



Door Drop Report 2024

In partnership with
HERDIFY

**JIC
MAIL**

Mail Media Metrics

**DM
A**
Data &
Marketing
Association

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/ Introduction–The DMA Print Council Door Drop Hub

Welcome to the findings of the latest annual DMA Door Drop report. This year our report is again supported by the critical insight that JICMAIL can provide. Not only can we understand the changes to the door drop volumes, but we can understand who is interacting with door drops, for how long and what actions they take as a result.

We are delighted to see that door drops form a key part of the media strategy for many brands, and whilst overall door drop volume has decreased, the number of advertisers using door drops has increased year on year. This increase can be linked to the continued refinement of door drop targeting—reputable DMA members are supporting advertisers in a more strategic and planned way—and also the rise in the use of leaflets by smaller advertisers; proving their worth for both large and smaller brands alike. Significantly, the commercial impact of door drops can be seen to increase substantially; a 21% growth in door drops prompting a purchase and a 12.5% increase in items being discussed with family and friends – simply put the attention that door drops are being given continues to be on the rise.

There have been many macro-economic events impacting overall door drop volumes (high inflation and a technical recession to name a couple) in the last eighteen months and whilst predictions for the coming twelve months can be tricky, the Bellwether report gives credence to our view that this medium will build on the increased attention consumers are paying it and continue to drive the commercial action we have seen grow over the last year. In addition, in the face of tighter regulations around the use of personal data in digital marketing, door drops can truly offer brands a legitimate and effective way to engage with new and existing customers.

The DMA Print Council Door Drop Hub

/ Sponsor's Foreword

It's not just what you put through a door that counts... It's where you put it.

How we behave and what we buy is largely influenced by those around us, both socially and geographically. While the phrase "humans are herd animals" can be used as an amusing hook on YouTube, behind the sentiment is a very serious point; the behaviours of those around us impacts our own actions and choices.

This means the more people around us that exhibit a particular behaviour, the greater chance we have of adopting this same behaviour.

In 2024, it's easy to think that all our decisions happen online, but there has been much written, from the likes of Damon Centola, that it's our real-world social networks where the strength comes from.

And home really is where the heart is.

In Rory Sutherland's book, *Transport for Humans*, it shows that more than 66% of all journeys are under five miles*. This means we spend a lot of our time in the communities we live in, making the streets, towns and boroughs some of the biggest influencers on our behaviour.

This is why we are partnering with the DMA on this Door Drop report. Herdify is a software platform used by brands and their media agencies to refine audience segmentation by harnessing behavioural science and tapping into herd mentality. In other words, we can pin-point the most influenced, primed consumers for any brand.

As a platform, we're channel agnostic and have customers using a range of addressable channels. The power of door drop is to bring a brand into the home, reinforcing the social influence that's in play, and the results we've seen from people using door drops have been spectacular.

One example being Abel and Cole seeing a 120% increase in response rates...

This might all seem a bit abstract, so let's look at an example.

Let's say you're dropping the children at school, and you ask another parent in casual conversation with a desperate reach for meal-time inspiration you ask "What are you cooking for the children's dinner?" and they respond with "I'll see what arrives in the veg delivery from Abel and Cole". Later that week, you're at a friend's house on the other side of town and see an Abel and Cole box on the doorstep, followed by, a few days later, their van driving past your in-laws. When that Abel & Cole door drop lands, you're much more likely to take an action based on the influence you've seen.

We know door drop is a great channel for accelerating social influence and helping brands grow with the wind in their sails. While the efficacy of door drops is increasing, as is the action taken by consumers, work still needs to be done to increase those actions and how they translate into sales. Ensuring the drop is happening in the right place and time, thus shining brighter in the eyes of the right people, will do a lot of the heavy lifting.

Tom Ridges
CEO, Herdify

*Source: *Transport for Humans* by Pete Dyson and Rory Sutherland (p22)

/ Acknowledgements

A special thank you to the DMA Print Council's Door Drop Hub for its expertise and support. Contributors and members of the hub include:

- **Jayne Raynsford**, Whistl (Chair)
- **Neal Dodd**, The Letterbox Consultancy
- **Christian Petersen**, Royal Mail
- **Mark Graham**, Smart Distribution Solutions
- **Richard Whyte**, Webmart

/ Seven things you should know about Door Drops

1. The **number of advertisers using Door Drops increased by 3%** in 2023 as the channel continued to evolve into a more targeted, effective and efficient advertising medium.
2. While the Door Drop channel experienced declining volume and spend in 2023, JICMAIL panel data reveals that these **declines were mainly confined to the first half of the year** – and the shockwaves resulting from industrial action in the postal sector softened as the year progressed.
3. **The commercial effectiveness of Door Drops increased in 2023.** These included the key metrics of purchases and payments made, which rose from 2.3% of items in 2022 to 2.8% in 2023.
4. Door Drops also have a ‘talkability factor’, crucial for raising brand awareness. There was a **year-on-year increase from 7.9% to 8.9% in recipients discussing items they received** with friends and family in 2023.
5. Time spent with items–JICMAIL’s attention metric–increased steadily during 2023. By Q4, time spent per item across 28 days had reached **62 seconds for the average Door Drop**.
6. Door Drops are the second best channel for **attention efficiency**, behind only 30-second TV ads. Each Door Drop item averages a Cost per Minute of £0.07.
7. Using campaign-centric data from the JICMAIL Response Rate Tracker, Door Drops across all sectors are revealed to have an average response rate of 0.6%; **ROI of £2.60**; and CPA of £201.50.

/ Door Drop Delivery Trends

Spend and Volume

In 2023, total spend on Door Drops was £171.7m, around £23m lower than the £194.9m spent in 2022.

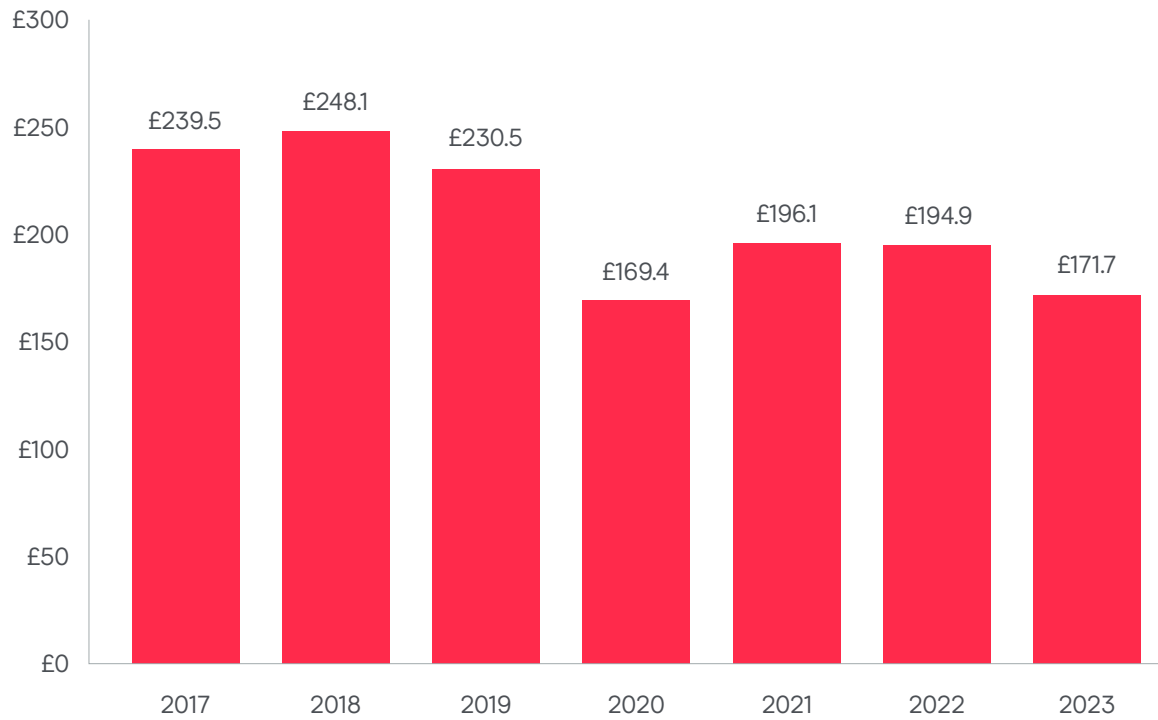
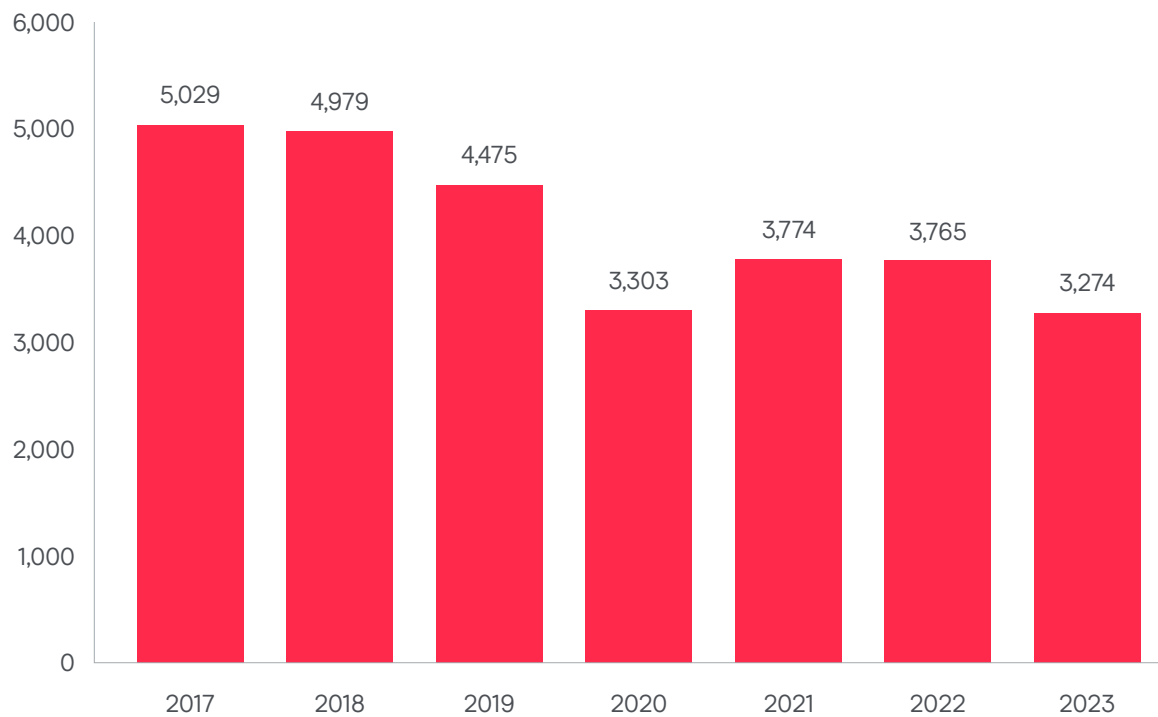
Overall volumes also decreased year-on-year. In total 3.27 billion units were delivered, around 500 million items fewer than in 2022, representing a decline of 13%.

