



ActualTech Media

2016-2017 Audience Survey



ActualTech Media



Executive Summary

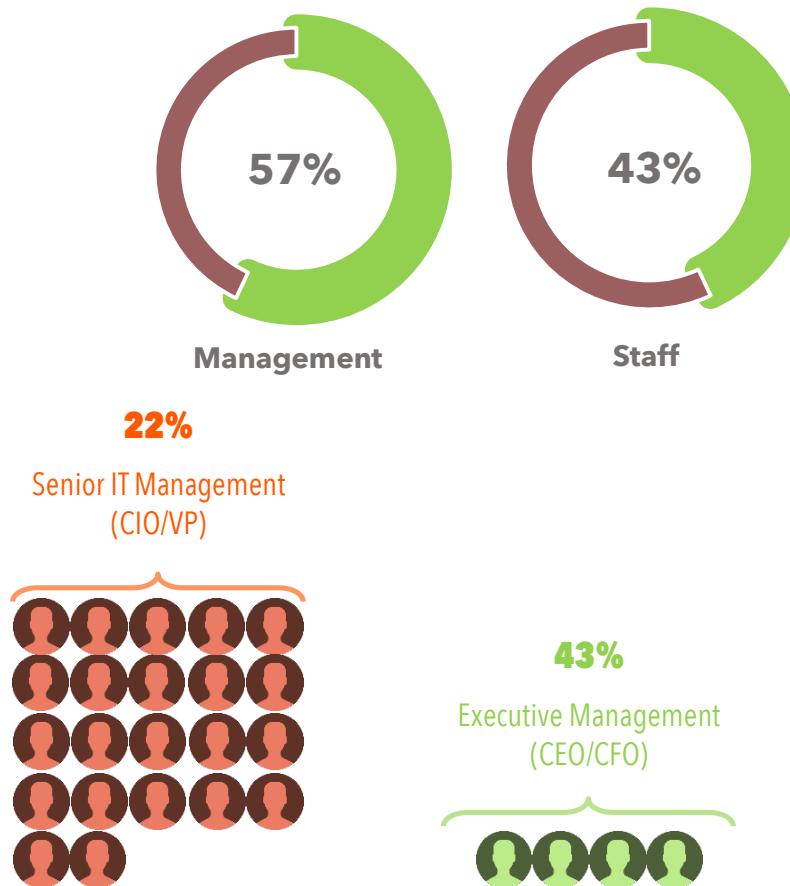
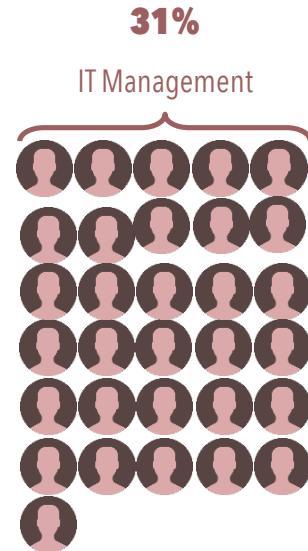
Introduction



One of ActualTech Media's key goals for 2016 and 2017 is to gain deeper insight into the insights, knowledge, and plans for our half-million strong audience, including details about what they are looking forward to in 2017. Our continuing goal is to make sure that our services are constantly aligned with the needs of our audience.

We launched a comprehensive survey of our audience, with this report representing the culmination of that effort, with responses aggregated from a pool of close to 1,200 individuals. In this report, you will learn a lot about our audience, including their self-assessed knowledge levels around specific current and emerging technologies, their thoughts around what kinds of content assets are of most value to them, how they feel about different kinds of video assets, and much more.

What is your primary role?

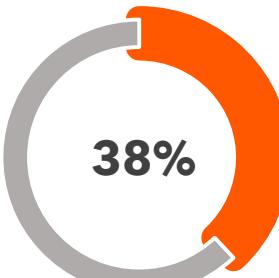


Job Responsibilities

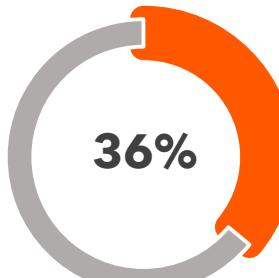


Just 39% of our audience has a single job
 29% have two to four roles
 20% have 5 to 8 roles
 11% are jacks-of-all-trades with nine or more roles

Although most of our respondents have multiple job responsibilities (61%), the "Big Three" job roles are very general in nature and consist of IT Systems Management, IT Management, and Architecture



IT Systems Management

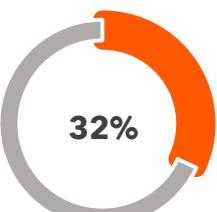


IT Management (CIO)

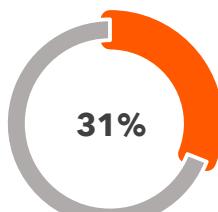


Architecture & Planning

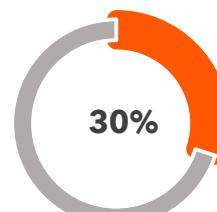
Main line technical responsibilities enjoy even ownership in the organization, with each being held by approximately one-third of our audience base



Storage



Security



x86 Servers Virtualization



Backup



Networking

The remaining job functions are carried out by around one-fifth of our audience with Cloud Computing responsibilities handled by 19%



Service Desk



End User Computing



Application & Database

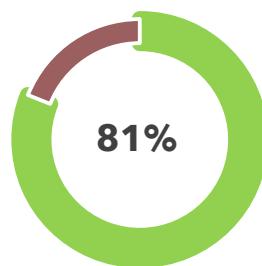


Cloud Computing

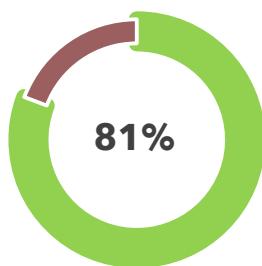
Subject Matter Expertise and Learning Interests



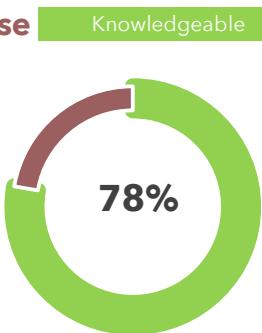
Self-Identified Subject Matter Expertise



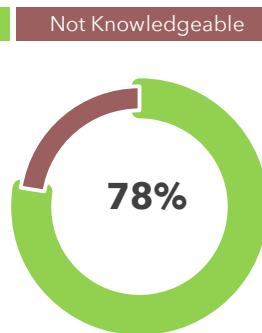
Storage



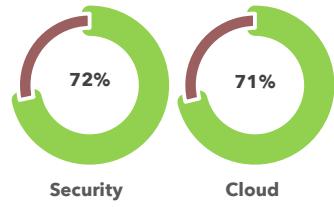
Virtualization



Data Protection



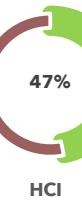
Network



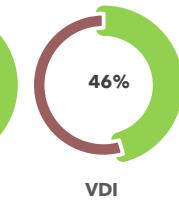
Security



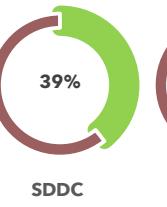
Cloud



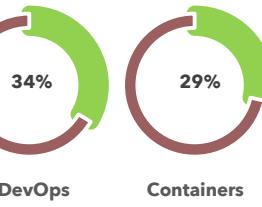
HCI



VDI



SDDC



DevOps

Containers

Respondents have deep familiarity with common technologies

People seem to be generally comfortable with their skills, but many want to continue to grow

81% of respondents indicate high levels of expertise with Storage and Virtualization

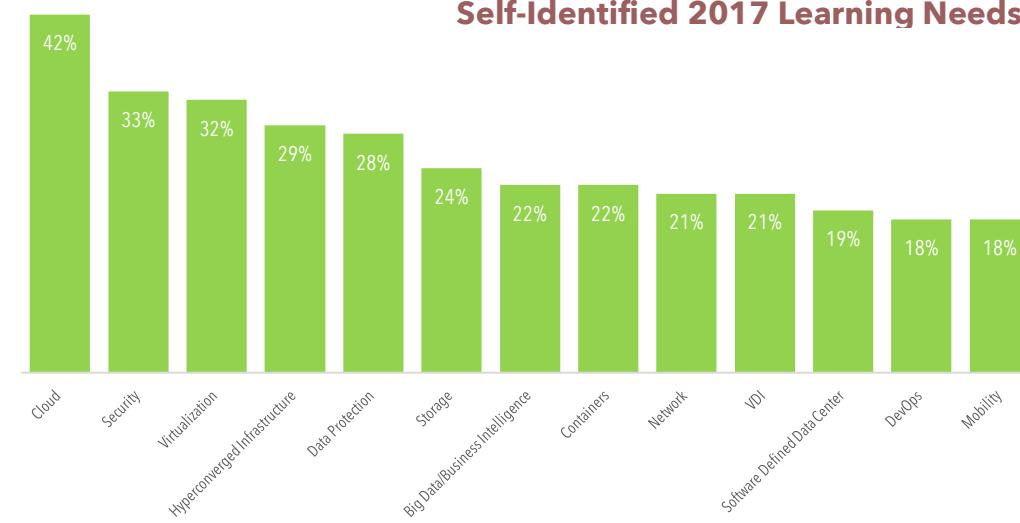
Other technologies and services, such as Containers and DevOps are far less understood

42% say they want to learn more about cloud - the clear front runner in educational need

Security (33%), Virtualization (32%), Hyperconverged Infrastructure (29%), and Data Protection (28%) round out the top five learning needs

DevOps and Containers do not enjoy high levels of interest from IT pros... yet

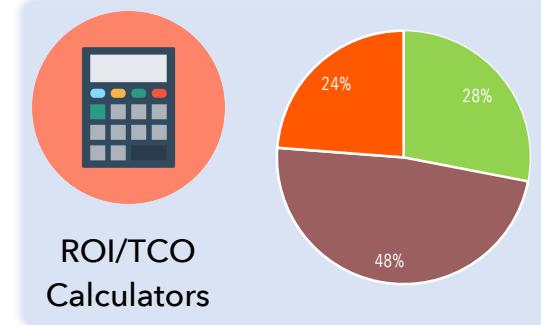
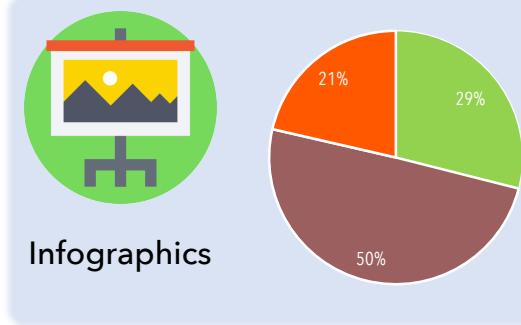
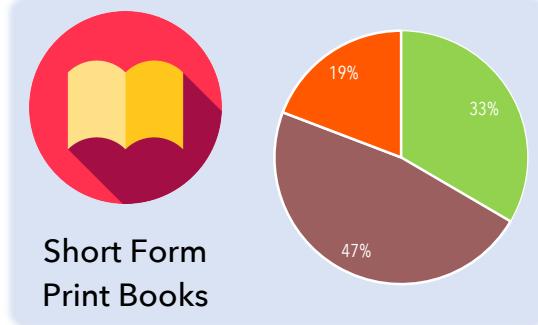
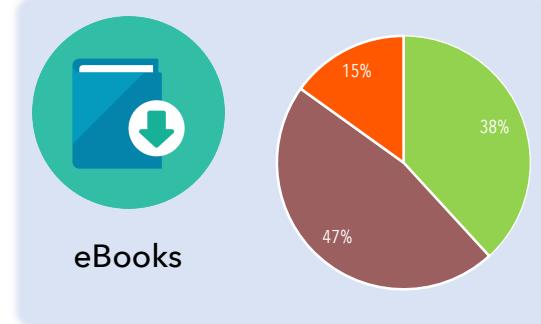
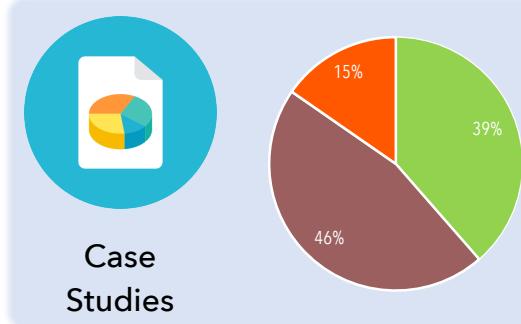
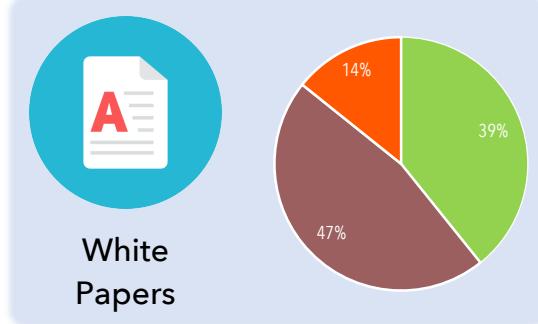
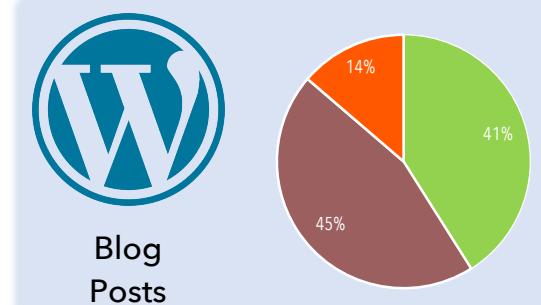
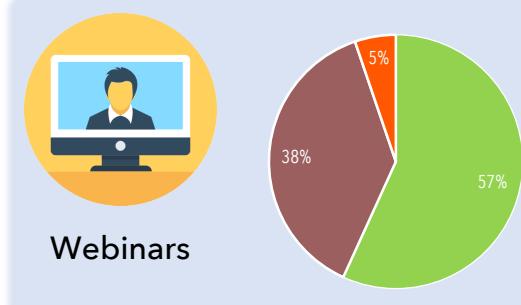
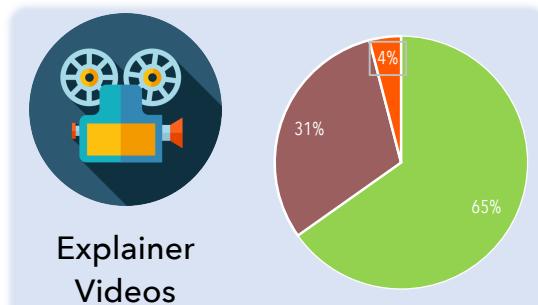
Self-Identified 2017 Learning Needs



