



CAMPING: An Opportunity

by James E. Houck and Lyrik Y. Pitzman

One in four Americans participates in camping; they need hearth, patio and barbecue products. An opportunity exists here for both manufacturers and retailers of these products.

Replace the term "hearth, patio and barbecue industry" with "hearth, patio, barbecue and camping industry. Broaden the term "Outdoor Room" to Outdoors. And remember that in 2005 there were 8.6 million permanent households in the U.S. classified as mobile/manufactured homes. Their heating and cooking systems have much in common with the approximately 10 million truly "mobile" homes, i.e., recreational vehicles (RVs). Many products and services provided by manufacturers of hearth, patio and barbecue products can, with little or no modification, be directed to the camp-

ing market. Outdoor cooking equipment, outdoor heaters, manufactured fuels, outdoor illumination and outdoor furniture apply to the campsite as well as to the patio.

With the popularity of recreational vehicles there is a considerable market for indoor gas cooking, heating and illumination appliances. Camping and picnicking often go hand-in-hand with barbecuing and the outdoor preparation of food. Backpackers have portable cook stoves and lanterns. Fishermen and boaters also use portable heaters and lanterns. Across the board these appliances, fuels and associated accessories

are not much different, if at all, from their cousins used in the Outdoor Room, on the hearth or on the patio.

Camping includes wilderness camping, tent camping at developed and undeveloped sites, RV camping, cabin camping, youth camping and church camping. Both the camper and the proprietors of developed RV parks, cabins and traditional campgrounds are potential customers. Specifically, camping represents a market for metal, plas-

At Outdoor Resorts' Rancho California RV Resort guests enjoy luxurious sites surrounding a lush golf course.



tic, wicker, rattan and wood furniture; outdoor fabrics; gas, charcoal and electric grills; fire starters, charcoal and outdoor firelogs; grill parts, utensils; accessories and cooking related items; patio heaters; gas lanterns; and LPG appliances.



Wood Fire



Charcoal Fire



Portable Gas Stove

Camping Happens

The Outdoor Industry Foundation (OIF) estimates that, in 2005, there were 68.1 million camping participants (over 16 years old) in the U.S. The results of a 2000 California survey showed the median length of each camping trip was three to six days. Similarly, a 2004 Wisconsin study showed that the average nights camping per trip was 2.7 for tent

campers and 3.7 nights for Recreational Vehicle (RV) campers. The results of the California survey also showed that two-thirds of camping parties had two adults, and six out of 10 had no children. However, both the California study and the Wisconsin study showed a larger average party size of about 4.1 people (some camping parties are quite large, which brings up the average).

There are approximately 200 million camping nights per year in the U.S. One third of U.S. adults say they have gone on a camping vacation in the last five years. Over 2,186,000 Americans age 55 and older RV-camp at least 15 days a year. Further, a 1996 survey reported that 20 percent of Canadians go camping each year. Currently eight to 12 percent (depending on the survey) of vehicle-owning households are reported to own a RV and this percentage is expected to continue to increase. In addition to owning a RV, many consumers rent a RV from over 400 national rental chain outlets.

There are more than 17,000 improved public and private campgrounds in the U.S., and considerable camping occurs at unimproved sites as well. (See bar chart.) Closely allied in terms of outdoor cooking equipment and outdoor furniture is picnicking. According to a national survey, 114.4 million Americans went picnicking in 1999.

