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Healthcare Staffing Market Forecasts to 2034 – Global Analysis By Service Type (Travel Nurse Staffing, Per Diem Nurse Staffing, Locum Tenens Staffing, Allied Healthcare Staffing, and Administrative & Support Staffing), Staffing Type, Healthcare Profession, Staffing Model, End User, and By Geography

https://marketpublishers.com/r/H57F588BB565EN.html
Date: May 2026
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: H57F588BB565EN

Abstracts

According to Stratistics MRC, the Global Healthcare Staffing Market is accounted for $50.0 billion in 2026 and is expected to reach $84.1 billion by 2034 growing at a CAGR of 6.7% during the forecast period. Healthcare staffing refers to the recruitment and deployment of medical professionals across hospitals, clinics, long-term care facilities, and other healthcare settings to address workforce shortages and fluctuating patient demands. This market plays a critical role in maintaining continuity of care, especially during seasonal surges, public health emergencies, and periods of systemic understaffing. The industry covers a wide spectrum of roles, from temporary placements filling immediate gaps to permanent hires building long-term organizational capacity.
Market Dynamics:
Driver:
Aging population and rising chronic disease burden
Global demographic shifts toward older populations are creating unprecedented demand for healthcare services, directly driving the need for larger and more flexible workforces. The prevalence of chronic conditions such as diabetes, cardiovascular disease, and respiratory disorders requires continuous, long-term care that stretches existing staffing resources. For every additional elderly patient, multiple healthcare professionals across nursing, therapy, and support roles become necessary to maintain quality standards. This sustained demand pressure forces healthcare providers to rely heavily on staffing agencies to fill both temporary and permanent positions, ensuring

that patient care does not suffer despite persistent workforce shortages.

Restraint:

High costs of third-party staffing services

Premium rates charged by staffing agencies significantly strain healthcare budgets, particularly for public hospitals and underfunded rural facilities. Temporary staff wages, agency markups, and administrative fees often exceed the cost of permanent employees by substantial margins, creating financial resistance among budget-conscious administrators. Smaller healthcare organizations may find it difficult to justify these expenses, forcing them to operate with chronic understaffing instead of leveraging agency support. This cost barrier limits market penetration in emerging economies and among smaller providers, despite acknowledged staffing needs. Reimbursement pressures from government payers further restrict the ability to pay premium staffing rates.

Opportunity:

Integration of AI-driven workforce management platforms

Artificial intelligence is transforming how healthcare organizations forecast demand and deploy temporary staff, creating significant operational efficiencies. Machine learning algorithms can analyze historical patient admission patterns, seasonal trends, and local disease outbreaks to predict staffing requirements with increasing accuracy. These platforms automatically match qualified professionals with open shifts, reducing time-to-fill and minimizing costly overtime expenses. By optimizing workforce allocation, AI tools make temporary staffing more cost-effective, encouraging greater adoption among previously hesitant providers. The integration of credential verification and compliance tracking further streamlines the onboarding process, enhancing the value proposition of agency-managed staffing solutions.

Threat:

Burnout and high turnover among temporary healthcare workers

The intense demands placed on contract and travel healthcare professionals are leading to elevated rates of burnout, reducing the available talent pool over time. Temporary staff often face challenging assignments in under-resourced facilities, with heavy patient loads, limited orientation, and minimal institutional support. These working conditions contribute to physical exhaustion, emotional fatigue, and decisions to leave the profession entirely rather than accept further assignments. As experienced clinicians exit the staffing pipeline, agencies face greater difficulty fulfilling client requests with qualified candidates. This cycle of burnout and attrition ultimately threatens the sustainability of the temporary staffing model upon which many healthcare systems depend.

Covid-19 Impact:

The COVID-19 pandemic served as both a catalyst and a stress test for the healthcare staffing market, exposing critical vulnerabilities while demonstrating the value of flexible workforce solutions. Surges in patient volumes overwhelmed existing staff, triggering unprecedented demand for travel nurses and temporary physicians, with some agencies reporting triple-digit increases in contract placements. However, extreme burnout during the pandemic led many healthcare professionals to leave bedside care permanently, tightening the available labor pool. Crisis rates temporarily boosted agency revenues, but the long-term effect has been a restructuring of workforce expectations, with more professionals seeking flexible, contract-based arrangements that offer better work-life balance.

