



**Identifiably Irish**  
Ireland's Domain Registry

# IE Digital Health Index





# Foreword



Welcome to the IE Domain Registry's (IEDR) first IE Digital Health Index. The objective of the IE Digital Health Index is to provide a comprehensive analysis of the quantity and quality of digital assets owned by Irish SMEs. The IE Digital Health Index explores three waves of research undertaken over the period May 2014 to September 2015. We believe that the publication of our first Index is timely, not least because many businesses across Ireland are now in the midst of the busiest trading period of the year, with Christmas just around the corner.

Ireland's digital economy continues to grow year on year. In 2014, the value of our digital economy was valued at €8 billion, or 5% of national GDP<sup>1</sup>. This level of economic activity supports 100,000 jobs, directly and indirectly<sup>2</sup>. By 2020, the value of the digital economy is expected to more than double to 10% of GDP and €21 billion<sup>3</sup>. Consumer spending online currently accounts for the largest proportion of Ireland's digital economy. In 2014, Irish consumers spent almost €6 billion online<sup>4</sup>. However, while Irish consumers have wholeheartedly embraced online shopping, many Irish SMEs have not kept pace with this consumer revolution by moving to sell their goods and services online, in addition to traditional methods. The numbers above highlight the opportunities which exist for Irish SMEs to grow their market share, strengthen their turnover and profitability and increase their workforces.

For businesses, increased digitisation can drive sales, reduce trading costs and open new paths to markets in terms of engaging directly with consumers and customers. With 98% of all enterprises in Ireland either SMEs or micro-enterprises, their importance to a vibrant and robust economy cannot be overstated. That is why it is vital that all Irish businesses have a digital strategy which is the right fit for their businesses' needs and objectives.

An increased awareness amongst all Irish businesses about why having an online presence and/or ability to sell online is also crucial. Even today, tens of thousands of Irish businesses (1 in 4) do not even have a basic website. This may often be because many are simply not aware of how an online presence can add to the success of their businesses.

Today's Index comprehensively looks at a number of key areas, including the key digital assets currently used by Irish SMEs and micro-enterprises; which assets are more prominent than others in the marketing strategies employed by Irish businesses; analysis of the importance placed on those digital assets by businesses; and a quantification of the extent to which some businesses have failed to adopt to the use of digital tools.

Finally, in Chapter Seven, we set out a number of key recommendations which we believe are fundamental to ensuring that Irish businesses maximise the opportunities presented by online trading and e-commerce.

What emerges most cogently from our research is that thousands of businesses are still failing to fully embrace online selling. These businesses, the communities in which they are rooted, and our wider economy are automatically placed at a disadvantage by this fact. Many businesses are beginning to take tentative steps towards a digital strategy, particularly through social media.

However, it remains vital that all stakeholders redouble their efforts to get Irish business online. The opportunity is too great and the loss to the Irish economy too substantial to ignore.

*David Curtin.*

**David Curtin** *Chief Executive*

26 November 2015

<sup>1</sup> UPC The Second UPC Report on Ireland's Digital Future, 2014.

<sup>2</sup> National Digital Strategy, 2013, Department of Communications, Energy and Natural Resources.

<sup>3</sup> UPC The Second UPC Report on Ireland's Digital Future, 2014.

<sup>4</sup> Source: Department of Communications, Energy and Natural Resources.

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## Key findings

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- The majority of Irish SMEs are positive about their businesses with 6 in 10 expecting revenues to increase over the next 12 months.
- 1 in 4 Irish SMEs have no digital presence.
- Of those with a digital presence, 2 in 3 have a website.
- Among those with a website, there has been a marked increase (37%) in the number that have responsive design (mobile optimised) compared to 2014, 63% versus 46% respectively.
- The main growth in digital assets of businesses has come from Facebook, Twitter and LinkedIn. However, these are also the assets that SMEs are using least.
- The use of video content has also increased from 34% to 52%, a 53% increase since December 2014.
- Among those without a website, 3 in 4 do not intend to build a website, with the majority saying that there is no need within their industry.
- Almost half of all SMEs (46%) don't advertise their services at all. Among those that do, 1 in 4 use traditional advertising and 1 in 6 use digital advertising.
- This figure is expected to grow: 1 in 4 say that they are spending more on digital advertising now than in the past.
- The overall IE Digital Health Index score has increased to 43.4 from 42.0. This increase is primarily driven by growth in digital assets owned.

# IE Digital Health Index

**43.4** is the latest Digital Health Index score<sup>1</sup> for Irish SMEs



37.4



May 2014

42.0



December 2014

43.4



September 2015

The Digital Health Index scores 9 digital assets: website; Twitter; Facebook; LinkedIn; YouTube; blog or content marketing; mobile or tablet app; web sales; and data analytics from online assets.



The main growth in digital assets has come from **Facebook, Twitter and LinkedIn.**

1 in 4 Irish SMEs have **NO** digital presence.  
3 in 4 of this group do not intend to build a website in the future.

Of those that have a digital presence, **2 in 3** have a website.

63% of Irish SMEs with websites now have optimised them for mobile, compared to 46% in 2014, an increase of 37%.

52% of Irish SME websites now use video content, a 53% year-on-year increase.

## ▶ Future outlook



6 in 10 Irish SMEs expect revenues to increase over the next 12 months.



But, almost half of all SMEs – 46% – don't advertise their services at all.



**86%** of SMEs have **NO** digital campaign or initiative planned for Black Friday, Cyber Monday or the Christmas period.

## ▶ The Digital Economy



€8 billion, the value of our digital economy in 2014<sup>2</sup>.



100,000, the number of jobs the digital economy directly and indirectly supports<sup>3</sup>.



€700,000, the amount Irish consumers spend online each hour on average<sup>4</sup>.



€4 million, the amount Irish consumers are expected to spend on Black Friday each hour<sup>5</sup>.

<sup>1</sup> Research carried out by Ignite Research on behalf of IEDR. Sample size of 500 SMEs per research wave.

<sup>2</sup> UPC The Second UPC Report on Ireland's Digital Future, 2014.

<sup>3</sup> National Digital Strategy, 2013, Department of Communications, Energy and Natural Resources.

<sup>4</sup> Source: Department of Communications, Energy and Natural Resources, August 2015.

<sup>5</sup> Source: Webloyalty, Christmas Trends 2015 Ireland

# Chapter One

## IE Digital Health Index

### What is the IE Digital Health Index?

The IE Digital Health Index provides a unique analysis of the number of digital assets owned by SMEs and the perceived quality of these digital assets. The nine digital assets scored are:

- Website,
- Twitter,
- Facebook,
- LinkedIn,
- YouTube,
- Blog or content marketing,
- Mobile or tablet App,
- Web sales, and
- Data analytics from online assets.

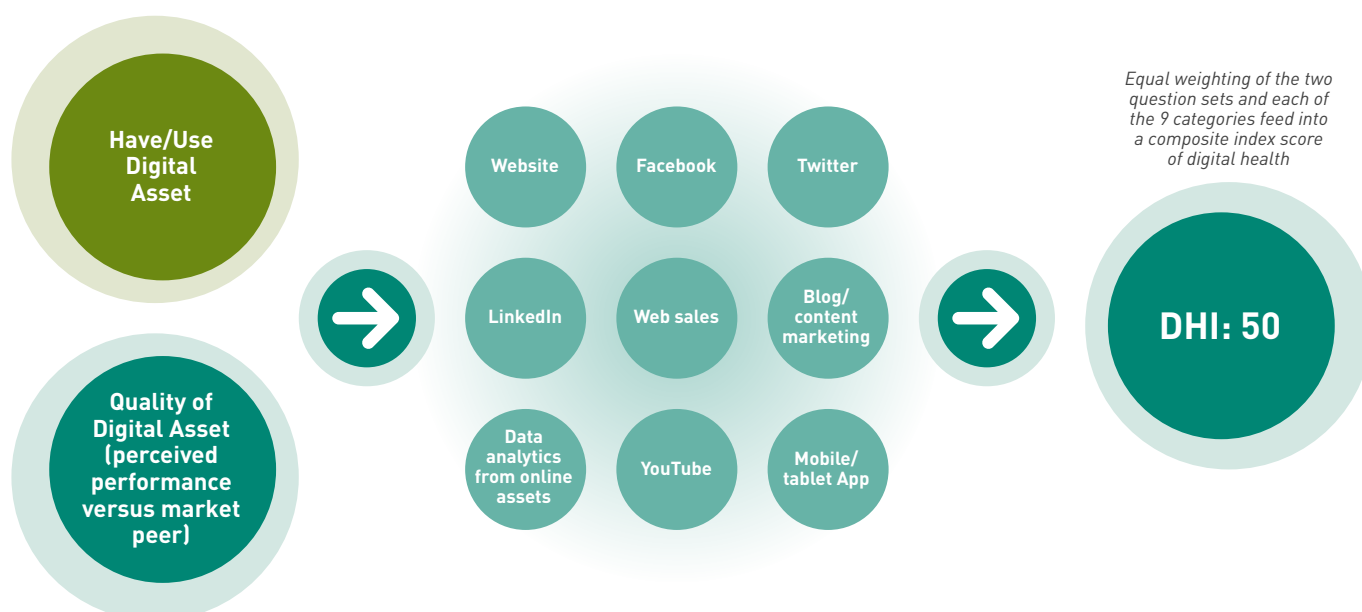
Two key question sets are asked of each SME to determine the overall index score:

1. From the range of nine digital 'retail assets' and activities, have you or do you use the digital asset?
2. What is the perceived quality of the digital asset used?

Equal weighting of each of the two question sets and each of the nine categories then feed into a composite index score of digital health.

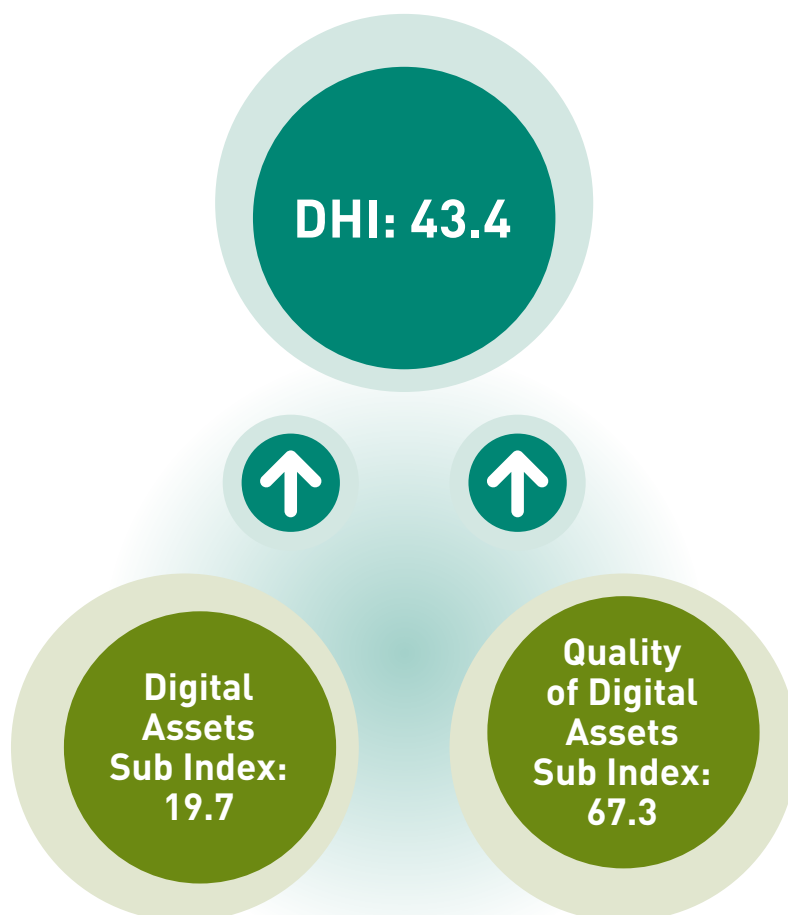
### Construction of IE Digital Health Index

