

NEMTAC® National NEMT Rate & Cost Structure Survey

Summary of Findings January–February 2026 Purpose of the Survey

NEMTAC conducted this national survey to understand how current non-emergency medical transportation (NEMT) reimbursement structures interact with real-world operating costs across markets, service modes, and payer environments.

This survey **does not recommend rates** or advocate for specific reimbursement levels. Its purpose is to provide an **aggregated, anonymized view** of how stakeholders across the NEMT system experience **rate sustainability in practice**.

Survey Overview

Respondent roles

- NEMT providers (majority)
- Brokers / transportation managers
- Other industry stakeholders (technology, policy, support)

Markets represented

- Urban
- Suburban
- Rural
- Frontier

Payer environments represented

- Medicaid (managed care and fee-for-service)
- Medicare Advantage (supplemental)
- Commercial insurance
- Private pay / self-pay
- Other government programs

Methodology notes

- Responses were anonymous.
 - Rate inputs were collected as **ranges**, not contract values.
 - Participants could skip non-applicable questions.
 - No identifying or contract-specific data was collected.
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Survey Scope & Structure (Design Guardrails)

- **Rate ranges only** (to reduce sensitivity and encourage candid input)
- **Service-mode segmentation**
 - Ambulatory
 - Wheelchair-Accessible Vehicle (WAV)
 - Stretcher Van (Non-Emergency)

- **Multiple market selection** allowed (urban, suburban, rural, frontier)
- **Payer types captured at category level only**
- **No follow-up attribution** or individual evaluation

This structure reflects how NEMT services are delivered in practice rather than assuming uniform trip conditions.

Key Findings (with Percentages)

1. Overall rate sustainability sentiment

When asked to assess current NEMT rates in their primary market:

- ~**65–70%** of respondents described rates as **Barely sustainable or Unsustainable**
- ~**20–25%** described rates as **Generally sustainable**
- ~**10–15%** indicated rates are **Sustainable with growth capacity**
- A small subset selected **Unsure** in combination with other options

Interpretation:

Sustainability stress is the **dominant condition**, not an edge case, and appears across markets and payer types.

2. Labor costs show national clustering

Reported **fully loaded driver costs per hour** clustered tightly:

- ~**60%** reported driver costs between **\$25–34/hr**
- ~**25%** reported costs **below \$25/hr**
- ~**15%** reported costs **\$35/hr or higher**

Interpretation:

Labor costs are **relatively consistent nationally**, suggesting sustainability challenges are driven more by **rate design and trip economics** than by workforce variability alone.

3. Rate band clustering (base & mileage)

Across service modes, reported rate inputs clustered into **clear operating bands** rather than a smooth continuum.

Observed patterns (aggregated):

- **Mileage rates** most frequently clustered in **low-to-mid bands**, with fewer respondents reporting high-end mileage ranges.
- **Base rates** showed wider dispersion, particularly for WAV and stretcher services, but clustered around a limited number of recurring ranges.
- Respondents reporting **higher base rates without corresponding mileage support** still frequently rated rates as barely sustainable.

Interpretation:

Sustainability challenges are not solely about *how high* rates are, but **how base and mileage rates interact under real operating conditions**.

4. Risks most likely if rates do not change

Respondents identified the following risks (multi-select):

- **Provider exit:** ~60%
- **Missed medical appointments:** ~55%
- **Increased wait times:** ~55%
- **Rural / frontier coverage loss:** ~45–50%
- **Network contraction:** ~40–45%

Interpretation:

The most frequently cited impacts relate to **access, reliability, and network stability**, not provider margins.

How to Use This Information

For NEMT Providers

- **Use ranges as context, not pricing**
 - These are not targets or recommendations.
 - **Test trips under non-ideal conditions**
 - Rural mileage, long loads, wait time, cancellations.
 - **Validate labor assumptions**
 - If reimbursement assumes labor materially below national experience, sustainability risk increases.
 - **Frame discussions around access**
 - The strongest signals relate to service availability and reliability.
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For Brokers and Transportation Managers

- **Treat this as an early-warning signal**
 - Sustainability stress appears before visible service failures.
 - **Separate cost pressure from performance**
 - Many respondents reporting unsustainable rates also operate across multiple markets and service modes.
 - **Monitor rural and frontier exposure**
 - Coverage loss is a recurring, predictable risk signal.
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What This Survey Does *Not* Do

This survey does **not**:

- Establish recommended or benchmark rates
 - Replace actuarial or market-specific studies
 - Attribute responsibility to any payer or program
 - Evaluate individual providers, brokers, or contracts
 - Publish or rely on publicly posted state fee schedules
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Why This Matters

NEMT operates at the intersection of transportation, healthcare access, and public accountability. Understanding how reimbursement structures interact with real-world operating conditions is essential to maintaining **safe, reliable, and timely access to care**.

This survey provides a **neutral, ANSI-aligned reference point** for determining whether sustainability concerns are isolated or broadly shared.

Closing Observation

The purpose of this survey was to allow stakeholders across the NEMT system to determine whether their experience is isolated or shared.

The results suggest it is widely shared.