Reduced spend and volume in the first half of 2023 could be partly attributed to the impact of higher paper and print costs along with uncertainty arising from the Royal Mail postal strikes that took place during the latter part of 2022, which caused advertisers to be less confident of delivery fulfilment during this period.

Confidence is now returning to the world of direct marketing however, reflected in an increase in overall direct marketing budgets noted in the [IPA Bellwether Report for Q1 2024](#).

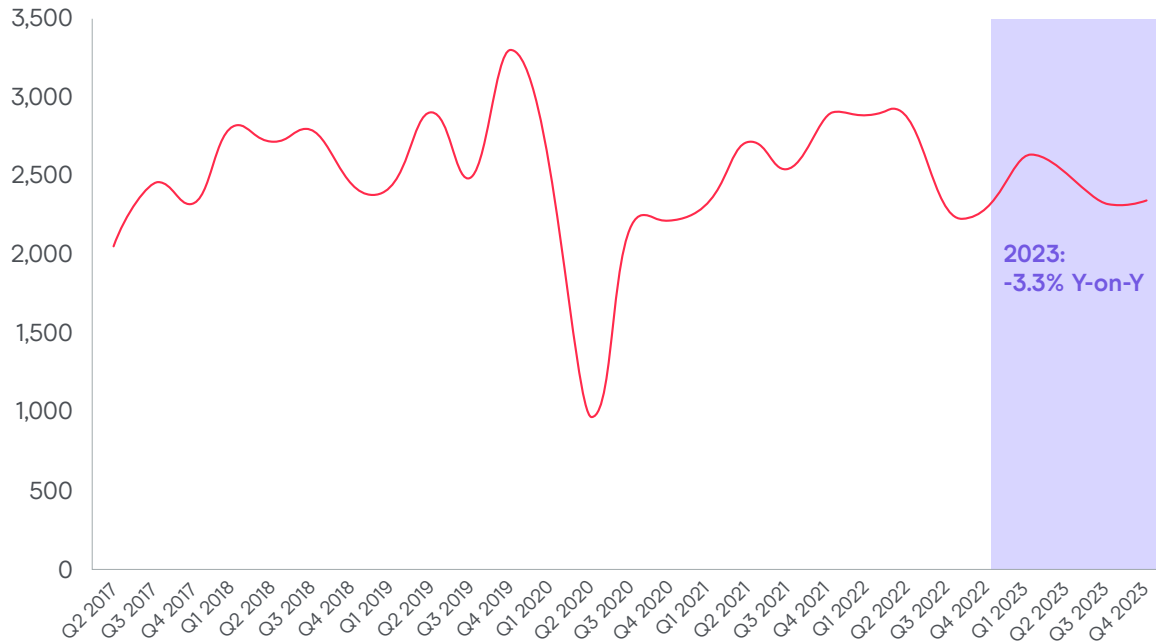
There are a number of crucial data points that also point towards increasing confidence in the Door Drop channel as 2023 progressed:

1. JICMAIL's panel of over one thousand UK households reports year-on-year growth in Door Drop volumes in the second half of 2023, revealing growing confidence following industrial action which mostly occurred in the first half of the year (see 'JICMAIL Door Drop volumes' chart overleaf).
2. The JICMAIL panel only recorded a 3.3% decline in volumes overall, compared to the 13% drop noted in submissions to this report. With a panel of over 1,000 households, JICMAIL represents a top-slice of Door Drop activity from larger UK advertisers. This potentially points towards larger advertisers being more likely to have held their nerve in terms of activity; and/or secondly that smaller advertisers seeking to conserve budget are using more local Door Drop distributors of the type not directly making a submission to this report through DMA membership.
3. The Door Drop channel is evolving into a more data-driven targeted medium compared to the 'spray and pray', high-volume medium it was widely regarded as a few years ago. Data from the JICMAIL panel reveals the number of advertisers using the channel overall has increased by 3%, from 3,054 in 2022 to 3,155 in 2023. The Door Drop channel is fast evolving in to the type of acquisition channel that gives marketers the accountability, effectiveness, data-driven creative and targeting solutions they need from an advertising channel in a post-third party cookie world.

Door Drops Yearly Expenditure (millions of pounds)**Door Drops Yearly Volumes (millions of units)**

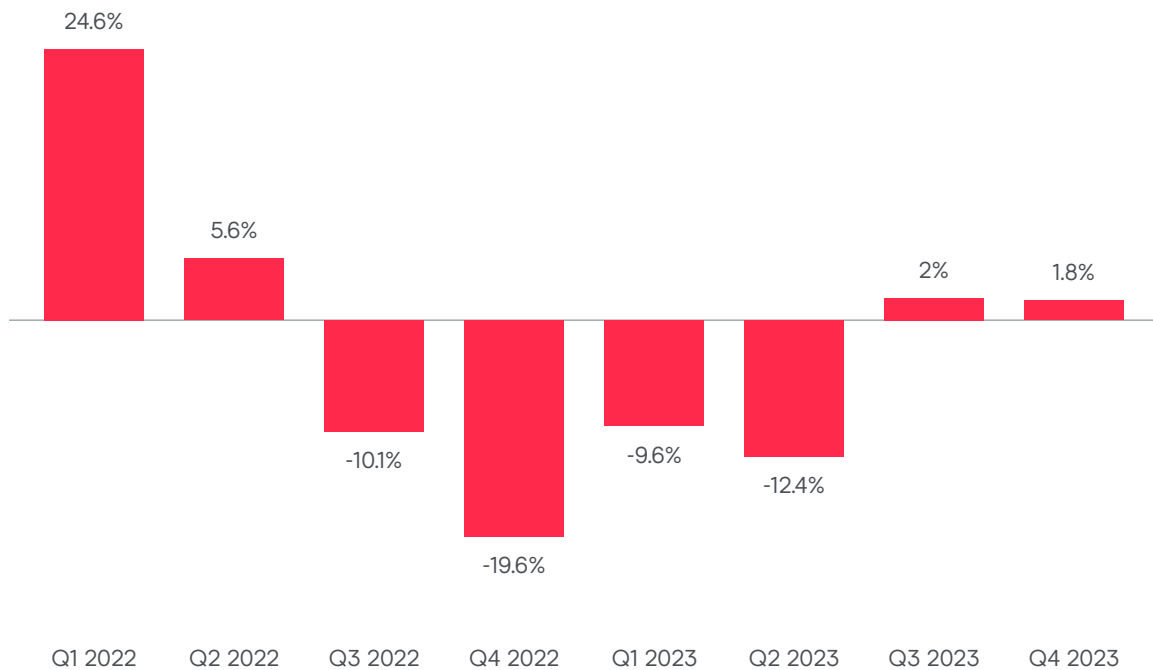
JICMAIL's nationally representative panel of over 1,000 households reveals just a 3.3% decline in panelist door drop volumes overall. Across the last two years, year-on-year volume declines have almost been perfectly aligned to periods of industrial action. With resolution on that front reached in mid-2023, modest growth once again returned to the medium in Q3 and Q4 2023.