#### Creating the IE Digital Health Index – the methodology



## IE Digital Health Index Score – September 2015

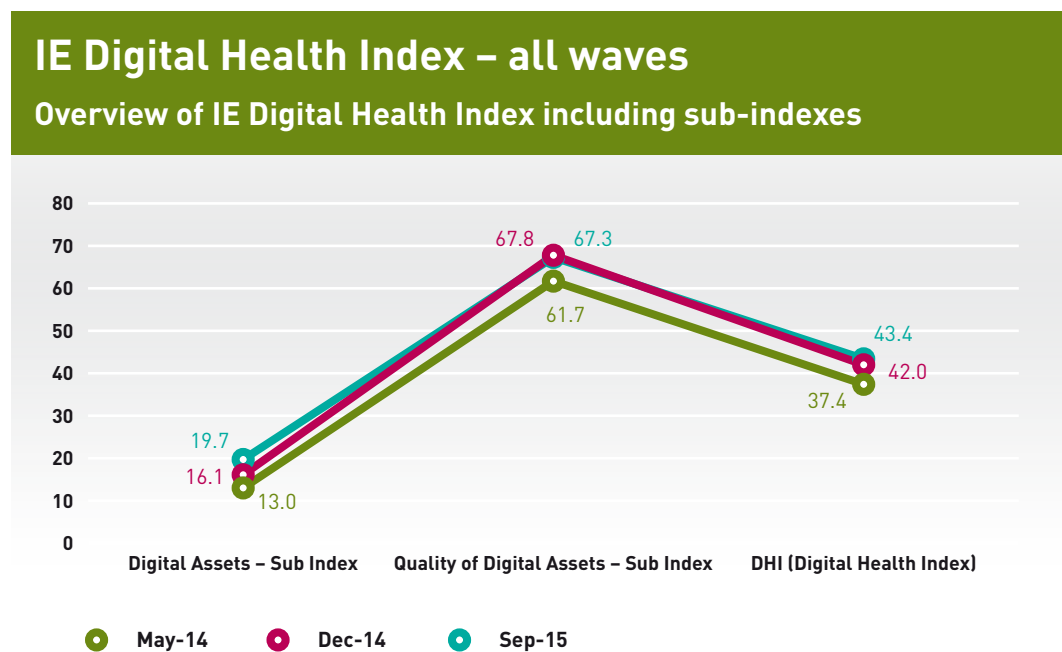
As of September 2015 the IE Digital Health Index is 43.4 – this has increased from 42.0 in December 2014. This increase is primarily driven by the number of digital assets owned by the SME sector.



## IE Digital Health Index Score – all waves

There has been a consistent increase in the IE Digital Health Index score since the first wave of research was conducted in May 2014, primarily driven by an increase in digital assets owned.

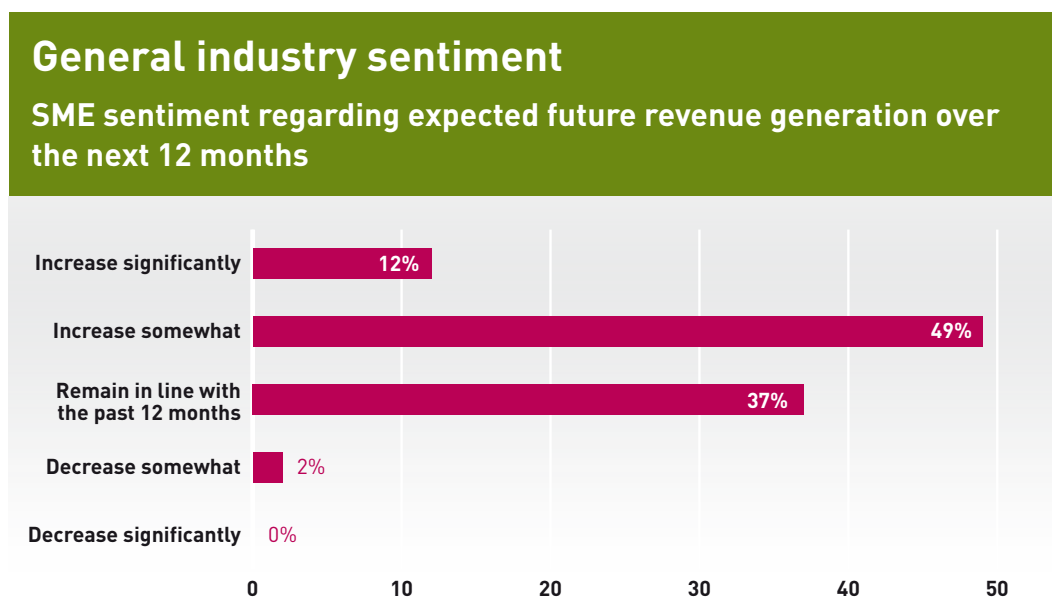
Given the positive outlook among SMEs – 3 in 5 expect revenues to grow over the next 12 months – there is a genuine opportunity for SMEs to continue to develop and grow their digital asset suite to maintain this positive momentum.





## General industry sentiment

Overall, Irish SMEs are quite positive about their businesses. Looking ahead to the next 12 months, 6 out of 10 (61%) SMEs said that they expect revenues to increase.



## The IE Digital Health Index findings over the period May 2014 to September 2015

This is the third wave of research which IEDR has undertaken in respect of the IE Digital Health Index project. Previous waves were undertaken in May 2014 and December 2014.

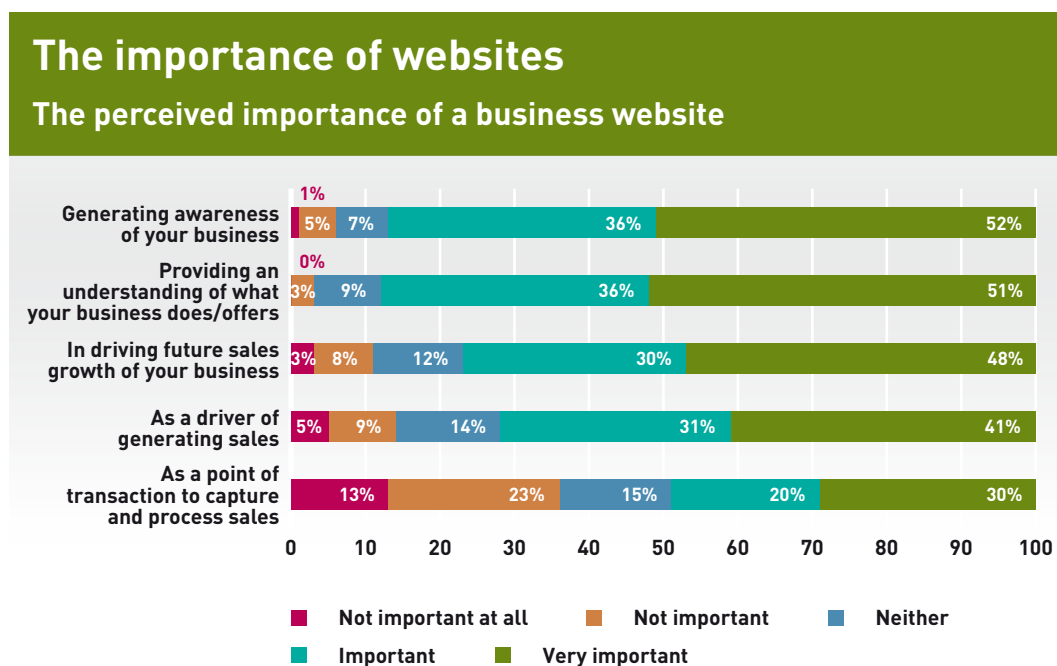
What emerges from our survey waves overall is a consistent reluctance amongst a large cohort of Irish companies (1 in 3) to have a website for their business. The number with a website (65%) versus those who do not (35%) has remained stable over the period.

The problem is worse when the number without a website is further broken down by company size:

- Micro-enterprises, defined as those employing 10 employees or less, are more likely not to have a website than those with more than 10 employees (37% v 6%);
- The position worsens further for companies with 5 or less employees, with 42% of these companies not having a website.

## Irish companies' perception of the importance of having a website

When questioned about their attitude to having a website, our SME participants revealed a number of interesting findings. These include:



Base: 328; All Companies with a website (Sep-2015)

## Online sales

Over the three waves of research, the number of companies with the ability to process sales online has grown from 1% in May 2014 to 8% in September 2015.

However, as fewer than one in ten Irish companies currently have an ability to directly sell online, it is clear that much more needs to be done to achieve an e-commerce-enabled business community.

# Chapter Two

## Analysis of digital assets owned

Digital assets, such as websites, apps and social media accounts, are vital for Irish SMEs to promote their brand and products on the internet where Irish consumers are now spending €6 billion online<sup>5</sup>. The IE Digital Health Index highlights some interesting findings in this area, particularly the pronounced disparity between those SMEs with an online presence and those without.

Over the three waves of research to date, there is strong and positive growth in companies building and developing their digital assets in the area of social media. The average number of digital assets owned increased by 25% over the period May to December 2014 and increased again by 4% over the period December 2014 to September 2015. The main growth in digital assets has come from Facebook, Twitter and LinkedIn.

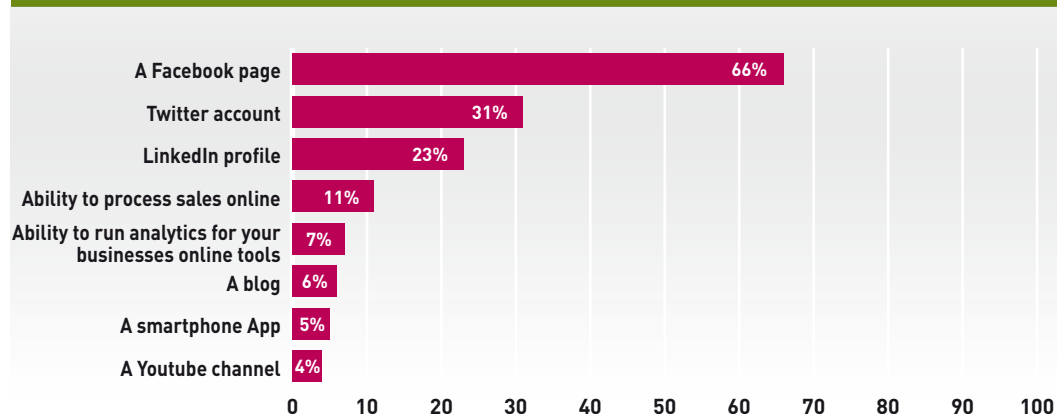
Of those SMEs with a digital presence, almost two-thirds (65%) have a website; more than half (51%) have a Facebook page; almost one quarter have a Twitter account; and 1 in 6 (16%) have a LinkedIn profile. The average number of digital assets owned increased by 25% over the period May 2014 to December 2015. Other key highlights include:

- Over the three waves of research the number of companies with a Facebook page has grown by 50% from 34% to 51%,
- The number of companies with a presence on Twitter has grown by 175% from 8% to 22%,
- The number of companies with a LinkedIn profile has grown by 100% from 7% to 16%.

While there is an increase in the average number of digital assets owned by SMEs, 1 in 4 (25%) SMEs have no digital presence whatsoever.

