



671 North Glebe Road, Suite 1610
Arlington, VA 22203
Phone: 773-778-3080
www.imvinfo.com

IMV 2023 MR MARKET OUTLOOK REPORT

Table of Contents

I.	Background and Objectives.....	6
II.	MR Market Outlook Executive Summary	7
III.	Methodology	12
IV.	Findings.....	16
	A. MR Priorities & Outlook: COVID-19 Impact Now and the Future	16
	B. MR Procedure Volume	37
	C. Installed Base of MR Systems.....	58
	D. MR Purchase Plans.....	94
	E. MR Contrast Media & Power Injectors.....	135
	F. Demographics & Site Operations Characteristics	161



IMV 2023 MR MARKET OUTLOOK REPORT

Exhibits

A. MR Priorities & Outlook: Now and the Future	16
1. Priorities to the Mission of MR Departments Over the Next Year, as of 2023 Survey.....	17
2. Hospitals vs. Non-Hospitals: Priorities to the Mission of MR Departments Over the Next Year, as of 2023 Survey.....	18
3. Priorities to the Mission of MR Departments Over the Next Year, by Hospital Bed Size, as of 2023 Survey	19
4. Priorities to the Mission of MR Departments Over the Next Year, by IMV Study Year, 2013-2023.....	20
5. Factors Affecting the Future Outlook for MR at your Facility Over the Next Few Years, as of 2023 Survey	21
6. Hospitals vs. Non-Hospitals: Factors Affecting the Future Outlook for MR at your Facility Over the Next Few Years, as of 2023 Survey.....	22
7. Factors Affecting the Future Outlook for MR at your Facility Over the Next Few Years, by Hospital Bed Size, as of 2023 Survey.....	23
8. Factors Affecting the Future Outlook for MR at your Facility Over the Next Few Years, by IMV Study Year, 2013 to 2023.....	24
9. Priority Ranking for Using Artificial Intelligence and Machine Learning Tools in MR Departments, as of 2023 Survey.....	25
10. #1/#2 Priority Ranking for Using Artificial Intelligence and Machine Learning Tools in MR Departments, by Site Type, as of 2023 Survey.....	26
11. Current Use and Consideration of Artificial Intelligence and Machine Learning Tools in MR Departments, As of 2023 Survey.....	27
12. Current Use and Consideration of Artificial Intelligence and Machine Learning Tools in MR Departments, As of 2023 Survey.....	28
13. 2023 MR Department Outlook for Procedure Volume, Reimbursement, Revenue, and Net Income.....	29
14. Comparison of MR Department Outlook for Increases in Procedure Volume, Reimbursement, Revenue, and Net Income, by IMV Study Year, 2016-2023.....	30
15. Comparison of MR Department Outlook for Decreases in Procedure Volume, Reimbursement, Revenue, and Net Income, by IMV Study Year, 2016-2023.....	31
16. 2023 MR Department Outlook for MR Procedure Volume, by Site Type.....	32
17. 2023 MR Department Outlook for MR Reimbursement Levels, by Site Type.....	32
18. 2023 MR Department Outlook for MR Revenue, by Site Type.....	32
19. 2023 MR Department Outlook for MR Net Income, by Site Type.....	32
20. Summary of Open-Ended Responses for MR Product Capabilities.....	33
21. Relative Impact of Coronavirus Pandemic on Department When Managing MR Operations, 2020-2023.....	34
22. 2023 AI Impact on MR Department – Summary of Open Ended Responses.....	35
23. 2024 and Beyond AI Impact on MR Department – Summary of Open-Ended Responses.....	36
B. MR Procedure Volume	37
1. Total MR Procedure Volume, Hospital and Non-Hospital Sites, 1998-2023.....	38
2. Whether 2024 MR Procedures are Anticipated to Increase, Stay the Same, or Decrease Compared to 2023, by Site Type, as of 2023 Survey.....	39
3. Distribution of MR Sites and Procedures, by Site Type, 2023.....	40
4. Trend in Distribution of MR Procedures, by Site Type, 2014-2023.....	41
5. Trend in Distribution of MR Sites, by Site Type, 2014-2023.....	41
6. Distribution of MR Procedures Performed in Main vs. Other Departments/Locations Using MR Scanners Managed by Hospital Radiology, by Hospital Bed Size, as of 2023 Survey.....	42
7. Average Annual MR Procedure Volume per Site, by Site Type, 2023.....	43
8. Average Annual MR Procedures Performed per Site, by Site Type, 2016-2023.....	43
9. Distribution of MR Sites by MR Procedure Ranges, by Site Type, 2023.....	44
10. Distribution of Hospital MR Sites by MR Procedure Ranges, by Fixed vs. Mobile Hospital Sites, 2023.....	44
11. MR Procedure Mix, All Sites, by Percent, 2023.....	45
12. 2023: MR Procedure Mix, by Site Type, as of 2023 Survey.....	46