JICMAIL Door Drop Volumes (Q2 2017 to Q4 2023)



Source: JICMAIL Item Data Q2 2017 – Q4 2023 Door Drops = 67,241 items

JICMAIL Door Drop Volumes Year-on-Year Change (Q1 2022 to Q4 2023)



Source: JICMAIL Item Data Q2 2017 – Q4 2023 Door Drops = 67,241 items

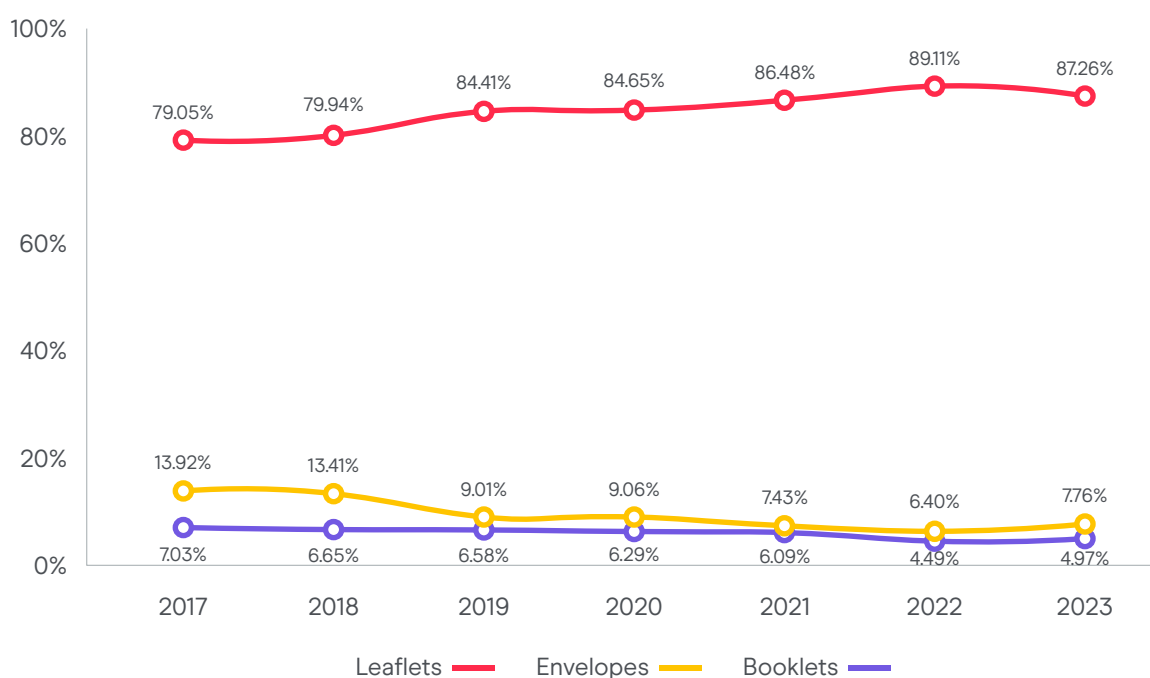
Total Material

Year-on-year total material data for leaflets indicates a reverse to the trend of previous years, during which the figure had steadily increased. In 2023, the share of leaflets dropped from 89% to 87%.

In counterpoint, there was a slight year-on-year increase in share for both envelopes—from 6.4% in 2022 to 7.8% in 2023—and booklets, the latter rising from 4.4% in 2022 to 5.0% in 2023.

The UK print industry experienced oversupply and low demand for both printing and paper during 2023. The resulting price reductions have potentially driven this marginal shift to weightier formats. While demand remained comparatively low in the final quarter, some print prices in the UK fell below those on mainland Europe, suggesting Door Drop advertisers would have renewed access to cost-effective printing.

Percentages of Door Drop material by category envelope



Share of Doormat (Sectors)

The chart below provides a perspective on the key advertiser sectors that were responsible for Door Drop volumes in 2023. Overall JICMAIL panel volumes for the year are plotted on the vertical axis, and year-on-year growth on the horizontal axis. A similar amount of sectors saw volumes increase as they did decrease in 2023.

The greatest decrease in share happened among restaurant/takeaway businesses. With a drop of around 20% in share year-on-year, the figure for this category was 10 percentage points higher than it was for supermarkets, which accounted for 10% share of Door Drops, while experiencing a 15% fall in volumes across the year.

Mirroring the overall decline in Door Drop volumes described earlier, the growth in volumes in some sectors—most notably tradespeople, financial, government/local authority and retail—wasn't enough to offset declines in other sectors such as mail order, property, medical and telecoms.

Despite this, the charts confirm that Door Drops are still used by a broad spectrum of sectors. This indicates the channel continues to offer efficiency, effectiveness and flexibility, regardless

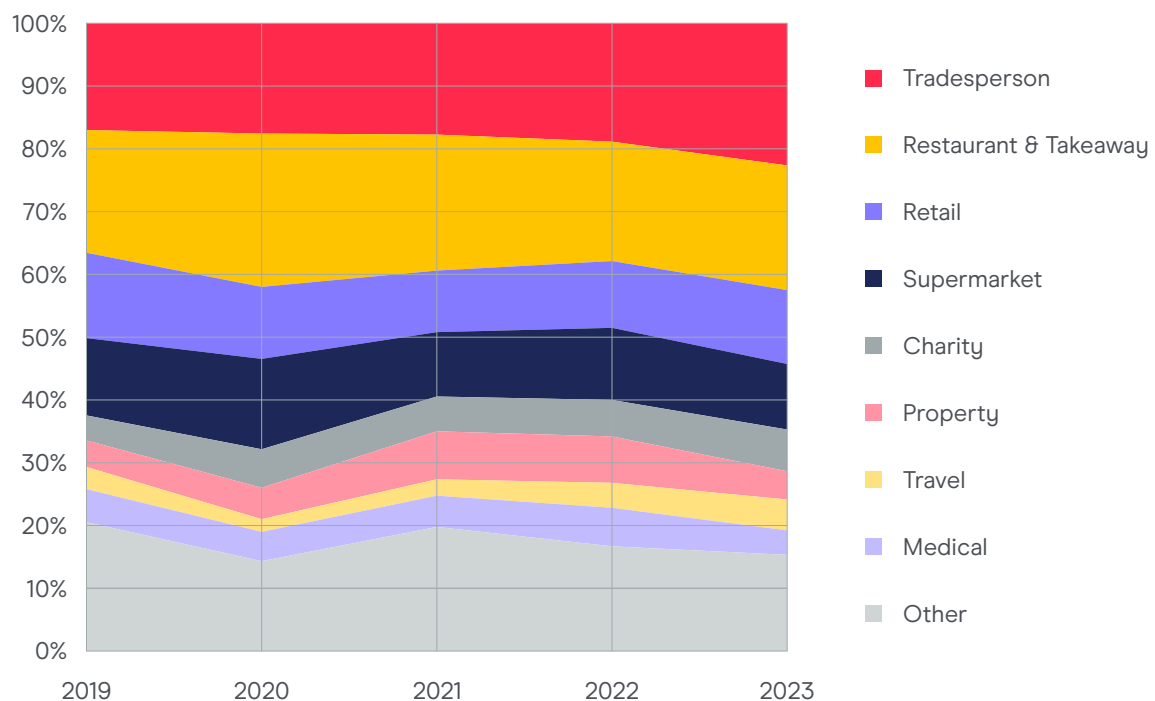
of advertiser industry. Arguably those sectors who have seen their volumes reduce are more representative of an outdated use of the channel, whereas those who have increased volumes have taken advantage of the rich targeting and creative capabilities now on offer.

Door Drop advertiser sector growth (2023)



Source: JICMAIL Item Data Q1 2022 – Q4 2023 Door Drops = 20,163 items

Advertiser Sector Share of Door Drop Panel Volumes



Source: JICMAIL Item Data Q1 2019 to Q4 2023 Door Drops = 49,628 items

/ Door Drop Effectiveness Trends

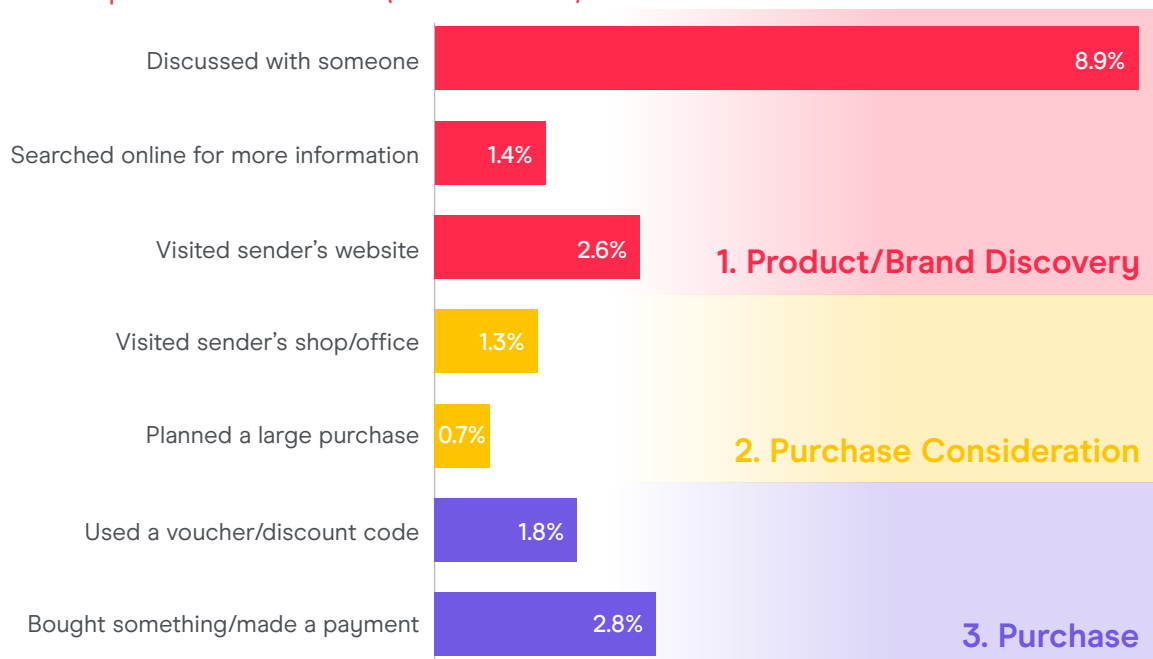
Commercial actions taken by consumers after receiving Door Drops paint an encouraging picture. The proportion of Door Drops prompting a purchase rose from 2.3% in 2022 to 2.8% in 2023.