Learning Styles



ROI and TCO calculators are out and Explainer Videos and Webinars are in, according to our audience. 24% of the audience say that ROI and TCO calculators are not helpful. On the other hand, a full 65% of the audience say that explainer videos are very useful and 31% say that they are useful. Just 4% do not find explainer videos useful.



Very Useful Useful Not Useful

Opinions on Video

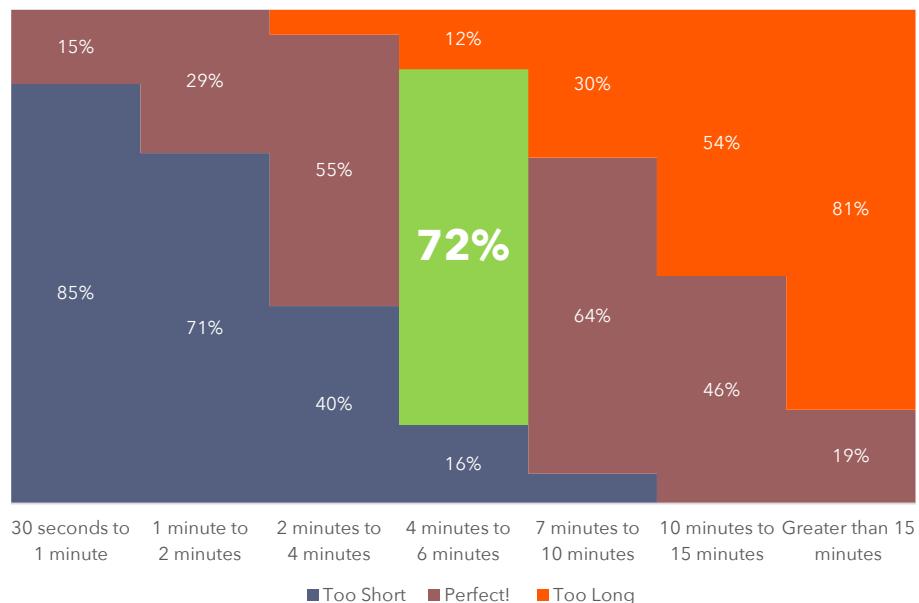
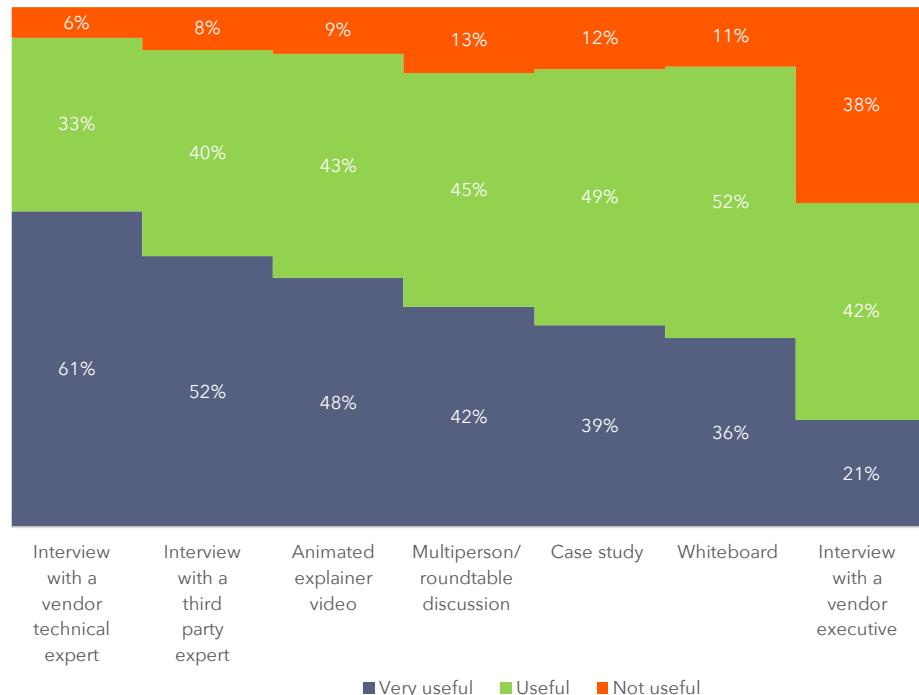


Your technical experts are beloved by the ActualTech Media audience

61% of the audience finds interviews with your technical experts very useful

Just 21% say the same about interviews with vendor executives.

The audience indicates that they find most types of video useful



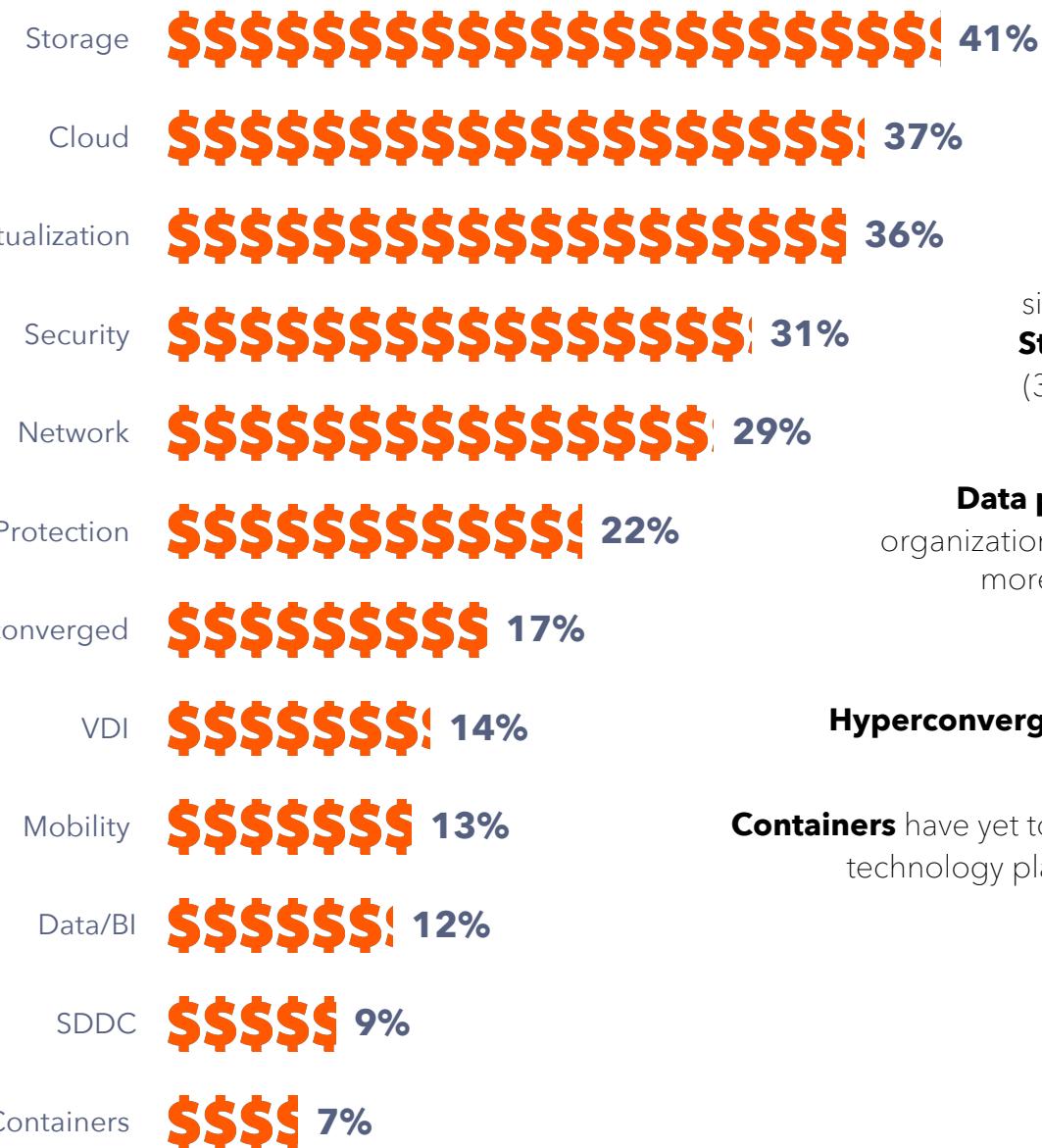
The “Goldilocks Zone” for video is four to six minutes in length

72% of the ActualTech Media audience say that this is the “perfect” video length

Shorter than four minutes and people think they’re not getting enough

Longer than six minutes and people’s attention begins to wander

2017 Technology Plans



Budget Spend in 2017 will be significant for the essentials, which include **Storage** (41% plan to buy storage), **Cloud** (37%), **Virtualization** (36%), and **Security** (31%)

Data protection (22%) is an eternal need, with organizations constantly looking for new, better, and more cost-effective ways to support this need

Budgets for 17% of the audience include **Hyperconverged infrastructure** services and products

Containers have yet to find a comprehensive place in people's technology plans with just 7% of the audience showing purchasing interest



Full Results

About the Audience



We asked respondents in a variety of ways to tell us about what they do each day. Beginning with Figure 1, you can see that we capture a healthy and varied cross-section of the business, from line staff to IT management and even some executive management. Although our larger survey data set does contain responses from some VARs and non-IT titles, for this purposes of this report, we eliminated chose to focus on the IT department itself.

As you can see in Figure 1, just over half (53%) of our survey respondents hail from IT management ranks while 43% come from staff roles. 4% of our respondents come from executive management, such as CEOs and CFOs. Particularly for smaller companies, we often see these roles making both strategic and tactical IT decisions.