13. Trend in MR Procedure Mix, 2013-2023	47
14. MR Procedure Volume, by Type, All Sites, 2018-2023.....	48
15. Percent of Sites Performing Specific MR Procedures, 2023	49
16. Number of Sites Performing MR Procedures and Mean Annual Procedures per Site Performing, 2023.....	49
17. Trend in Percent of Sites Performing Specific MR Procedures, 2014-2023	50
18. Distribution of Vascular and Cardiovascular MRA Procedures, All Sites, 2013-2023.....	51
19. Percent of Sites Performing Vascular and Cardiovascular MRA Procedures, by Procedure Type, 2023	51
20. Mix of Inpatient, Outpatient, and Emergency MR Procedures, by Site Type, 2023	52
21. Mix of Inpatient, Outpatient, and Emergency MR Procedures, 2013-2023	52
22. Percent of MR Sites Performing Pediatric Procedures, by Site Type, 2023.....	53
23. Adult vs. Pediatric MR Procedures, by Site Type, 2023	53
24. Mix of MR Sites by Pediatric MR Procedure Ranges, by Site Type, January-June 2023.....	54
25. Number of MR Sites Performing Pediatric Procedures and Mean Annual Pediatric Procedures per Site Performing, by Site Type, 2023	55
26. Percent of MR Procedures Performed on Obese Patients, by Site Type, 2023	56
27. Trend in Percent of MR Procedures Performed on Obese Patients, 2013-2023.....	56
28. Number of MR Sites Performing Procedures on Obese Patients and Mean Annual Procedures per Site Performing, by Site Type, 2023	57

C. Installed Base of MR Systems..... 58

1. Distribution of Fixed MR Sites and MR Systems, Hospitals and Imaging Centers, as of 2023 Survey	59
2. Trend in Distribution of Fixed MR Systems, Hospitals vs. Imaging Centers, by IMV Study Year, 2012 to 2023.....	59
3. Site Type of Sites Using Mobile MR Service vs. Fixed MR Systems, as of 2023 Survey.....	60
4. Fixed vs. Mobile MR Sites & MR Systems, as of 2023 Survey.....	60
5. Distribution of Sites, by Number of Fixed MR Systems Installed, by Site Type, as of 2023 Survey	61
6. Distribution of Hospitals, by Number of MR Systems Radiology Owns/Manages in Outpatient Locations Associated with Hospital, by Hospital Bed Size, as of 2023 Survey	61
7. MR Installed Base in Hospitals and Independent Imaging Centers, by Year of Installation, as of 2023 Survey	62
8. Distribution of Fixed MR Installed Base, by Year of Installation, by Site Type, as of 2023 Survey.....	63
9. Percent Distribution of MR Installed Base, by Manufacturer, as of 2023 Survey	64
10. MR Installed Base Market Share, by Manufacturer, by IMV Study Year, 2013 to 2023.....	64
11. MR Unit Installed Base Share, by Manufacturer, by Site Type, as of 2023 Survey	65
12. Percent of Sites Having MR Manufacturer Installed, by Site Type, as of 2023 Survey.....	66
13. MR Installed Base Market Share, by Installation Time Frames, as of 2023 Survey.....	67
14. Distribution of Installed Base of MR Systems, by Magnet Field Strength, as of 2023 Survey.....	68
15. Distribution of Installed Base of MR Systems, by Magnet Field Strength, by Site Type, as of 2023 Survey ..	68
16. Trend in Magnet Field Strength of MR Installed Base, by IMV Study Year, 2014 to 2023.....	69
17. Mix of MR Systems Installed, by Magnet Field Strength, by Installation Time Frames, as of 2023 Survey ..	70
18. MR Installed Base Market Share, by Magnet Field Strength, as of 2023 Survey	71
19. Distribution of Installed Base of MR Systems, by Magnet Field Strength, by Manufacturer, as of 2023 Survey	71
20. Distribution of Installed Base of MR Systems, by Bore Type, as of 2023 Survey.....	72
21. Distribution of Installed Base of MR Systems, by Bore Type, by Site Type, as of 2023 Survey	72
22. Trend in Bore Type of MR Installed Base, by IMV Study Year, 2014 to 2023.....	73
23. MR Installed Base Market Share, by Bore Type, as of 2023 Survey	74
24. Distribution of Installed Base of MR Systems, by Bore Type, by Manufacturer, as of 2023 Survey	74
25. Current Ownership of New MR Technology & Clinical Applications Capabilities, as of 2023 Survey.....	75
26. Distribution of MR Installed Base, by Whether Purchased New or Refurbished/Used, as of 2023 Survey.....	76
27. Distribution of MR Installed Base, by Whether Purchased New or Refurbished/Used, by Site Type, as of 2023 Survey.....	76
28. Trend in Distribution of MR Installed Base, by Whether Purchased New or Previously Owned, by IMV Study Year, 2014 to 2023	77
29. MR Unit Installed Base Share, by Whether the System was Purchased New or Refurbished/Used,	