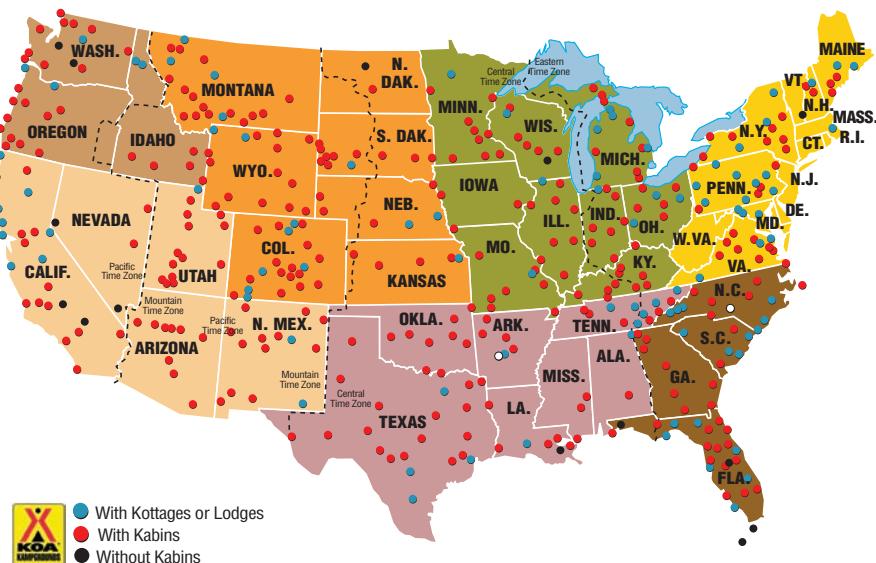
In addition to the approximately 17,000 improved campgrounds shown by ownership, there are also considerable numbers of improved campgrounds



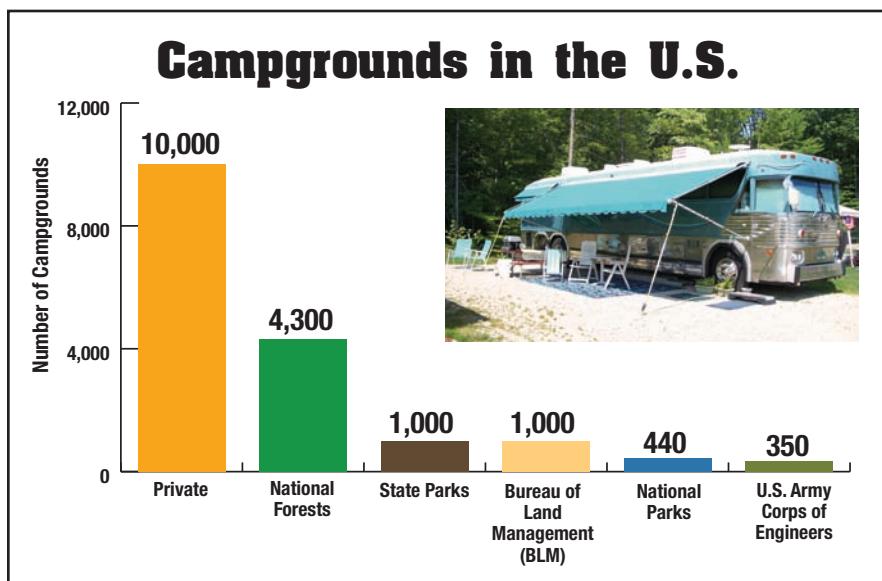
A living area set up under an awning.

in state forests, city and county parks, national wildlife refuges, military bases, tribal lands, as well as organized youth camps, campgrounds in Mexico and more than 3,000 campgrounds in Canada that are not part of the tally.

It is estimated that 31.9 million people camped at a primitive site without facilities and 52.7 million camped at developed sites with facilities such as tables and toilets. The OIF survey showed that 17.7 million participants were involved in "away-from-car" camping (away-from-car camping is defined as camping more than a quarter-mile from the car) and 51.7 million participants were involved in car camping.



Kampgrounds of America (KOA) is the largest campground chain in North America with more than 500 campgrounds. Map courtesy of KOA.



Private campgrounds are steadily going upscale.

According to a 2005 Kampground of America (KOA) survey, 71 percent of KOA campers took summer vacation trips; 68 percent took summer weekend trips; and 23 percent took winter trips to southern locations.

The Happy Camper Profile

The 2000 California study showed that few campers are under 30 years old and that 58 percent of all campers are over 50. The 2005 KOA study found that the average age of a KOA RV camper is 57 and a KOA tent camper is 42. The 2004 Wisconsin study showed that the average age of tent campers is 41 and the average age of RV campers is 50. The average age of American campers reported by the OIF survey was somewhat lower at 35 years old because it included away-from-car campers, most of which, not surprisingly, are comprised of more younger campers with 16 and 34 being the most common age group.

The KOA study found that 79 percent of campers are married and 37 percent of campers do so with children. About 50 percent of active campers fall into the Baby Boomer generation, and one in five active campers are retired.