Current Primary Role (N=1175)

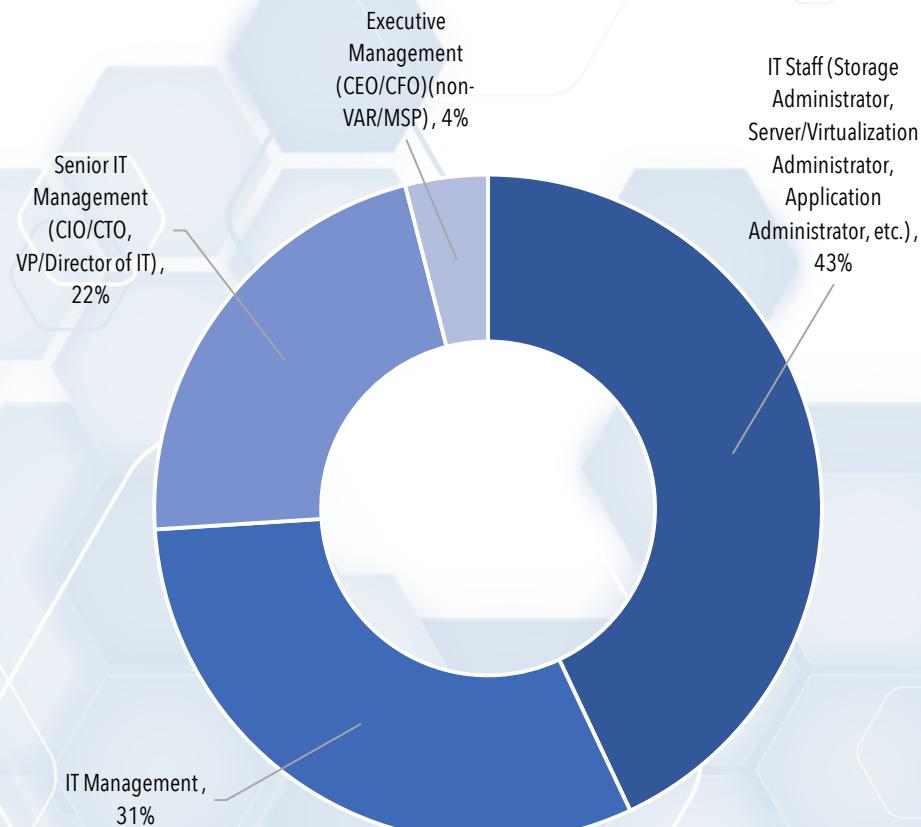


Figure 1: Respondents' Primary Responsibility

Granular Responsibilities



Functional Responsibilities (Multiple Responses)

Allowed, N=1175

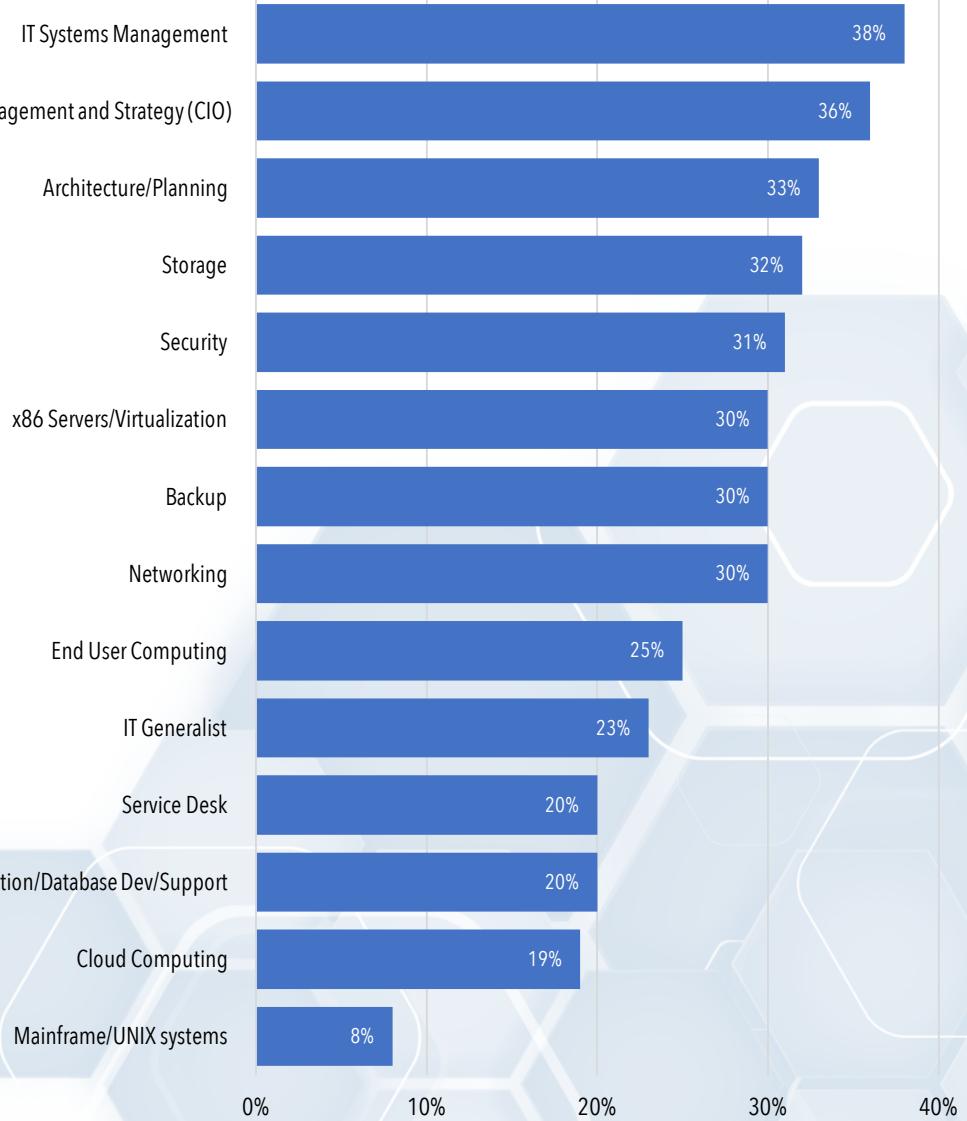


Figure 2: Functional Responsibilities (Multiple Responses Allowed)

It's common knowledge that IT leaders and IT staff are constantly on the go and many wear a variety of different hats in the IT organization. The more roles that a person plays, the more pressure they're under and the more difficult it can be to stay current with technology. Whereas Figure 1 asked respondents to provide their primary role definition, in Figure 2, you will see a full breakdown of everything these people do every day. Even CIOs in some companies are heavily involved in managing security, the service desk, cloud computing systems, and much more. It's easy to see that the most relied-upon skill set in our audience demographic is IT Systems Management (38%) followed very closely by strategic IT management (36%). We don't see a major drop off in functional attention until we get to end-user computing, and, even then, a full 25% of respondents must pay attention to this area. The only areas that are not getting much attention are mainframe and UNIX systems, which, in 2016, isn't much of a surprise. Everything else, however, is critical and our audience has a wide variety of people in each of these areas. For ActualTech Media, this makes it increasingly important that we ensure that we have content and services that can target each of these areas to help ensure that all parts of our audience are getting the critical information they need to make decisions on technology strategies and specific solutions to meet their individual challenges.

Multiple Responsibilities Are the Norm



As said before, the more jobs you have, the tougher things can be, and it makes it especially difficult to stay current on all aspects of each area. One of the reasons that ActualTech Media creates consumable content and hosts multi-vendor events is to ensure that even the busiest IT pro has the opportunity to get the full breadth of solutions available on the market so that they understand the options at their disposal.

Among our audience, 39% of respondents have a single hat to wear. 61% have multiple responsibilities! That's a lot of people! In fact, a full 31% of our audience has at least five separate roles they must fulfill. It's really tough being an expert in a lot of different areas!

We suspected that company size would play at least a small role in the number of discrete jobs that people must perform in IT and we were right... to a point. As you can see in Figure 4, those with just a single job (the blue bar) rises steadily as company size grows, but then suddenly drops as you get to a company size of 5,000 or more. There, we see more IT staff wearing multiple hats than in even the smallest companies in our survey. So, while our supposition that those in smaller companies would wear more hats is true, it only holds to a point, after which it seems that we're seeing people needing to maintain multiple skill sets regardless of company size. We suspect that larger organizations are continually experimenting with newer technologies, which may impact these results.

Respondent Role Count (N=1175)

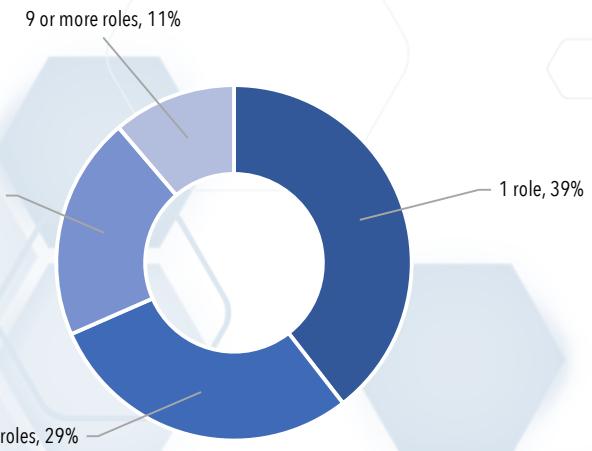


Figure 3: Number of Roles Held By Respondents

Respondent Role Count by Company Size (N=1175)

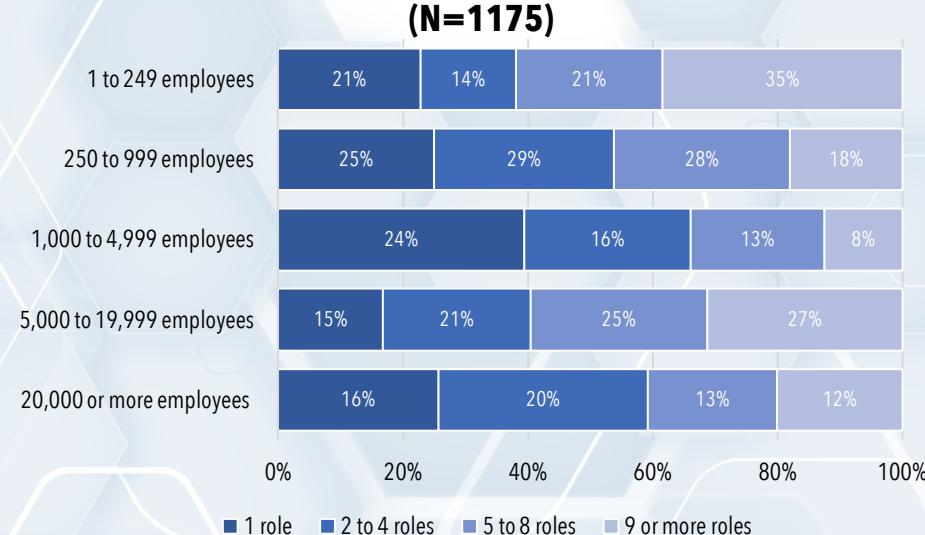


Figure 4: Respondent Role Count Broken Down By Company Size

Technical Knowledge



Describe your knowledge levels around the following technologies N=1175)