In addition, 1.8% of Door Drops prompted the usage of a voucher, increasing from 1.4% year-on-year. Discounts have been redeemed in large volumes during the cost-of-living crisis, as highlighted by the [DMA Customer Engagement Report 2024](#). Businesses looking to meet their quarterly targets in difficult economic circumstances have increasingly leant on price promotions and discounts – a tactic in which the Door Drop channel is well versed.

The DMA's recent [Value of Measurement](#) report highlights that performance marketing effectiveness declined for three years running in 2023 in the face of constrained consumer budgets and sub-standard measurement best practice in the performance marketing space. Against this backdrop, the Door Drop channel has moved in the opposite direction with growing impact year on year. The same report highlights that the ad mail channel of which Door Drops are part, is the highest indexing channel for measurement best practice – providing advertisers the accountability they need when budgets are under more pressure than ever.

Door Drops can also have a positive effect on brand discovery and awareness. There has been a year-on-year increase from 7.9% to 8.9% in the amount of Door Drop subject matter discussed with family and friends. Moreover, purchase consideration metrics have increased slightly. Advertiser website visits driven by Door Drops rose to 2.6%, while the figure going in-store as a result rose from 1.1% to 1.3%.

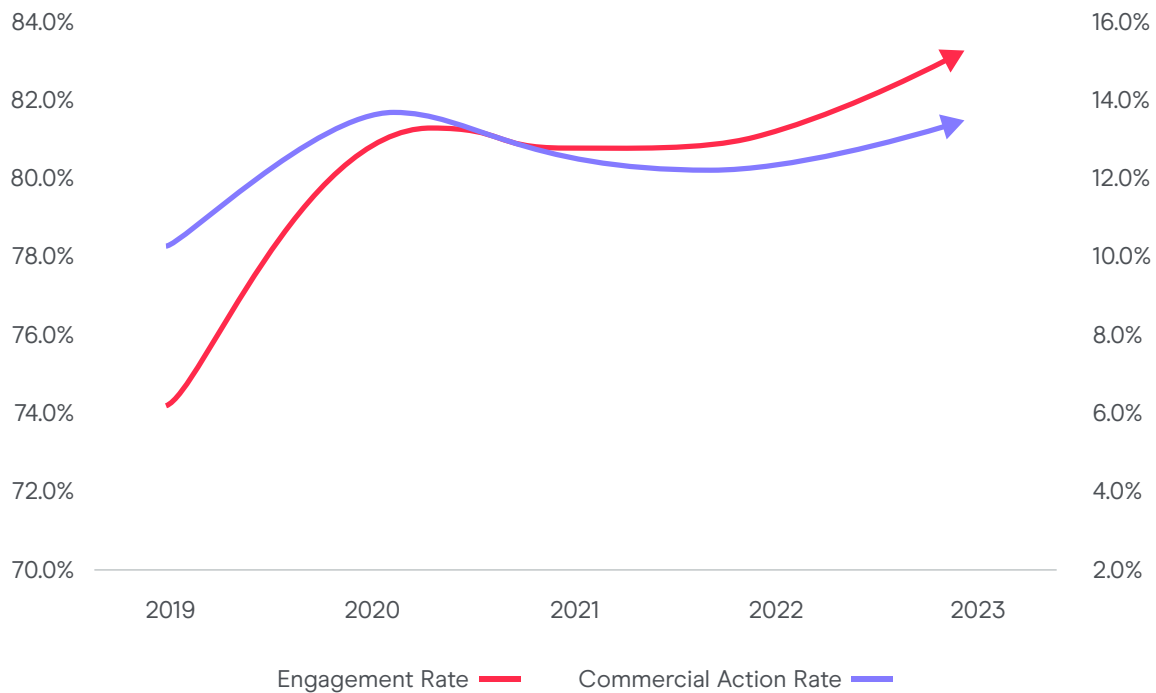
Door Drop Commercial Actions (% of mail items)



Source: JICMAIL Item Data Q1 2023 – Q4 2023 Door Drops = 9,808 items

Overall, the results strengthen the case that the channel is evolving positively to deliver higher levels of commercial actions throughout the funnel. The chart below offers further evidence. It shows that both engagement and commercial actions rates are increasing. Engagement is defined as the proportion of Door Drops having any sort of physical action taken other than being immediately discarded. Effectiveness relates to the proportion that drive some sort of commercial outcome for advertisers. Both metrics are on a long term upward trend.

Door Drop Engagement vs Effectiveness

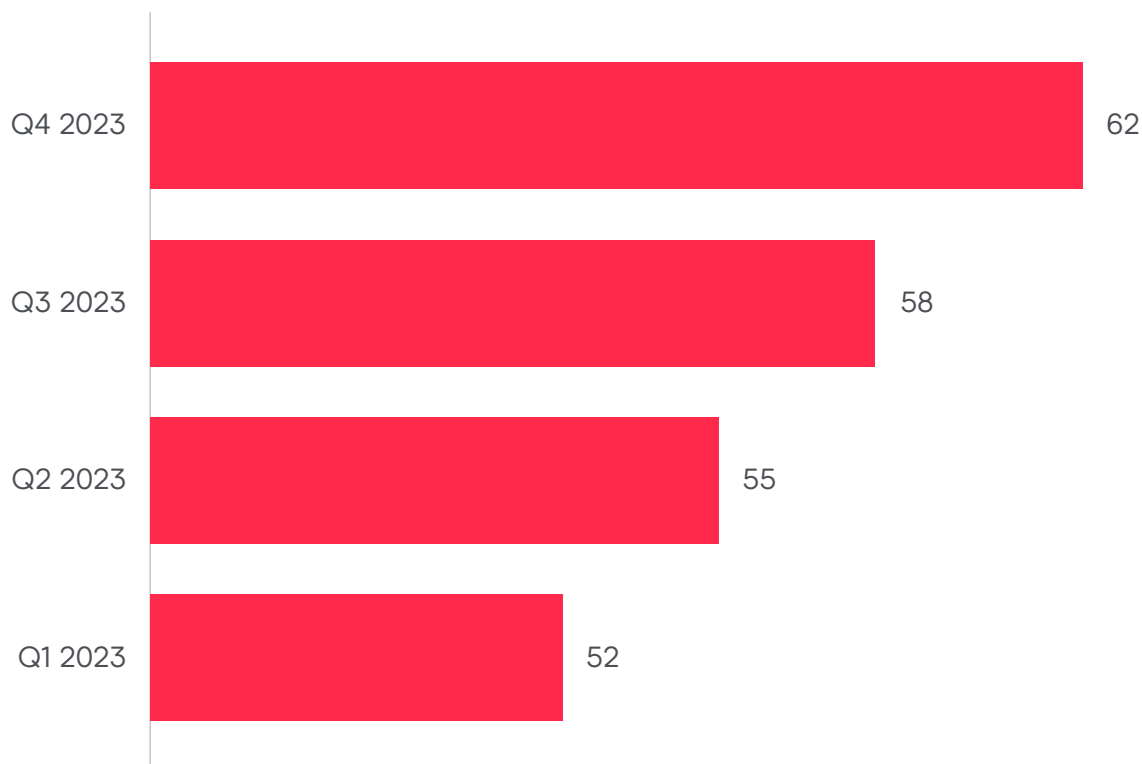


Source: JICMAIL Item Data Q1 2019 to Q4 2023 Door Drops = 49,628 items

For the second year running this report includes the results of JICMAIL's ongoing mail attention measurement, which quantifies the amount of time consumers spend looking at mail.

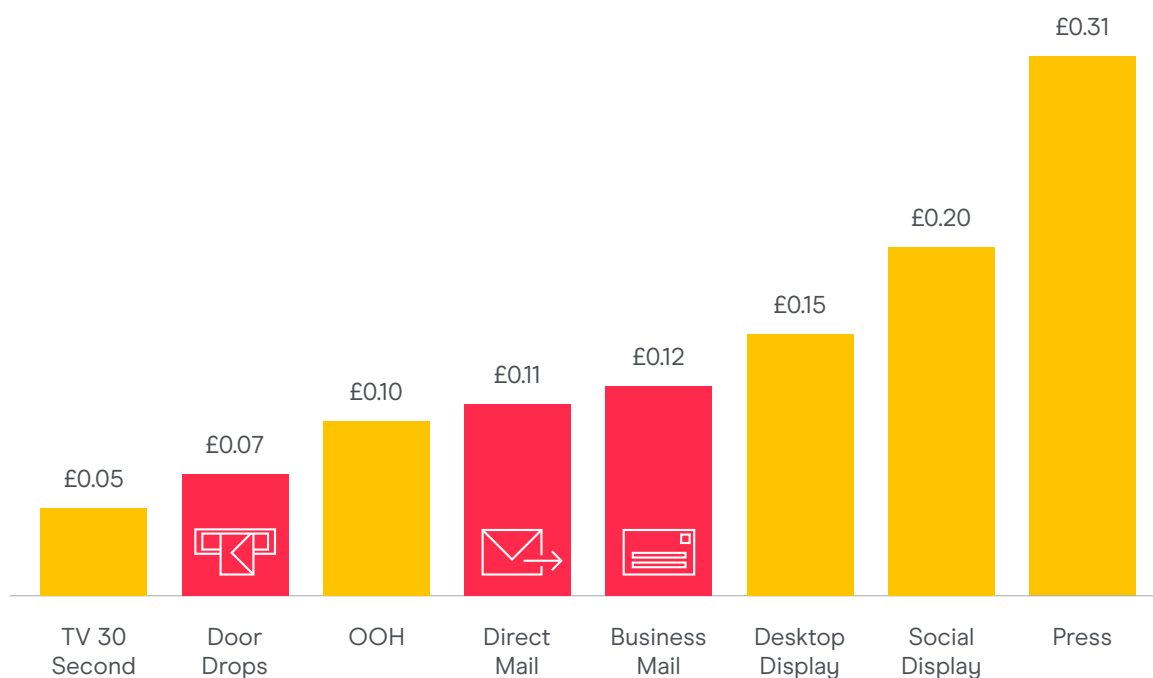
As part of the research, JICMAIL panelists are asked to record how long they spend reading a piece of mail they receive. Every time they interact, they estimate the amount of time the interaction lasted. In a methodology vetted by PWC, the research also provides a cost-efficiency metric: the cost of generating a minute's-worth of attention. This is recorded not just for Door Drops and mail but across other channels too using industry ad rates and publicly available attention data.