According to a 2005 University of Michigan study, today's typical RV owner is 49 years old, married, with an annual household income of \$68,000. RV owners are likely to own their homes and spend their disposable income on traveling.

The State of Wisconsin study found that 48 percent of RVers were Baby

Boomers, 23 percent were empty nesters (55-64 years old), and 19 percent were Gen X-ers (25-34 years old). The OIF study noted that away-from-car campers tend to go with friends; that segment is dominated by the young-adult market, whereas car camping is traditionally a family activity.

The OIF study also concludes that the away-from-car campers are primarily made up of males, with a male to female ratio of 2.5 to 1, whereas car campers are more gender balanced. However, in general, male campers go camping 2.9 times a year, which is significantly more than females, who go camping 1.78 times per year.

Campers are relatively well educated. In California, the majority of campers, 84 percent, have had at least some college or graduated from a trade school. Campers are relatively affluent with over two-thirds having annual incomes of \$50,000 or more (in 2000) and about 25 percent are minorities. The highest per capita number of campers is in the West (42% in 2005) and the lowest is in the Northeast (24%).

The Great Outdoors

About two-thirds of campgrounds and RV parks in the United States are commercially owned. Many commercial campgrounds are affiliated under varying arrangements. There are three basic types of commercial campground affiliations: chain campgrounds, independent campgrounds and membership campgrounds. Largest among the chain campgrounds are:

- Kampgrounds of America (KOA) (franchised chain)
- Good Sam Park Network (independent registered campgrounds)
- Thousand Trails (membership campgrounds)
- Best Holiday Trav-L-Park Association (non-franchised chain)
- Yogi Bear's Jellystone Park Camp Resorts (franchised chain)

The basic features of commercial campgrounds are RV sites ranging from rustic clearings to "pull-thru" concrete pads with utility hookups for water, sewage, electricity and LPG, tent sites, rest rooms and shower facilities. Some of the fanciest have soaking tubs, gyms, fishing ponds, extensive libraries, on-site golf courses, nature trails, teen video game parlors, live entertainment, hook-ups with high-

The Long Weekend

The long weekend is replacing the two-week time off, which means fewer total overnight stays in campgrounds, particularly public campgrounds. Total overnight stays in national parks fell 20 percent to 13.8 million between 1995 and 2005. RV campers may represent the best future target market; the Recreational Vehicle Industry Association's (RVIA) Campfire Canvass survey found that 89 percent of respondents feel that RVs make it easier to take more frequent weekend getaways or mini-vacations.

speed Internet access, classes in bird watching and financial investing, even concierges to arrange restaurant and tour reservations. Some upscale RV parks even sell sites to RV owners – just like condos.

In contrast, many public campgrounds, such as those operated by the National Park Service, National Forest Service, Bureau of Land Management, U.S. Army Corps of Engineers, U.S. Fish and Wildlife Service, and state parks and forests systems, typically offer fewer amenities with commensurately lower rates than their private competitors. These public lands offer the bulk of away-from-car camping, which has become a major recreational activity since the 1960s when the "backpacker boom" hit North America, encouraged by the development of durable lightweight equipment.



Home Away from Home

Tent campers and RV campers represent different market opportunities for hearth, patio and barbecue products, with RV campers being the more significant target of the two.

There are more RV campers than tent campers and as Business America noted, "The progression from tent camping to RV camping as campers grow older is evident. Even though RV camping is more commonplace than tent camping, tent camping is not insignificant and tent camping is more common on public land. Some statistics illustrating the relative number of tents and RVs are:

- 77 percent of KOA campers use RVs, 11 percent tents and 10 percent Camping Kabins (2006).
- 51 percent of Quebec campers use trailers, 10 percent mobile homes, 39 percent tents (1999).
- 68 percent of Wisconsin campers (2004) use RVs and 32 percent use tents.
- 58 percent of campers in developed National Park Service (NPS) Campgrounds use tents and 42 percent use RVs. (This does not include campers in concessioner campgrounds.) In addition, for every 10 campers camping in developed NPS campgrounds, three campers either use sleeping bags or tents in walk-in undeveloped campsites not accessible by road.*

"The fire is the main comfort of the camp, whether in summer or winter, and is about as ample at one season as at another. It is well for cheerfulness as for warmth and dryness."