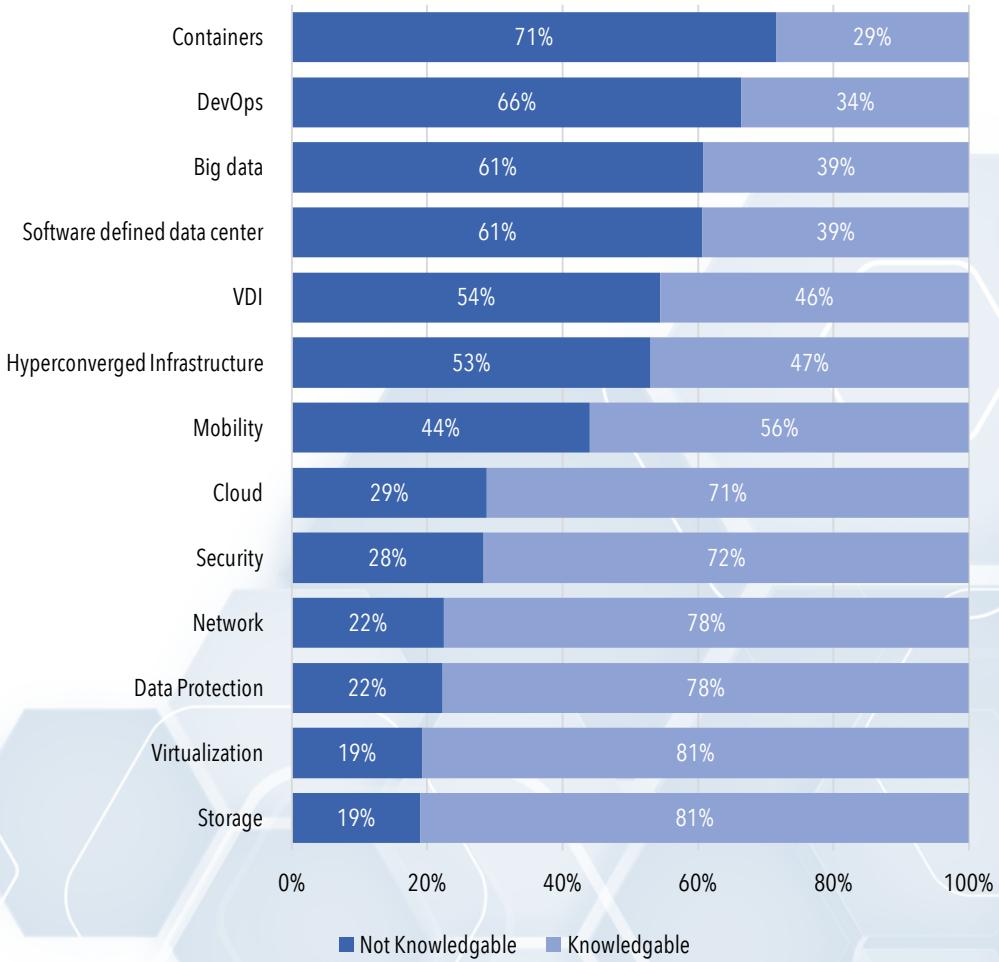


Figure 5: Self-assessed Knowledge Around Specific Technologies

What do IT people really need to know? It would stand to reason that they need to learn about those technologies for which they do not have expert-level knowledge. Newer technologies tend to be ones that people need to learn, which is generally pretty obvious. Figure 5 provides a look at those technologies that people are and are not knowledgeable about. A word of caution, however: This doesn't necessarily mean that people want or need to learn about these technologies. Later in this report, you will get a look at people's plans for 2017, which provides additional insight into what people still need to learn.

Regardless of deployment plans, it's clear that containers, DevOps, Big Data, and the Software Defined Data Center are topics for which IT pros do not yet trust their current skills. For example, 71% of respondents rated themselves as either not knowledgeable or with little knowledge regarding containers. Other topic areas, such as storage virtualization, data protection, and networking, enjoy much higher knowledge levels, primarily because these topic areas have existed for quite some time. However, we believe that people's knowledge levels in these areas will drop as they continue to evolve and staff will need to work to maintain currency in their skills.

2017 Technology Learning Goals



In fact, we're already beginning to see a need for even the most expert-level technologists to enhance their skills in legacy topic areas. Figure 6 provides you with a look at the topic areas of education interest to IT pros in 2017 and it's pretty eye-opening. For example, even though 71% of respondents rated themselves as knowledgeable about cloud, a full 42% of respondents say that they want to learn more about cloud in 2017. Further 32% of respondents want to learn more about virtualization, a topic area that has been around and talked about for a very long time. That said, as companies look at accompanying technologies, such as hyperconverged infrastructure, there are new questions raised around virtualization.

Security is also a hot topic. Thirty-three percent (33%) of respondents want to gain more insight into this critical area in 2017. Rounding out the top five learning areas for 2017 are hyperconverged infrastructure (29%) and data protection (28%).

All of this is not to say that people don't want to learn about other areas, but, for 2017, those other areas may not have as much focus as the items identified in Figure 6.

Which technologies would you like to learn more about in 2017? (N=1175)

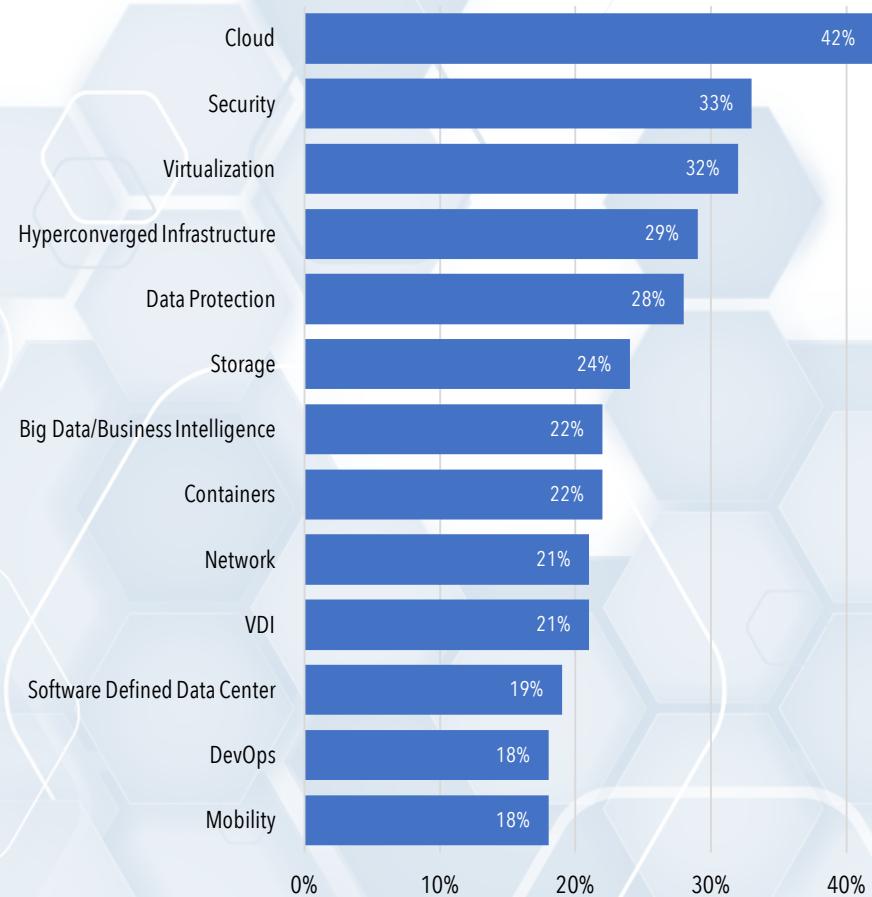


Figure 6: 2017 Technology Education Plans

Learning Styles and Educational Content Perceptions



You now know what kinds of topics people are interested in for 2017. The next step is to discover how these people want to learn about those topic areas and products. To that end, we asked our audience to tell us the kinds of content assets that they prefer to consume. Figure 7 makes it very clear that videos are at the top of people's lists. Further, although some people believe that webinars are old and sometimes undesirable, that sentiment is not shared by 95% of the ActualTech Media audience. In fact, 57% of the audience rates webinars as Very Useful with another 38% saying that they're useful. Just 5% of respondents say that webinars are not useful.

From there, the content strategy gets a bit more challenging. Blogs and white papers have been very popular ways for people to engage their customers and potential customers, but, for both, 14% of the audience indicates that these kinds of assets have outlived their usefulness. Of course, that does leave 86% of the market finding these kinds of assets helpful, so we certainly don't recommend that vendors stop creating these types of assets.

There are two types of content that people talk about a lot - infographics and ROI/TCO calculators - that don't seem to be of high interest to IT pros. Speaking from our own experience, ActualTech Media is no longer providing infographics as a service to our clients, and for a variety of reasons. First, they're overdone and have lost some of the punch they had early on. Second, they are very expensive to create and have a dubious ROI. Finally, they're simply too subjective to be successful. Very often, clients want to get as much input from as many internal stakeholders as possible and everyone has an opinion on the visual style, tone, and the amount of content. As a result, infographics end up designed by committee, and it shows.

How useful do you find the following types of content? (N=1175)

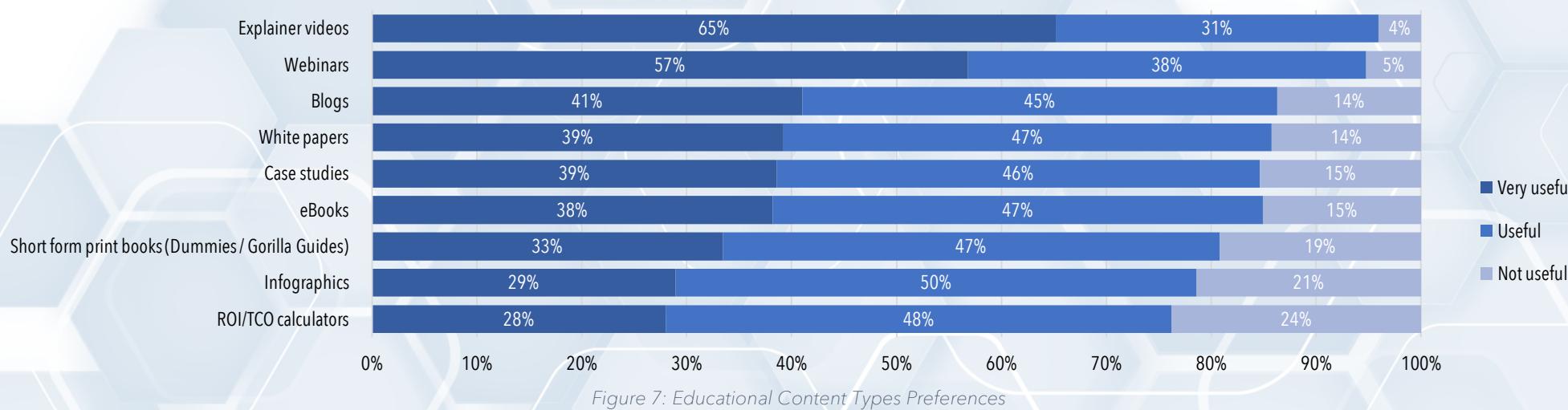


Figure 7: Educational Content Types Preferences



Likewise, it appears as if online ROI/TCO calculators have fallen somewhat out of favor with a significant chunk of the audience (24%). Bear in mind that these resources are often considered as biased by the audience, and, thus, may not have the value that they once did. Of course, 76% of the audience still finds these resources valuable in some way, so we don't recommend elimination, but we do recommend a hard look at the ROI of such projects and we urge vendors to be as complete and neutral as possible in order to maintain the integrity of these kinds of services.

You saw in Figure 7 that videos top respondent's content preferences. Suspecting that videos would be considered valuable, we asked respondents some follow up questions about them. As you know, there are a number of different types of videos from which you can choose, from interview style videos to explainer videos to case studies and whiteboard videos. In general, as shown in Figure 8, the ActualTech Media audience finds all types either very useful or useful, with one exception. A full 38% of survey respondents indicate that interviews with vendor executives aren't particularly useful. Just 21% said that these types of videos are very useful.

So, put your executives away, it seems! Instead, it's time to bring out your technical experts, which are beloved by a whopping 61% of survey respondents. This is followed closely by interviews with third party experts, which 52% of survey respondents identified as very useful. For these two types of videos, just 6% and 8% respectively think that they are not useful at all.

