

## ◆ The Future of Scanning ◆

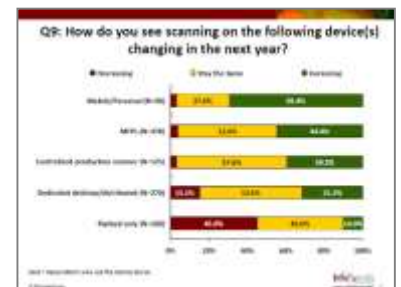
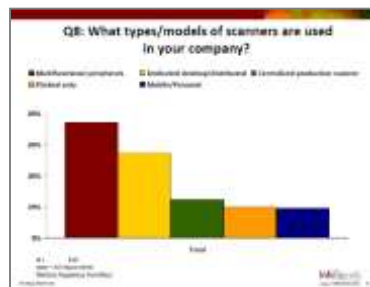
### 完成のご案内 スキャンニングの将来

スキャン業界では、過去 15 年にわたり、Decentralized & Distributed Scan に着目してきましたが、現在、スキャナーベンダーにとっての機会およびチャレンジは、何でしょうか？

今日、スキャンニングは業務オペレーションに浸透し、複数種のデバイスがドキュメント(文章)やコンテンツ(情報)のキャプチャに活用されています。Business Process Automation(BPA)による紙の削減傾向は、スキャンニングの重要性を加速させ、自動認識ソフト・画像情報抽出ソフトの精度はさらに向上していくことでしょう。そして、特定バーティカル(産業)、また固有業務においては、特有のスキャンニング需要が存在しています。



企業内のスキャンオペレーションで利用されているスキャナーおよびスキャンボリュームの傾向を分析すると右図となります。将来、(a)Mobile/Personal、(b)MFP、(c)Centralized Production Scanner とともに、スキャンニングは大きく成長することが期待されています。



- BPA(自動化/IT化)によって増加する予想される Scan Volume は、いつまで増加傾向なのか？
- 現在の Production/Single Function の Volume は、どのようにシフトする？ Mobile/Tabletop へのシフト傾向は？
- Centralized Scanning から分散型にシフトするなかで、中堅企業・中小企業における MFP への期待値は？
- 現在スキャンされている Application は、BPA の浸透とともに、どのように変わってくるか？
- 現在スキャンされていない Application が、新ハードウェアにより、今後、スキャンされ始める傾向があるのか？

- 調査目的：(詳細は英文企画書 p.10 をご覧ください)
- 現在/将来の電子化・自動化への動き(BPA)が、MFP および単機能スキャナーに与える影響を確認する
  - MFP のスキャンニング機能が、ワークフローにつながる切っ掛けになるかを確認する
  - Total Scanning Solution の価値を定量化する
  - スキャンニング利用の変化が、ビジネスに与える影響を理解する
  - スキャンニング活動を牽引し、新収益の機会を創り出す可能性があるクラウド・ソリューションを確認する
  - スキャンソリューションのチャンネルをプロファイルし、多様な市場アプローチ(Go To Market)の概要を把握する(バーティカル、もしくはビジネスセクターへのアプローチなど)
  - スキャンおよびキャプチャー以外への展開の機会(Expansion Opportunity)を確認する

■ 対象国

- 米国

■ 調査方法

- ウェブ調査： 購入決定者 および インフルエンサー 500名
  - Variety of vertical industries to determine specific adoption and focus
  - Use of scanning technology and solutions
  - Drivers and inhibitors
  - Cloud file management
- 電話インタビュー調査
  - 企業 / エンドユーザ(利用者) 5件

■ 納品物の着目点

- Current and future adoption analysis of scanning devices
- Analysis of key drivers for Distributed and Centralized scanning and adoption
- Current needs and challenges of IT or Decision makers for scanning solutions
- Current scanning solutions by OEM provider

■ 納品物

- エグゼクティブサマリー、分析レポート (PDF)
- ウェブ調査結果 PPT グラフサマリ
- 調査結果 データタブ(Excel / PDF)
- オンラインプレゼンテーション

■ 担当アナリスト

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Anne Valaitis is the Director for InfoTrends' Image Scanning Trends and Professional & Managed Print Services Consulting Services. Ms Valaitis is responsible for managing custom consulting projects, providing forecast analysis, developing market sizing estimates, and creating editorial content for product and market analysis reports. She has over 22 years of experience in the office solutions and imaging and IT industry. Prior to joining InfoTrends, Ms. Valaitis gained industry experience as a Product Manager for Océ North America. Anne was responsible for bringing to market a variety of hardware and software products. In this position, Ms. Valaitis played a critical role in developing, implementing, and overseeing a solutions driven organization. Prior to Océ, Anne was a Product Manager with Konica Minolta Business Solutions, where she focused on hardware and software solutions targeted at the office.