— Henry David Thoreau.

Tin Box Camping

RV camping is sometimes irreverently referred to as tin box camping and probably represents the largest market potential to the hearth, patio and barbecue industries. Tin boxes, or RVs, cover a wide range of interests and budgets. At one end of the spectrum there are folding camping trailers that sell for a few thousand dollars, while at the other end are luxurious motor homes that feature all the comforts of home and come with a pricetag to match.

The RV world is generally divided into two broad categories: motorized RVs and towable RVs. Motorized RVs combine a motor vehicle chassis and living quarters in a single unit. Among motorized RVs there are class A, class B and class C motor homes. Towable RVs are designed to be towed (or carried) by a car, van, SUV or pickup truck, but are small enough not to require a special highway movement permit. Among towable RVs there are travel trailers, folding camping trailers, fifth wheels and truck campers.



Class A motor homes are from 30 to 40 feet in length. They usually provide cooking facilities, a refrigerator, heating, air conditioning, a self-contained toilet, water tanks, faucets, sinks, a LPG supply, a separate 110-volt electrical system, and a full array of appliances and entertainment features.



Class B motor homes are also commonly known as van conversions. They are generally 17 to 19 feet in length. Class B motor homes usually provide cooking facilities, a refrigerator or an ice box, heating, a self-contained toilet, a fresh water tank, a waste water tank, a faucet, a sink, convertible/folding beds, a LPG supply, and 110 VAC and 12VDC electrical outlets.



Class C motor homes, sometimes referred to as mini-motor homes, are scaled-down versions of Class A motor homes. They are 20 feet to 31 feet in length and have a driver compartment similar to a van. They usually provide cooking facilities, a refrigerator, heating, air conditioning, a self-contained toilet, water tanks, faucets, sinks, a LPG supply, a separate 110-volt electrical system, and a full array of appliances and entertainment features.



Travel trailers come in a variety of sizes, ranging from a small bedroom on wheels to the equivalent of a Class A motor home in terms of amenities. Travel trailers may be as small as 10 feet long or as big as 35 feet long.



Folding camping trailers are commonly referred to as tent trailers or pop-up trailers. Folding camping trailers usually provide cooking facilities, a refrigerator or an ice box, heating, a fresh water tank, a waste water tank, a faucet, a sink, convertible/pull-out beds, a LPG supply, and a separate 110-volt electrical system.



Fifth-wheel trailers are similar to larger travel trailers, but they have an extension on the front of the box that extends over the tow vehicle and a horizontal plate that looks like a wheel (hence the name "fifth wheel") that rests on the tow vehicle for support.



Truck campers, sometimes referred to as pickup campers or slide-on campers, consist of a camper body loaded onto the bed of a standard pickup truck. Because truck campers can be loaded and unloaded with relative ease, they are popular among weekend RVers. Truck campers usually provide cooking facilities, a refrigerator or an ice box, heating, air conditioning, a self-contained toilet, a fresh water tank, a wastewater tank, a faucet, a sink, a LPG supply, and a separate 110-volt electrical system.

Associations

If you want to sell products to campers, campground operators or retailers, there are a number of associations that offer its member RV parks and campgrounds group purchasing power; publish magazines and newsletters for campers; provide national public relations, promotional services and advocacy for state and national issues; and host annual convention/expos.

These include: the National Association of RV Parks and Campgrounds (ARVC), Sporting Goods Manufactur-

ing Association (SGMA), Recreation Vehicle Industry Association (RVIA), Outdoor Industry Association (OIA) with its affiliated foundation the Outdoor Industry Foundation (OIF), National Association of State Park Directors, American Recreation Coalition, and the National Recreation and Park Association.

The Market

According to the Good Sam Park Network, the typical Good Sam Park camper spends on average \$2,900 a year on RV accessories. A 2002 Vermont survey found that resident campers spend on average \$3,177 per year primarily on RV- and tent-related costs, and \$600 per year on items such as stoves, coolers, lanterns and lawn chairs. A 2006 Outdoor Industry Foundation Recreation State of the Industry report showed annual durable goods expenditures not related to RVs per camping participant was about \$430. 1985 Statistics Canada estimated that 26 percent of Canadian households own camping equipment.

