

Non-Emergency Medical Transportation Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Service Type (Private Pay Patient Transportation, Insurance Backed Patient Transportation, Courier Services, and Others), Facility (Intra-Facility and Inter-Facility), Application (Dialysis, Routine Doctor Visits, Mental Health Related Appointments, Rehabilitation, and Others), End User (Hospitals and Clinics, Nursing Homes, Homecare Settings, MCO and State Agencies, Healthcare Payers, and Others), and Geography (North America, Europe, Asia Pacific, Middle East & Africa, and South & Central America)

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Abstracts

The non-emergency medical transportation market is anticipated to grow from US\$ 16.71 billion in 2024 and is projected to reach US\$ 31.87 billion by 2031; it is expected to register a CAGR of 9.7% during 2025–2031. The non-emergency medical transportation market growth is attributed to increasing need for non-emergency medical transportation and surging incidence of chronic conditions among aging populations.

Non-emergency medical transportation (NEMT) refers to transportation services

provided to individuals who need assistance traveling to and from medical appointments or healthcare facilities but do not require emergency medical care during transit. This service is typically used by patients who are unable to drive themselves due to illness, disability, or other factors but do not have urgent medical needs that would require an ambulance. NEMT can be provided by a variety of vehicles, including specialized vans, wheelchair-accessible vehicles, or other transport options, and it ensures that patients can access necessary medical services safely and on time. It is often covered by Medicaid and some private insurance plans for eligible individuals.

The non-emergency medical transportation market in North America is segmented into the US, Canada, and Mexico. The North American region is anticipated to play a pivotal role in driving the market's growth. Key factors contributing to this growth include increasing prevalence of chronic illnesses, aging populations, disabilities, injuries, and obesity. In North America, the US holds a significant share of the non-emergency medical transportation market. The growth of the non-emergency medical transportation market is attributed to increasing prevalence of various diseases, expanding insurance coverage for non-emergency medical transportation (NEMT), and high state-wise rate of reimbursement for these services as administrative or medical expenses. In addition, a shift towards patient-centered care, heightened awareness of NEMT, and technological advancements are some of the factors supporting the growth of the market. Chronic illnesses, old age, disabilities, injuries and obesity are just a few of the many reasons Americans rely on non-emergency medical transportation services. The pandemic generated an enormous need for reliable car transportation to get to appointments, essential doctor visits, and daily treatments. In addition, the increase in the number of senior citizens is contributing to the growth of the non-emergency medical transportation market in the country. Additionally, Companies operating in the market are adopting organic and inorganic development strategies for market expansion. Below are a few instances of the same:

Coastal Medical Transportation Systems (CMTS), a privately owned medical transportation company based in Massachusetts, acquired Transformative Healthcare's medical transportation division in September 2022. This division included LifeLine Ambulance Service and Fallon Ambulance Service. As a result of this acquisition, CMTS became one of the largest ambulance networks in the state, both in terms of the number of patients served and the geographic area covered.

In September 2022, Baystate Wing Hospital partnered with Quaboag Connector to provide transportation services for healthcare in Massachusetts. This curb-to-

curb service offers Non-Emergency Medical Transportation (NEMT), allowing patients to request rides to and from medical appointments at Baystate Wing Hospital facilities.

Expanding Role of Technology in Non-Emergency Medical Transportation to Provide Market Opportunities in Future

Service providers and users are likely to benefit from the technologically advanced NEMT solutions in the coming years. States, brokers, MCOs, providers, drivers, and beneficiaries can focus on utilizing technologies, such as GPS tracking, electronic scheduling software in NEMT, artificial intelligence (AI), and data analytics, which are strengthening program integrity and improving on-time performance along with customer satisfaction.

GPS data, usually collected through a smartphone or tablet in vehicles, documents the date, time, and location for each pickup and drop-off to determine the genuineness and authorization of trips. They can also be used to track real-time performance. Furthermore, more advanced GPS technology (real-time location monitoring) can allow brokers to track drivers who are likely to arrive late at the commuter's location and assign new ones without delay to ensure that the appointments are not missed. When coupled with a beneficiary-facing application, GPS capability can also provide riders with real-time information about estimated pickup times.

Integrating the newest route-building and GPS features into the process enhances transparency, which, in turn, promotes accountability. Additionally, digitizing rides positively impacts the overall quality of NEMT services. Soon, all NEMT rides will be completely digitized, and then essential metrics related to ride quality based on driving parameters and rider feedback can be monitored at both the individual ride level and aggregated at the transportation provider level. For transportation providers, this will streamline the entire process, reducing missed connections and ensuring that transportation availability meets patient demand effectively.

With the evolution of the NEMT sector, innovations such as AI and data analytics are leading to substantial enhancements in efficiency and reliability. AI will help streamline scheduling and routing processes, minimizing no-show rates and ensuring timely transportation. Meanwhile, data analytics will provide valuable insights for optimal resource allocation and strategic planning. These advancements will enable healthcare facilities to ensure reliable patient transport, improve appointment adherence, and

ultimately achieve better health outcomes.

Technological innovation also encourages transparent and dependable practices in NEMT, which is likely to boost NEMT services without compromising the newest standards. Hence, the growing use of technology in NEMT is expected to become a key trend in the market during the forecast period.

The Federal Transit Administration (FTA), Transit Cooperative Research Program, Transportation Research Board, Center for Health Law and Policy Innovation (CHLPI), and Centers for Disease Control and Prevention (CDC) are among the primary and secondary sources referred to while preparing the non-emergency medical transportation market report.

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14. APPENDIX**14.1 About The Insight Partners**

14.2 Glossary of Terms

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