as of 2023 Survey	78
30. Distribution of MR Installed Base, by Whether Purchased New or Refurbished/Used, by Manufacturer, as of 2023 Survey	78
31. Distribution of MR Installed Base, by Whether Purchased New or Refurbished/Used, by Magnet Field Strength, as of 2023 Survey	79
32. Distribution of MR Installed Base, by Magnet Field Strength, by Whether Purchased New or Refurbished/Used, as of 2023 Survey	79
33. Distribution of MR Installed Base, by Whether Purchased New or Refurbished/Used, by Bore Type, as of 2023 Survey	80
34. Distribution of MR Installed Base, by Bore Type, by Whether Purchased New or Refurbished/Used, as of 2023 Survey	80
35. Distribution of Sources for Primary MR Service Support, as of 2023 Survey	81
36. Distribution of Sources for Primary MR Service Support, by Site Type, as of 2023 Survey	81
37. Trend in Distribution of Sources for Primary MR Service Support, by IMV Study Year, 2013 to 2023	82
38. Distribution of Sources for Primary MR Service Support, by Manufacturer of Installed MR, as of 2023	83
39. Distribution of MR Installed Base, by Whether Purchased New or Refurbished/Used, by Primary Source of MR Service Support, as of 2023 Survey	84
40. Distribution of MR Installed Base, by Primary Source of MR Service Support, by Whether Purchased New or Refurbished/Used, as of 2023 Survey	84
41. Contractual Arrangements with Outside MR Service Providers, as of 2023 Survey	85
42. Contractual Arrangements with Outside MR Service Providers, by Site Type, as of 2023 Survey	85
43. Contractual Arrangements with Outside MR Service Providers, by Primary Source of MR Service Support, as of 2023 Survey	86
44. Contractual Arrangements with Outside MR Service Providers, by Manufacturer of Installed MR, as of 2023 Survey	87
45. Distribution of MR Installed Base, by Whether Purchased New or Refurbished/Used, by Contractual Arrangements with Outside MR Service Providers, as of 2023 Survey	88
46. Distribution of MR Installed Base, by Contractual Arrangements with Outside MR Service Providers, by Whether Purchased New or Refurbished/Used, as of 2023 Survey	88
47. Distribution of Sources for Primary MR Service Support, by Installation Time Frames, as of 2023 Survey ..	89
48. Contractual Arrangements with Outside MR Service Providers, by Installation Time Frames, as of 2023 Survey	89
49. Distribution of Hospital-Based MR Scanners Owned/Managed by Radiology, by Department Location, by Hospital Bed Size, as of 2023 Survey	90
50. Percent of Hospitals with MR Systems Owned/Managed by Radiology and Located Within Hospital Facility, by Location Type, by Hospital Bed Size, as of 2023 Survey	90
51. Whether Radiology Owns/Manages MR Systems Located Beyond the Main Hospital, as of 2023 Survey ...	91
52. Other Locations with MRs Owned/Managed by Radiology, as of 2023 Survey	91
53. Distribution of Sites, by Number of MRs Installed in Locations Outside Main Hospital that are Owned/Managed by Radiology, as of 2023 Survey	91
54. Whether there are MRs Located in Other Hospital Locations that are <u>Not</u> Owned/Managed by Radiology, as of 2023 Survey	92
55. Other Hospital Locations Having MR Units <u>Not</u> Owned/Managed by Radiology, as of 2023 Survey	92
56. Distribution of Sites, by Number of MRs Installed in Other Hospital Locations that are <u>Not</u> Owned/Managed by Radiology, as of 2023 Survey	92
57. Whether there are Other Imaging Centers or Outpatient Locations in Local Service Area that are Owned /Co-owned by Non-hospital Organization which have MR Scanners Installed, as of 2023 Survey	93
58. Distribution of Sites, by Number of MRs Installed in Other Outpatient Locations in their Local Service Area that are Owned/Co-owned by their Non-Hospital Organization, as of 2023 Survey	93
D. MR Purchase Plans	94
1. Percent of MR Sites Planning to Purchase MR from 2023 through 2026, by Site Type, as of 2023 Survey ...	95
2. Percent of MR Sites Planning to Purchase MR from 2023 through 2026, by Fixed vs. Mobile MR Sites, as of 2023 Survey	95
3. Percent of MR Sites Planning to Purchase MR from 2022 through 2025, by Site Type, as of 2022 Survey ...	96