### Digital assets owned – SMEs with a website

Breakdown of digital assets owned by SMEs with a website  
(excluding SMEs with no digital presence)

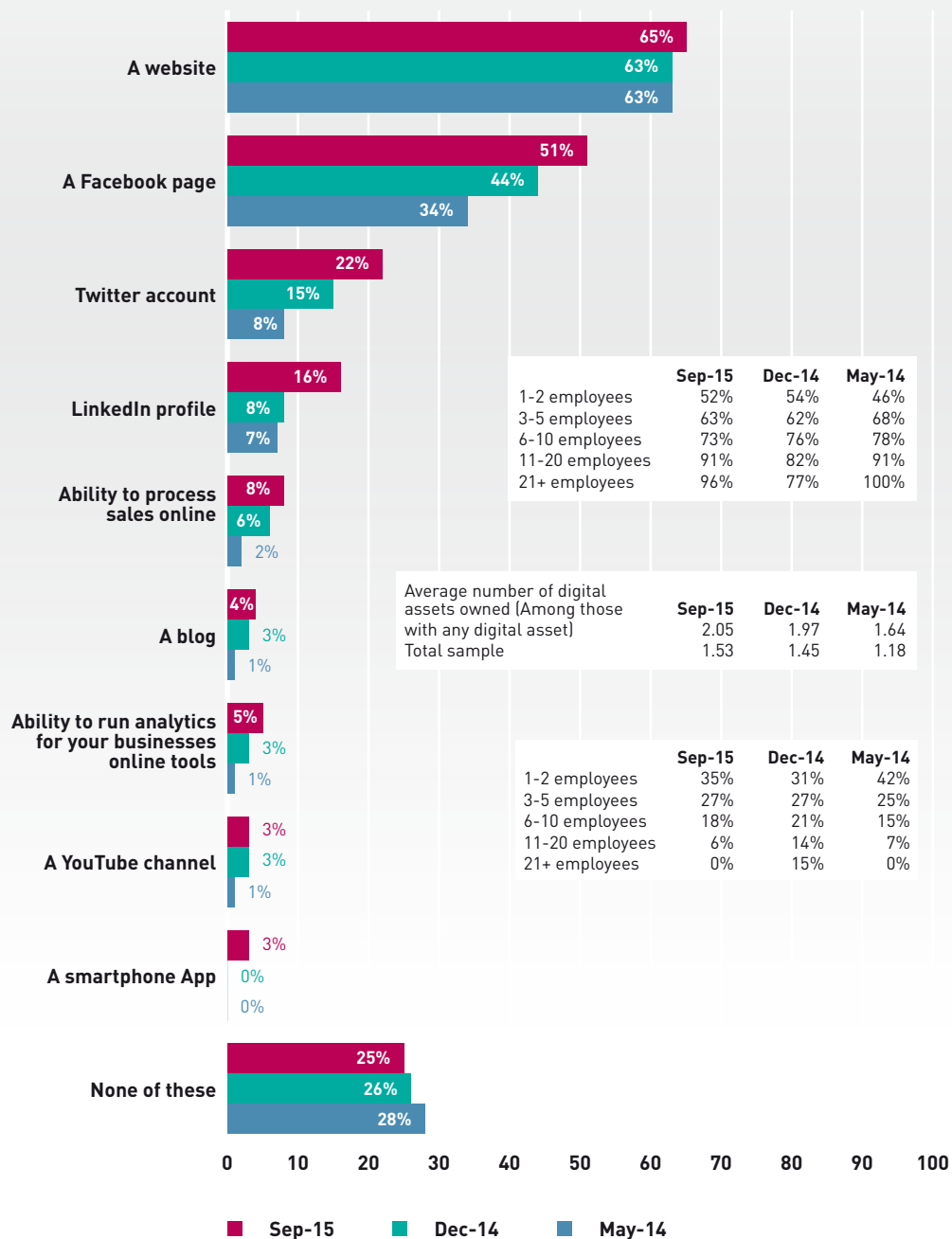


Base 328: All companies with a website (Sep-2015)

<sup>5</sup> Source: Department of Communications, Energy and Natural Resources.

## Digital assets owned

Overview of the digital assets owned by Irish SMEs



Base 508: All Participants (Sep-2015)

# Chapter Three

## Analysis of website functionality

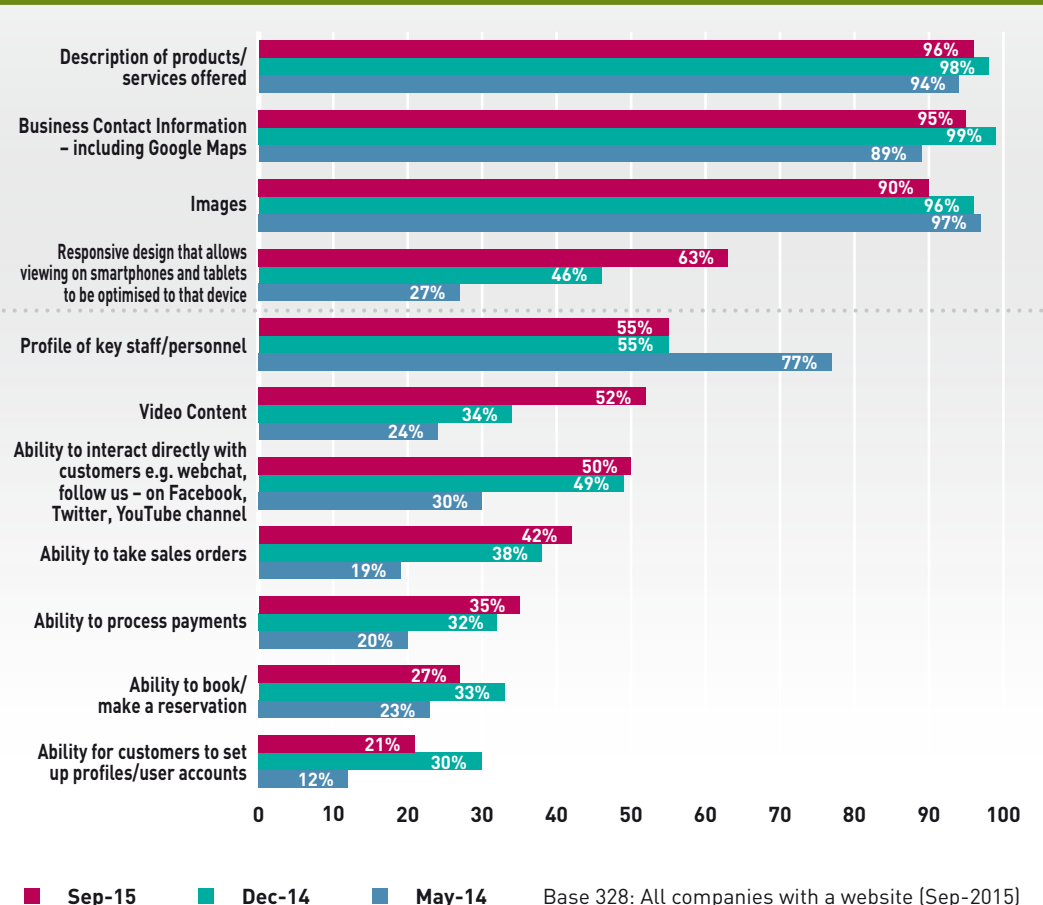
The surveys included question sets designed to assess the content provided by and the functionality of SME websites. The results found that there has been minimal change in the overall functionality of SME websites. The numbers of Irish SMEs conducting e-commerce has increased marginally since December 2014. 42% of Irish SMEs can take sales orders online and just over a third, 35%, can process payments online.

While these increases are welcome, most Irish SMEs still have static “postcard” websites and therefore lose out on the benefits of e-commerce. Of note, there is a 6% decrease in the number of SMEs that display images on their websites, but this is counteracted by a marked increase in mobile optimisation and the use of video content.

Mobile optimisation has increased by 37% since December 2014, while more than half of SMEs (52%) now have video content on their websites. Despite recognising the importance of a website for marketing and e-commerce, 1 in 4 Irish SMEs only update their websites every three months or less often.

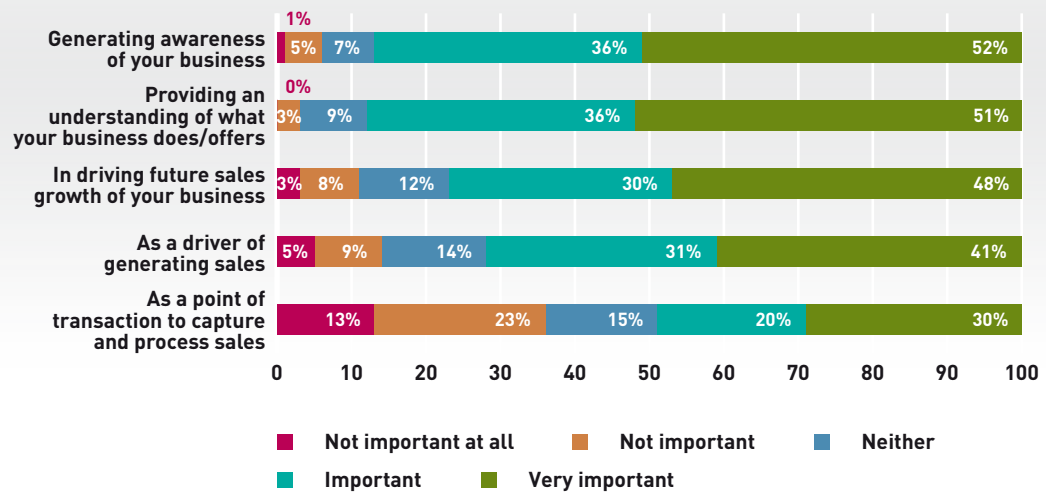
### Website functionality

#### Breakdown of the functionality of SME websites



## The importance of websites

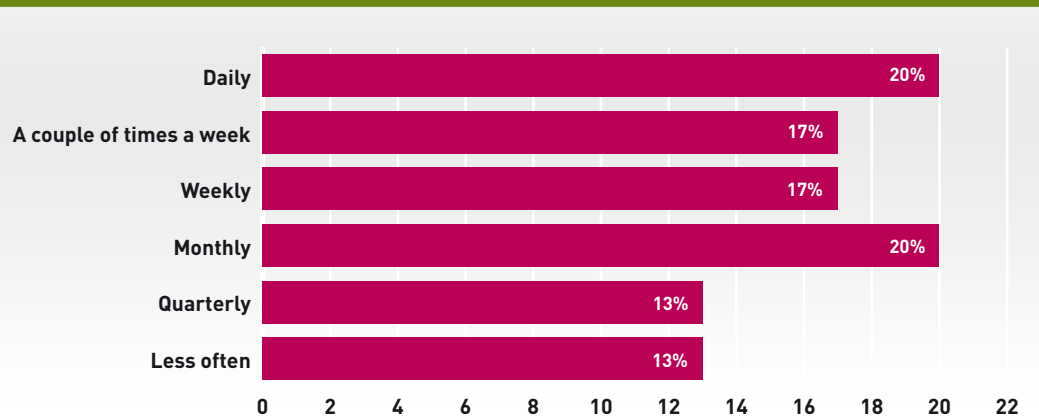
### The perceived importance of a business website



Base: 328; All Companies with a website (Sep-2015)

## Website development

### Breakdown of how frequently SMEs update their website



Base: 328; All Companies with a website (Sep-2015)

