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PARCEL PLUS MARKETING PLAN: TARGETING STUDENT MOVEHDUT'S

BY

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A research paper submitted in fulfillment of the requirements for 1 credit, UNDERGRADUATE INDEPENDENT RESEARCH PROJECT Winter Term, 1998, Professor Joseph Priester, Faculty Advisor.

Faculty Comments

Nice integration of marketing concepts with an actual case.

Signature of Faculty Supervisor

Asst Prof Marketing

Title

I. GENERAL INFORMATION

INTRODUCTION

Dayal Investments, a limited liability company, has researched and developed an exciting market opportunity to open a franchised commercial retail center that specializes in providing packaging and shipping services for items of all sizes, and also small business support services. The business will be a franchise of Parcel Plus, Incorporated.

COMPANY OVERVIEW

Description and Management Team

The franchise of Parcel Plus, Inc. is wholly owned by Dayal Investments, LLC, and operated primarily by Ms. Bharti N. Dayal, the Executive Vice President of Dayal Investments.

Mr. Dayal's primary responsibility is to ensure the firm's success through setting and overseeing the strategic direction and vision of the franchise, as well as managing the firm's financial success. With an undergraduate degree in Engineering, Mr. Dayal is in the process of obtaining a Masters in Business Administration from the University of Michigan.

Ms. Dayal will be responsible for the day-to-day operations and management of the Parcel Plus franchise. She holds a bachelor's degree in criminal justice from Auburn University and her most recent professional experience has been working as a paralegal for an Ann Arbor law firm.

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In addition to the Dayal Investments management team, Ms. J. Adaire Putnam, Parcel Plus Michigan Area Coach will be involved in the management and success of the business. Ms. Putnam has previously served as the Parcel Plus' Director of Marketing and Sales and has been involved with the corporation since October 1995.

Franchiser

Parcel Plus, Inc. is a California corporation with corporate headquarters in Annapolis, Maryland. Parcel Plus, Inc. is a premier packaging, shipping, and small business support convenience center franchiser. It began franchising operations in 1986 and now has established 130 franchises nationwide with 29 additional locations currently under development. Parcel Plus is preparing for the future of the industry by investing in research and development in order to answer questions such as, how advancing technology will change the purchasing habits of consumers, homebased businesses and commercial organizations.

Parcel Plus' national competitors include Mail Boxes, Etc., Pak Mail Centers of America, Handle with Care Packaging Store, and PostNet Postal and Business Services. Independent mail/packaging stores are also considered competitors, to a lesser degree, of the franchise since franchise affiliation has proven to be a critical component of the success of this business.

The benefits of franchise affiliation include market area and site selection, lease assistance, interior design, construction management, training, purchasing power, operating manuals/documentation, accounting procedures, and continuing operational support. In addition to all of the benefits of being a part of this national organization, the agreement with Parcel Plus will also guarantee a protected territory by the franchise of a 2.5 mile radius of the store site. This is an fa^nan, feature that some competitor ^ ^ ^ provide.

MARKET ANALYSIS

Industry Analysis

The small package shipping, post office box rental and other small business service market is growing at a rapid rate, driven primarily by the continuing national trend toward the use of "convenience" services and products. The lack of a full-service US Postal Service coupled with a boom in home-based business has created a growing demand for these type of service oriented businesses.

The primary driver for the success in this industry is superior service, added with the convenience of a strategic business location. The proper location includes demographics that match the customer profiles, a site within a 3-mile radius, and a good balance of residential and small business customers in the area.

Customer Profiles

For the packaging and shipping services of Parcel Plus, the educated, professional, affluent middle and upper classes are the primary residential users of these services. These are busy individuals who would pay for convenient, quality service. Students moving to and from colleges are also a primary customer of these services as well as commercial and small businesses that are not equipped with a full-scale logistics department.

Business services provided by Parcel Plus include services such as color and high speed copying, faxing, notarizing, and laminating. These services should provide convenience and find attractive markets with the small businesses, home-based offices, and even residential customers.

Location & Demographics

The Lamp Post Plaza, located at East Stadium Boulevard and Washtenaw Avenue in Ann Arbor, Michigan has been selected as the first site for Parcel Plus in Ann Arbor. The store site has excellent visibility due to its location and has all of the characteristics that proved important for the successes of other Parcel Plus franchises. These characteristics include a solid anchor store that draws a strong base of customers on a frequent basis, a good residential and small offices/business customer mix within a 2-3 mile radius, and a site that houses other convenience service centers. Furthermore, the University of Michigan campus is located within the 2-3 miles radius and should allow Parcel Plus to capture a significant portion of student traffic.

