

# **Non-Emergency Medical Transportation Market Forecast to 2028 - COVID-19 Impact and Global Analysis By Service Type (Private Pay Patient Transportation, Insurance Backed Patient Transportation, Courier Services, and Other Services) and Application (Dialysis, Routine Doctor Visits, Mental Health Related Appointments, Rehabilitation, and Others)**

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## **Abstracts**

The non-emergency medical transportation market is expected to grow from US\$ 8,658.87 million in 2021 to US\$ 15,579.98 million by 2028; it is estimated to grow at a CAGR of 9.0% from 2022 to 2028. The market growth is attributed to the growing need for non-emergency medical transportation, rising incidence of chronic disease, and increasing geriatric population. However, lack of efficient oversight systems, rise in fraud by NEMT companies, and lack of transportation services in rural areas hamper the market growth.

Non-emergency medical transportation (NEMT) service providers are widely known to serve Medicaid beneficiaries. Patients and healthcare consumers who need to be transported to medical facilities, avoiding expensive commuting options, for regular appointments and check-ups can avail NEMT services, including ambulance services, wheelchair-assisted services, stretchers, flight services, and courier services.

Canada is witnessing a rising aging population. Thus, incidence of age-related chronic diseases and their management are growing and evolving challenges. In the 2018 Health Care in Canada (HCIC) survey, more than half of the Canadian adults were

suffering from one or more chronic illness(es), such as arthritis, cardiovascular disease, mental health disorders, and lung disease. Despite increasing concerns about the health, the prevalence of dementia, as represented by reported memory problems affecting with daily living, remains relatively low.

Inaccessibility to health care due to lack of transportation affects the most vulnerable groups of society, such as low-income inner-city residents who often belong to racial/ethnic minority communities. Across Canada, there is a growing momentum among government and nongovernment organizations as they develop policies and programs to support active transportation and healthy built environments. The Travel Assistance Program (TAP) helps alleviate some of the transportation costs for eligible British Columbia residents who must travel within the province for non-emergency medical specialist services unavailable in their own community. TAP is a corporate partnership between the Ministry of Health and private transportation carriers. The program is coordinated by the Ministry of Health and the transportation partners who agree to waive or discount their regular fees. Therefore, the increasing prevalence of chronic disease in Canada fuels the growth of the non-emergency medical transportation market.

States and healthcare providers are looking forward to partner with transportation network companies (TNCs) to enhance access to care. TNCs, such as Uber or Lyft, are typically characterized by their on-demand ride-hailing capabilities and easy-to-use mobile apps. These capabilities will allow them to resolve the availability and scheduling concerns related to NEMT services. Additionally, collaboration with TNCs will help NEMT services providers to deal with states' program integrity concerns as these systems maintain automatic electronic ride records. Various TNCs are currently developing or are engaged in partnerships with NEMT and individual healthcare service providers. For instance, Circulation, a Boston-based startup, partnered with Uber and Lyft, as well as traditional medical transportation providers to develop an NEMT system that closely resembles the TNC model. The partnerships have resulted in multiple pilot programs, starting at healthcare facilities in Boston, Delaware, and Pennsylvania, with further prospects of spreading to over 1,000 facilities across the country. Circulation now serves patients insured by Medicaid, Medicare, and dual-eligible and commercial insurance programs.

NEMT is reshaping healthcare trends and consumer habits. TNCs pursue partnerships and government contracts that guarantee stable revenue streams. They are propelling the transition of the conventional healthcare sector to a modern healthcare mobility marketplace, but brokers still control the market. To retain their dominance, brokers are

modernizing their services and transitioning into NEMT–TNC hybrid models. In states that allow health mobility companies to hire independent contractor drivers, NEMT players are placing their network of drivers while also outsourcing rides to Uber and Lyft.

The emerging markets in developing economies offer lucrative growth opportunities to major players to expand their business and geographic reach. The adoption of NEMT services is likely to increase in regions, including Asia Pacific and the Middle East & Africa, in the coming years. The regions invest significantly in the healthcare sector and create awareness regarding NEMT services. The growing healthcare expenditure in economies, including India, China, and the UAE, creates notable opportunities. These countries are witnessing an increase in adult and geriatric populations. Geriatric age group may need regular check-ups and weekly doctor's visits to maintain their health. Also, there is a rise in the number of people who need NEMT services to reach healthcare facilities in countries, such as India and China. Also, the incidence of chronic conditions is increasing. In addition, there is a rise in the number of start-up companies operating in the healthcare sectors in India and China. Therefore, the market in developing countries is likely to show high growth potential during the forecast period.

### Service Type Insights

The non-emergency medical transportation market is segmented on the basis of service type and application. Based on service type, the market is segmented into private pay patient transportation, insurance-backed patient transportation, courier services, and others. The private pay patient transportation segment is estimated to account for the largest market share and is expected to register the highest CAGR during the forecast period. The private pay patient transportation services include assistance for hospital visits, pharmacy pick-ups, and different healthcare-related journeys for Medicaid members. Various benefits of private pay patient transportation are custom NEMT rates of reimbursement with higher margins compared to other, ease of travel during off-peak hours in addition to regular business hours, and flexibility in billing process compared to Medicaid based services. Currently, private pay transportation is essential aspect for shifting the insurance scenario in the NEMT businesses especially for non-Medicaid members.

The Centers for Disease Control and Prevention, Association of Indian Medical Device Industry, Australian Institute of Health and Welfare, German Arthroplasty Registry, and the Hindustan Syringes and Medical Devices are among the primary and secondary sources referred to while preparing the report on the non-emergency medical

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