In 2006, 390,500 RVs were shipped, making it a \$14 billion-a-year industry. Buyers age 35-54 are the largest and fastest growing segment of RV owners.

As Boomers enter their prime buying years over the next decade, the number of RV households will outpace overall household growth. Twenty-three percent of current (2005) and former RV owners intended to purchase a RV in 2005. It is worth noting that, for many RV buyers, the interest on their RV loan is tax deductible as a second home mortgage, and the KOA study found that 50 percent of campers spend an average of 16 hours a month on the Internet.

As with any mature market, there are well-established players already in the game. The challenge for new players will be to distinguish their products, find a niche, and establish distribution and retail outlets.

The Bottom Line

One American in four participates in camping, making it the third most popular recreational activity in the U.S. The camping market represents an opportunity for manufacturers, distributors and retailers of traditional hearth, patio and barbecue products. A lucrative market does exist, witnessed by the fact that, over the past five years, outdoor industry businesses have outperformed the S&P 500.



PHOTO: ©2008 CHUCK CAMPBELL/RV IMAGE

Roughing it? Hardly. Campgrounds are going decidedly upscale.

Jim Rogers, Chief Executive Officer Kampgrounds of America (KOA)

Kampgrounds of America (KOA) is the largest private campground chain in the U.S. with more than 500 campgrounds across the country.

What is the current status of the camping, campground and recreational vehicles market?

"I have been involved in the outdoor industry for over 30 years and I have never seen it more robust."

Have you noticed any new trends?

"There is no longer any question: We do not need to be an overnight facility; we need to offer an experience that includes recreation, entertainment and more fun.

"We (the campground and hearth, patio and barbecue industries) are mutually compatible. More people are doing outdoors at home, which means more people will do outdoors when they camp. But they're basically limited to what they can put in their cars, trucks and motor homes.

"To that degree, we in the campground industry have to anticipate what we know they can't take with them. So there is a development of what we call patio sites. They provide people with a variety of expectations: a picnic table, gas-fired grill, hot tub, hammock, swings, etc."

What type of vendors do you look for when selecting appliances for your campground?

"This is an incredibly new market, and your audience has a tremendous opportunity to pursue it aggressively. I think we are on the brink of something important. Last year more RVs were sold in the U.S. than in any year in the last 30. Instead of the evolution we have seen over the last 30 years, where people might (trade up) from a tent, then a pop-up



trailer, then trailer, type-C motor home, motor coach, etc., we now have Baby Boomers going straight for a motor home, and they have high expectations for service and the facility.

"There are many campgrounds that need an industrial- or commercial-grade product similar to what hotels seek in their beds, refrigerators and hair dryers. We need products that are not being used as household items, but are being used for commercial purposes. We think the campground industry is one of those industries that is not on many people's radar. My advice is that there is tremendous potential here, and that the industry you are writing for needs to get closer to the campground industry.

"The National Association of RV Parks and Campgrounds (ARVC) represents 4,000 private campgrounds, and I bet these guys (the hearth, patio and barbecue industries) have not even knocked on their door. This past year was the first time in our history that both KOA and ARVC held their conventions together. We had 250 vendor spots at the convention; it was the biggest expo for camping ever. It was held at the convention center in Phoenix. (Dates for the 2008 conventions for ARVC and KOA have not been set at this time.)

According to the Outdoor Industry Association, campers spent over \$400 on durable goods per participant annually. What would be your advice to a company wanting to break into this new market?

"I think it's like the rental car business. If they are proactive in the camping industry they may find more people buying it when they get home. I often



ABOVE and BELOW: Class A RV.

rent a car and check it out. If you can test-drive a barbecue, a hearth, patio equipment and find that you like it, then you may wind up buying it when you get home. There is a tremendous opportunity to do some branding in these high-volume camping experiences that may last for a night or a week.

"I think there is a win-win situation, both on the wholesale and retail sides, to get products into campgrounds that are hosting the conference. We estimate there are 175 million camper nights a year, on the public and private sides. That is a huge number of hamburgers, hot dogs, s'mores and outdoor activities that have basically been ignored."