Competition

The Ann Arbor area has three Mail Boxes, Etc., one Handle with Care Packaging Store, and several independent postal services. The nearest competitor, location-wise, is the Handle with Care Packaging Store, which is located at S. Industrial Hwy and is very close to the University of Michigan central campus. This competitor's sole focus is the specialty item packaging and shipping business.

Another on-campus competitor is the Mail Boxes, Etc. store in the basement of the Michigan Union. Mail Boxes, Etc. competes in all major business services that Parcel Plus is involved in and should prove to be one of the toughest competitor to deal with.

MARKETING PLAN FOR PACKAGING AND MOVING SERVICES

Target Market for Packaging and Moving Services

Retail Market

This segment of the market includes residential and walk-in customers with pre-packed items to be shipped via UPS (note that UPS' upper weight limit on packages is 150 lbs). It also includes those with a need for packaging supplies. Customers of the retail packaging and shipping services offered will mainly come from middle to upper income customer. This group is the strongest contributor to the overall store traffic.

Residential/Student Move-out Market

Young professionals, University of Michigan students, single people and the elderly, living in apartments and owning a limited amount of furniture (under 1,000 lbs) are the primary targets for moving services, packaging materials, and shipping. Included in this group are young families making a local move, or either want to do the move themselves without incurring the expenses involved with a moving company.

Advertising and Promotion Plans

Our advertising and promotion strategy is to position Parcel Plus as the leading provider of small package shipping and small business support products and services. This is consistent with the franchise registered trademark of "We Do Everything First Class."
<survey results>

The franchiser makes available collateral materials, newspaper slicks, and other promotional materials. Additional emphasis will be directed toward developing a referral service between local merchants, movers, storage facilities, and freight companies.

The following media modes and vehicles should be employed both in increasing our store-name awareness within the region as well as educating our potential customers of the range of our products and services:

- RESIDENTIAL: newspaper ads coupled with promotional flyers, door hangers.
- HOME-BASED: similar to residential with added emphasis on business support services.
- STUDENT: the Michigan Daily, promotional flyers coupled with coupons (dormitories, school bulletin boards, email).

For the first 12 months, advertising and promotion expenses are estimated to be about $5,000, excluding the pre-opening marketing expenses. The total includes an annual advertising fee of 1% gross revenues, which is paid monthly to Parcel Plus, Inc. as part of the contractual agreement with the franchiser for the national marketing and advertising fund. The second year will see a small reduction in marketing expenses, but will still maintain an aggressive focus in penetrating the market.

II. TARGETING THE UNIVERSITY STUDENT-MOVE

BACKGROUND INFORMATION

At the request of Mr. Dayal, my involvement with the franchise consisted primarily of drafting the marketing plan to target the University of Michigan student-moveout market. It is to my understanding that one of major reasons for opening up the franchise in April was to capture this brief window of opportunity presented by the student traffic moving out of the Ann Arbor campus.

Method

To assist Parcel Plus in capturing its fair share of the student traffic during the moveout, I started by conducting a preliminary survey on-campus[1], assessing the target market's attitudes and feelings toward such available professional services. In doing so, I was also hoping to gain some insight into the market's possible purchasing behavior (assuming that attitudes correctly predict actions) of such services.

The results of the survey is presented in Appendix B of this paper. The survey was given out in a time span of three days across locations such as the Diag, East Quad, South Quad, Michigan Union, College of Literature, Science, & Arts lobby, Modern Language Building (MLB), Angell Hall complex, South University Street, one fraternity and one sorority.

Results & Interpretation

There are seven! things worth noticing in the preliminary survey results, assuming that toe sample was representative of the overall campus population: Firs,, although in the aggregate mere was no significant difference between males and femaJes' attitudes toward

[1] For a copy of the survey, please refer to Appendix A.

question #4 of the survey, it is interesting to point out that the male students are more likely to answer "do it myself, or "my friends will help me move" than their female counterparts. On the other hand, female students are more likely to answer the same question with "too much trouble moving" or "hire professionals". More importantly however, it is apparent that most of the seniors are more willing than their non-graduating friends to use professional services such as Parcel Plus in assisting their move. The reasons for this are two-fold and are hypothesized as follows: First, being a graduating student myself, I know that a good majority of us already have employment offers. Most the companies do offer to either pay a lumpsum fee to relocate their new hirees, or to reimburse them up to a certain amount (e.g. $3,000) to assist them of any out-of-pocket expenses.