# Chapter Four

## Analysis of SMEs without websites

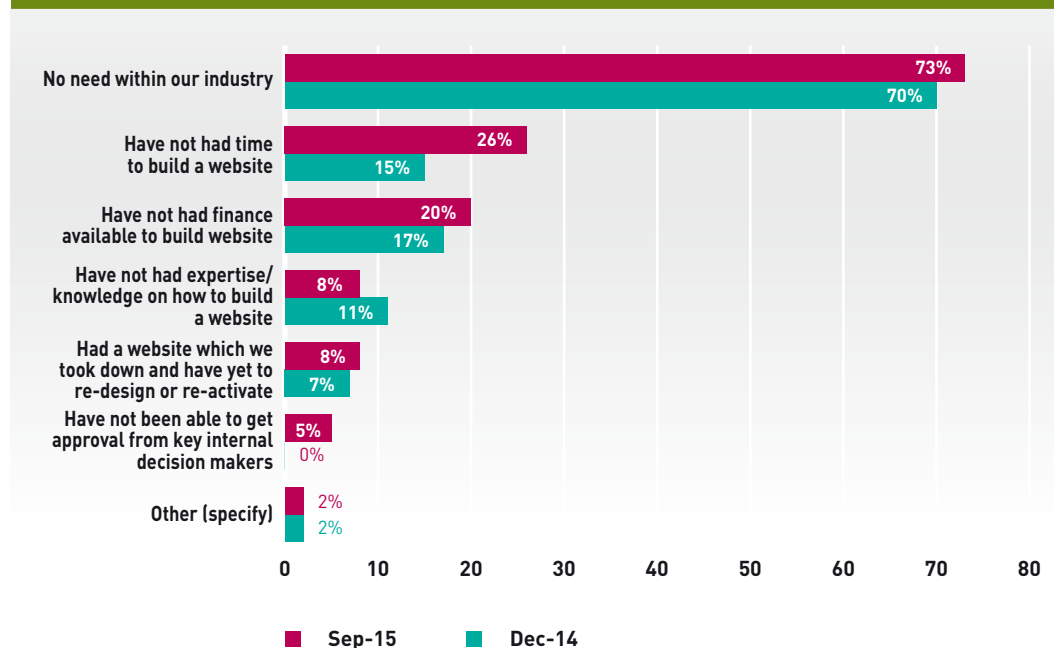
Today, 1 in 4 Irish SMEs still have no digital presence whatsoever – i.e. no website, app or social media account. Of this group, 3 out of 4 say that they do not intend to build a website in the near future.

The primary reason SMEs cite for not having a website is that there is no need in their industry (73%). Cost and time pressures are also a factor, with 1 in 4 saying that they have no time to build a website, and 1 in 5 saying that they do not have the finance available.

This is not the first research that has highlighted a concerning “herd” mentality in “analogue” Irish SMEs. Some Irish SMEs think that because their competitors do not have a digital presence, they see no pressing need to have their own, leading to entire sectors of the economy losing out to foreign websites on e-commerce and a customer base broadened by online activity.

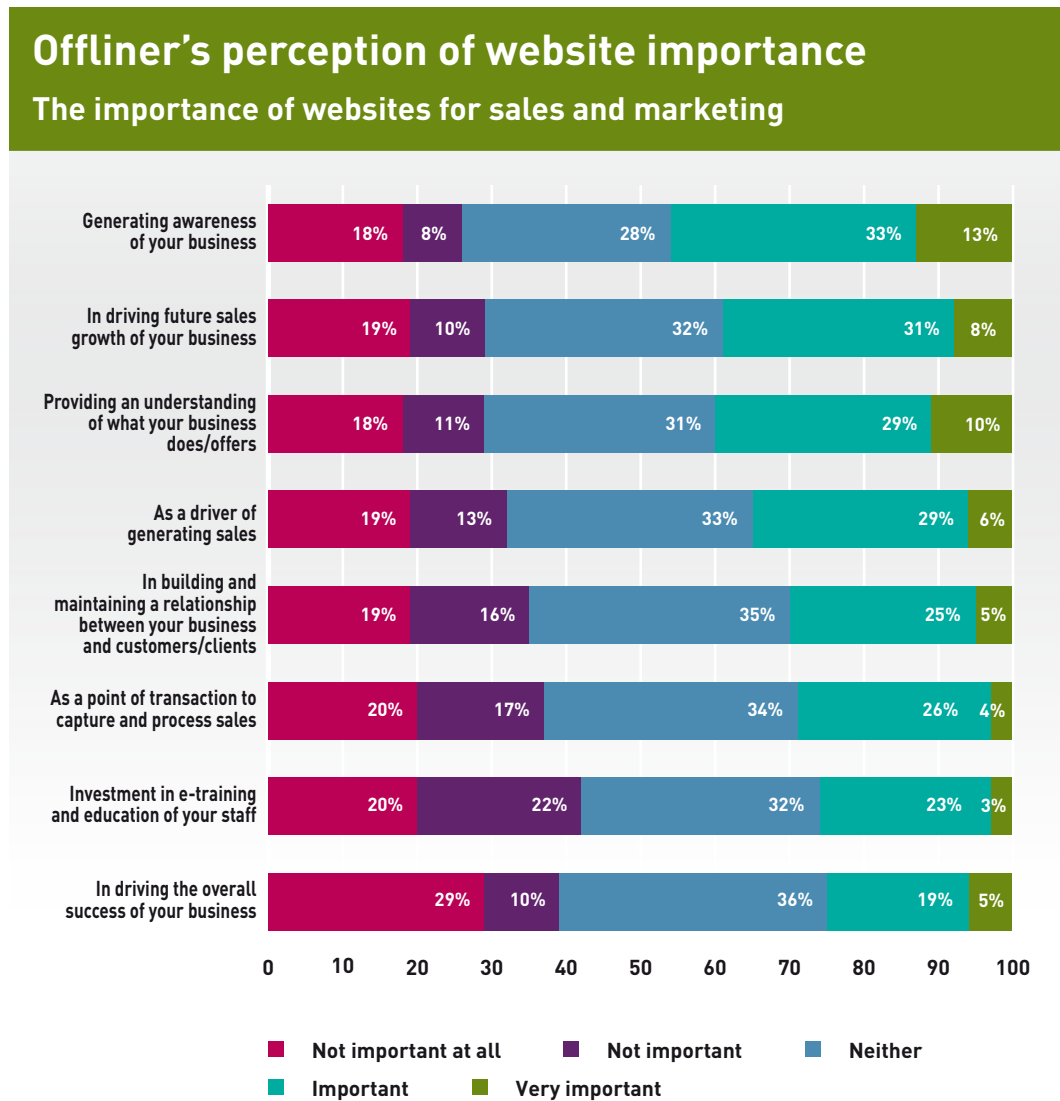
### Reasons for not having a website

#### Primary reasons for not having an active web presence



Base: 180; All companies without a website (Sep-2015)

Despite the majority of those SMEs without a website saying that their industry does not require an online presence, almost half (46%) believe that a website is important in generating awareness of your business, while 2 in 5 (39%) say that a website is important in driving sales growth and in educating the public on what your business does/offers.



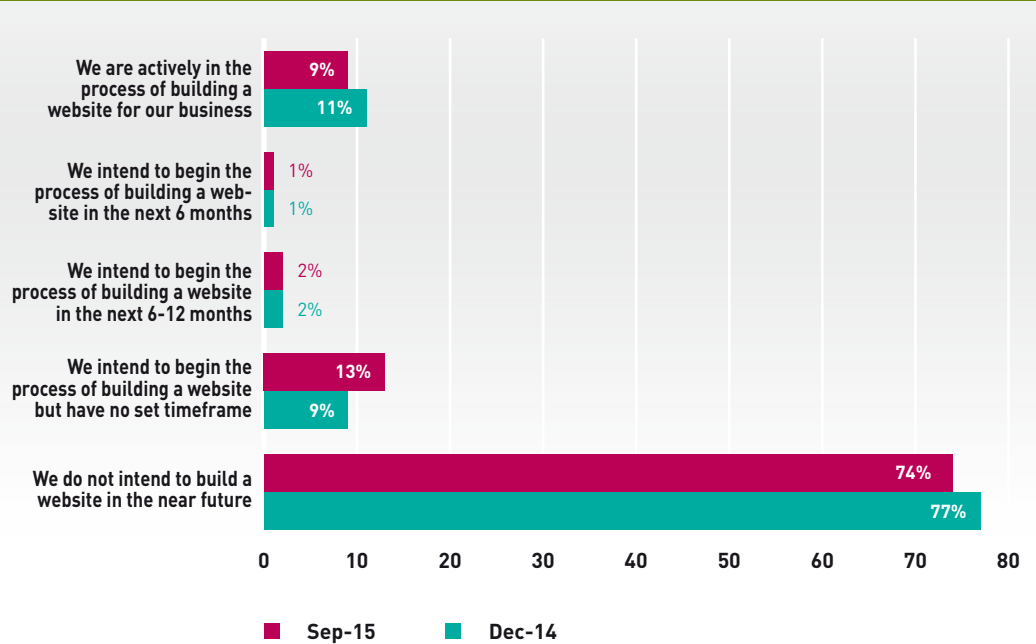
Base: 180; All Companies without a website (Sep-2015)



Notwithstanding this perceived level of importance, 77% of SMEs without a website say that they do not intend to build one in the future.

## Website development

### Attitudes towards building a web presence among SMEs without a website



Base: 180; All companies without a website (Sep-2015)

# Chapter Five

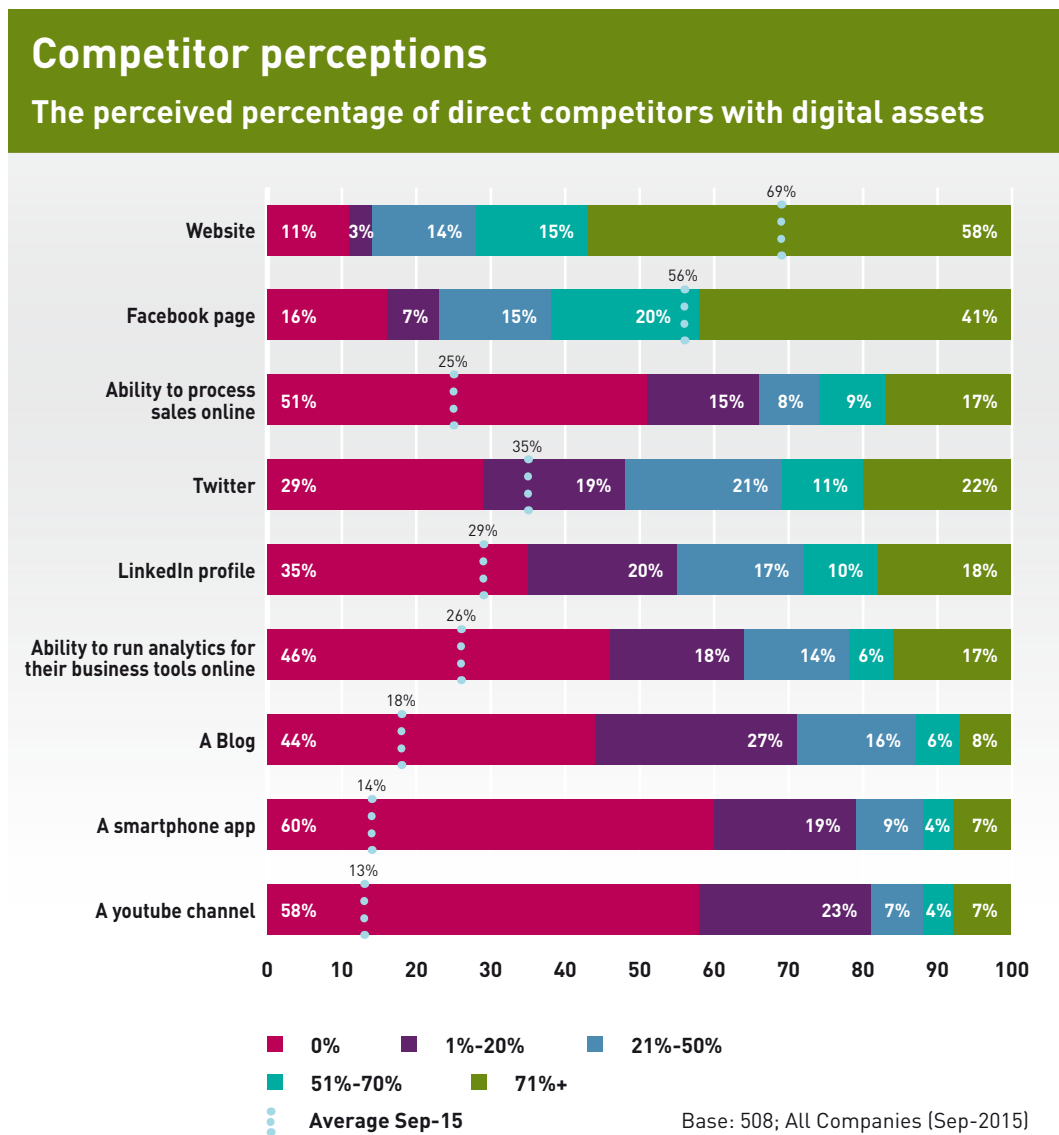
## Keeping up with the digital Jones

Our surveys identified a direct correlation between the SME's own use of social media and digital assets and its perception of its competitors' use of the same.