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## Future of Scanning 調査レポート - ハイライト

### ■ Project Objectives

The purpose of this multi-client study is to understand and identify the major trends and drivers for scanning solutions within five key vertical areas, specifically by:

- **Understanding the ownership and use of scanning devices**
- **Identifying the level of integration of scanning devices among vertical specific processes**
- **Determining satisfaction with scanning solutions**
- **Assessing attitudes in regards to mobile and cloud technology**



### ■ Demographics

Figure 4: Which of the following are business priorities for your organization? (Vertical Market)

Figure 5: Which of the following are business priorities for your organization? (Company Size)

### ■ Scanning Hardware

Table 1: Which of the following are used to scan documents within your office? (Vertical Market)

Table 2: Which of the following are used to scan documents within your office? (Size)

Figure 6: What are the key purchasing criteria for scanning devices?

Figure 7: How is each device being used to scan? (Single Function)

Figure 8: What types of documents do you scan with a single function scanner?

Figure 9: How do you see the use of scanning changing on single function scanners in the next three years?

### ■ MFDs

Figure 10: How is each device being used to scan? (MFD)

Figure 11: What type of documents do you scan with MFDs?

Figure 12: How do you see the use of scanning on MFDs changing in the next three years?

### ■ Smartphone/Mobile

Figure 13: How is each device being used to scan (Smartphone/Tablet)

Figure 14: What type of documents do you scan with mobile devices?

Figure 15: How do you see the use of scanning on mobile devices changing in the next three years?

### ■ Scanning's Effect on Paper Use

Table 3: Of all external business content that your company receives, what percentage comes in as paper?

Figure 16: How do you see the use of paper in your organization changing in the next three years?

Figure 17: Does your company have any of the following initiatives/policies to reduce paper use?

Figure 18: For any paperwork where you have to capture a signature, how is that done? (Vertical Market)

Figure 19: For any paperwork where you have to capture a signature, how is that done? (Company Size)

Figure 20: Are you considering implementing a digital signature solution?

**■High-volume Production Scanners**

Figure 21: How long have you had your current in-house centralized scanning solution?

Figure 22: What are the main benefits of this in-house centralized scanning service?

Figure 23: How do you see the volume of scanning in your in-house centralized solution changing in the next 12 months?

Figure 24: Reasons for Increase in Scanning

Figure 25: Will you be making any new investments in the in-house centralized scanning solutions in the next two years?

**■Change in Scanning**

Table 4: In the next 12-18 months, are there specific scanning projects your company will be implementing?

Table 5: Which of the following devices will be used to implement the upcoming scanning solution? (Vertical Market)

Table 6: Which of the following devices will be used to implement the upcoming scanning solution? (Company Size)

Figure 26: What are some of the key drivers for scanning within your organization? (Vertical Market)

Figure 27: What are some of the key drivers for scanning within your organization? (Company Size)

**■Scanning by Vertical Market**

▼ Scanning in Banking

Figure 28: For which of the following processes do you use your scanning device? (Banking)

Figure 29: Overall, how integrated are scanning devices in the following business processes? (Banking)

Figure 30: Does your company use any of the following scanning software solutions? (Banking)

Figure 31: How satisfied are you with your current scanning solution? (Banking)

Figure 32: Are you planning on integrating the following processes with scanning in the future? (Banking)

▼ Scanning in Education                      中略

▼ Scanning in Healthcare                      中略

▼ Scanning in Manufacturing                      中略

▼ Scanning in Retail                      中略

**■Mobile Scanning Solutions**

Figure 53: How does your company view the use of mobile devices to take pictures of company documents?

Figure 54: How does your company view the use of cloud document repositories to share and store company content?

Figure 55: What are the key drivers for using mobile devices for scanning documents for business?

Figure 56: Where do you feel the biggest inhibitors or threats are with mobile technology?