These students then, especially those that face the reimbursement option, do not really care about the costs and would only be too happy to let professional services handle their move. Secondly, moving away from Ann Arbor for good is very different from leaving the town for a summer. Most students find it uneconomical to spend too much money on moving for the summer. As a result, they either chose not to move (if they renew their leases with their current apartments) or they could simply store away their belongings for the summer. They probably do not need all their stuff during the vacation anyway if they are going home. All these factors suggest then, that unless Parcel Plus can offer a phenomenal deal to these students (and beat out competition), it is unlikely that they will turn to PP or other professional moving services at all. They also seem to suggest that Parcel Plus should target the graduating students and/or students who are moving away permanently for its student move-out program. Looking at the current market, it also seem to coincide with the fact that more plain packaging for the purpose of storing these away services are offered than the actual transportation of belongings from one city to another.

The survey also seems to indicate that students in general probably will turn to Parcel Plus and its competitor more for other smaller services such as photocopying, faxing, binding, laminating, and small package delivery (question #5 and 6). This is especially heightened when the subjects are made to reflect on their answers and also have the opportunity to re-answer the question about which stores they think best suit their needs for these services. After taking into account different factors and prioritizing those that are really important to their decision making, over half (54.4%) of the respondents (up from 35%, "pre-reflection") included stores such as Mail Boxes, Etc. and Parcel Plus in their invoked/ consideration set. A rating that is almost four percentage points higher than their second most frequenfly mentioned choice, local bookstores such as Michigan Books and Supplies and Ulrich's, and Kinko's.

More importantly, when asked about which factors were critical *in* arriving to this conclusion, **convenience** (95.6%), **location** (91.1%), and **range of services** (75.6%) were mentioned as the top three factors. The next most important factor, price, trails behind substantially with a mere 45%. This seems to suggest that students are willing to knowingly pay a premium in exchange for convenience and a broad range of services. It also suggests that student discount programs probably will not be very influential in students' decision making IF the store is located at an inconvenient location or if the store only offers a limited menu of products and services. More studies are recommended to find the exact correlation between discounts and the top three factors in order to assess the effectiveness of such a student discount program (the store owners have expressed interest in implementing one).

It was also interesting to see that while a broad range of services is very important to our target market, the level of service is not nearly as essential (19.1%). The reason for this can be, for example, that most students prefer to do their own photocopying anyway. It is cheaper, possibly faster, and less mistakes are likely to occur because students are familiar with which pages they want to photocopy. This is not to say however, that quality of service is entirely irrelevant. As the price of a purchase increases, as in the case of point-to-point moveout services, students are also definitely more concerned about quality and level of customer support. This is almost exactly the opposite in the case of price. As the cost of a purchase increases, it is only natural that students will also be more preoccupied with price comparisons. I believe this is where the student discount program can come in useful. Instead of offering the students a flat 10% discount on all services as planned, Parcel Plus can be better off by offering discounts only on moving services.

Additionally, it is probably safe to classify student moveout services as a relatively low Motivation, Ability, and Opportunity (MAO) purchase for our target market. By this I mean our typical target consumer probably does not spend a lot of time and brain cells in selecting which "brand" to buy for this kind of service, probably does not feel too strongly about any brand (unless there has been previous unpleasant experiences with a particular store), and probably would not care nor have the time to seek out the best brand (especially those that do get reimbursed or do not have to pay at all). A good enough and not necessarily the best choice would suffice, as long as the price differential is discriminatingly great.

It is important to take into account factors such as motivation, ability, and opportunity because attitude alone often is not sufficient to predict behavior. Taking this into consideration, it can be surmised then that factors that affect any of the three components of MAO in turn affects decision making as well. It is important to realize that a high motivation (or ability or opportunity) alone will not be effective in inducing behavior either. The three components must work in conjunction and understanding how they work collectively helps improving our chance in attracting our target market. In the following section, I will briefly define each of the MAO components and discuss the factors that have an impact on each.