Two-thirds of SMEs believe that their competitors have a website, while they estimate that Facebook, Twitter and LinkedIn are the next most popular digital assets.

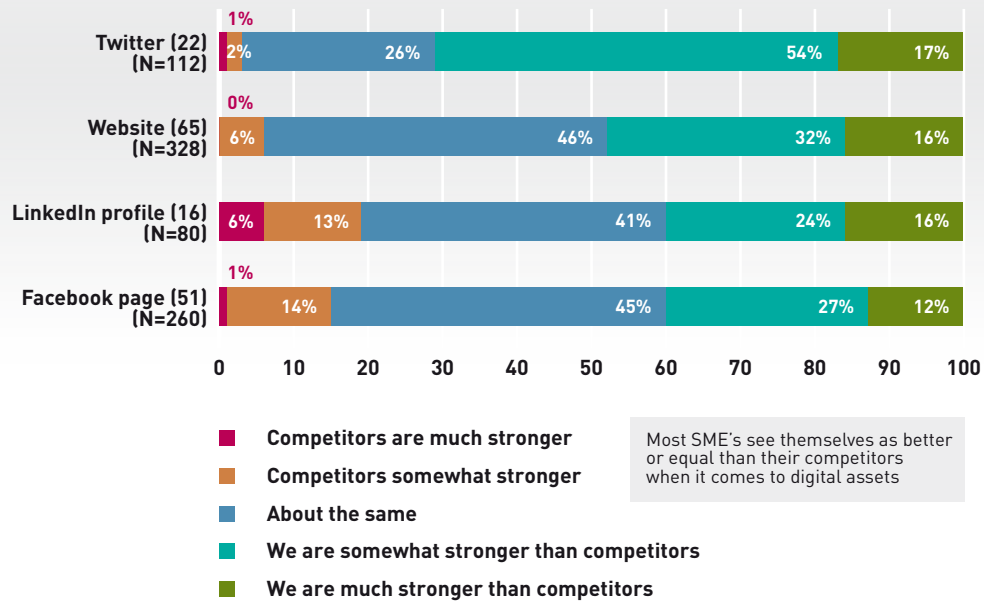
Interestingly, 1 in 4 SMEs believe that their competitors have e-commerce capabilities despite the fact that less than 10% of SMEs are able to process sales online.

Overall, however, the majority of SMEs see themselves as better or equal than their competitors when it comes to their digital assets.



## Competitor analysis

How SMEs believe they perform against direct competitors



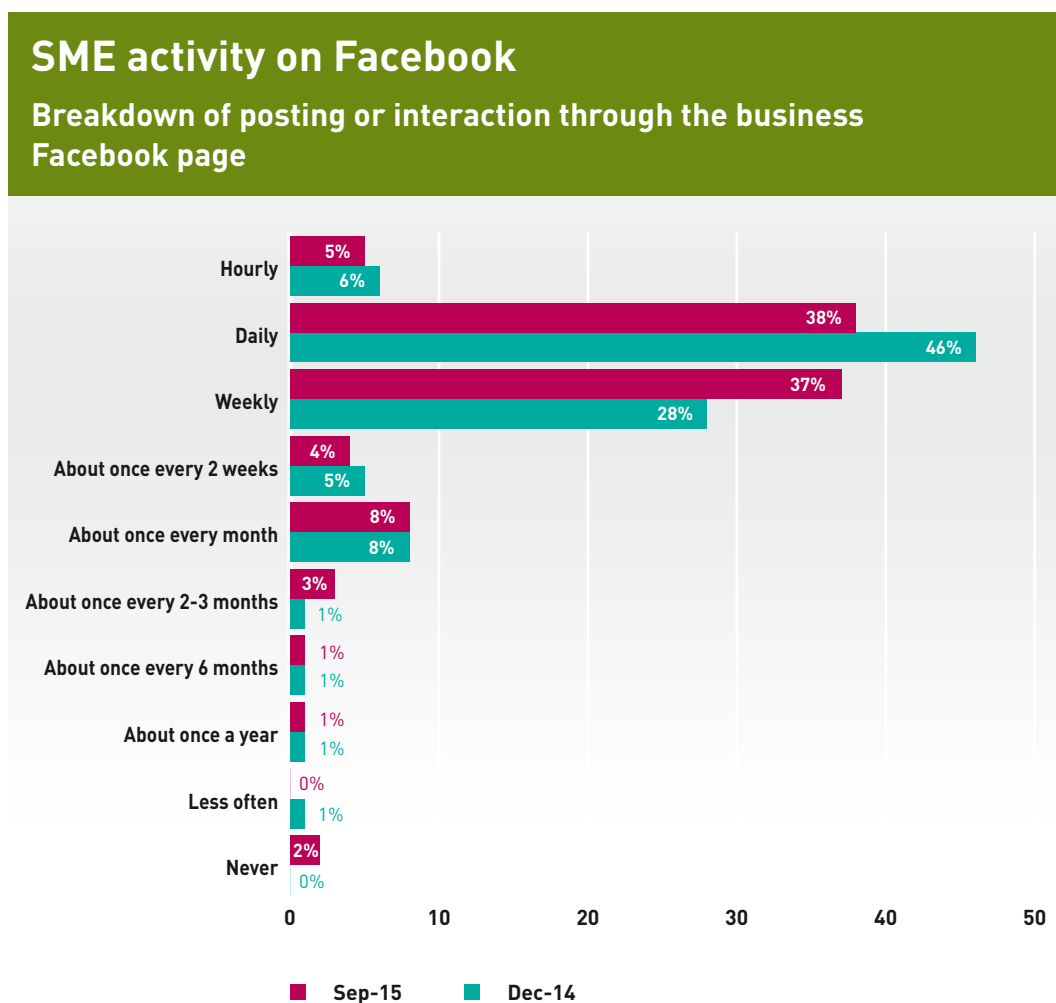
Base: 508; All Companies (Sep-2015)

## Use of social media by Irish SMEs

The average number of digital assets owned by Irish SMEs increased by 4% over the period December 2014 to September 2015, with the main growth in assets coming from Facebook, Twitter and LinkedIn.

Despite this positive growth, 1 in 4 Irish SMEs report that they do not have a website or any other digital or social media assets.

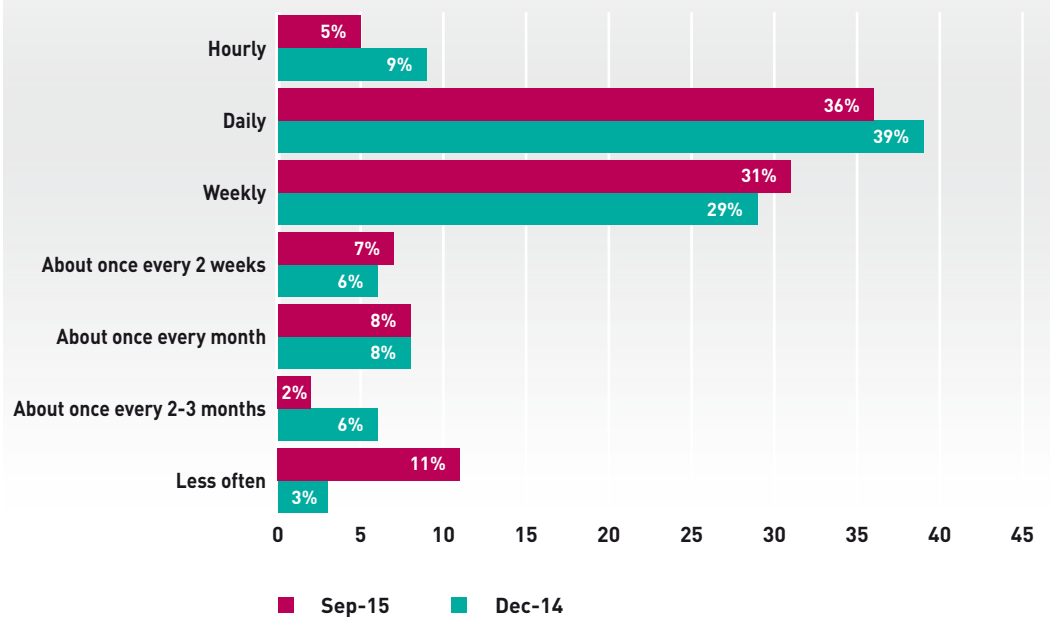
What's more, while an increasing number of SMEs have Facebook, Twitter and LinkedIn accounts, these are the digital assets that are being used least often by SMEs.



Base: 260; All companies with a Facebook page (Sep-2015)

## SME activity on Twitter

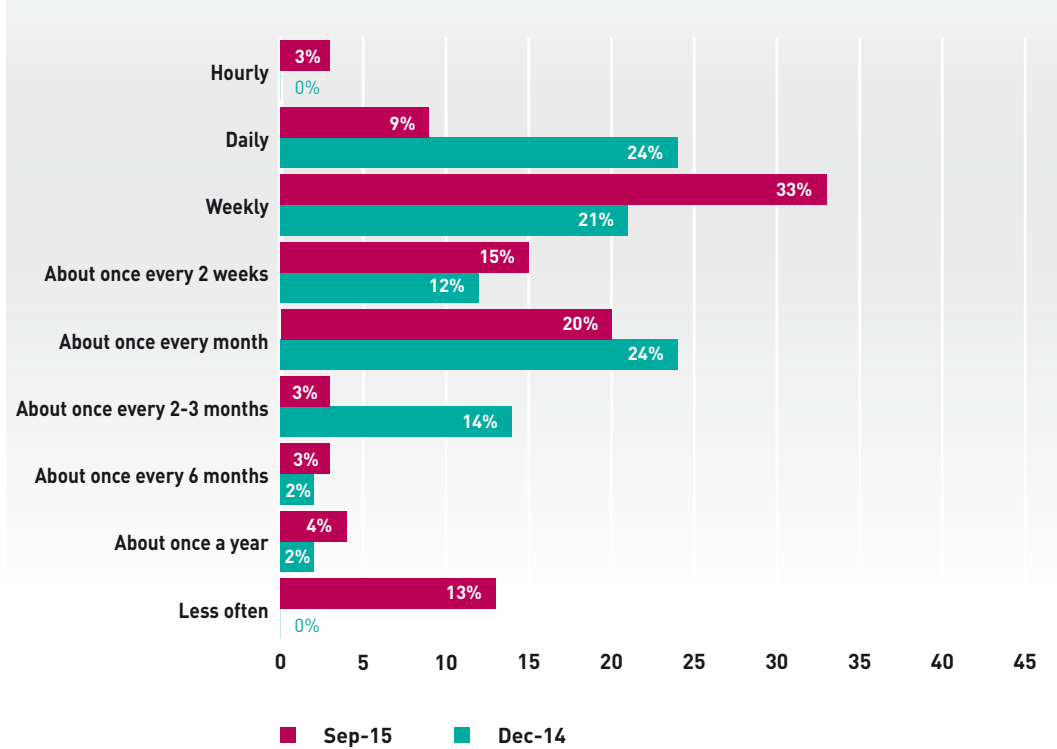
Breakdown of posting or interaction through the business Twitter page



Base: 112; All companies with a Twitter account (Sep-2015)

## SME activity on LinkedIn

Breakdown of posting or interaction through the business LinkedIn page



Base: 80; All companies with a LinkedIn profile (Sep-2015)

## Chapter Six

### SME attitudes to online advertising and digital marketing

The Irish e-commerce market is worth an estimated €8 billion, with Irish consumers spending almost €700,000 online each hour<sup>6</sup>.

