

Locum Tenens Staffing Market Size, Share and Growth Outlook 2026: By Type (Physicians, Nurses, Surgeons, Anesthesiologists, Radiologists), By End-Use, Companies to 2034.

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Abstracts

The global Locum Tenens Staffing Market size is forecast to increase from \$10.43 Billion in 2026 to \$18.92 Billion in 2034 at a CAGR of 7.73% between 2026 and 2034.

The Locum Tenens Staffing market report provides detailed analysis and outlook of Locum Tenens Staffing segments including By Type (Physicians, Nurses, Surgeons, Anesthesiologists, Radiologists), By End-Use (Hospitals, Ambulatory Facilities, Other End-uses) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Locum Tenens Staffing Industry Overview

Physician Workforce Shortages Continue to Accelerate Locum Tenens Adoption

The locum tenens staffing industry is experiencing strong momentum as healthcare organizations increasingly utilize temporary physician staffing solutions to address workforce shortages, fluctuating patient demand, and recruitment challenges. Hospitals, academic medical centers, specialty clinics, and healthcare networks are relying on locum tenens professionals to maintain service continuity while reducing the operational impact of prolonged vacancies. Growing physician interest in flexible work arrangements, combined with rising demand for specialized clinical expertise, is expanding the role of locum tenens staffing across multiple healthcare disciplines. Technology-driven workforce planning and managed staffing solutions are further

strengthening industry growth and operational efficiency.

Physician Interest in Flexible Practice Models Reaches New Levels

Changing workforce preferences are significantly influencing the healthcare staffing landscape. Weatherby Healthcare's 2026 Locum Tenens Physicians Report revealed that physician participation in temporary clinical assignments has reached its highest level in a decade. According to survey findings, 41% of physicians reported having worked a locum tenens assignment during their careers, representing a substantial increase from participation levels reported ten years earlier. Additionally, more than one-quarter of surveyed physicians expressed interest in pursuing locum tenens opportunities, citing greater schedule control and supplemental income generation as primary motivations. These trends demonstrate how workforce flexibility is becoming a central factor in physician career planning and healthcare labor market dynamics.

Industry Consolidation Expands Managed Staffing Capabilities

Strategic acquisitions are strengthening the operational capabilities of staffing providers and expanding service offerings. Barton Associates announced the acquisition of LocumsCollective, a specialized managed service provider focused on locum tenens workforce solutions. The transaction enhances Barton Associates' technology infrastructure, vendor management capabilities, and workforce coordination services across the healthcare staffing sector. As healthcare organizations seek more efficient methods for managing temporary clinical labor, integrated managed service models are becoming increasingly valuable. Industry consolidation is enabling staffing firms to offer broader service portfolios while improving visibility, compliance oversight, and workforce deployment efficiency.

Predictive Analytics Improves Healthcare Workforce Planning

Advanced workforce intelligence tools are becoming critical for healthcare organizations facing persistent staffing shortages. AMN Healthcare introduced a data-driven workforce program specifically designed for Academic Medical Centers. The initiative utilizes predictive analytics to identify staffing requirements and accelerate placement of highly sought-after specialists, including anesthesiologists and psychiatrists. By reducing reliance on fragmented hiring approaches and streamlining recruitment workflows, the program enables institutions to fill critical clinical positions in less than two months. The growing use of predictive analytics within workforce management reflects a broader industry shift toward data-informed staffing strategies that improve

resource allocation, reduce vacancy durations, and strengthen healthcare delivery continuity.

Locum Tenens Staffing Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Locum Tenens Staffing market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- CHG Healthcare , AMN Healthcare Services, Inc., Aya Healthcare, Cross Country Healthcare, Inc., Medicus Healthcare Solutions, LLC, LocumTenens.com, The Delta Companies, Maxim Healthcare Staffing, VISTA Staffing Solutions, Adecco Group AG. The Locum Tenens Staffing market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Locum Tenens Staffing industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Locum Tenens Staffing Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Locum Tenens Staffing companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Locum Tenens Staffing markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Locum Tenens Staffing Market Competitive Benchmarking and Company Analysis

Leading companies in Locum Tenens Staffing industry include- CHG Healthcare , AMN Healthcare Services, Inc., Aya Healthcare, Cross Country Healthcare, Inc., Medicus Healthcare Solutions, LLC, LocumTenens.com, The Delta Companies, Maxim Healthcare Staffing, VISTA Staffing Solutions, Adecco Group AG. The Locum Tenens Staffing market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Locum Tenens Staffing Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Locum Tenens Staffing market remains one of the strongest-performing segments in the country.

The US Locum Tenens Staffing Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Locum Tenens Staffing market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Locum Tenens Staffing industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Locum Tenens Staffing markets

Canada's strong Locum Tenens Staffing sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Locum Tenens Staffing market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Locum Tenens Staffing Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Locum Tenens Staffing market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Locum Tenens Staffing population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Locum Tenens Staffing industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Locum Tenens Staffing market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Locum Tenens Staffing sales through 2034

France Locum Tenens Staffing companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Locum Tenens Staffing Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Locum Tenens Staffing distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Locum Tenens Staffing Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Locum Tenens Staffing market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Locum Tenens Staffing industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Locum Tenens Staffing industry. Over the forecast period,

demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Locum Tenens Staffing Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Locum Tenens Staffing market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Locum Tenens Staffing market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Locum Tenens Staffing Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding

private healthcare sectors, and growing investments in healthcare delivery systems.

Locum Tenens Staffing Market Segmentation

By Type

Physicians

Nurses

Surgeons

Anesthesiologists

Radiologists

By End-Use

Hospitals

Ambulatory Facilities

Other End-uses

Leading Companies in Locum Tenens Staffing Industry (2026)

CHG Healthcare

AMN Healthcare Services, Inc.

Aya Healthcare

Cross Country Healthcare, Inc.

Medicus Healthcare Solutions, LLC

LocumTenens.com

The Delta Companies

Maxim Healthcare Staffing

VISTA Staffing Solutions

Adecco Group AG

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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