

## Future of Scanning Multi-client Study

---

Project Director:	Anne Valaitis, Director
Senior Advisors:	Megan McCarthy, Consultant Mark DiMattei, Manager
Creative Services:	Kara Hanlon, Desktop Publisher
Editorial/Proofreading:	Mark DiMattei, Manager

---

This report is copyrighted by InfoTrends and is made available to a limited number of clients subject to the following conditions:

InfoTrends retains all rights to this report in its entirety.

Reproduction and/or disclosure in whole or in part to parties other than the InfoTrends client to whom the document was originally sent is prohibited without the express written consent of InfoTrends.

This report should be treated as confidential and proprietary for internal use only.

The information is believed to be accurate and reliable, but cannot be guaranteed to be correct or complete.

**InfoTrends, Inc.**  
97 Libbey Industrial Parkway, Suite 300  
Weymouth, MA 02189  
(781) 616-2100  
[www.infotrends.com](http://www.infotrends.com)

## Table of Contents

Executive Summary	5
<i>Key Findings</i>	5
<i>Recommendations</i>	5
Introduction	6
Project Objectives	6
Methodology	7
<i>Web Survey</i>	7
<i>Telephone Interviews</i>	7
End User Survey	8
<i>Demographics</i>	8
<i>Scanning Hardware</i>	12
Single Function	14
MFDs	17
Smartphone/Mobile	20
<i>Scanning's Effect on Paper Use</i>	23
<i>High-volume Production Scanners</i>	29
<i>Change in Scanning</i>	33
<i>Scanning by Vertical Market</i>	37
Scanning in Banking	37
Scanning in Education	42
Scanning in Healthcare	47
Scanning in Manufacturing	52
Scanning in Retail	57
<i>Mobile Scanning Solutions</i>	62
InfoTrends' Opinion	67

## List of Tables

Table 1: Which of the following are used to scan documents within your office? (Vertical Market)	12
Table 2: Which of the following are used to scan documents within your office? (Size)	12
Table 3: Of all external business content that your company receives, what percentage comes in as paper?	23
Table 4: In the next 12-18 months, are there specific scanning projects your company will be implementing?	33
Table 5: Which of the following devices will be used to implement the upcoming scanning solution? (Vertical Market)	34
Table 6: Which of the following devices will be used to implement the upcoming scanning solution? (Company Size)	34

## List of Figures

Figure 1: Which best describes your role in regards to purchasing office scanning solutions and devices?	8
Figure 2: Which of the following best describes your business role?	9
Figure 3: How many people are in your organization?	10
Figure 4: Which of the following are business priorities for your organization? (Vertical Market)	11
Figure 5: Which of the following are business priorities for your organization? (Company Size)	11
Figure 6: What are the key purchasing criteria for scanning devices?	13
Figure 7: How is each device being used to scan? (Single Function)	14
Figure 8: What types of documents do you scan with a single function scanner?	15
Figure 9: How do you see the use of scanning changing on single function scanners in the next three years?	16
Figure 10: How is each device being used to scan? (MFD)	17
Figure 11: What type of documents do you scan with MFDs?	18
Figure 12: How do you see the use of scanning on MFDs changing in the next three years?	19
Figure 13: How is each device being used to scan (Smartphone/Tablet)	20
Figure 14: What type of documents do you scan with mobile devices?	21
Figure 15: How do you see the use of scanning on mobile devices changing in the next three years?	22
Figure 16: How do you see the use of paper in your organization changing in the next three years?	24
Figure 17: Does your company have any of the following initiatives/policies to reduce paper use?	25
Figure 18: For any paperwork where you have to capture a signature, how is that done? (Vertical Market)	26
Figure 19: For any paperwork where you have to capture a signature, how is that done? (Company Size)	27
Figure 20: Are you considering implementing a digital signature solution?	28
Figure 21: How long have you had your current in-house centralized scanning solution?	29
Figure 22: What are the main benefits of this in-house centralized scanning service?	30
Figure 23: How do you see the volume of scanning in your in-house centralized solution changing in the next 12 months?	31
Figure 24: Reasons for Increase in Scanning	32
Figure 25: Will you be making any new investments in the in-house centralized scanning solutions in the next two years?	32
Figure 26: What are some of the key drivers for scanning within your organization? (Vertical Market)	35
Figure 27: What are some of the key drivers for scanning within your organization? (Company Size)	36
Figure 28: For which of the following processes do you use your scanning device? (Banking)	37
Figure 29: Overall, how integrated are scanning devices in the following business processes? (Banking)	38
Figure 30: Does your company use any of the following scanning software solutions? (Banking)	39
Figure 31: How satisfied are you with your current scanning solution? (Banking)	40
Figure 32: Are you planning on integrating the following processes with scanning in the future? (Banking)	41
Figure 33: For which of the following processes do you use your scanning device? (Education)	42
Figure 34: Overall, how integrated are scanning devices in the following business processes? (Education)	43
Figure 35: Does your company use any of the following scanning software solutions? (Education)	44
Figure 36: How satisfied are you with your current scanning solution? (Education)	45
Figure 37: Are you planning on integrating the following processes with scanning in the future? (Education)	46
Figure 38: For which of the following processes do you use your scanning device? (Healthcare)	47
Figure 39: Overall, how integrated are scanning devices in the following business processes? (Healthcare)	48
Figure 40: Does your company use any of the following scanning software solutions? (Healthcare)	49
Figure 41: How satisfied are you with your current scanning solution? (Healthcare)	50
Figure 42: Are you planning on integrating the following processes with scanning in the future? (Healthcare)	51
Figure 43: For which of the following processes do you use your scanning device? (Manufacturing)	52
Figure 44: Overall, how integrated are scanning devices in the following business processes? (Manufacturing)	53
Figure 45: Does your company use any of the following scanning software solutions? (Manufacturing)	54

Figure 46: How satisfied are you with your current scanning solution? (Manufacturing)	55
Figure 47: Are you planning on integrating the following processes with scanning in the future? (Manufacturing)	56
Figure 48: For which of the following processes do you use your scanning device? (Retail)	57
Figure 49: Overall, how integrated are scanning devices in the following business processes? (Retail)	58
Figure 50: Does your company use any of the following scanning software solutions? (Retail)	59
Figure 51: How satisfied are you with your current scanning solution? (Retail)	60
Figure 52: Are you planning on integrating the following processes with scanning in the future? (Retail)	61
Figure 53: How does your company view the use of mobile devices to take pictures of company documents?	62
Figure 54: How does your company view the use of cloud document repositories to share and store company content?	62
Figure 55: What are the key drivers for using mobile devices for scanning documents for business?	63
Figure 56: Where do you feel the biggest inhibitors or threats are with mobile technology?	64
Figure 57: Are there any corporate restrictions in the use of the following within your organization? (Mobile Devices)	65
Figure 58: Are there any corporate restrictions in the use of the following within your organization? (Cloud Repositories)	65
Figure 59: How integrated are mobile devices for scanning to the larger business environment (other than to company e-mail system)?	66