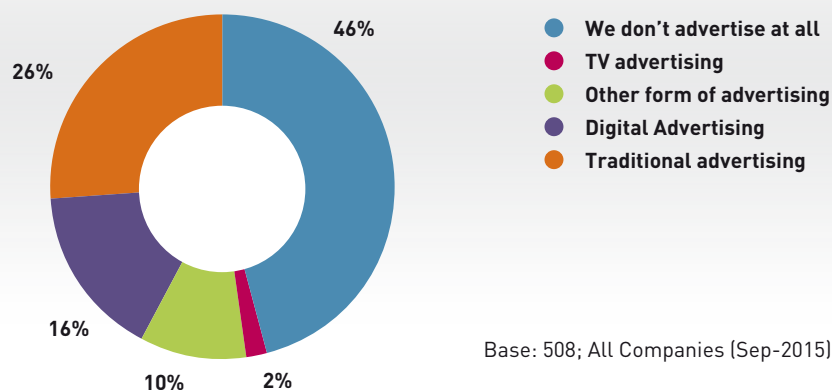
As Irish consumers are predicted to spend more and more money online, digital advertising is expected to overtake traditional advertising for the first time ever in Ireland by 2017<sup>7</sup>.

For SMEs, however, traditional advertising remains most popular, although almost half of all SMEs (46%) in our survey do not advertise their services at all.

Among those that do, 1 in 4 use traditional advertising, while 16% use digital advertising. This figure is expected to grow as 28% of all SMEs surveyed say that they are now spending more on digital advertising now than in the past.

#### Advertising spend

##### Breakdown of advertising spend by SMEs



<sup>6</sup> Source: Department of Communications, Energy and Natural Resources, August 2015.

<sup>7</sup> Source: Zenith Optimedia, Advertising Expenditure Forecast, June 2015.

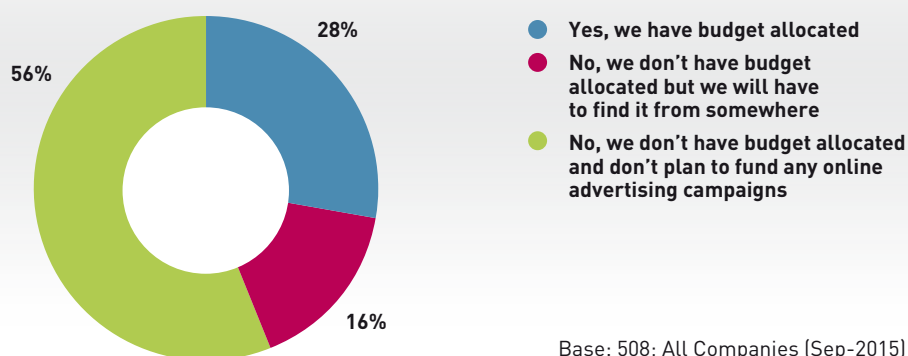
Although two-thirds of SMEs have not changed their spending pattern compared to 12 months ago, encouragingly, a quarter of SMEs have allocated a digital advertising budget for an online campaign over the next six months, and a further 16% say they will find budget to do so.

Additionally, while more than half of SMEs do not have a dedicated resource to manage their digital assets, 15% plan to have one in the next 12 months.

From this, we can conclude that SMEs have not yet embraced digital as an advertising channel to their customers, but green shoots are slowly starting to emerge. Almost half of those surveyed agreed that digital marketing training is important, noting the value of digital marketing in supporting business growth.

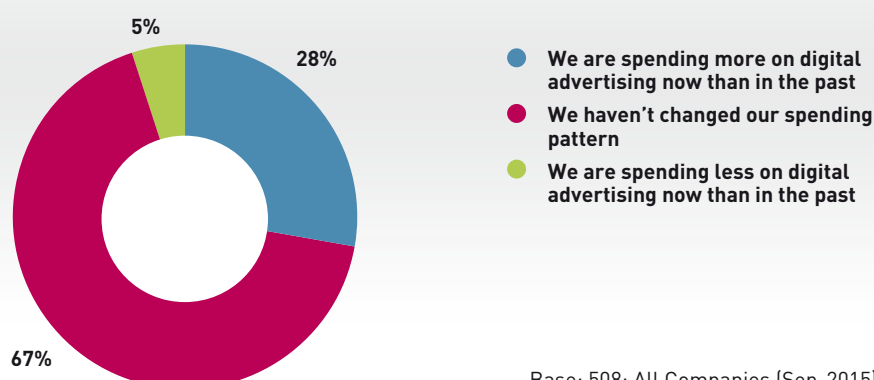
## Online advertising budgets

### Breakdown of intended budget allocations for online advertising campaigns in the next 6 months



## Online advertising campaigns

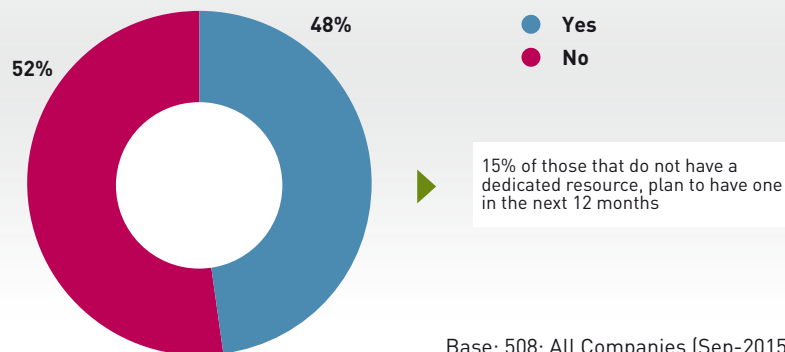
### Changes in budgeted intentions and spending





## Online advertising resource

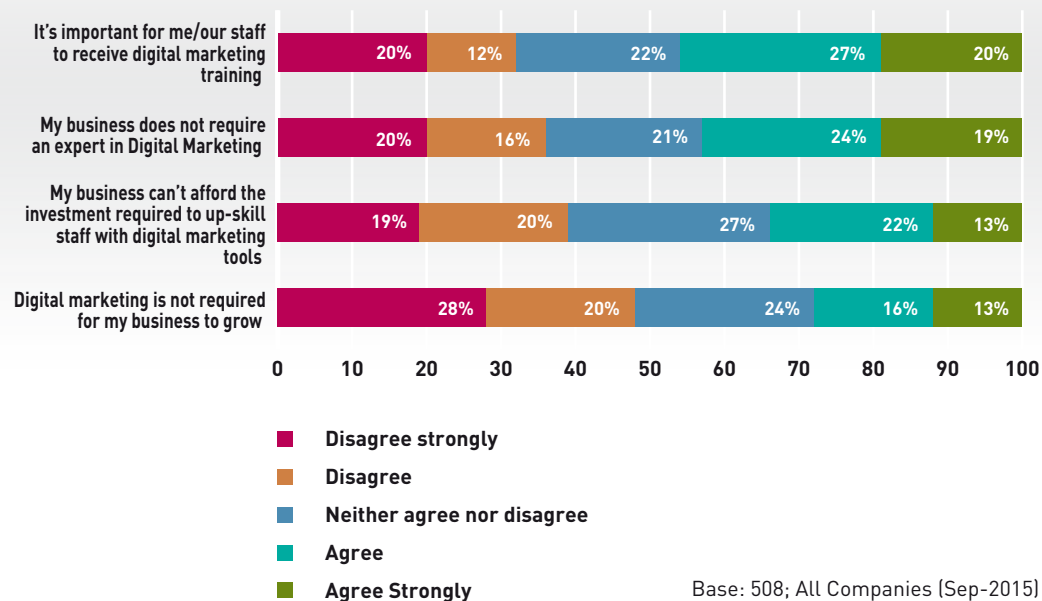
### Percentage of SMEs with dedicated online/digital resource



Base: 508; All Companies (Sep-2015)

## Digital marketing

### Importance of digital marketing for business growth



Base: 508; All Companies (Sep-2015)

# Chapter Seven

## Survey recommendations

The results of our IE Digital Health Index indicate that while some progress has been made by Irish SMEs in the journey towards full e-commerce engagement, there remains much work to be done.

For example, while there have been increases in the number of businesses engaging in social media activity, the number that have dedicated websites has remained stagnant. With 1 in 4 Irish SMEs without a website, it is evident that all stakeholders need to do more to assist Irish SMEs to help them develop their digital presence.

Equally our research shows disparities between larger and smaller Irish SMEs, with the former much more likely to be e-commerce enabled with smaller companies less likely to be able to trade and process payments online. Greater research is needed to identify the levers to change the SME mind-set in favour of selling online. These barriers must be urgently addressed.

In 2011, IEDR launched its own initiative for SMEs, the OPTIMISE Fund. The fund is designed to encourage and enable Irish SMEs or micro enterprises to make greater use of existing web technologies and upgrade the e-commerce functionality of their websites.

By end 2015, the OPTIMISE Fund will have provided funding and shoulder-to-shoulder assistance to 75 Irish SMEs and micro-enterprises to improve their digital presence and e-commerce capabilities. This year's OPTIMISE Fund 2015 was valued at €150,000 and 15 Irish businesses are currently part of the website enhancement programme. Each year demand for funding is high, signalling a strong desire from Irish SMEs for assistance in selling online.

With Ireland's economy recovering and evidence of consumers' increased disposable income, the opportunity for Irish businesses to tap into a multibillion Euro online marketplace is clear.

However, a number of critical reforms and policy drivers are vital to ensure that online selling is an option for all Irish businesses.

### Recommendations

1. Increase state funding in the Online Trading Voucher Scheme which provides tax relief to small businesses who invest in their online sales capacity;
2. Ensure that Local Enterprise Offices (LEOs) have the manpower and resources to reach out to "analogue" SMEs and help them to set-up and grow their businesses online. In particular, to provide resources that enable LEOs to focus on older and more established SMEs who may not be as tech savvy as younger start-ups;
3. Roll out a national awareness campaign targeting Irish SMEs which highlights the benefits of trading online for Irish businesses, addressing issues such as increasing the potential for consumer engagement and increasing market share, turnover, profits and staff numbers;
4. Develop and implement a Department of Communications-sponsored mentoring programme for Irish SMEs which facilitates mentoring and knowledge sharing led by successful online Irish companies;
5. Prioritise the roll-out of high-speed broadband to every community in Ireland to ensure that infrastructure exists for small local and SOHO businesses to trade online.