Motivation

So what is motivation? It is defined as "an inner force that reflects goal-directed arousal. A motivated consumer is energized, ready, and willing to engage in an activity. So how can we make a consumer motivated? Specifically, how do we make a member of our target market motivated to purchase Parcel Plus' student moveout services?

Specifically, consumers are motivated when decision making is effortful and goal-relevant, and when consumers experience felt involvement (Hoyer, 31). It is hard for consumers to experience any real "felt involvement" on commodity products such as moving services (that is why it is hard to build brand loyalty for these kinds of goods and services), however, it is possible to affect heighten motivation in a couple of ways. Two main factors that improve motivation includes high personal relevance (with own values, goals, and needs) and higher perceived risk (performance, financial, safety, social, and psychological).

In Parcel Plus' case, it is probably safe to assume that moving services is personally relevant to the extent that it is the students' goal to successfully (fast, complete, with a minimum of damages) and painlessly (not having to do it themselves) accomplish the moving ordeal from one location to another. At the same time, the perceived risks involved with moving services probably are more of performance (how effective the service is in achieving the goal), financial (budget constraints), and property safety. Defined this way then, it is possible for firms such as Parcel Plus to appeal to its target market by advertising its moving services as a good solution to the students' relocating concerns and simultaneously reducing the perceived risks through performance guarantees, discounts, and liability warranties. By making this information available to consumers, it will magnify Parcel Plus' odds in being included in its target market's consideration set.

Ability

Ability is generally defined as the extent to which consumers have the necessary resources to make the outcome happen. These resources then, are factors that affects ability. These resources can be broadly categorized as: product knowledge and experience, intelligence, money, cognitive style, age, and education.

Because of individual consumer differences in these resources, it is very difficult to create a single campaign that can communicate its product's unique selling point (USP) as equally effective to every target audience member. Fortunately, since Parcel Plus' target market has been narrowed down to students, more specifically graduating seniors and students transferring out of Ann Arbor, such variations in ability (in terms of age, money, education, and perhaps even cognitive style) have already been reduced.

It is possible to deduce then, that while Parcel Plus' advertising strategy should generate variations based on differing consumer product knowledge and experience, a unified overall message can be created to reach its target audience. Concerning product knowledge and experience, consumers can vary greatly in these about an offering. A number of studies have compared the information processing activities of consumers who have a lot of product knowledge or expertise with those who do not (Hoyer, 49). One key finding is that experts have an advantage in learning new information about an offering.

Specifically, prior experience gives consumers the <u>ability</u> to interpret new and more complex types of information. It has also been found that "experts" were also able to process information more extensively when the information was stated in terms of its aanbu.es (type of service, e,e.), whereas novices could do so only if the information was stated in terms of its benefits.

Assuming that typical university students are probably not too knowledgeable in the area of moving services, Parcel Plus then, should probably focus its marketing efforts on promoting the benefits of its services. For example, it can capitalize on its speed of delivery, extensive level of customer service, good track record in keeping its customers' belongings intact, and the ease its use (for example, "Painless moving is just a phone call away", "We will do everything for you", or "Just enjoy your trip to New York (or whatever city)".)

Opportunity

Opportunity reflects the extent to which the situation is conducive to achieving the outcome. Several factors, including time, distraction, and the amount, complexity, and repetition of information , affects opportunity. For example, time can affect the opportunity to process information, make decisions, and perform certain behaviors. Consumers under time pressure to make a decision will engage in limited information processing. Furthermore, in an advertising context, it has been found that the opportunity to process information is also limited when the message is time-compressed, when consumers cannot control the pace of message presentation (TV and radio ads), or when consumers fast-forward through the ads (video-taped programs) (Hoyer, 52).

In the case of Parcel Plus, since the recommended media vehicle is more toward the nature of printed advertising, time should not be a restricting factor on opportunity. Such is also the case for distraction as a limiting influence. However, as it is very easy for clutter to occur on printed mediums, the amount and complexity of information can be very important. As the information becomes more complex, the opportunity to process it decreases. Likewise, as behaviors become more complex, their execution requires greater ability. At the same time, too little verbal or visual information can also be damaging to the communication of the message and achievement of the advertising objective (e.g. increase awareness). It would be very hard to process such an ad even if the consumer is motivated and is equipped with the ability to do so.

