



A Study of the Mobile Capture Market in the United States

US Mobile Image Capture Software Market to Grow to \$1.3B by 2015

East Northport, NY – November 29, 2011 – Harvey Spencer Associates (HSA) Inc. expects the market for mobile ad-hoc transactional and mobile ad-hoc image capture software in the US to grow to over \$1.3B by 2015, driven by the impact of mobile devices and technology on business processes. The growth will be based primarily on new applications using tablets and smartphones to create, capture and consume content in real time while communicating with back end enterprise resources. The new HSA report, **'A Study of the Mobile Capture Market in the United States'**, examines the size, growth potential, competitive landscape and key success factors of 8 major use cases, providing capture ecosystem vendors with information they can use to chart their strategies as the market evolves.

"The document capture market has historically captured information when it entered an organization or work process," explains David Wood, Principal, Mobile Capture. "This information typically originated earlier, outside of the organization and, when needed, had to be captured, using a scanner, fax machine, or digital copier (MFP/MFD), as a complete paper or electronic document. Now, however, workers or consumers with camera-enabled mobile devices and wireless communications are able to connect directly and in real time with the enterprises they wish to transact with. As a result, data can be captured, verified and used immediately, enabling complete transactions in near real time with improved capture accuracy, more successful sales processes, reduced support costs, improved customer loyalty and accelerated receivables." **'A Study of the Mobile Capture Market in the United States'** examines the value proposition, return on investment, readiness to adopt, competitive landscape and growth potential for field service, mobile worker productivity, Scan-to-the-Cloud, Home Healthcare, Assessment/Survey/Audit, Onboarding, Transportation, and Mobile Check Deposit. In each case a transformation of work processes is underway that promises real and permanent benefits for both the vendors and customers involved.

'A Study of the Mobile Capture Market in the United States' was supported by **Gold Sponsor ABBYY USA** along with Industry sponsors: Eastman Kodak Co., Expedata, KnowledgeLake, Kofax plc, PFU Limited a Fujitsu Company, Vision Objects; and Vertical Sponsors: Accusoft, ACS/TripPak a Xerox Company, Mitek Systems, RAF Technology and STOIK.

Dean Tang, ABBYY USA President and CEO, stated, "Whether they operate in a single city or the entire globe, businesses of all sizes are finding they need to go mobile in order to compete. Yesterday's tools leave valuable information locked up with mobile workers, and delay internal processes. New tools that enable workers to capture a receipt for expense reporting or use a mobile phone to capture scanned images and send them directly to cloud repositories, to name a few, are becoming critical to business efficiency and productivity. We have already seen a boost to our bottom line as businesses adopt mobile capture solutions for various use cases, and expect the trend to continue."



Other opportunities are opened by using mobile devices for direct data capture. "Mobile apps are replacing paper based business processes with real time and interactive data entry that includes a multitude of input methods and extraction technologies," continued Wood. "Today, electronic forms can include signature, bar code or QR code capture along with voice, camera, video and keyboard-based data entry. These systems promise to ease user adoption and training by enabling users to select how they wish to interact with a form in real time. For markets with an older or less technical workforce, such as onboarding or home healthcare, these improvements may prove critical in winning workplace support for adoption so that the available business benefits can be achieved on a broad scale."

The study predicts that the gains will be particularly pronounced for small businesses in the US. This segment has not been able to benefit much from traditional workflow systems because of their high cost and the requirement for IT expertise. However, new vertical services based on cloud repositories and supporting smartphones and/or tablets are now available that offer complete transportation, field service, mobile worker productivity, expense receipt capture and field assessment/survey/audit capability at monthly subscription costs ranging from \$10 to \$50. Featuring straight through processing that in some cases encompasses the entire transaction up to and including payment acceptance, these services offer tremendous small business productivity improvement in both customer satisfaction and revenue/employee. "These new services and the increased power of tablets will further accelerate the growth of worker mobility in the US, and will tend to improve the rate of growth of small businesses over the next five years," Wood added.

About Harvey Spencer Associates, Inc.

Harvey Spencer Associates (HSA – www.hsassoc.com) is an analyst and market consulting company founded in 1989 to specialize in document scanning, recognition and allied technologies. Based on Long Island, NY, HSA is the only company that measures and forecasts the Worldwide market for capturing images and data from semi and unstructured business transactional forms and paper based media. Relied on by all the major capture vendors, our in-depth research helps our clients understand current and developing market trends, and aids in the identification of opportunities and strategies to increase their businesses. HSA has a highly regarded annual conference, now in its 8th year.

The HSA mobile capture practice is designed to specialize in the markets and applications for capture technologies using Mobile Devices including cell phone cameras, tablets and mobile scanners with associated recognition technologies, touchscreen for data entry and will include voice, stylus, e-forms and location recognition that can be used in mobile and transactional work processes. More information on HSA and its Mobile Capture Practice can be obtained by calling 1-631-368-8393 or via email at: info@hsassoc.com.

-- end --