4. Percent of MR Sites Planning to Purchase MR from 2023 through 2026, by Site Type, as of 2023 Survey ...	96
5. Percent of MR Sites Planning to Purchase MR from 2023 through 2026, by Number of Fixed MR Systems Installed, as of 2023 Survey	97
6. Whether MR Sites Plan to Purchase MR Scanners Located Outside their Main Facility that Radiology Will Own/Manage from 2023 through 2026, by Site Type, as of 2023 Survey	98
7. Purchase Plans for MR Systems from 2023 through 2023, as of 2023 Survey	99
8. Percent of MR Sites Planning to Purchase MR Over the "Next Three Years," by IMV Study Year, 2012 to 2023.....	99
9. Distribution of MR Sites, by Number of MR Units Planned for Purchase, by Site Type, as of 2023 Survey	100
10. Projected MR Replacement Cycle, Based on 2023 MR Survey.....	101
11. Average Age of MRs Upon Replacement, by IMV Study Year, 2013 to 2023.....	101
12. Distribution of Planned MR Purchases, by Magnet Field Strength, by Site Type, as of 2023 Survey.....	102
13. Distribution of MR Purchases Planned by Hospitals, by Magnet Field Strength, by Current Fixed vs. Mobile MR Status, as of 2023 Survey.....	102
14. Distribution of Planned MR Purchases "Over the Next Three Years," by Magnet Field Strength, by IMV Study Year, 2012 to 2023	103
15. Distribution of Planned MR Purchases, by Bore Type, by Site Type, as of 2023 Survey.....	104
16. Distribution of MR Purchases Planned by Hospitals, by Bore Type, by Current Fixed vs. Mobile MR Status, as of 2023 Survey	104
17. Distribution of Planned MR Purchases "Over the Next Three Years," by Bore Type, by IMV Study Year, 2014 to 2023.....	105
18. Current and Planned Ownership of New MR Technologies, as of 2023 Survey.....	106
19. Current and Planned Ownership of New MR Clinical Applications Capabilities, as of 2023 Survey	107
20. Plans for New vs. Refurbished MR Systems, by Site Type, as of 2023 Survey.....	108
21. Hospital Plans for New vs. Refurbished MR Systems, by Current Fixed vs. Mobile MR Status, as of 2023 Survey	108
22. Magnet Field Strength Planned for MR Purchases, by Whether Planned Unit will be New vs. Refurbished/Used, as of 2023 Survey	109
23. Whether Planned MR Purchases will be New vs. Refurbished/Used, by Magnet Field Strength Planned, as of 2023 Survey	109
24. Bore Type Planned for MR Purchases, by Whether Planned Unit will be New vs. Refurbished/Used, as of 2023 Survey.....	110
25. Whether Planned MR Purchases will be New vs. Refurbished/Used, by Bore Type Planned, as of 2023 Survey	110
26. Plans for First Time, Replacement, and Additional MR Systems, by Site Type, as of 2023 Survey	111
27. Plans for First Buyer, Replacement, and Additional MR Systems, by IMV Study Year, 2014 to 2023	111
28. Whether Planned MR Purchases Will be Part of a Multi-Modality Purchase, as of 2023 Survey	112
29. Whether Planned MR Purchases Will be Part of a Multi-Modality Purchase, by Hospital Ownership Type, as of 2023 Survey	112
30. Percent Distribution of Sites Mentioning Manufacturers Being Considered for Next MR Purchase, as of 2023 Survey.....	113
31. Trend in Percent Distribution of Sites Mentioning Manufacturers Being Considered for Next MR Purchase, by IMV Study Year, 2016 to 2023.....	113
32. Percent Distribution of Sites Mentioning Manufacturers Being Considered for Next MR Purchase, by Site Type, as of 2023 Survey.....	114
33. Percent Distribution of Sites Mentioning Manufacturers Being Considered for Next MR Purchase, by Location Type, as of 2023 Survey.....	115
34. Brand Loyalty: Vendor Being Considered, by Current MR Installed Base, as of 2023 Survey.....	116
35. Annual 2023-2026 Budget Status for Planned MR Purchases, as of 2023 Survey	117
36. Distribution of 2023 MR Equipment Budgets, All MR Sites.....	118
37. Distribution of 2023 MR Equipment Budgets, by Site Type	118
38. MR Equipment Budget Trend, 2015-2023	119
39. Distribution of 2022-2026 MR Equipment Budgets, as of 2023 Survey.....	120
40. Average <u>Planned</u> MR Equipment Budget per Site, for Sites Having Budgets >\$0, by Site Type, 2017-2024	121