The data for Q4 2023 reveals consumers on average spent just over one minute reading a Door Drop. Encouragingly, this figure steadily increased throughout 2023.

Door Drop Attention: seconds spent per item across 28 days

Source: JICMAIL Item Data Q1 2023 – Q4 2023 Door Drops = 9,808 items

In terms of attention efficiency Door Drops are ranked second on £0.07. Door Drops are behind only 30-second TV ads and well ahead of the rest of the media channels.

Door Drop Attention Efficiency: Cost per Minute of Attention as of Q1 2024 (ABC1 Adults)

Source: JICMAIL Item Data Q1 2024; Lumen; TVision; 7Stars 2023 CPM data. Note: Attention is measured using an eye-tracking methodology for all channels apart from mail. Mail attention is a claimed metric measured using the JICMAIL diary survey and verified by observed video analytics data. Viewability and % Viewed metrics have not been taken into account as standard across this analysis. OOH data based on roadside only.

Door Drop Response Rate Tracker Benchmarks 2023

0.6%

Response Rate

£2.60

ROI

£201.5

CPA

Source: JICMAIL Response Rate Tracker 2023, n=250 Door Drop campaigns

Campaign-centric Door Drop performance benchmarks have been published by JICMAIL for the first time in 2024. The JICMAIL Response Rate Tracker contains aggregated anonymous campaign level data gathered from 250 Door Drop by organisations spanning sell-side businesses, agencies, data and technology partners. With an average response rate of 0.6% and ROI of £2.6, Door Drops are a vital mail channel for customer acquisition and are being used to good effect by advertiser sectors ranging from telecoms, retail / online retail, mail order, charities, to gambling, magazine publishing and letting / estate agents.

The Response Rate Tracker benchmark data above can be contextualised with the results of Thinkbox's Profit Ability 2 study. While the numbers aren't directly comparable with JICMAIL data, there is clear evidence to show that Door Drops are as effective as any other channel in driving profitable campaign response.

While warm marketing campaigns will hit maximum reach relatively quickly—since advertisers can only target a finite amount of their own customers – Door Drops are an acquisition channel which can be used to reach the vast majority of the population. The medium therefore offers high ROI and high reach.

Bountiful Cow's study 'Relative Advantage' highlights that competitive advantage can be gained by advertisers using channels with a guaranteed mass audience; where the medium is effective; and where it's possible to reach consumers through a channel that their rivals potentially overlook. All of these factors are to a greater or lesser extent, true of Door Drops.

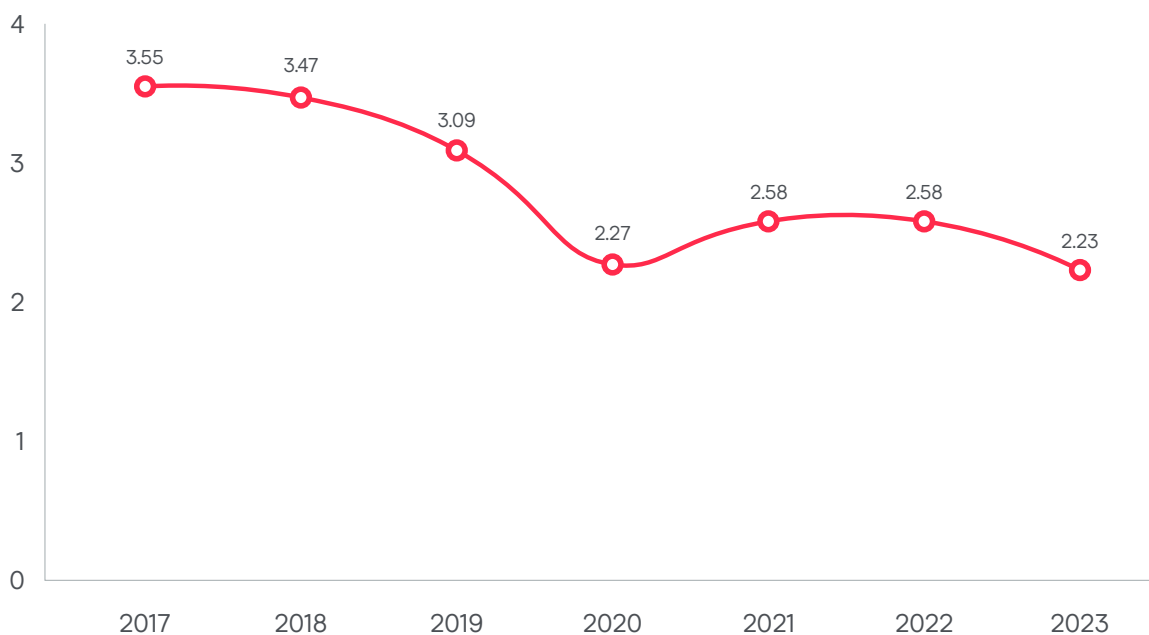
This appears to be the moment for advertisers to explore the hidden opportunities of the channel.

/ Door Drops in the Home

The DMA's estimate for the number of Door Drops per household is calculated using data from the Office for National Statistics (ONS). As of 2023, the ONS estimates there were 28.4 million UK households. (While the Royal Mail number is significantly higher, for the purposes of year-on-year comparisons the ONS figure has been used.)

Volume Received

Door Drops received (units per household per week)

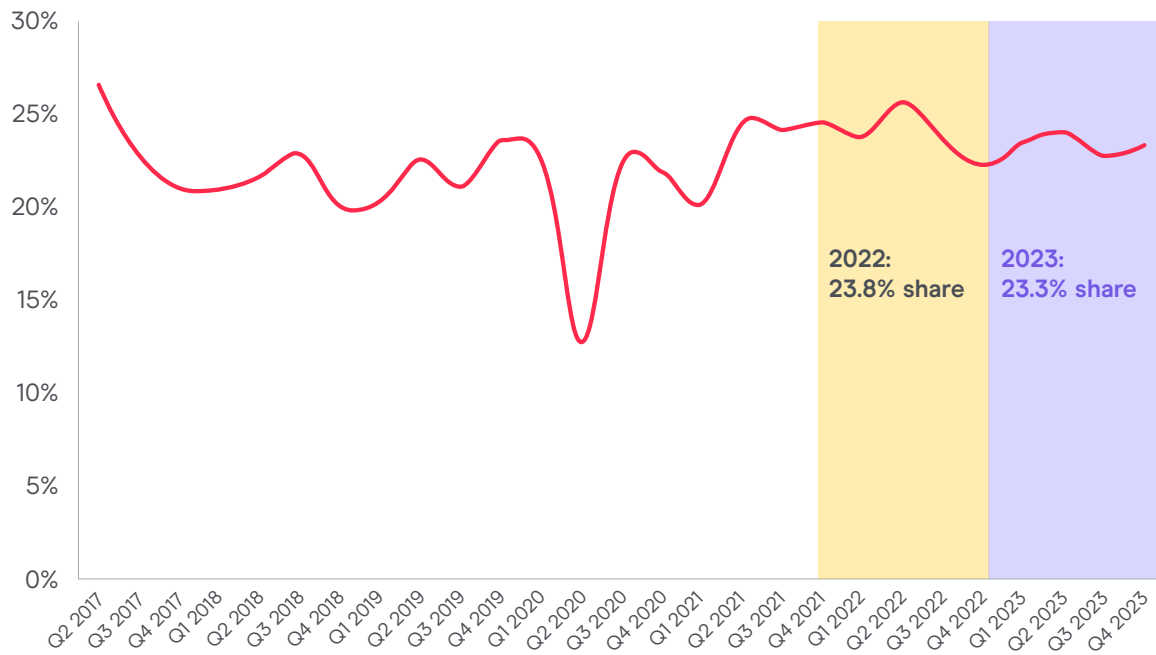


Through JICMAIL and in lieu of Census-level data relating to mail circulation, it is possible to make data-driven observations about the state of Door Drop volumes within the mail channel. While JICMAIL was primarily set up to provide a quarterly measure of consumer mail engagement and mail effectiveness the robust, nationally representative nature of the panel means that panel volume trends should mirror the circulation picture nationally.

As might be expected given the overall decrease in Door Drop volumes described earlier, the amount of items received per household declined year-on-year, to an average of 2.23 per week. That figure is now comparable to the volume recorded for 2020, with mail volumes having risen then plateaued during the intervening years. However, this should not detract from the view made more widely in this report that the channel is now being harnessed by some advertisers—often to great effect—in a way that differs from how they used it in the past.

Door Drop share of mail volumes remained virtually stable at 23.3% in 2023.

