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US Non-Emergency Medical Transportation Market Size and Forecast (2021 - 2031), Country 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 Country

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Abstracts

The US non-emergency medical transportation market expected to grow from US$ 6.58 billion in 2023 to US$ 13.43 billion by 2031; it is estimated to register a CAGR of 9.3% from 2023 to 2031. Factors such as the growing need for non-emergency medical transportation and the rising incidence of chronic conditions are driving the US non-emergency medical transportation market growth.

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

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 in the US during the forecast period.

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The US non-emergency medical transportation market is categorized into service type, facility, application, and end user. 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 include services such as hospital visits, pharmacy pick-ups, and different healthcare-related journeys for Medicaid members. Various benefits associated with private pay patient transportation include 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.

Based on facility, the US non-emergency medical transportation market is bifurcated into intra-facility and inter-facility. The inter-facility segment accounted for a larger share of the market in 2023. Moreover, the same segment is anticipated to register a higher CAGR in the market during the forecast period.

Based on application, the US non-emergency medical transportation market is segmented into dialysis, routine doctor visits, mental health related appointments, rehabilitation, and others. The mental health related appointments segment accounted for the largest share of the market in 2023. However, the rehabilitation segment is anticipated to register the highest CAGR in the US non-emergency medical transportation market during the forecast period.

Based on end user, the non-emergency medical transportation market is segmented into hospitals & clinics, nursing homes, homecare settings, MCO & state agencies, healthcare payers, and others. Hospitals & clinics captured the largest share in 2021 and is expected to follow a similar trend 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 US non-emergency medical transportation market report.

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