41. Whether Decisions for Purchasing MR Scanners are Usually Made at the Corporate HQ or at the Individual Facility Level, as of 2023 Survey	122
42. Whether Decisions for Purchasing MR Scanners are Usually Made at the Corporate HQ or at the Individual Facility Level, by IMV Study Year, 2016 to 2023.....	122
43. Whether the Influence of Corporate HQ in Purchase Decisions for MR Scanners is Increasing, Staying the Same, or Decreasing in 2023, Compared to 2-3 Years Ago, as of 2023 Survey	123
44. Whether the Influence of Corporate HQ in Purchase Decisions for MR Scanners is Increasing, Staying the Same, or Decreasing, Compared to 2-3 Years Ago, by IMV Study Year, 2016 to 2023	123
45. Preferred MR Manufacturers in Healthcare System/Organization, as of 2023 Survey	124
46. Preferred MR Manufacturers in Healthcare System/Organization, by Hospital Bed Size, as of 2023 Survey	124
47. Preferred MR Manufacturers in Healthcare System/Organization, by IMV Study Year, 2013 to 2023	125
48. Whether MR Purchases are Usually Part of a Larger Purchase of MR Scanners at the Same Time for Healthcare System, or are Usually Made Just for Hospital, by Hospital Bed Size, as of 2023 Survey.....	126
49. Planned Location of MRs to be Located in Hospitals and Owned/Managed by Radiology, by Hospital Bed Size, as of 2023 Survey	127
50. Whether Hospital Plans to Purchase MR Systems Located Outside the Main Hospital that Radiology Will Own/Manage, as of 2023 Survey	128
51. Other Locations for Planned MRs to be Owned/Managed by Radiology, as of 2023 Survey	128
52. Whether Hospital Plans to Purchase MR Systems that Radiology will NOT Own/Manage, as of 2023 Survey	129
53. Other Locations for Planned MRs that will NOT be Owned/Managed by Hospital Radiology Department, as of 2023 Survey	129
54. Non-Hospital Organization Plans to Purchase MR Systems for Other Imaging Centers or Outpatient/Ambulatory Locations, as of 2023 Survey	130
55. Other Locations for Planned MRs to be Owned/Managed by Non-Hospital Organizations, as of 2023 Survey	130
29. Information Sources Used During Decision Process for Purchasing MR Equipment, as of 2023 Survey	131
30. Information Sources Used During Decision Process for Purchasing MR Equipment, by Site Type, as of 2023 Survey	132
31. Information Sources Used During Decision Process for Purchasing MR Equipment, by Location Type, as of 2023 Survey	133
32. Interest Level for Using In-Person Contact vs. Virtual On-line Alternatives as Information Sources When Purchasing MR Equipment, as of 2023 Survey	134
E. MR Contrast Media & Power Injectors	135
1. Percent of MR Procedures Using Contrast Media, by Site Type, 2023	136
2. Percentage of MR Sites Using Contrast Media, by Site Type, as of 2023 Survey	136
3. Annual MR Procedure Volume, by use of MR Contrast Media, 2013 to 2023.....	137
4. Relative Use of MR Contrast Media, 2013-2023	137
5. Average MR Contrast Media Procedures per Site, by Site Type, 2023	138
6. Average MR Contrast Media Procedures per Site, by Site Type, 2011-2023	138
7. Distribution of 2023 MR Contrast Media Budgets, All MR Sites.....	139
8. Distribution of 2023 MR Contrast Media Budgets, by Site Type	139
9. MR Contrast Media Budget Trend, 2013-2023.....	140
10. Average MR Contrast Media Expenditures per Site, by Site Type, 2023	141
11. Average MR Contrast Media Expenditures per Contrast Procedure, by Site Type, 2023.....	141
12. MR Contrast Media Expenditures, by Budget Year, 2013-2023	142
13. Trend in Average MR Contrast Media Expenditures per Contrast Procedure, 2013-2023	142
14. Market Share Trend of MR Contrast Media Expenditures, 2007-2023.....	143
15. Distribution of 2023 MR Contrast Expenditures, by Contrast Agent Brand, All Sites	144
16. Percent of MR Sites Mentioning Use of Contrast Agents, by Contrast Agent Brand, as of 2023 Survey	144
17. Market Share Trend of MR Contrast Media Expenditures, by Contrast Agent Brand, 2007-2023	145
18. Percent of MR Sites with at Least One Power Injector, by IMV Study Year, 2013 to 2023	146
19. Percent of MR Sites with at Least One Power Injector, by Site Type, as of 2023 Survey	146