JICMAIL Door Drop share of mail volumes (Q2 2017 to Q4 2023)



Source: JICMAIL Item Data Q2 2017 – Q4 2023 Door Drops = 67,241 items

Door Drop Consumer Engagement

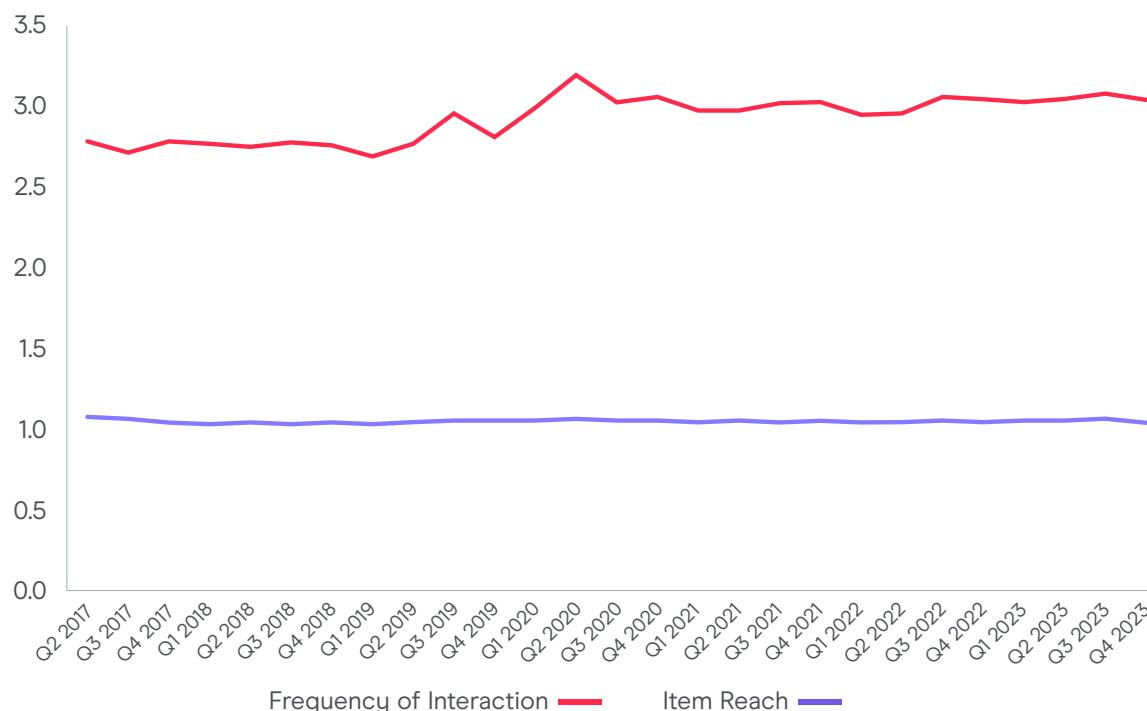
Tracking consumer engagement with Door Drops gives the industry a benchmark it can use to make credible and robust cases for inclusion on advertiser media plans.

Every time a Door Drop is shared in a household, it contributes to a calculation that equates numbers of items delivered to numbers of eyeballs on ads.

And on each occasion a Door Drop is interacted with—read, looked or glanced at, put aside to review later or placed with other items in ‘the usual place’—it contributes to a measure of frequency of exposure. In turn, this metric is used to calculate Door Drop campaign impression delivery.

Usually credited to above-the-line channels, the delivery of ad impressions enables marketers to quantify total exposure to advertising messages. It is a vital measure in brand campaign planning. It allows the Door Drop channel to be evaluated with equal weighting to other channels on the media plan, while amplifying the role the mail channel has beyond delivering direct response KPIs.

Door Drop item reach and frequency Q2 2017 to Q4 2023



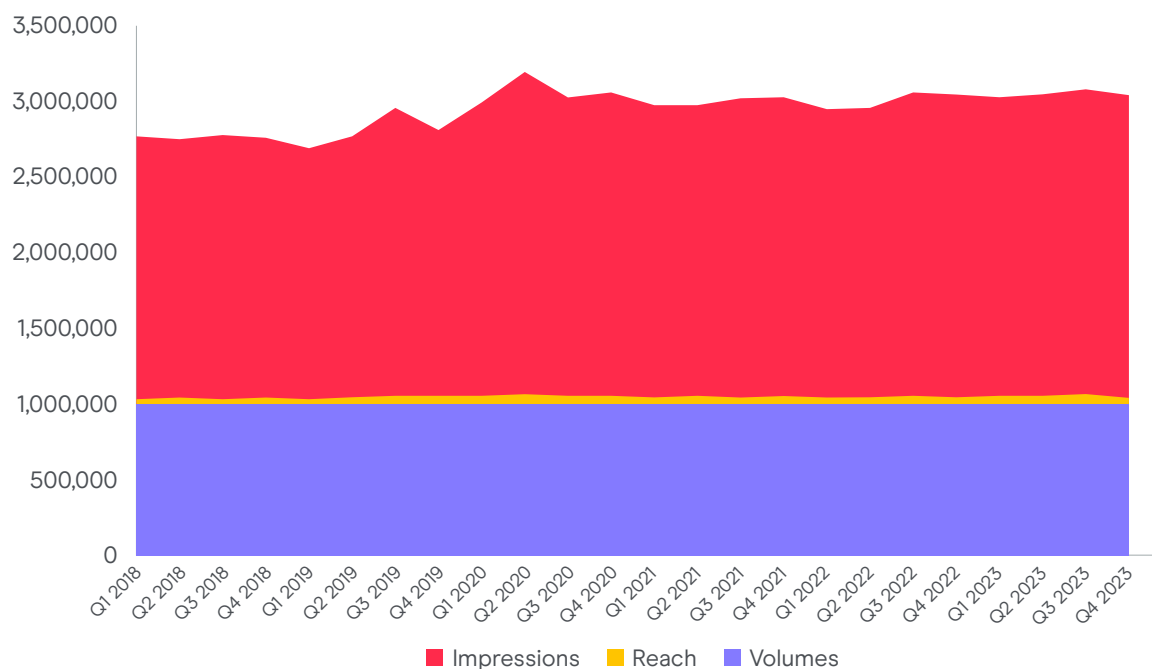
Source: JICMAIL Item Data Q2 2017 – Q4 2023 Door Drops = 65,567 items

As of Q4 2023, the average Door Drop was shared with 1.05 people per household (a metric referred to as Item Reach), reflecting an additional 5% audience reach on top of campaign volumes. In addition, the average person in the UK interacts with each Door Drop 3.05 times a month. Together, these calculations allow us to quantify the numbers of eyeballs on ads (so in the example above, 1 million Door Drops will reach 1.05 million people), while quantifying the numbers of impressions generated by a campaign (in this case 1.05 million people interact with the average Door Drop 3.05 times each, resulting in 3.05 million impacts or impressions being generated).

As the chart below shows, layering ad impression delivery and audience reach on top of campaign volumes provides a different perspective on the quantity of ad exposure that advertisers are generating in-market by using Door Drops.

Despite volume challenges in the first half of 2023, consumer engagement with the channel remained strong and those advertisers who retained their confidence benefitted from high impression delivery alongside the previously reported uplift in effectiveness.

Door Drop reach and impression delivery



Source: JICMAIL Item Data Q2 2017 – Q4 2023 Door Drops = 65,567 items

Frequency of Interaction by Audience

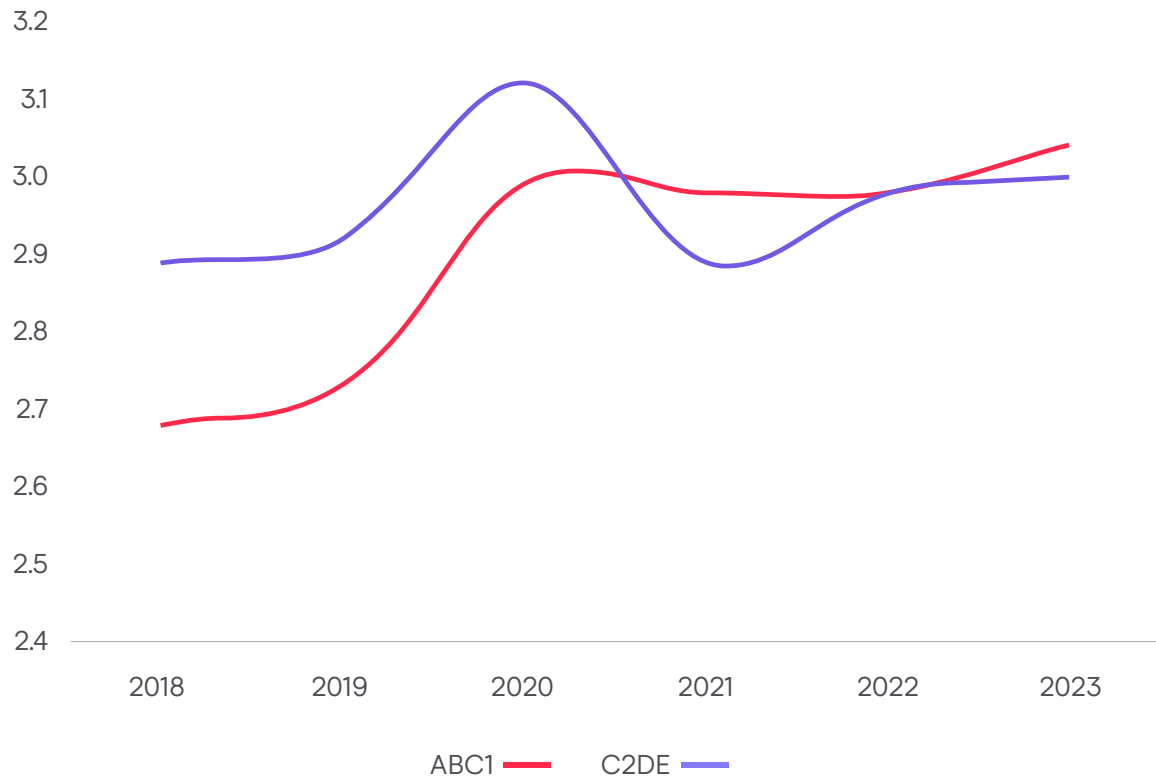
We can interrogate JICMAIL audience and household profile data to understand the source of increased impression delivery efficiency. Simultaneously the data provides a chance to consider future audiences that will be receptive to Door Drops.