# Chapter Eight

## Survey methodology

The IE Digital Health Index was conducted on behalf of IEDR by Ignite Research among 1,500 Irish SMEs across three separate waves of research with 500 respondents in each wave. These waves of fieldwork were carried out in May 2014, December 2014 and August/September 2015.

Of those surveyed, 86% were micro-businesses of less than 10 employees. This is in line with CSO national enterprise profiles, where SMEs account for 99.7% of the total enterprise population and 91% are micro-businesses<sup>8</sup>.

## Demography of research sample

### Survey sample set-up

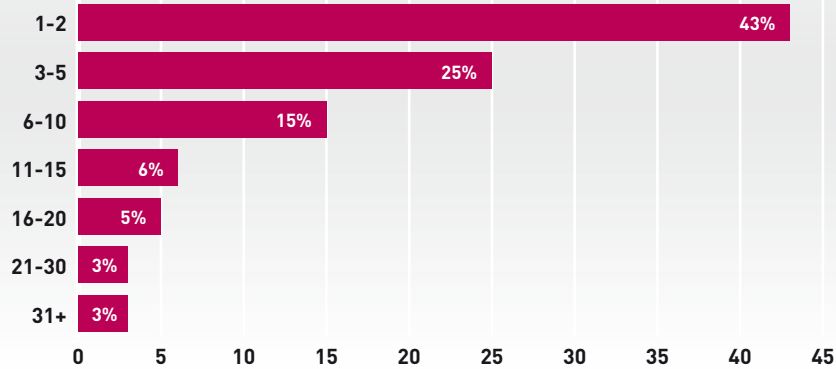
#### Breakdown of overall sample by employee size

Number of Employees	Sample Size	Number of Employees	Sample Size
1-10 Employees	86% of Sample	1-2 Employees	220 (44%)
11+ Employees	14% of sample	3-5 Employees	130 (26%)
		6-10 Employees	80 (16%)
		11-15 Employees	27 (5%)
		16-20 Employees	17 (3%)
		21-50 Employees	26 (6%)
		<b>Total</b>	<b>500</b>

<sup>8</sup> Source: CSO Business Demography 2012 (June 2014).

## Demographics by employee number

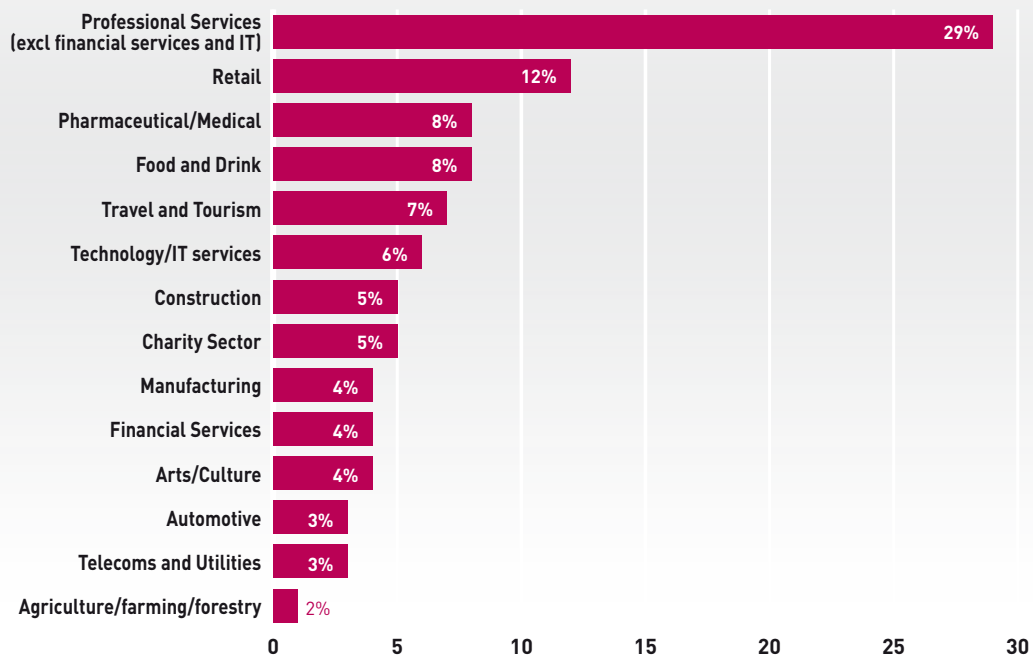
Number of full-time employees presently employed by SME sample



Base: 508; All SME Participants (Sep-2015)

## Demographics by sector

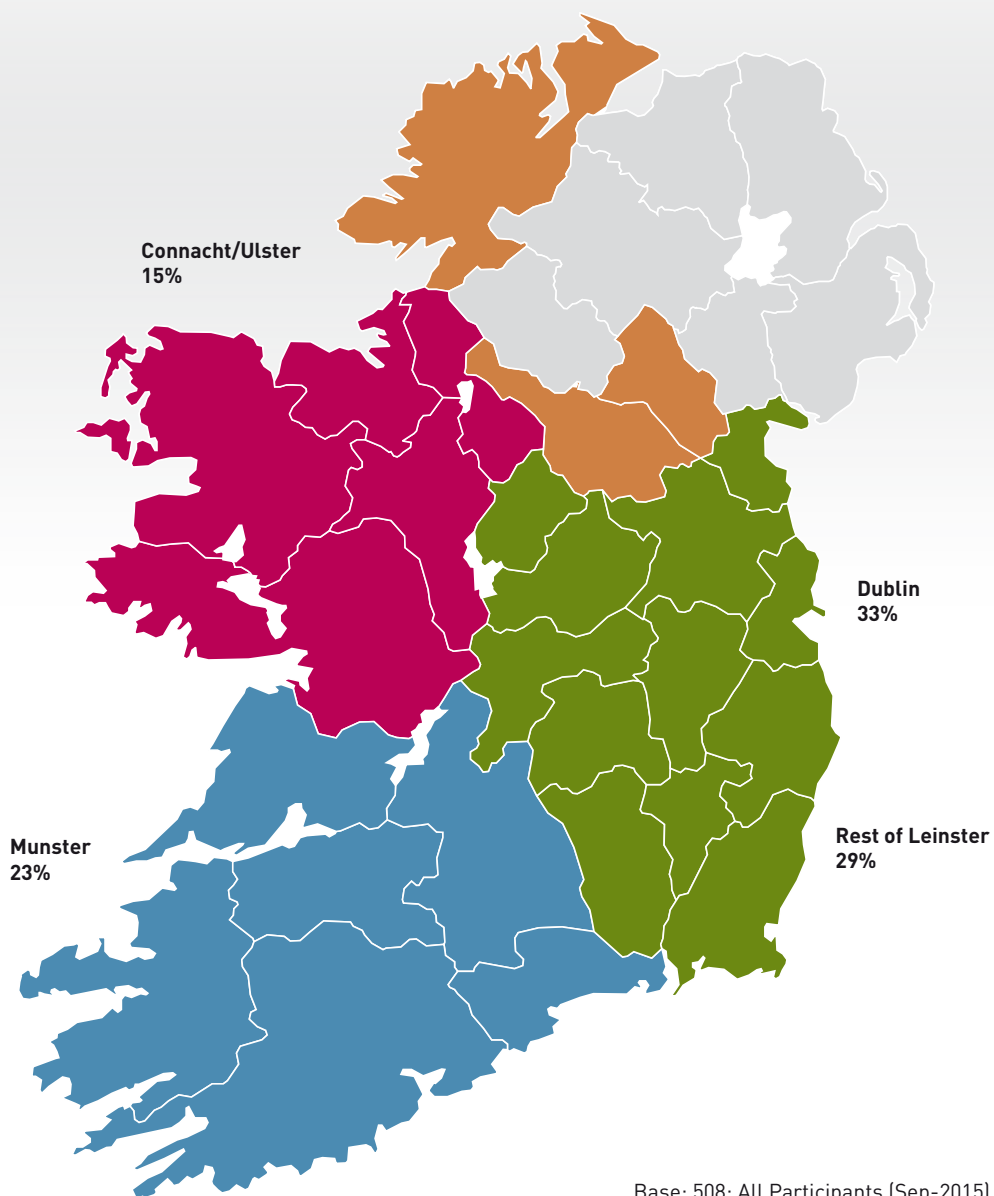
Sectoral breakdown of SME sample



Base: 508; All SME Participants (Sep-2015)

## Demographics by location

Breakdown of SME sample by location



## Construction of the IE Digital Health Index

The IE Digital Health Index analyses the number of digital assets owned by SMEs and the perceived quality of these digital assets.

The nine digital assets scored are:

- Website,
- Twitter,
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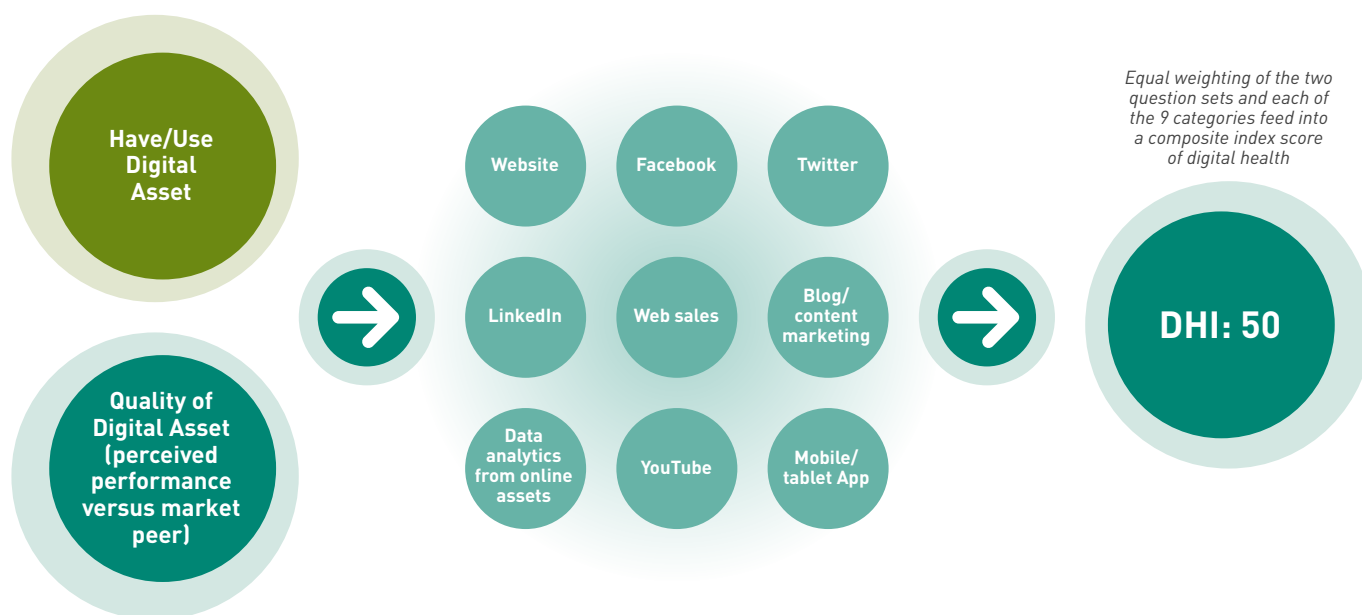
Two key question sets are asked of each SME to determine the overall index score:

1. From the range of nine digital 'retail assets' and activities, have you or do you use the digital asset?
2. What is the perceived quality of the digital asset used?