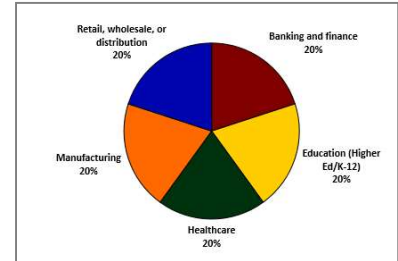
Figure 57: Are there any corporate restrictions in the use of the following within your organization? (Mobile Devices)

Figure 58: Are there any corporate restrictions in the use of the following within your organization? (Cloud Repositories)

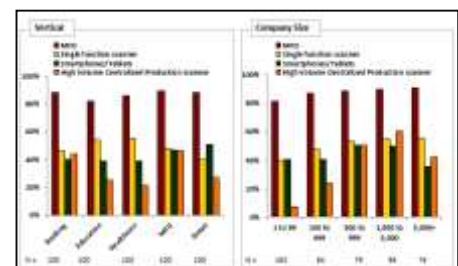
Figure 59: How integrated are mobile devices for scanning to the larger business environment (other than to company e-mail system)?

**Future of Scanning 調査結果チャート 目次**

1. The Future of Scanning *Capture and Scan Key Drivers and Improvements for Business*
2. Industry
3. Role in Scanning Purchase Decisions
4. Business Role
5. Company Size



6. Scanning Devices Used
7. End User Operation Knowledge Level (Mean)
8. Key Purchasing Criteria for Scanning Devices
9. Business Priorities
10. Business Priorities
11. Percentage of External Paper that Come in as Paper (Means)
12. Use of Paper in Next 3 Years
13. Change in Paper in Next 3 Years (Means)
14. Policies and Initiatives to Reduce Paper
15. Outsourcing Scanning
16. In-House Centralized Scanning Years of Ownership
17. Benefits of In-Housed Centralized Scanning Service
18. Volume of In-House Centralized Scanning Over Next 12 Months
19. Reasons for Increase in Scanning / New Investments
20. Implementation of Specific Scanning Projects in Next 12-18 Months
21. Devices that Will Be Used to Implement New Scanning Solutions
22. Key Drivers for Scanning
23. Expected Change in Scanning Solutions Technology Investment
24. Single Function Scanners
25. Type of Documents Scanned on Single Function Scanners
26. Multifunctional Scanning Devices
27. Type of Documents Scanned on MFD
28. Smartphone/Tablet Scanning
29. Type of Documents Scanned on Smartphones/Tablets
30. Scanning Associated with Departmental Processes
31. Percentage of Documents Scanned by Department (Mean)
32. Signature Capture - Vertical
33. Signature Capture – Company Size
34. Consideration of Digital Signature Solution



35. Finance or Banking
36. Process that Scanning Devices are Used On
37. Plans to Integrate Scanning into Process
38. Level of Integration
39. Level of Integration (Mean)
40. Improvement with Additional Investments into Scanning Hardware & Software
41. Use of Scanning Software Solutions
42. Satisfaction with Current Scanning Solution

43. Education

44. Process that Scanning Devices are Used On
45. Plans to Integrate Scanning into Process
46. Level of Integration
47. Level of Integration (Mean)
48. Improvement with Additional Investments into Scanning Hardware & Software
49. Use of Scanning Software Solutions
50. Satisfaction with Current Scanning Solution

#### 51. Manufacturing

52. Process that Scanning Devices are Used On
53. Plans to Integrate Scanning into Process
54. Level of Integration
55. Level of Integration (Mean)
56. Improvement with Additional Investments into Scanning Hardware & Software
57. Use of Scanning Software Solutions
58. Satisfaction with Current Scanning Solution

#### 59. Retail

60. Process that Scanning Devices are Used On
61. Plans to Integrate Scanning into Process
62. Level of Integration
63. Level of Integration (Mean)
64. Improvement with Additional Investments into Scanning Hardware & Software
65. Use of Scanning Software Solutions
66. Satisfaction with Current Scanning Solution

#### 67. Healthcare

68. Process that Scanning Devices are Used On
69. Plans to Integrate Scanning into Process
70. Level of Integration
71. Level of Integration (Mean)
72. Improvement with Additional Investments into Scanning Hardware & Software
73. Use of Scanning Software Solutions
74. Satisfaction with Current Scanning Solution

#### 75. Mobile

76. Favorability of the Use of Mobile Devices/Cloud Repositories
  77. Key Drivers for Mobile Devices for Scanning Documents for Business Purposes
  78. Biggest Inhibitors/Threats with Mobile Technology
  79. Corporate Restrictions on Mobile Devices/Cloud Repositories
  80. Overall Integration of Mobile Scanning Devices
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