Finally, it is also very important to take into account the last factor that affects opportunity. Whereas all previous factors limit consumers' opportunity to process information, repetition actually enhances opportunity. It makes sense that if consumers are repeatedly exposed to information, processing is facilitated just because of mere familiarity. Once a certain level of familiarity is achieved, the product/brand is said to have accomplished "top-of-mind" awareness. This is specially important in Parcel Plus' situation as it is positioning itself as a new entrant into a market that has not been readily exposed to its name and reputation. Once top-of-mind awareness is achieved, as in the case of Coca Cola and Xerox for the respective categories that they compete in, the chance of the brand being included in the consumer evoked set is magnified exponentially.

MAO Conclusion

Motivation, Ability, and Opportunity are all contributing factors to how effectively an advertising message will be communicated and understood in its intended way by its target audience. To maximize the effects of MAO on positive information process and subsequent decision making, Parcel Plus should first increase its target audience's opportunity to become familiar with the Parcel Plus name. To do so, Parcel Plus' advertising copy should also not be overwhelmingly cluttered yet explicit enough to carry out its intended purpose. By exposing our target market to the Parcel Plus name repeatedly, we are enhancing our opportunity to achieve top-of-mind awareness.

Secondly, the franchise will also need to take into account its potential consumers' ability to process the intended message. To facilitate information process and decision making and achieve greater advertising effectiveness, Parcel Plus should focus its marketing efforts on promoting the benefits of its services.

Finally, Parcel Plus can also increase its target market's motivation to seek out information or even employ its services by proposing its services as an excellent solution to their very real and imminent need of moving, while reducing the associated perceived risks through devices such as performance guarantees, student discounts, and property liability warranties.

COMPETITION

Based on the survey and the advertisements placed on the Michigan Daily around this time during the previous year, it is apparent Mail Boxes Etc. (MBE) is still one of Parcel Plus' biggest competitor. Due to a greater awareness (perhaps even top-of-mind) of its brand/store name, Mail Boxes Etc. was mentioned almost exclusively whenever the students are questioned about products and services that range from photocopying to furniture shipping. MBE then, competes across all major categories that Parcel Plus is intending to contest.

Other competitors in the area of parcel shipping and handling include firms such as Small-Moves Worldwide, Master Key Ministorage, National Ministorage, Corrigan, A-l Student Moving, In-Storage, Mail Shoppe, the Packaging Store, and Stowaway Self-storage. Notice that in accordance with the hypothesis that students in general prefer to store away their belongs during the summer (if not renewing their lease), there is a proliferation of storage services that competes for a share of the same market.

Furthermore, some of the smaller competitors are run by students and have special deals with certain dormitories when it comes to the student moveout. For example, it is known that one of the smaller shops has an exclusive relationship with various dormitories to take care of its traffic of students moving out for the summer. Since exclusivity ensures volume, firms such as this can drive down their prices in order to attract markets outside the dormitories. Because it is unlikely that Parcel Plus will be able to compete with these firms on the basis of price, this is yet another reason to concentrate on the market of graduating seniors or transfer students that are leaving for good in conjunction with the other previously mentioned reasons. However, it may be possible for Parcel Plus to negotiate shorter term, more flexible contracts with these dormitories as their agreements with their current suppliers come up for review. Further studies are recommended to assess the attitude of the responsible University officials on this subject matter.

Outside these smaller shops, bigger establishments such as MBE and Corrigan offer prices around the same level. However, again, it seems like MBE is the only major chain that offer the same broad range of services as Parcel Plus. This is an advantage for both stores since the day-to-day services such as photocopying, etc. can help increase the firms' awareness and establish a relationship between the franchises and their customers.

CONCLUDING THOUGHTS

- On the other hand, the target market for the smaller day-to-day services (photocopying, faxing, etc.) includes the other student groups:
  - Would pay premium for convenience, location, and broad range of services,
  - Parcel Plus and competitors ranked as number one choice when it comes to these services,
  - These services are relatively low MAO purchases,
  - Target market not too price-sensitive; student discounts on these products and services probably will not increase store traffic and revenue significantly.

- On the other hand, the most feasible target market for the student moveout program is graduating seniors or students transferring out of University of Michigan, Ann Arbor. This group has significantly different needs and considerations.
  - This group is relatively less concerned about cost and more willing to spend on hiring professionals since the move is more permanent.
- Since these customers represent sizable amount of revenue for Parcel Plus, the franchise should try to magnify its customer group's Motivation, Ability, and Opportunity in selecting Parcel Plus as the brand of choice. This can be done through steps that is summarized in the previous section's conclusion.