**Please tell us your feelings on the usefulness of each of the following kinds of videos when evaluating a new technology or vendor solution
(N=1175)**

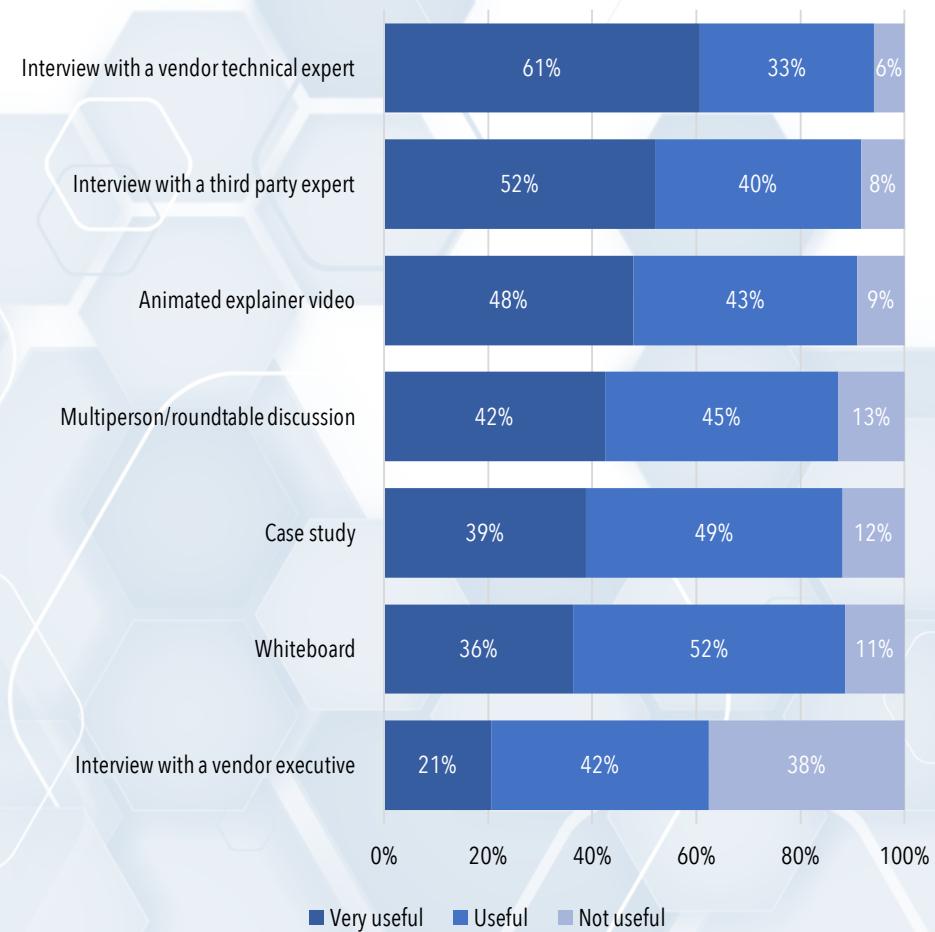


Figure 8: Thoughts Regarding Different Types of Educational Assets

Thoughts on Video Length



As you watch videos explaining a technology concept, what is an ideal length? (N=1175)

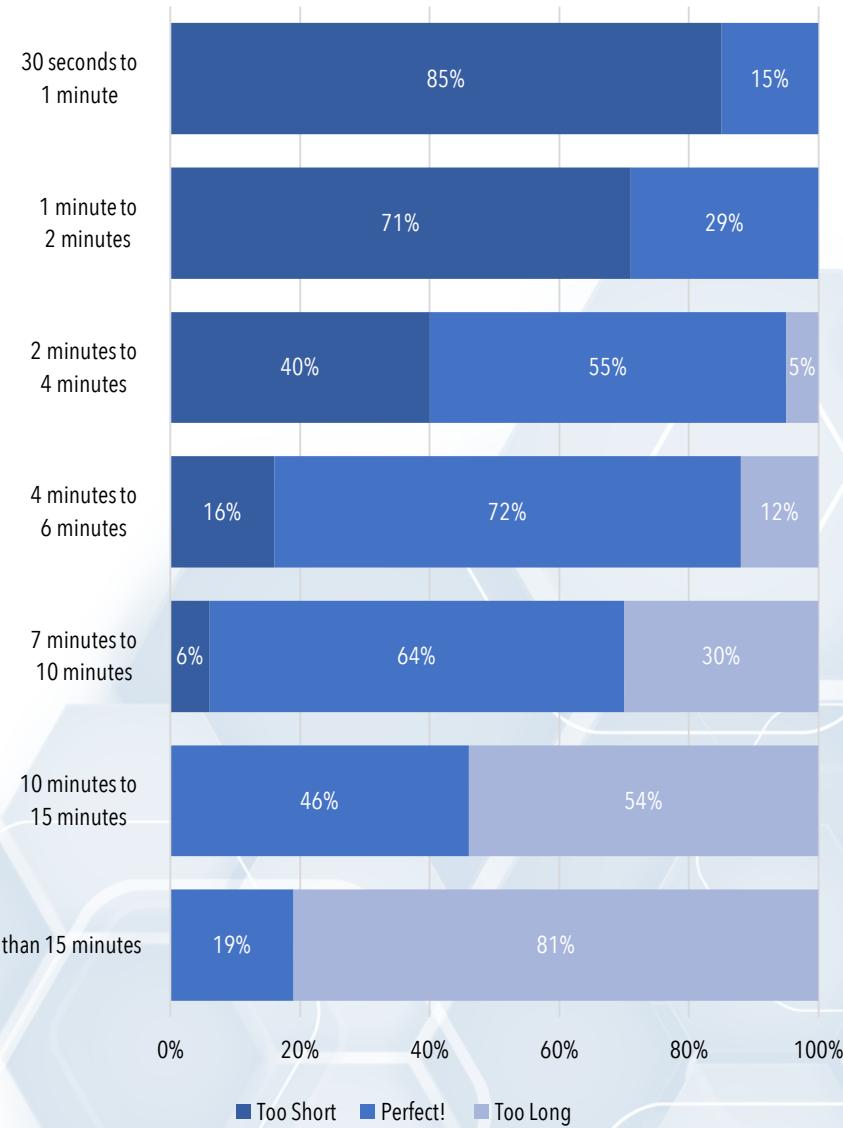


Figure 9: Ideal Length of a Video

Video length is always an interesting topic with a variety of opinions. We're here to tell you that videos that range in length from 4 minutes to 6 minutes are ideal to most IT pros, as evidenced by the chart shown in Figure 9. In general, videos under 2 minutes long are viewed as too short by viewers; they can't glean sufficient actionable information to make it worthwhile. However, if you go beyond 6 minutes, you'll risk losing 30% of your viewers, who don't feel that it's worth the time investment. For videos that are 2 to 4 minutes in length, 55% of the audience feels that this is a perfect length while 40% feel that this is too short and just 5% feel it's too long. At 4 to 6 minutes, 72% of the audience feels that the perfect length has been achieved, with just 16% feeling these are still too short and 12% feeling that they're too long. Bear in mind that this information is gathered at a time when people aren't actually watching videos, so we suspect that more people would actually be ok with videos in the 2- to 4-minute range than is reported. As such, we recommend to our clients that they try to keep all videos in the 2- to 6-minute range, depending on the topic and what's trying to be addressed. Also bear in mind that the content will have an impact on the duration as well. A video interview with a third party expert probably shouldn't go beyond the 6-minute mark, but a module in a complete training course can probably safely be at the 15-minute and higher range.

2017 Technology Plans



Every year, IT leaders lay out their plans for the coming year, aligning budgets, getting people on board, and drawing on project frameworks. But, each year, those plans are different. Replacement cycles for different parts of the data center hit; new technologies come to market; the business makes a change and new areas of focus are placed on IT. We asked 1175 survey respondents to provide us with some insight into their purchasing and upgrade plans for 2017 (Figure 10). Newer technologies such as containers (7%) and the software defined data center (9%) are not high on the list at all. However, more traditional areas, such as storage (41%), virtualization (36%), security (31%), and network (26%) are expected to receive significant attention in 2017. It should also be noted that cloud technologies (37%) are expected to receive significant attention in 2017.

Be careful reading too much into some of these items. For example, although software defined data center only received 9% of votes, we fully expect to see such technologies integrated in other resources, such as storage and networking. Further, while cloud gets 37% of respondents, it's a very broad category that can mean a lot of different things.

In 2017, what technology areas will you be purchasing or upgrading? (N=1175)

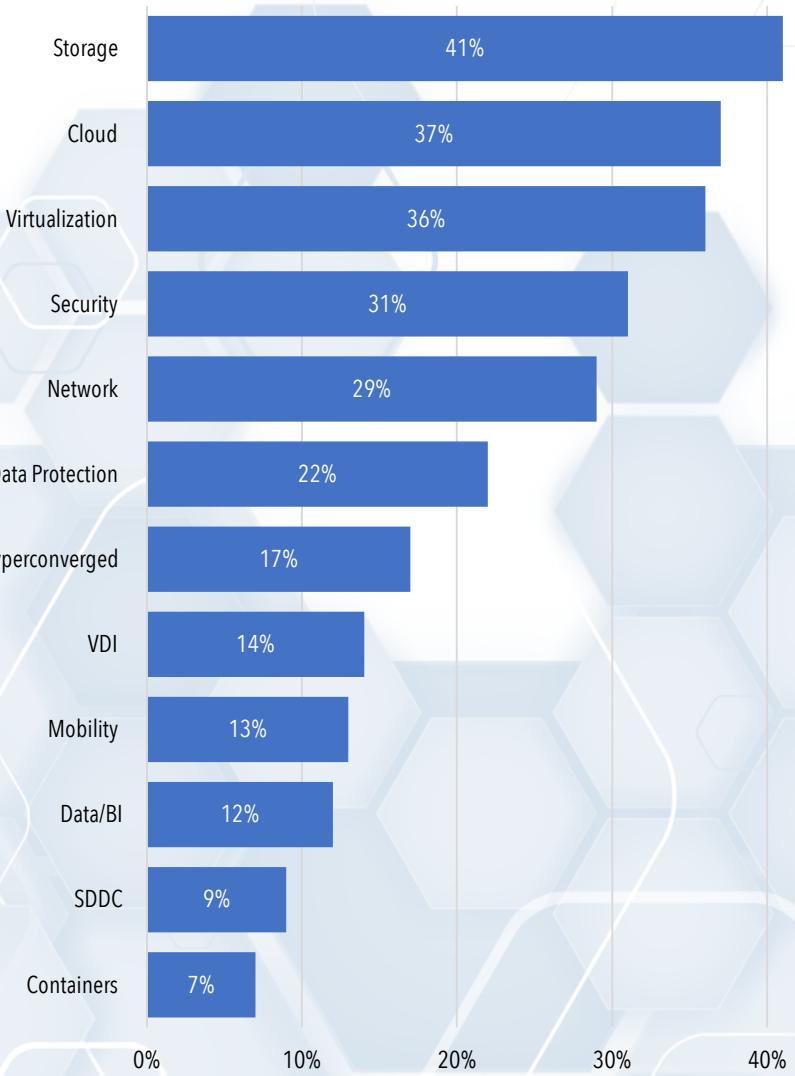


Figure 10: Purchasing and Upgrade Plans for 2017

Cloud Outlook is Cloudy



Although these general adoption trends are interesting and can help people target their general content marketing efforts, there is more nuance that needs to be considered in order to target the right people and the right organizational size. For many of these technology areas, role doesn't really play much of a, well, role, when it comes to people's thoughts. Regardless of whether someone is a CIO or someone is IT staff, their thoughts on their 2017 technology trends stayed the same.

For some of these areas, though, the person's role and the size of their company do seem to impact what they intend to do in 2017. Bear in mind that certain roles have far more visibility across the organization than others. For example, CIOs will likely have a worldview that encompasses all of IT and the business while IT staff may only be exposed to a portion of that view. This would impact the future plans for these IT pros and their 2017 plans would necessarily differ from those of their leadership.

One of the more striking differences of opinion emerges when considering respondents' 2017 plans around cloud adoption. There is a lot of variance around these plans based on both role (Figure 11) and, to a lesser extent, by company size (Figure 12). For example, while 48% of those in senior IT management roles, such as CIOs, indicate that they will be adopting cloud technologies in 2017, just 27% of those in staff roles say the same. Moreover, cloud adoption is a bit more of an interest for very large companies. Forty-three percent (43%) of companies with 20,000 or more employees say they plan to adopt cloud technologies in 2017 compared to just 34% of very small companies (those with 1 to 249 employees).

These facts tell us a couple of things. First, larger companies have a little more focus on cloud and, more importantly, executive management ranks are keenly interested in cloud technologies while line staff may remain somewhat in the dark about these plans.