The Temporary Staffing segment is expected to be the largest during the forecast period

The Temporary Staffing segment is expected to account for the largest market share during the forecast period, driven by the cyclical and unpredictable nature of healthcare demand. Hospitals and clinics frequently face seasonal spikes such as flu season, unexpected staffing shortages due to illness or leave, and surge capacity needs during public health emergencies. Temporary staffing provides the agility to scale workforces up or down without the long-term commitments and benefit costs associated with permanent hires. Travel nursing, per-diem physician coverage, and short-term allied health contracts have become indispensable tools for healthcare administrators seeking to maintain patient care standards while managing financial constraints, ensuring this segment remains dominant.

The Allied Health Professionals segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Allied Health Professionals segment is predicted to witness the highest growth rate, reflecting expanding recognition of the critical roles played by respiratory therapists, physical therapists, radiologic technologists, laboratory scientists, and other non-physician, non-nursing clinical staff. As healthcare delivery shifts toward preventative care, outpatient services, and rehabilitation, demand for these specialized professionals is rising faster than supply. Staffing agencies are increasingly building dedicated allied health divisions to serve this growing need, particularly as credentialing requirements and certification standards make independent sourcing challenging for individual providers. The diversity of allied health specialties and their integration across virtually all care settings fuels sustained, accelerated growth throughout the forecast period.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, driven by high healthcare spending, chronic nurse and physician shortages, and mature outsourcing practices across the United States and Canada. The region's complex and fragmented healthcare system encourages flexible staffing models, with for-profit hospital networks and long-term care facilities routinely using agency personnel to manage census fluctuations. Strong regulatory frameworks for staffing agency licensing and clinician credentialing provide quality assurance, building employer confidence. Additionally, the growth of travel nursing as a career path has created a deep and mobile workforce willing to accept assignments across state lines, reinforcing North America's dominant position.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapid healthcare infrastructure expansion, growing medical tourism, and severe shortages of trained healthcare professionals across developing economies. Countries including India, China, Indonesia, and Vietnam are investing heavily in new hospital construction, but their educational systems cannot produce qualified nurses, doctors, and allied health workers quickly enough to meet operational needs. This imbalance creates strong demand for staffing agency services, both for domestic placement and international recruitment. Government initiatives to reduce patient-to-nurse ratios and improve care quality further drive reliance on flexible staffing solutions, positioning Asia Pacific as the fastest-growing regional market.

Key players in the market

Some of the key players in Healthcare Staffing Market include AMN Healthcare Services Inc., CHG Healthcare Services Inc., Cross Country Healthcare Inc., Aya Healthcare Inc., Maxim Healthcare Services Inc., TeamHealth Holdings Inc., Envision Healthcare Corporation, LocumTenens.com LLC, Jackson Healthcare LLC, Medical Solutions LLC, Trustaff Inc., Health Carousel LLC, Favorite Healthcare Staffing Inc., Supplemental Health Care, and Advantis Medical Staffing LLC.

Key Developments:

In February 2026, Aya Healthcare launched its 2026 Technology Advisory Board, a group of clinical and tech leaders tasked with accelerating the development of data-driven workforce solutions and AI-powered recruitment tools.

In August 2025, Envision announced a strategic focus on its core emergency medicine, hospitalist, and anesthesiology services, utilizing a new "local understanding, national scale" model to improve patient outcomes.

Service Types Covered:

- Travel Nurse Staffing
- Per Diem Nurse Staffing
- Locum Tenens Staffing

Allied Healthcare Staffing

Administrative & Support Staffing

Staffing Types Covered:

Temporary Staffing

Permanent Staffing

Healthcare Professions Covered:

Nursing Staff

Physicians

Allied Health Professionals

Non-Clinical Staff

Staffing Models Covered:

Managed Service Provider (MSP)

Recruitment Process Outsourcing (RPO)

Direct Hire

End Users Covered:

Hospitals

Clinics & Physician Practices

Ambulatory Surgical Centers

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- Long-Term Care Facilities
- Home Healthcare Settings
- Other End Users

Regions Covered:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - United Kingdom
  - Germany
  - France
  - Italy
  - Spain
  - Netherlands
  - Belgium
  - Sweden
  - Switzerland
  - Poland

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Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

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Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

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Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:
All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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