So you're recommending partnerships with campgrounds?

"What happens if you experience a Coleman lantern in a campground because it is provided for you? You go home and want one. Hotels these days have the new soft bed, the new shower head and curtains. They have a catalog in their room that offers all that stuff for sale. A wholesaler or manufacturer who comes to KOA wanting to operate through 500 campgrounds in North America, and wants to establish a partnership where we are using their products, is going to realize more sales.

"The future for this industry is huge! We have another 15-20 years of 9,000 Baby Boomers a day reaching retirement age; Baby Boomers have twice the likelihood of owning a RV, than the average American. The whole opportunity to further develop that experience is huge. For example, we are now building RVs with remote controls for TV sets that pop-up so we can watch it outside."



PHOTOS COURTESY: ©2008 KOA

Sue Bray (top), executive director and vice president of the Good Sam Club Joe Daquino (bottom), vice president and publisher of Affinity Group (AGI).

The Good Sam Club consists of more than one million families who own recreational vehicles. Members get access to information and discounts with associated businesses. Additionally, associated campgrounds get the credibility of the Good Sam trademark name. AGI is the parent company of the Good Sam Club and eight other affiliated companies serving the safety, security, comfort and convenience needs of the North American recreational vehicle market.

What is the current status of the camping, campground and recreational vehicles market?

Bray: "As far as the RVs are concerned, there are more than nine million vehicles on the road this year. Over the next 10 years the numbers are supposed to rise to 15.4 million; that's a 71 percent increase."

Daquino: "Even though gas prices are at record levels, it seems as if people are traveling at record levels and campground occupancy rates are as high as they have ever been, if not even higher. Things are looking pretty healthy as far as usage of RVs and participation at campgrounds."

Have you noticed any new trends in the camping, campground and recreational vehicles market?

Bray: "A few years ago the biggest movement was toward slide-out, where the walls slide out and expand. Another area of growth is in the tow-ables, the trailers. There is a lot of interest in what is called toy haulers – a trailer or fifth wheel with living quarters in the front part; the back part is essentially a garage."

Daquino: (In reference to tow-ables) "This is indicative of the fact that younger people are getting more and more into the market. And they're finding that RVs are useful in helping them enjoy their active lifestyle. For many years people associated RVs with an older demographic, and maybe a retired one. But perhaps that is changing."

Bray: "A lot of the RVs come equipped with a built-in barbecue; it just slides out like a drawer."

What kind of backyard products are you seeing people use at campgrounds or around their RV?

Daquino: "It runs the gamut. Basically, you buy your space, it's your little yard and people go wild with it."

Bray: "I think that RVers, for years and years, have made their outdoor campsite their own private outdoor living space. That is just the nature of RVing; you want to be outdoors. And certainly products for them to do that have improved over the years. It's not just folding chairs anymore. One trend is condos where people buy the land, the pad. You go to

some of those campgrounds and it's amazing what people are doing; it becomes almost like one-upmanship; they need to have a better campsite than their next-door neighbor. People are pouring tens of thousands of dollars into installing Jacuzzis, barbecues, wet bars ... it's everything. It gets very elaborate.

"There is one condo campground I know of, it's being built with a subterranean garage under the campsite, a small garage that is big enough for a golf cart and patio furniture so that when the RVer leaves, they have a place to leave all that stuff behind."

According to the Outdoor Industry Association campers spent over \$400 dollars on durable goods per participant annually. What would be your advice to a company wanting to break into this new market?

Daquino: "You would definitely need to develop some kind of relationship with one of our companies, because we are so dominant in the industry. Camping World (currently part of our company, and will become a sister company in the future) is the biggest marketer of the things you need if you are going to be in the RV lifestyle. It has 50 stores across the country, enormous

presence on the Internet and also in your mailbox in the form of catalogs. Our publications are, by and large, the biggest in these markets and are reaching people to a greater extent than other publications. Without sounding too self-serving, I do think it makes sense for people who want to reach (this market) to at least develop some kind of relationship with us."