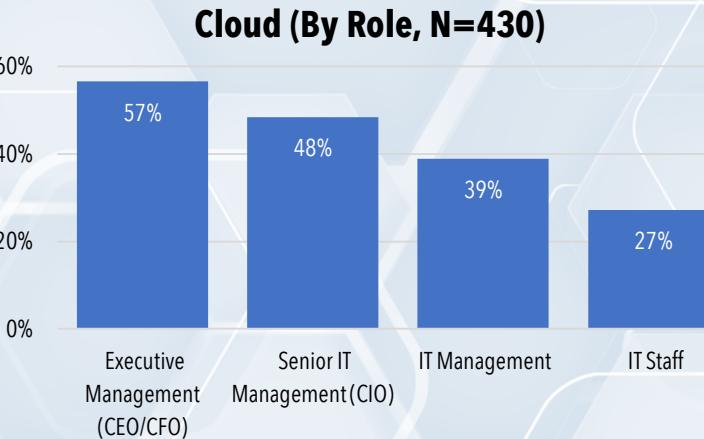


Figure 12: 2017 Cloud Adoption Intent by Role

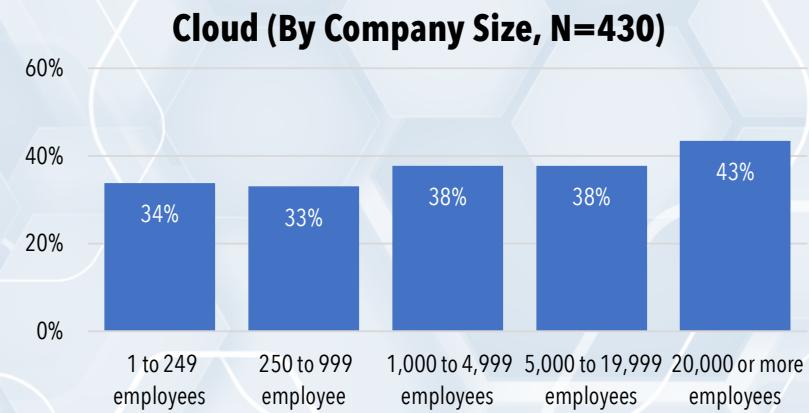


Figure 11: 2017 Cloud Adoption Intent by Company Size

Data Protection Expectations Mismatch



As is the case with cloud technologies, we also see a mismatch in expectations between management and staff. 39% of executive management and 28% of senior IT management intend to undertake data protection projects in 2017 while only 18% of IT staff indicate the same. On the company size front, large companies have far more intent (30%) to work on data protection projects as compared to small companies (20%).

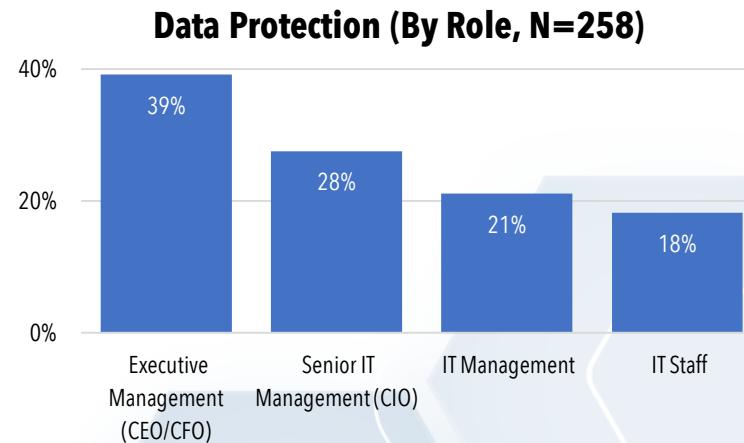


Figure 14: 2017 Data Protection Services Adoption Intent by Role

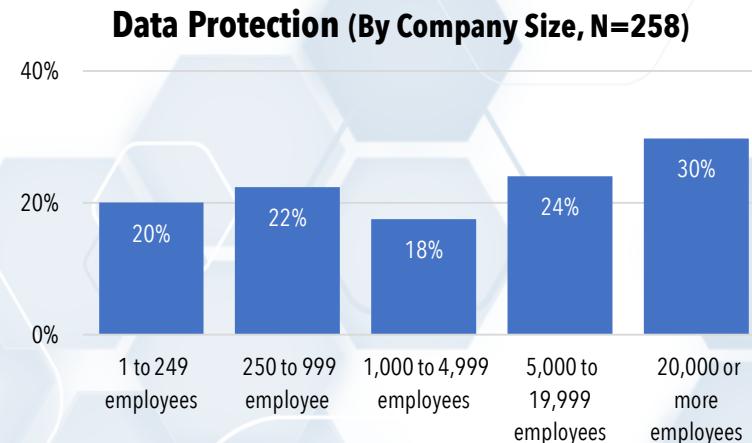


Figure 13: 2017 Data Protection Services Adoption Intent by Company Size

Hyperconverged Infrastructure Goes Hyper



Hyperconverged infrastructure is a technology trend taking the data center by storm and has spawned an entire market of vendors competing with one another. So, where do these vendors needs to focus in 2017? Those in larger companies are far more likely (25%,) to deploy hyperconverged infrastructure in 2017 than those in smaller companies (12%).

Hyperconverged Infrastructure
(By Role, N=200)

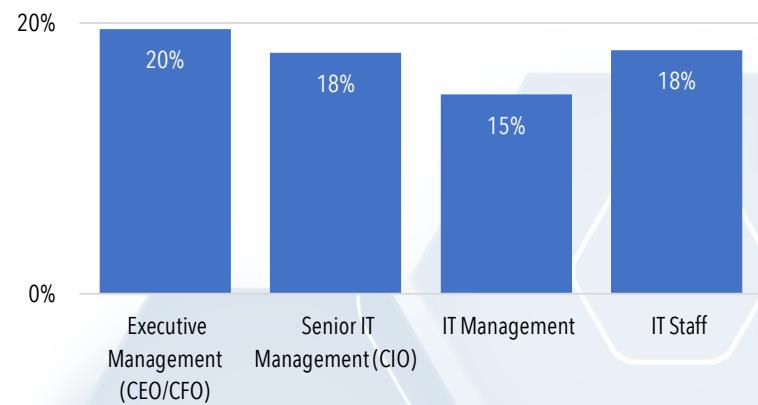


Figure 15: 2017 Hyperconverged Infrastructure Adoption Intent by Role

Hyperconverged Infrastructure
(By Company Size, N=200)



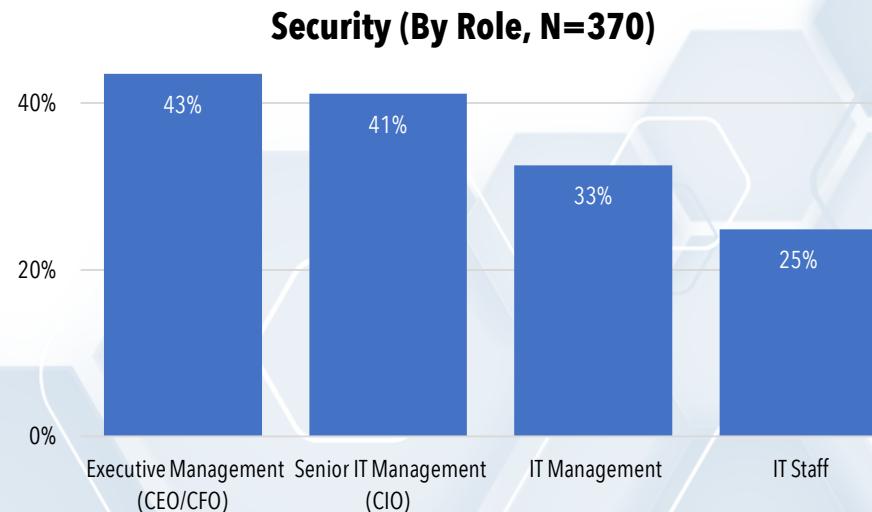
Figure 16: 2017 Hyperconverged Infrastructure Adoption Intent by Company Size

Security is Important to Senior Management



As one of the most critical services provided by IT, information security should be top of mind, particularly as news reports continue to emerge indicating that there are threats lurking around every corner.

43% of executive management and 41% of senior IT management intend to undertake security-related projects in 2017 compared to just 25% of IT staff.



2017 Technology Project Drivers



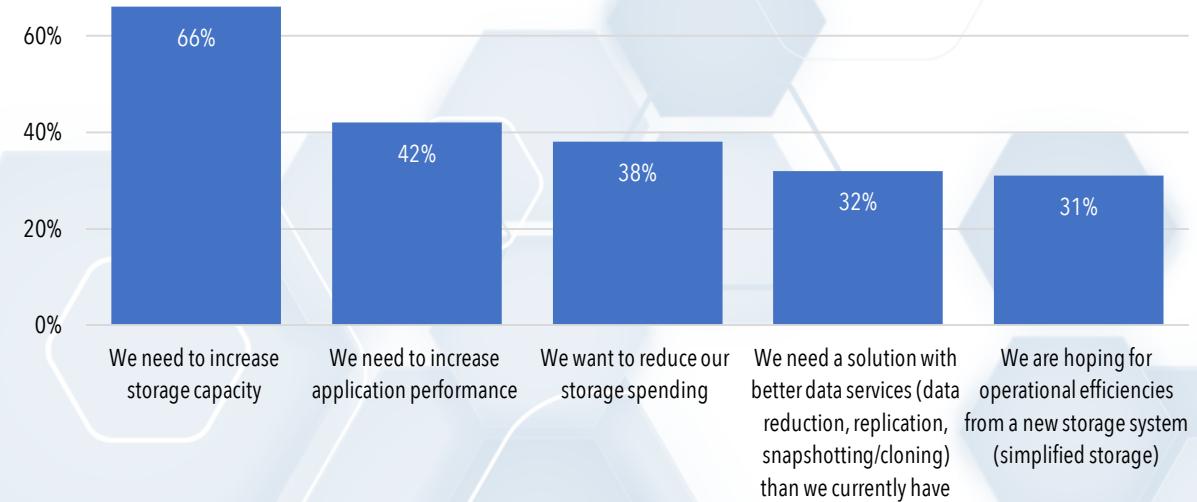
We asked survey respondents to lend some insight into the reasons that they're undertaking projects in 2017. For each technology area listed in Figure 10, we sought to better understand the drivers that have led people to make changes this year.

Every year, storage needs grow. With more and more data being stored for longer periods of time, organizations are constantly seeking more capacity. In fact, for those respondents planning 2017 storage projects, 66% say that capacity is a key driver behind their project. 42% say that they need more storage performance.

However, many are beginning to look at storage a bit differently. Rather than replacing or upgrading storage for capacity reasons, they're looking for ways that they can reduce their spent or make storage more efficient.

In fact, if you look at the storage market today, there is a serious movement toward simplifying what many consider to be a complex resource while also bringing overall storage spend down.

Storage: What areas are a focus for you and driving you to implement or upgrade your current solution?