With regard to frequency of interaction by household social grade, there is a clear trend towards ABC1 households interacting more frequently with Door Drops. This group moved ahead of C2DE in 2022, and the gap for this measure widened during 2023.

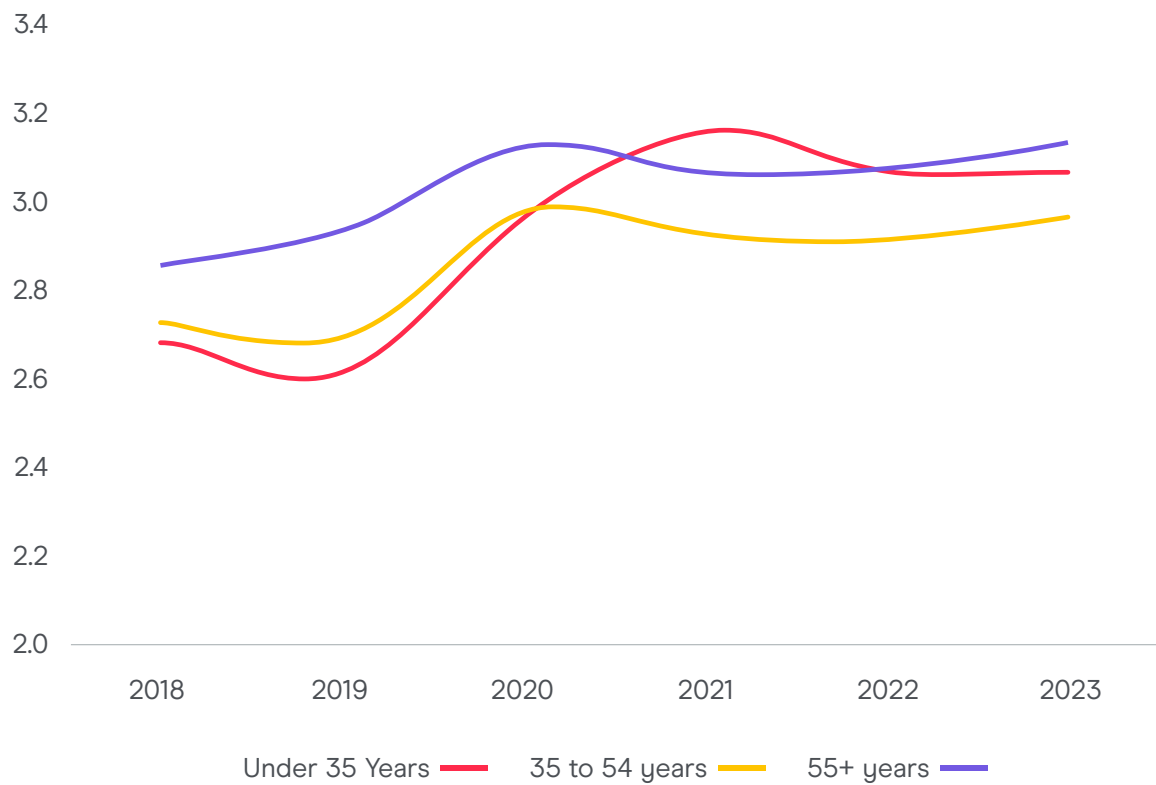
It's also interesting to note there is a long term upward trend for Door Drops to be increasingly read by under-35s – a typically valuable and hard-to-reach audience for advertisers.

The fact remains, if advertisers are successful with targeting and messaging, Door Drops are an effective way to engage all audiences regardless of age.

Door Drop frequency by household social grade

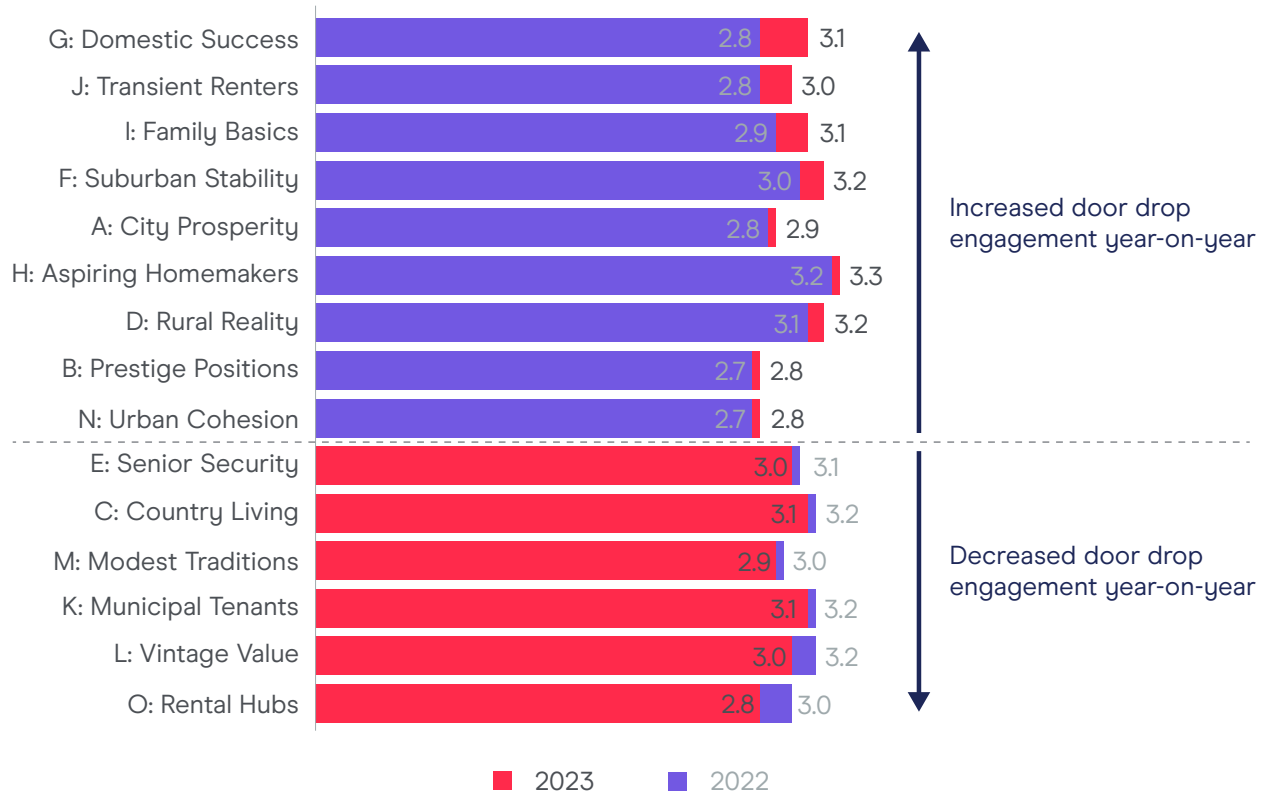


Door Drop frequency by household co-ordinator age



Geo-demographic segmentations are vital tools in the targeting of Door Drop campaigns and it is possible to visualise both ACORN and MOSAIC audience segmentations on JICMAIL's panel data. Nine of the 15 MOSAIC segments featured here recorded an uplift in Door Drop engagement / interaction rates in 2023, while the rest reported a decline. Aspirational audiences such as Domestic Success drove the increase in year-on-year engagement, but they were also joined by a rise in the Transient Renters segment, among other groups. The most positive aspect of this analysis is the ability of the Door Drop medium to be effective across diverse socio-economic groups, making the channel attractive to brands active in various industries.

