2026 Healthcare Staffing Market Realignment

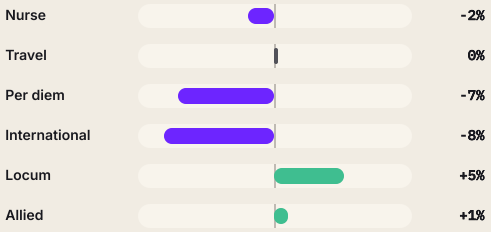
The market is stabilising. The operating model is not.

The US market is forecast at **$38.7B in 2026**, but aggregate stability hides a widening split: nursing channels remain under pressure while locum tenens and advanced-practice demand expand.[1][2]

$38.7B	73%	$9.9B
2026 market [1]	MSP share [3]	2026 locum [2]

01 · SEGMENT OUTLOOK

Six trajectories, not one recovery.



2026 forecast: nurse -2%, travel flat, per diem -7%, international -8%, locum about +5%, allied +1%.[1]

02 · THREE INDUSTRY SHIFTS

$38.7B → $39.6B

Stability masks allocation choices

Total growth coexists with sharp segment divergence.[1]

69% → 73%

Managed channels tighten economics

Travel-nurse MSP share rose as bill rates and gross margin fell.[3]

+35% vs +3%

Provider mix becomes APP-heavy

APP-group employment growth versus physicians/surgeons, 2024–2034.[5]

TRAVEL-NURSE BENCHMARK

$89.78	19.3%	73%
bill rate / hr	gross margin	MSP share

2024 · Source [3]

03 · OPERATING RESPONSE

Investigate workflows—not promises.

01 **Credentialing readiness**
Historical, read-only exception baseline

02 **Timecard / payroll exceptions**
Reconciliation and rework visibility

03 **Candidate-order matching**
Human-controlled shortlist support

30-day first experiment

Use approved historical credential packages. AI extracts, compares and organises; authorised people validate every output and make every clearance decision.

BASELINE FIRST · NO INVENTED TARGET

FIVE ROI INPUTS | 01 Weekly volume | 02 Hours spent | 03 Exception volume | 04 Loaded cost | 05 Impact of delay

AI organises, explains and recommends.
Authorised people retain every material decision.

Sources: [1] SIA, Healthcare staffing sees uneven growth, 7 Apr 2026. [2] SIA, Structural forces reshape $9.6B locum market, 13 Jan 2026. [3] SIA NATHO Travel Nurse Benchmark 2025. [4] AAMC physician supply and demand, Mar 2024. [5] Definitive Healthcare Industry Pulse, Jun 2026. [7] PMCF HCM M&A Pulse, Q1 2026. Full links and qualifications: www.eq.app/blog/healthcare-staffing-market-report-2026