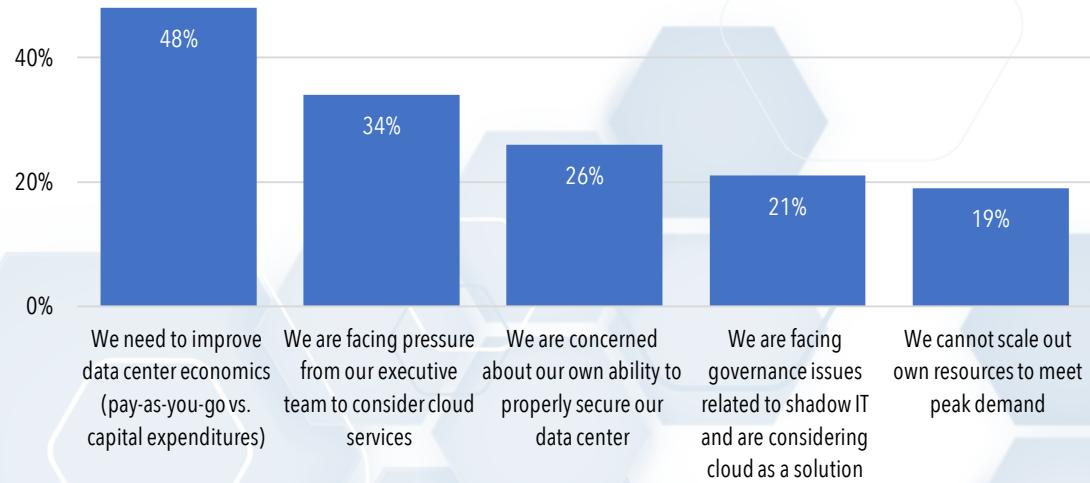
2017 Technology Project Drivers



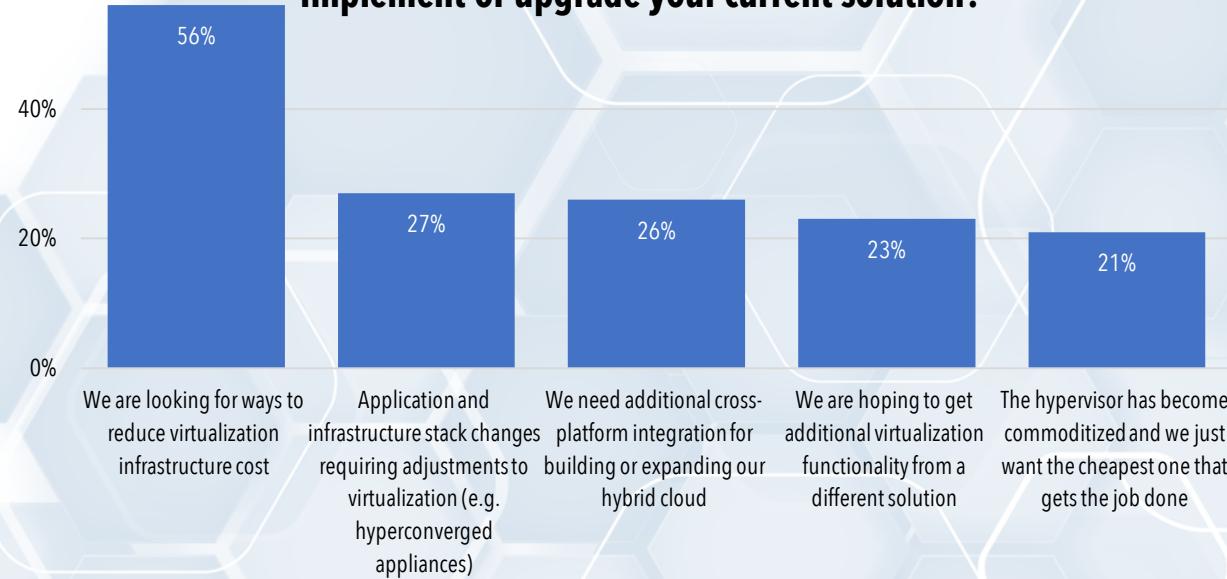
Storage isn't the only resource being directly impacted by a desire to change the data center economic picture. In fact, the entire data center is under scrutiny, as evidenced by people's interest in cloud services. For those considering cloud services, the number one driver (48%) is a desire to shift to a more operationally-focused data center economic structure.

Interestingly, 34% of respondents say that one of their key drivers is executive pressure, showing that IT architecture is always being watched to ensure the best business outcomes.

Cloud Services: What areas are a focus for you and driving you to implement or upgrade your current solution?



Virtualization: What areas are a focus for you and driving you to implement or upgrade your current solution?



Virtualization is not just yesterday's technology! More than ever, organizations large and small are virtualizing more and bigger workloads. However, many struggle with the financial side. For those undertaking virtualization projects in 2017, 56% are doing so in order to reduce the overall cost of their virtual infrastructure.

New data center architectures, such as hyperconverged infrastructure, are also driving some of these projects.

2017 Technology Project Drivers

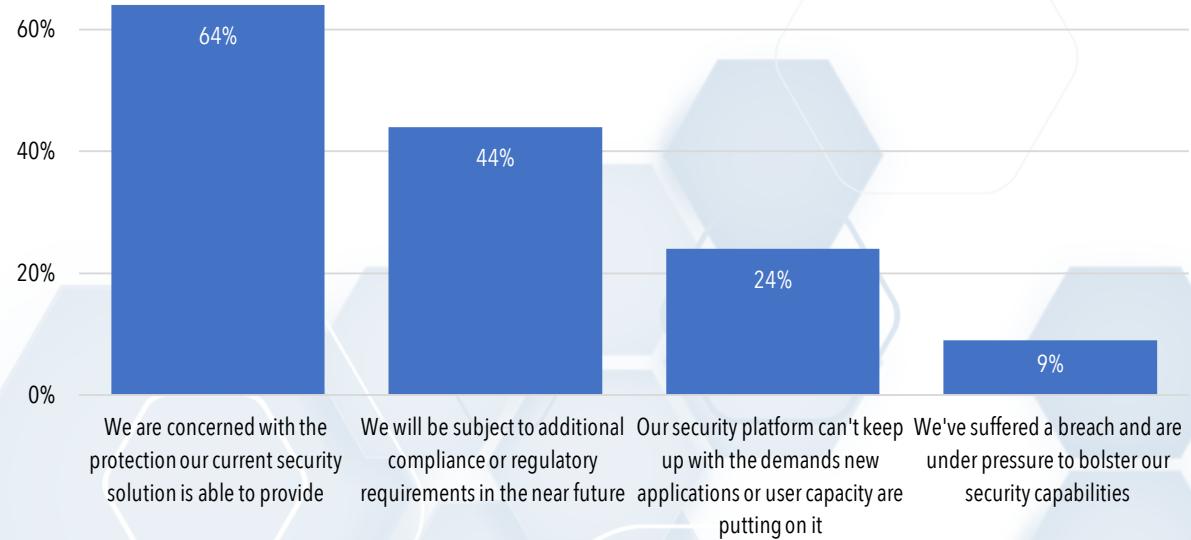


Although not all respondents are undertaking security projects, an overwhelming 64% of those that are indicate that they have a lack of faith in their current security systems.

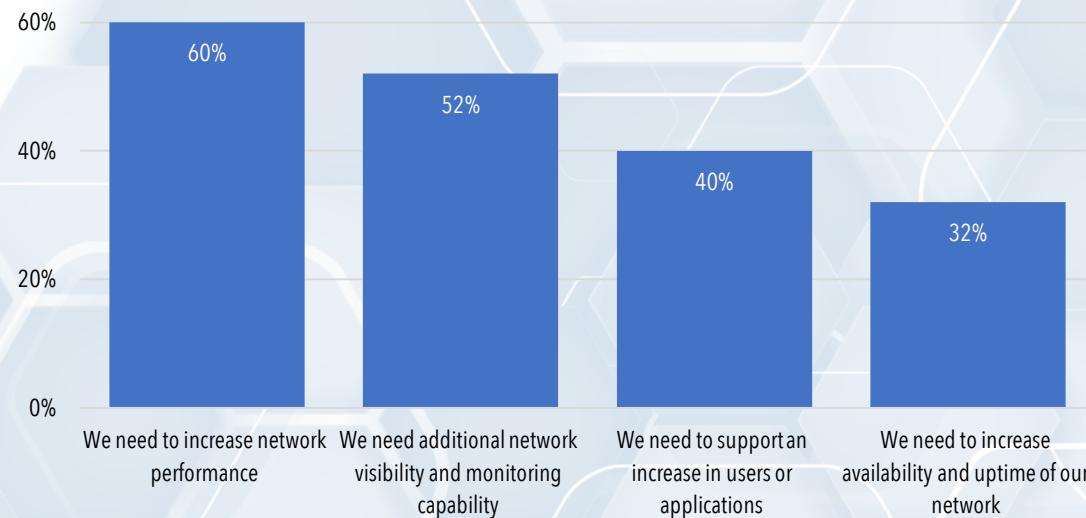
This is a major concern and is also a major opportunity for upstart security solutions to displace unsatisfactory incumbent solutions.

In addition, respondents identified a need to support new compliance directives and application demands as drivers behind security projects.

Security: What areas are a focus for you and driving you to implement or upgrade your current solution?



Network: What areas are a focus for you and driving you to implement or upgrade your current solution?



Everyone wants faster Internet and access to applications, a fact reinforced by 60% of those that are planning network projects in 2017. These people have a need to increase overall performance of the network.

But, they also need to be able to prove that the network is operating at peak efficiency. 52% of respondents are looking for additional network visibility and monitoring capabilities.

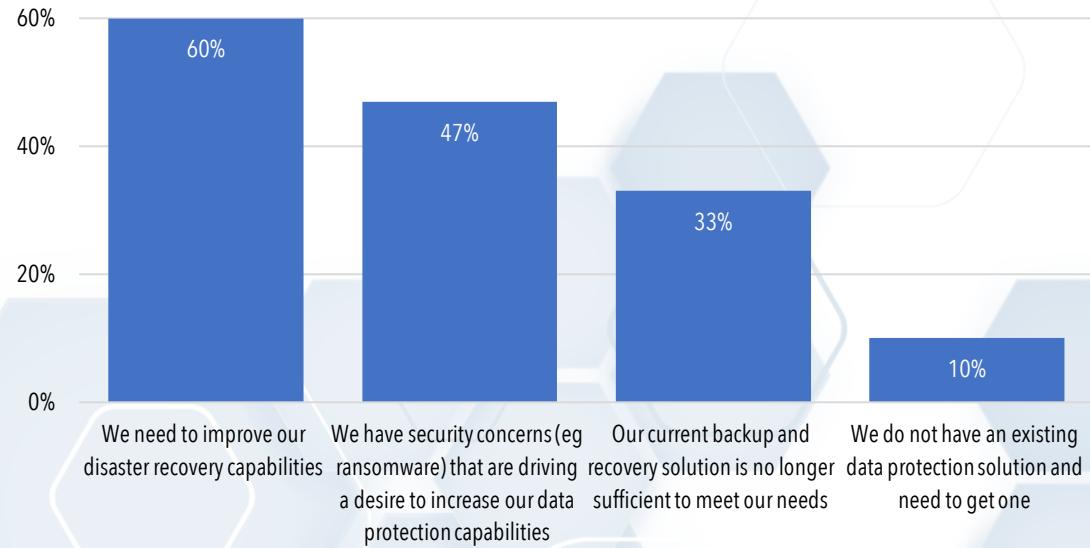
2017 Technology Project Drivers



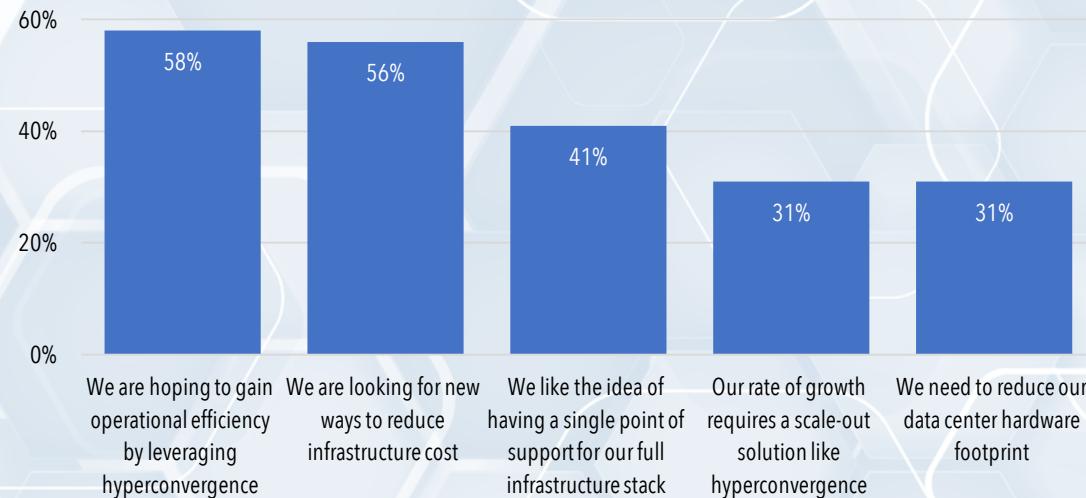
Data protection is increasingly going hand-in-hand with security. With new threats emerging all the time and with increasingly criticality of business workloads, 60% of people undertaking data protection projects in 2017 are looking for ways to improve their overall disaster recovery capabilities.

In addition, 47% of respondents directly indicate that their data protection improvements are the result of security concerns.

Data Protection: What areas are a focus for you and driving you to implement or upgrade your current solution?



Hyperconverged Infrastructure: What areas are a focus for you and driving you to implement or upgrade your current solution?



One of the hottest data center architectures on the market today is hyperconverged infrastructure, which is a conglomeration of servers, storage, and a hypervisor in an appliance form factor.