Bray: "Over the years, what I have seen that works for marketing to this group is that you have to have that RV focus – targeted marketing. You could argue that, if people are buying a patio chair from a catalog, they make a connection from the house to the RV, but I'm not sure that always happens. (Marketers) should find out what RVers really want, particularly the portability factor. If I were promoting an item like that I would be promoting that it is portable, light, easy to carry and fits in an RV very easily. Just target it that way."

A growing number of upscale RV resorts and high-end campgrounds are providing creature comforts and ambiance at their campsites. How are campers bringing the comforts and ambiance of their home into the campground? And what are the campgrounds providing for them?

Daquino: "It runs the gamut and it can get pretty elaborate. I mentioned Internet access, Wi-Fi ability, landscaping and privacy at the site. A lot of parks are going out of their way to provide wider sites so you have the privacy and you have a sense that the space is yours.

"When you are at an RV campground, that space underneath your awning is your living room. The living room is not in the rig; it's outside the rig. Anything that makes that space seem more like a living room or living space... enhances the experience. That includes a grill, tables, chairs, awnings, even things like television sets."



High-End RV at the Bluffs in Freedom, NH.

camping

Terry McMullen, Director of Operations Eugene Premier RV Resorts

Premier Resorts owns four RV resorts, with locations in California, Oregon and Washington. The Eugene, Oregon, location provides 152 sites with all the latest amenities.

In addition to grills, can you tell us what other appliances (heaters, lights, generators) and furniture (chairs, tables, coverings) people are using at your campground? And how are these appliances fueled?

"We provide picnic tables at all of our sites. Chaise lounges and ergonomic chairs that can run upwards of \$150 apiece are a popular choice that our guests carry with them, as well as portable exercise equipment. I have seen treadmills and stationary bicycles that fold up and are completely portable.

"All of our sites are full hook-up. Any heaters or other appliances are either electric or propane fired. The high-end campers who are looking for a different experience slide out full stainless-steel grills with heating pads that they store in the basement of their large motor home. Grills are just like the kind you would have in the backyard – a \$1,500 grill set-up, with legs that snap in place. Most of the ones we see nowadays inside the RVs are electric. They are getting farther away from propane on the higher-end motor

coaches, but yet the (outside) grills they carry with them are still propane."

Are the pull-out grills aftermarket?

"You can get them aftermarket, but it is also a factory option. You can also get full surround sound theater systems – large screen flat TVs with great speaker systems – that pull right out of the basement.

"The basement is just like in an old Greyhound bus, where you put your baggage, down below. Those compartments have gotten larger and all the TVs, grills and theater systems just roll out like a drawer does in a kitchen. It comes out and locks into place, you use it, then snap it all down so it's portable, and it all slides back inside. It's amazing what they have down there.

"They are now offering electric and propane-fired fireplaces inside the RV. The electric fireplaces are beautiful. They set them right up front by the dashboard, which becomes the focal point of the living room. They are amaz-



This grill slides out from the "basement."

PHOTOS COURTESY: ©2008 MARATHON COACH.

ing, not only in how they look, but also in the amount of heat they put out."

How can a manufacturer of camping products access campground managers on a supplier level?

"The best way for a vendor that has something to offer for the camping/RV industry is through a periodical by the name of Campground Manager, put out by Woodalls, which is a leader in the directory industry for RV parks."

What types of home furniture and appliances are found inside the RVs that visit your campgrounds?

"They have gotten away from what I consider to be RV-style furniture and made a switch to home-style furniture with everything being full size. Whether it's full-size lounge chairs and sofas, side-by-side refrigerator/ freezers, electric range or oven, double shower with double heads and vanity bathrooms with two sinks and two mirrors."

Why do people come to private vs. public campgrounds?

"Amenities. The public parks are very basic. With the cost of a modern RV people want to use what they are buying, and they are not able to do that in the public campgrounds. It also becomes a social event. In this industry everybody wants to get to know everybody, so you give them a platform to do that, whether it is jazz shows, wine tasting or out fishing by the pond. People make lifelong friendships in this industry."



Lush interior of a Marathon Coach.

The Authors

James E. Houck and Lyrik Y. Pitzman can be reached at OMNI Environmental Services; e-mail houck@omni-test.com and pitzman@omni-environmental.com, phone (503) 643-3788. OMNI's Web site is <http://www.omni-environmental.com>.