20. Distribution of MR Sites Having at Least One Power Injector, by Number of MR Power Injectors, by Site Type, as of 2023 Survey.....	147
21. Distribution of MR Procedures by Use of Contrast Media and Whether or Not Power Injectors are Used, 2023.....	148
22. Proportion of MR Procedures Using Power Injectors, 2013-2023	148
23. Percent Distribution of MR Power Injectors, by Manufacturer, as of 2023 Survey.....	149
24. Percent Distribution of MR Power Injectors, by Manufacturer, by Site Type, as of 2023 Survey.....	149
25. Percent Distribution of MR Power Injectors, by Manufacturer, by IMV Study Year, 2014 to 2023	150
26. MR Power Injector Installed Base, by Year of Installation, as of 2023 Survey	151
27. MR Power Injector Installed Base Market Share, by Installation Time Frames, as of 2023 Survey.....	152
28. Distribution of MR Power Injectors, by Single vs. Dual Syringe/Head Capability, by Site Type, as of 2023 Survey	153
29. MR Power Injector Installed Base Market Share, by Single vs. Dual Syringe/Head Capability, as of 2023 Survey	153
30. Purchase Plans for MR Power Injectors from 2023 Through 2026, as of 2023 Survey	154
31. Percent of Sites Planning to Purchase MR Power Injectors “Over the Next Three Years,” by IMV Study Year, 2013 to 2023.....	155
32. Percent of Sites Planning to Purchase MR Power Injectors from 2023 Through 2026, by Site Type, as of 2023 Survey	155
33. Distribution of Planned MR Power Injectors, by Whether Part of an MR Scanner Purchase or Separate, by Site Type, as of 2023 Survey.....	156
34. Distribution of Planned MR Power Injectors, by Whether Considering Single vs. Dual Syringe/Head Capability, by Site Type, as of 2023 Survey	157
35. Whether Planned MR Power Injector Will be an Additional, Replacement, or First Time Purchase, by IMV Study Year, 2013 to 2023	158
36. Whether Planned MR Power Injector Will be an Additional, Replacement, or First Time Purchase, by Site Type, as of 2023 Survey.....	158
37. Percent Distribution of MR Sites Mentioning Manufacturers Being Considered for Future Power Injector Purchases, as of 2023 Survey.....	159
38. Percent Distribution of MR Sites Mentioning Manufacturers Being Considered for Future Power Injector Purchases, by IMV Study Year, 2015 to 2023.....	159
39. Brand Loyalty: MR Power Injector Manufacturers Being Considered, by Current MR Power Injector Installed Base, as of 2023 Survey.....	160
F. Demographics & Site Operations Characteristics	161
1. Hospital vs. Non-Hospital Mix of MR Locations, as of 2023 Survey.....	162
2. Mix of Hospitals and Independent Imaging Centers with MR Scanners, as of 2023 Survey.....	162
3. Ownership of “Independent” Imaging/Outpatient Locations, 2023 Survey	162
4. Hospital Bed-Size Mix of Hospital MR Locations, 2023 Survey	163
5. Hospital Ownership Type, as a Percentage of Hospitals in 2023 MR Universe, by Bed Size	163
6. Academic/University Hospital Status as a Percentage of Hospitals in 2023 MR Universe, by Bed Size	163
7. 2023 MR Universe, by Location and Site Type	164
8. Average MR Procedures Performed per Fixed MR System, by Site Type, 2023.....	165
9. Average MR Procedures Performed per Fixed MR System, by Site Type, 2014-2023	165
10. Percent of MR Sites with Staff Types, by Site Type, as of 2023 Survey	166
11. Mean Number of Employees per MR Site Having that Type, by Site Type, as of 2023 Survey.....	166
12. Number of MR Technologists Involved with Performing and/or Preparing Patients for MR Exams, as of 2023 Survey	167
13. Number of MR Technologists Involved with Performing and/or Preparing Patients for MR Exams, by Site Type, as of 2023 Survey.....	167
14. Average MR Procedures Performed per MR Technologist, by Site Type, 2023.....	168
15. Distribution of Sites, by Number of Radiologists that Read MR Images, by Site Type, as of 2023 Survey..	169
16. Average Annual MR Procedures Read per Radiologist, by Site Type, as of 2023 Survey	169
17. Percentage of MR Sites Using Outside Reading Services, On-Site Radiologists vs. Off-Site Radiologists to Read MR Scans, by Site Type, as of 2023 Survey	170