- MBE is the only major firm that competes in all categories with Parcel Plus. Their advantage over us currently is their level of awareness.
- Dormitories that have exclusive contracts with our smaller student-run competitors are unlikely markets for Parcel Plus for the present time. However, there is still some opportunity if Parcel Plus can negotiate contracts (maybe more flexible and shorter term contracts) with some of the dorms as their agreements with their current supplier expire.
- Outside of these firms, price level is pretty consistent->possible opportunity for a discount program.

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APPENDIX A

1) Do you live in a: (circle one)

dormitory   frat/sorority house   apartment

other(specify):_________

2) Your year in the University: (sophomore, senior, etc.) __________

3) Your gender: Male   Female

4) After the academic year comes to an end, which of the following services do you plan to use in assisting your move-out? (circle only one)

DIY, family, friends   professional services such as Mail Box Etc., Parcel Plus   not moving   not sure

5) Do you regularly require services such as photocopying, faxing, binding, laminating, package delivery, etc. during the school year?

Yes   No   Not regularly

6) Of the services described in #5, which of the following you think better suit your needs? (circle ALL that apply)

stores like MailBox Etc.   Post Office   Bookstores   OfficeMax/ Office Depot

7) Which of the following were important in arriving at your decision in #6? (circle ALL that apply)

Location[1]   Convenience   Level of Service   Price

Student Discounts   Range of Services   Other:_______________

8) Please Re-evaluate your answer to #6 (circle ALL that apply)

stores like MailBox Etc.   Post Office   Bookstores   OfficeMax/ Office Depot

Thank you for your time!

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[1] Location includes the distance from campus, other stores in the vecinity, whether the store is in a mall or not, etc.

APPENDIX B

Sample demographics

Total number of respondents: 540
Total number of male respondents: 244
Total number of female respondents: 296

Number of male respondents living in fraternities: 28 (11.5% of total male, 5.2% of all)
Number of male respondents living in apartments: 147 (60.2%, 26.7%)
Number of male respondents living with parents or other relatives: 3 (2.1%, insignificant)
Number of male respondents living in dormitories: 66 (26.2%, 12.2%)

Nmber of female respondents living in sororities: 15 (5.1% of total female, 2.8% of all)
Number of female respondents living in apartments: 178 (60.1%, 33%)
Number of female respondents living with parents or other relatives: 5 (1.7%, insignif.)
Number of female respondents living in dormitories: 98 (33.1%, 20%)

Number of freshmen respondents: 106 (19.6%)
Number of sophomore respondents: 65 (12%)
Number of third year respondents: 193 (35.7%)
Number of graduating respondents: 176 (32.7%)

Question 4: "After the academic year comes to an end, which of the following services do you plan to use in assisting your move?"

Number of "DIY's, help from family, friends": 184 (34.1%)
Number of "professional services such as Parcel Plus": 138 (26.2%)
Number of "not moving": 166 (30.1%)
Number of "not sure": 52 (9.6%)

Question 5: "Do you regularly require services such as photocopying, faxing, binding, lamination, package delivery, etc. during the school year^"

Number of "yes": 395 (73%)
Number of "no": 39 (7.4%)
Number of "not regularly": 106 (19.6%)

Question 6: "Of the services described in #5, which of the following you think better suit your needs?" (circle all that apply)

Stores like MailBox Etc.: 189 (35%)
Post Office: 236 (43.7%)
Local Bookstores (& Kinko's): 287 (53.1%)
OfficeMax/Office Depot: 226 (41.9%)

Question 7: "Which of the following were important in your decision in #6?" (circle all that apply)

Convenience: 516 (95.6%)
Location: 492 (91.1%)
Range of Services: 408 (75.6%)

Price: 243 (45%)
Student Discounts: 107 (19.8%)
Level of Service: 103 (19.1%)
Others: insignificant

Question 8: "Re-evaluate your answer to #6" (circle all that apply)

Stores like MailBox Etc.: 294 (54.4%)
Post Office: 111 (20.6%)
Local Bookstores (& Kinko's): 274 (50.7%)
OfficeMax/Office Depot: 202 (37.4%)

BIBLIOGRAPHY

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