Equal weighting of each of the two question sets and each of the nine categories feed into a composite index score of digital health.

### Construction of IE Digital Health Index

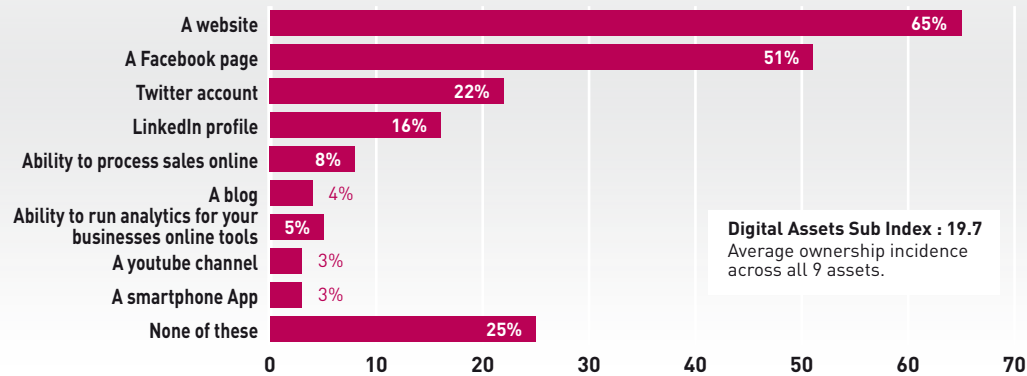
#### Creating the IE Digital Health Index – methodology



## Appendix 1: IE Digital Health Sub-Index Construction

### Digital assets owned

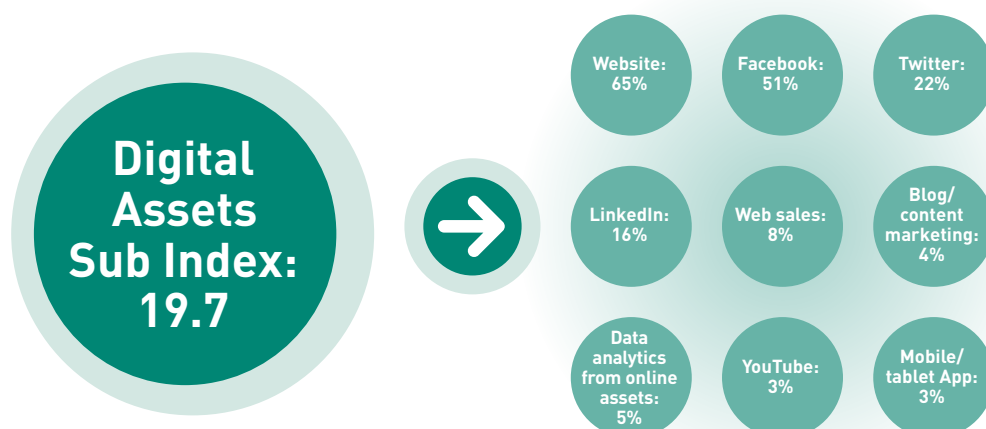
#### Digital assets sub-index



Base: 508; All Participants (Sep-2015)

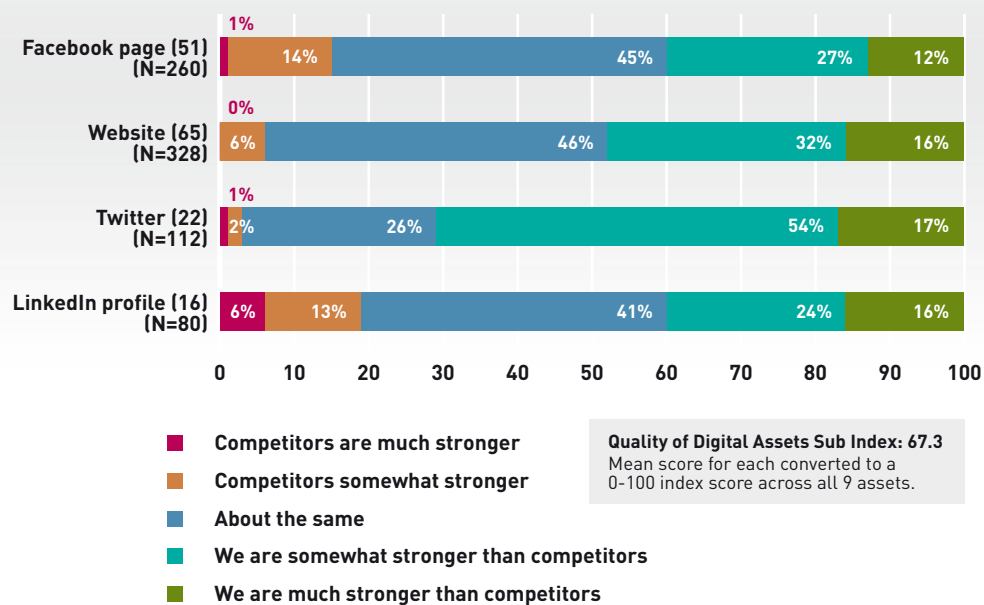
### Digital assets owned

#### Digital assets sub-index



## Quality of digital assets owned

### Quality of digital assets sub-index

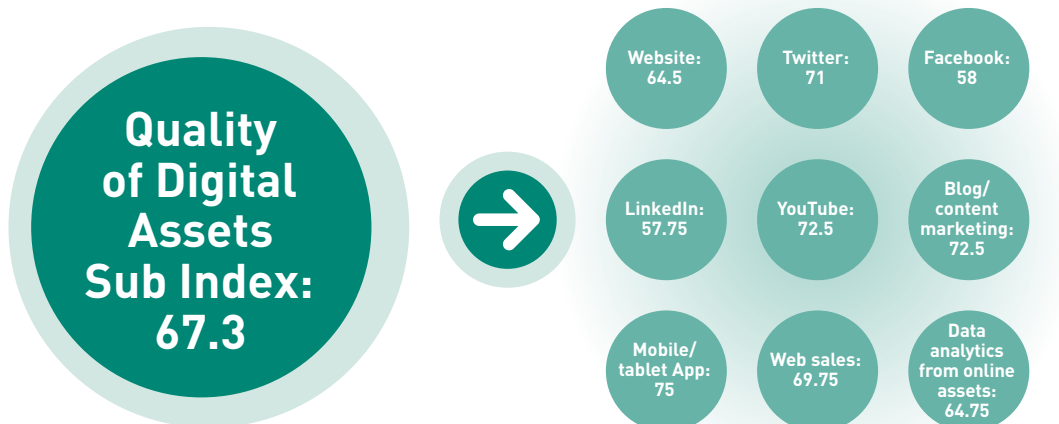


Base: All Companies with digital assets (Sep-2015)

\* note only main assets with large sample size charted here

## Quality of digital assets owned

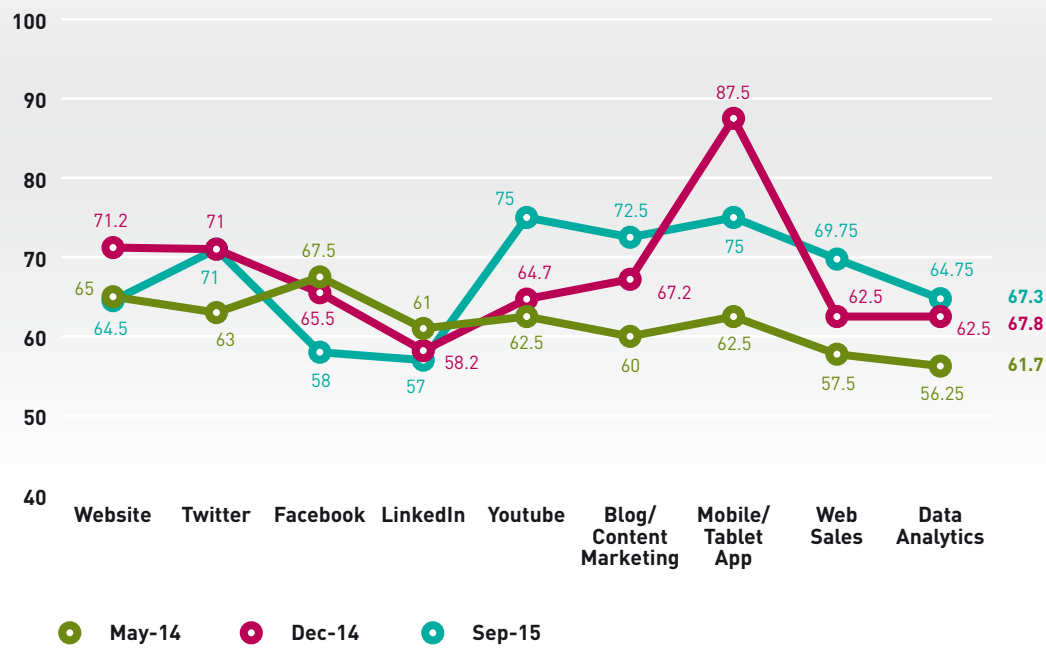
### Quality of digital assets sub-index





## Quality of digital assets owned (all waves)

Quality of digital assets sub-index from May 2014 to September 2015



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# Chapter Nine

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## About the IE Domain Registry

The IE Domain Registry (IEDR) is the official registry for .ie internet domain names and maintains the database of registered .ie domain names. The IEDR originated as a spinout from University College Dublin, becoming an independent, separate limited company 15 years ago in July 2000.

The IEDR is responsible for the management and administration of Ireland's official internet domain .ie, in the interest of the Irish and global internet communities. It operates the domain name system (DNS) for the .ie namespace, facilitates a dispute resolution service with WIPO and operates a public 'Whois' lookup service for .ie domains.

The mission of the IEDR is to provide unique, identifiably Irish domain names along with registry and related services to the local and international internet community.

The IEDR is a managed registry which means that there are policies and procedures governing the registration of .ie domain names. New applications are reviewed to ensure compliance with the terms and conditions of registration. This contrasts with .com and .eu where there is no manual review, and the domain applied for will be automatically registered once the name is available.

Only the IEDR can administer and manage the .ie namespace. These roles and responsibilities are undertaken as a public service. The IEDR liaises with Government departments, governing bodies, trade associations and abides by internet best-practice principles while still operating as an independent public company.

## Why choose a .ie domain name?

A .ie domain name requires a connection with the island of Ireland and a legitimate claim to the chosen name to register a domain.

A .ie domain name has a number of distinct advantages when compared against alternatives:

- A .ie web address tells the global community you are Irish and tells the Irish community you are local. It gives consumers a great sense of security particularly when buying online from a known, local business
- There is more choice of domain names, as a .ie is more likely to be available than a similar .com
- .ie is the only domain name reserved for anyone with a connection to Ireland and helps to connect Irish businesses to local and global markets online.

## About Ignite Research

Ignite Research has been operating in Ireland since 2005. We are a team of expert researchers, analysts, and strategists who are focused on delivering best-in-class solutions to our clients, and not in packing off-the-shelf products. Ignite is a genuinely forward-thinking and tech-adopting research agency with many examples of innovative tech tools combined with creative and commercial thinking in our repertoire, all of which delivers impactful research for our clients.

We are a passionate and ambitious research agency that works with an eclectic mix of Ireland's blue-chip companies and leading semi-state institutions. Ignite also conducts research globally for some of the most recognisable and trusted brands.

At Ignite, we always strive to work as part of our clients' team, developing close relationships with all aspects of our clients' business in order to offer the optimum level of insight based on the research we conduct. Our overall aim is to offer a highly flexible bespoke service to all our clients in an effort to deliver a true partnership.





**Identifiably Irish**

Ireland's Domain Registry

**IE Domain Registry Limited**

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