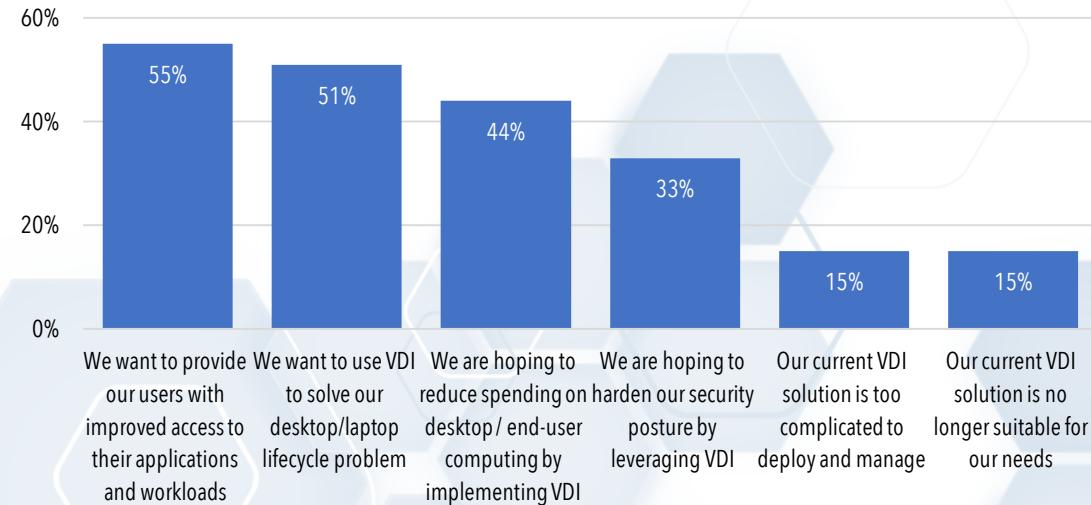
There are numerous benefits to be had with this technology. For those considering such services in 2017, 58% are hoping for improved data center efficiency while 56% are looking for ways to reduce their overall data center infrastructure costs.

2017 Technology Project Drivers

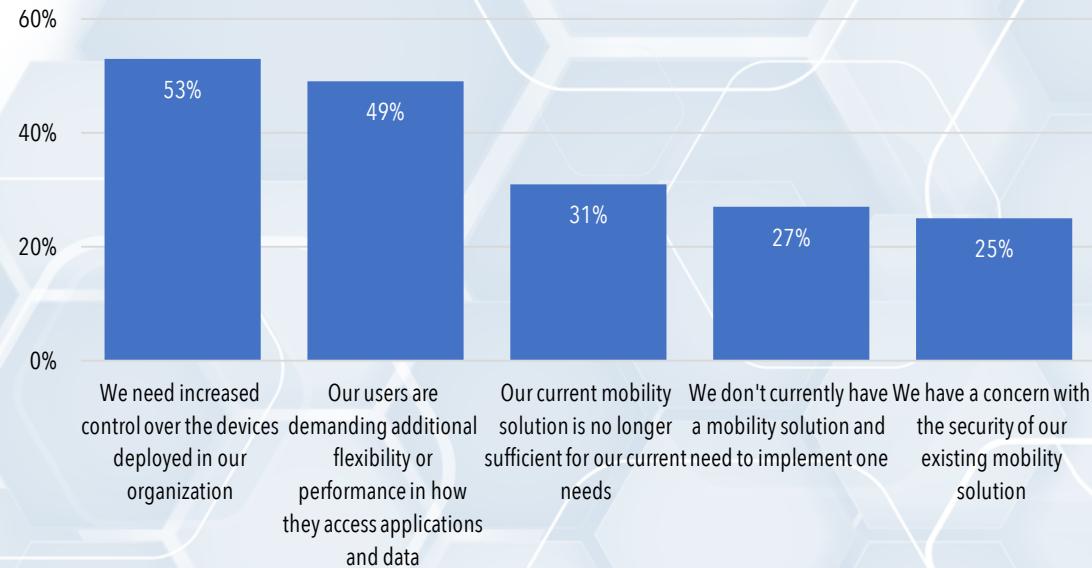


Virtual desktop infrastructure (VDI) has been a technology of interest for a number of years. Originally, many looked at VDI as a way to save money on desktop replacement and, while that is still a key driver identified by 44% of people planning VDI projects, it's not the biggest driver. Instead, 55% of respondents say that they want to make application and workload access more ubiquitous for their users. In addition, 51% say that they want to simplify the desktop/laptop replacement cycle with VDI, which often relies on less complex thin clients.

VDI: What areas are a focus for you and driving you to implement or upgrade your current solution?



Mobility: What areas are a focus for you and driving you to implement or upgrade your current solution?



Right along with VDI, mobility needs have taken center stage in recent years as well. More employees and bringing and demanding support for a wider array of devices than ever before.

Again, however, security raises its head. For companies planning mobility projects, a full 53% are doing so in order to increase the control of the devices they have deployed in the organization. In addition, 49% say that users are demanding increased flexibility, which IT is working to provide.

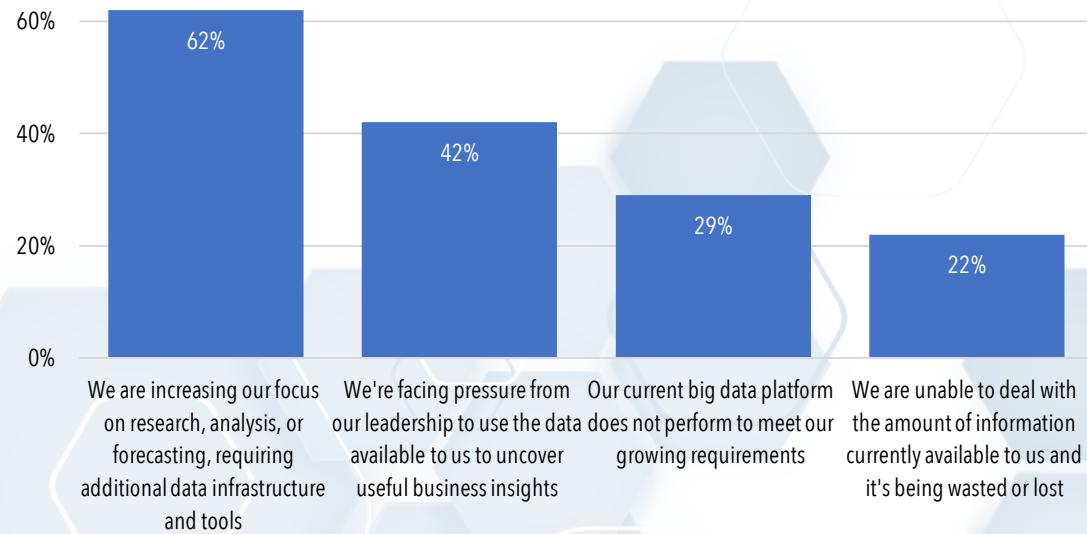
2017 Technology Project Drivers



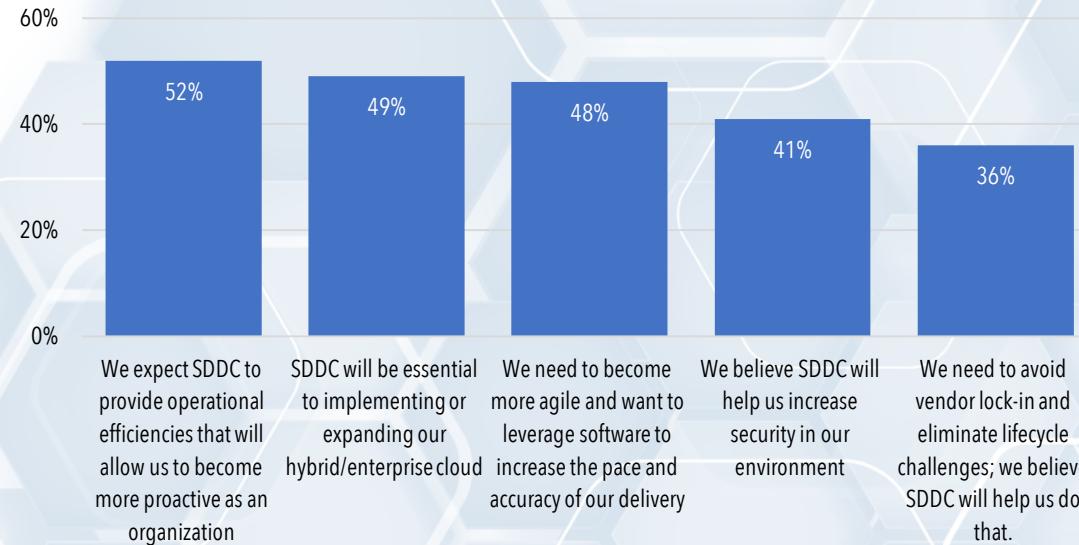
Data analytics and business intelligence have emerged as critical services intended to help organizations make sense of their data by turning it into actionable insights. In 2017, for those organizations that have planned to undertake data projects, 62% are doing so because they are increasing their focus on research and forecasting, which requires the deployment of new tools and supporting infrastructure.

Expect this trend to continue for a long time as companies gather more and more data.

Business intelligence: What areas are a focus for you and driving you to implement or upgrade your current solution?



SDDC: What areas are a focus for you and driving you to implement or upgrade your current solution?



Although the software defined data center (SDDC) has become a buzzword, a lot of people are still learning about it and it's one of the items with a bit less specific focus in 2017. We suspect that people are focusing on software-centric solutions in the main project categories, such as networking, rather than simply working on SDDC adoption directly. However, for those that do have an SDDC-centric view, the goals are to reduce complexity (52%) and enable broader support for cloud (49%) in order to improve overall delivery of IT services (48%).

2017 Technology Project Drivers

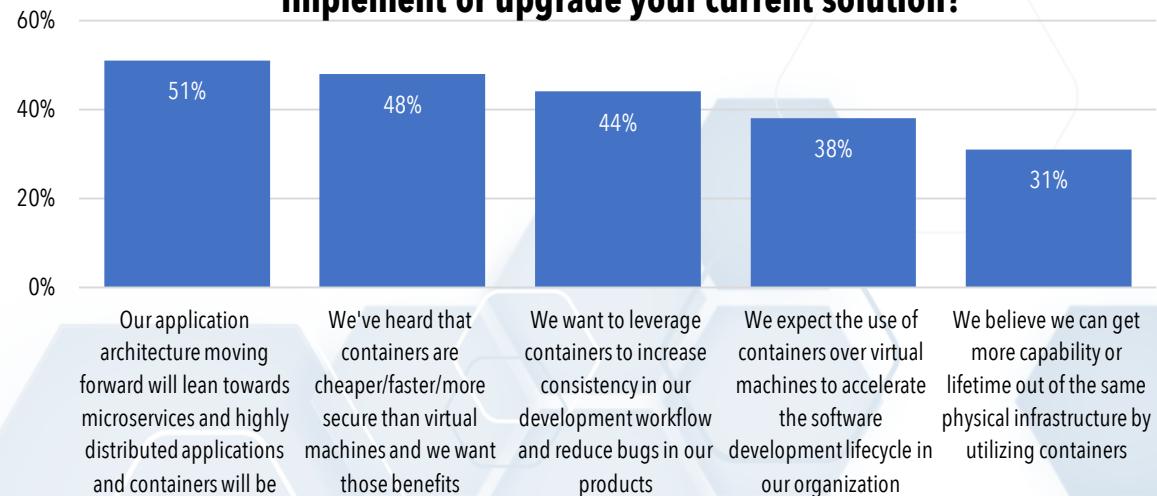


Finally, rounding out people's 2017 technology deployment plan is container technology, which takes virtualization to a whole new level while also completely redefining application architectures.

In 2017, for those planning to undertake container projects, 51% are doing so in order to support microservices-based application architectures, an increasingly popular option for building at-scale applications.

Others are turning to containers as a way to try to better control overall infrastructure costs (48%).

Containers: What areas are a focus for you and driving you to implement or upgrade your current solution?



Summary

The ActualTech Media audience is dynamic and representative of the wider IT community with members planning to undertake a variety of projects in the coming year across a number of technology areas. By better understanding people's motivations and linking that to their preferred content types and learning styles, ActualTech Media is uniquely positioned to help our clients meet their marketing and demand generation goals. Through the creation of unique and authoritative content, we can help you reach potential new customers and assist in driving your demand efforts.

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