18. Percentage of MR Procedures Read On-Site by Radiologists, Read Off-Site by Radiologists, or by Outside Reading Services, by Site Type, as of 2023 Survey.....	170
19. Hours per <u>Weekday</u> MR Department Open for Scheduled Procedures, by Site Type, as of 2023 Survey.....	171
20. Hours per <u>Weekend</u> MR Department Open for Scheduled Procedures, by Site Type, as of 2023 Survey.....	171
21. Average MR Procedures per <u>Scheduled</u> Hours Open, per Site and per MR, by Site Type, as of 2022 Survey	172
22. Average MR Procedures per <u>Scheduled</u> Hours Open, per Site and per MR, by Site Type, as of 2023 Survey	172
23. MR Sites Using Fixed MR Systems vs. Mobile Services Exclusively, as of 2023 Survey	173
24. Number of Days per Week Mobile MR Service Comes to Facility, as of 2023 Survey	173
G. Appendix	174
1. Additional MR Department Priorities – Open-Ended Responses	175
2. Additional Future Outlook Factors – Open-Ended Responses	176
3. Suggestions for Product Capabilities or Services for MR Equipment of Software Manufacturers – Open-Ended Responses	177
4. 2023 AI Impact on MR Department Open-Ended Responses	181
5. 2024 AI Impact on MR Department Open-Ended Responses	182
6. About IMV	186