Door Drop frequency by MOSAIC group

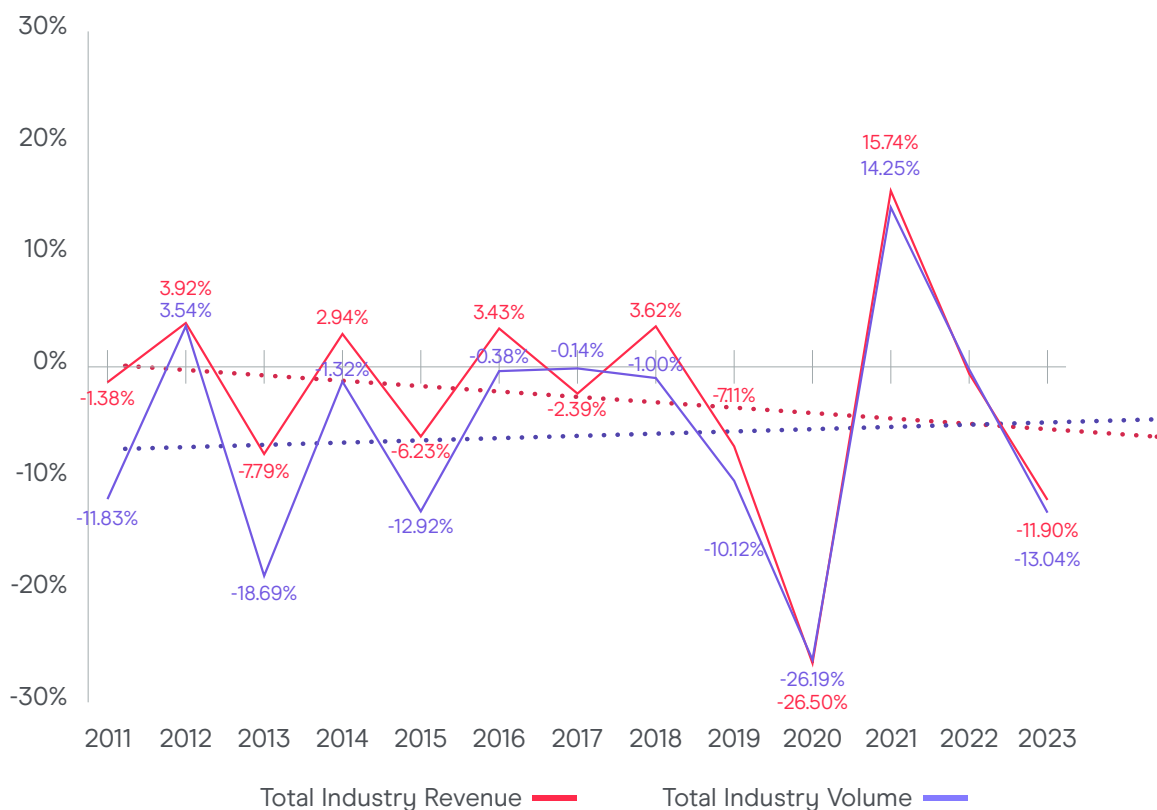


/ Door Drops in Context

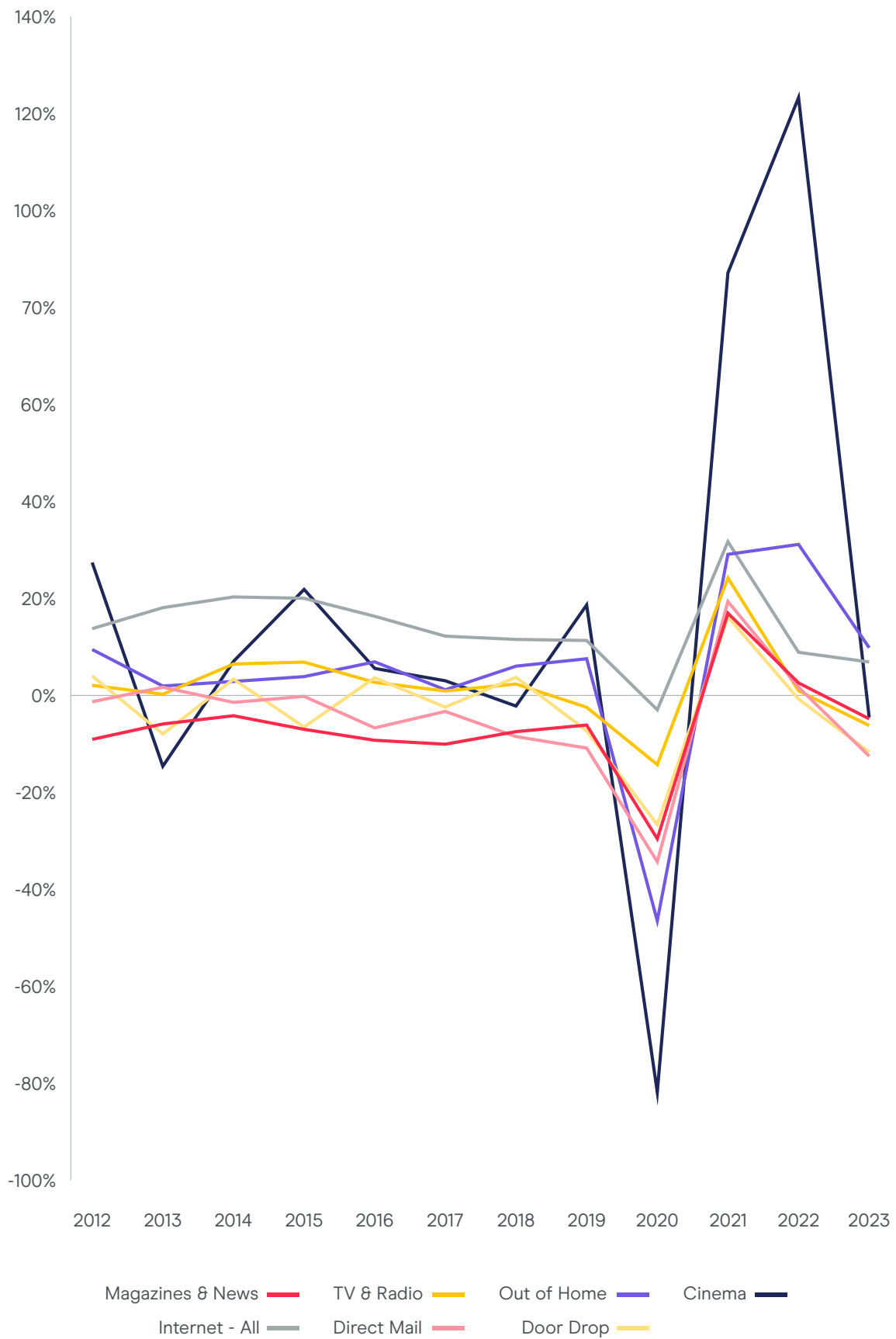
Reviewing historic data used for DMA reports each year, it has clearly been a challenging period for Door Drops, at least with regard to budgets and volumes. The first chart below shows a downward trend in revenues continuing during 2023. The second chart below highlights reduced spend in most other channels too.

However, this is not the full story. As the [IPA Bellwether Report Q1 2024](#) shows, direct marketing budgets overall are strong and further bounce-back is expected during the next 12 months.

Change in year-on-year expenditure and volume



Change in year-on-year expenditure of Door Drops and other media



/ Methodology

DMA Data

This research seeks to estimate the size of the UK market in terms of volume and expenditure from advertisers who, directly or indirectly, fund the distribution of pre-printed communications material on a commercial basis. This includes leaflets, catalogues, newsletters and product samples for commercial organisations, local authorities, charities and central government, as well as locally sourced directories.

The survey specifically excludes volumes and distribution expenditure for:

- Local free weekly newspapers (the actual host newspaper)
- Items inserted mechanically into paid or free publications
- National directories, where these are effectively publications with advertising space sold by the media owner (e.g., Phonebooks, Local Directories)

The above categories measure their own advertising revenue separately and have control over their own recycling and waste control arrangements, liaising directly with Defra.

Volume and expenditure data were kindly provided by anonymous contributors. The analysis was carried out in-house by the DMA's Insight department. The sample covers major door drop companies operating in the UK. This information was collected between February and April 2022 and the data corresponds to January to December 2021. All the information collected is confidential and only aggregates are published in this report.

There were several providers – including one significant provider – that had contributed data for this report from 2009 to 2014 that did not take part in this year's edition. To estimate an industry total for 2023 previous contributions were used to calculate an up-weighting factor.

This report was compiled by the DMA's Insight, with comments and input from members of the DMA Print Council's Door Drop Hub.

JICMAIL Data

JICMAIL is the independent media planning currency representing the mail industry. JICMAIL is based on an ongoing study by Kantar TNS which overcomes a number of inherent challenges in the recording of mail exposure. Mail is a directly addressable medium. Unlike TV or print, there is no other reason to interact with mail other than to interact with mail. Simply asking people how often they are exposed to mail fails to capture the full picture.

These challenges present methodological opportunities for JICMAIL. A rotating panel of over 1000 households a month completes a diary-based app in which they capture an image of every mail item they receive in a week, record what type of mail it is and who sent it, and then record exactly what they did with the item both immediately and over a 28 day period. A household co-ordinator (who's responsibility it is to collect, sort and distribute the post) records all mail activity for all household members.

The list of physical interactions that can be recorded for mail items includes opening, reading, filing away and throwing away amongst many others. This rich picture of how mail is interacted with contributes to a calculation of frequency of exposure – a figure which, along with reach, can be analysed for multiple mail types and audiences. In addition, twelve commercial actions (i.e., effectiveness metrics) are also captured for mail.

JICMAIL accreditation and access is open to the entire mail ecosystem. Find out more here:

<https://www.jicmail.org.uk/training/accreditation/>

/ About the DMA

The DMA is the UK's trade association for the data and marketing industry. Our vision is a data and marketing industry where every organisation takes a 'customer-first' approach.

As the voice of the data and marketing industry, our responsibility is to prove the responsible and innovative use of data in marketing drives business growth. We set the standards for the good of marketers, and most importantly, customers.

We empower marketers to drive growth and prove the value of data through public affairs, resources, learning, and talent.

With over 700 organisations, the DMA is the UK's largest community made up of 27,000+ marketers.

www.dma.org.uk

/ About JICMAIL

JICMAIL provides essential data for the whole of the mail industry to help plan, pitch and evaluate the effects of using the mail channel.

Like all joint industry currencies, JICMAIL has board representatives from both the buy side and sell side of the channel, including: Royal Mail Market Reach, Whistl. ISBA, The IPA and The DMA.

Under the new JICMAIL levy, access to the data carries no cost. To access the data you need to sign a Standard Licence Agreement, available from the team at JICMAIL. Once signed and returned, you will be provided access along with training and support.

JICMAIL data use is through JICMAIL Discovery or using channel planning software. If you wish to conduct your own analysis on the quarterly release data, you can receive the data in whatever data format you prefer (e.g. SPSS/Excel/CSV etc).

All JICMAIL subscribers are required to be accredited by JICMAIL. This means signing the Data Agreement and agreeing a simple Adoption Plan.

www.jicmail.org.uk

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