation, told AIN that he is now trying to convince the European Aviation Safety Agency to formalize training requirements for FBO staff and dispatchers. He wants to see a European equivalent to the FAA's requirement for a dispatcher's license for Part 121 operators.

According to Helmut Lehr, chief flight dispatcher with Switzerland-based aircraft charter and management company Comlux Aviation, business aviation handling staff and dispatchers shoulder a higher degree of responsibility than their airline counterparts and—as a consequence—they have an even greater need for formal training. —C.A.