

2011 List of Largest U.S. Healthcare Staffing Firms

Introduction:

- We estimate that 16 firms generated at least \$50 million in healthcare staffing revenue in 2010, accounting for \$3.6 billion (48% of the healthcare sector). Lists of largest healthcare staffing firms, as well as sub-segment lists, are on the following pages.
- We have ranked companies by revenue, according to industry custom, but this ranking should not be taken to imply that a firm with a higher rank provides better service or more value to its shareholders.
- Staffing firms varied in degree of financial transparency, and even when forthcoming with information, in some cases data provided was adjusted for the sake of consistency. Therefore, for all firms on this list, the revenue reported is estimated by Staffing Industry Analysts.
- Overall, we believe that this list is accurate and can be used appropriately to get a “big picture” reading of the U.S. healthcare sector. However, as we are constantly improving our methodology, in some cases this year’s estimates may not be strictly comparable to those of previous years. For that reason, we did not report prior year revenue in this list.

The data included in this report was collected through an online survey in May/June 2011.

2011 list of largest U.S. healthcare staffing firms

Information Provided:

- Companies were ranked by their estimated 2010 U.S. revenue generated in the healthcare segment.
- The list also provides our estimate of each company's market share of the healthcare segment. Market share is calculated by dividing a company's listed revenue by our 2010 estimate of \$7.6 billion for the healthcare staffing segment.

Note:

- In this report, companies are ranked by their U.S. temporary healthcare staffing revenue only, not company-wide revenue. Examples of business lines that would not be included are: clinical/scientific staffing, direct hire/retained search, home health that is not B2B, Emergency Department outsourcing, and revenue that is not generated in the U.S.

Largest healthcare staffing firms in the U.S.

Ranked by estimated 2010 U.S. temporary staffing revenue

| Rank | Company | 2010 U.S. Staffing Revenue (\$M) | Market Share |
|--------------|------------------------------------|----------------------------------|--------------|
| 1 | AMN Healthcare | \$765 | 10% |
| 2 | CHG Healthcare | \$513 | 7% |
| 3 | Cross Country Healthcare | \$364 | 5% |
| 4 | Jackson Healthcare | \$339 | 4% |
| 5 | Maxim Healthcare | \$297 | 4% |
| 6 | Medical Staffing Network | \$289 | 4% |
| 7 | Team Health | \$199 | 3% |
| 8 | Supplemental Healthcare | \$178 | 2% |
| 9 | On Assignment | \$139 | 2% |
| 10 | C&A Industries | \$123 | 2% |
| 11 | Sun Healthcare Group (Careerstaff) | \$92 | 1% |
| 12 | Adecco | \$91 | 1% |
| 13 | Favorite Healthcare Staffing | \$84 | 1% |
| 14 | ATC Healthcare | \$65 | 1% |
| 15 | Kforce | \$56 | 1% |
| 16 | Reliant Healthcare | \$50 | 1% |
| Total | | \$3,641 | 48% |

2011 list of largest U.S. per diem nurse staffing firms

Information Provided:

- We estimate that five firms generated \$50 million or more in per diem nurse staffing in the U.S., making up 25% of the market.

Largest per diem nurse staffing firms in the U.S.

Ranked by estimated 2010 U.S. temporary staffing revenue

| Rank | Company | 2010 U.S. Staffing Revenue (\$M) | Market Share |
|--------------|--------------------------|---|---------------------|
| 1 | Maxim Healthcare | \$226 | 9% |
| 2 | Medical Staffing Network | \$203 | 8% |
| 3 | AMN Healthcare | \$90 | 4% |
| 4 | ATC Healthcare | \$55 | 2% |
| 5 | Supplemental Healthcare | \$50 | 2% |
| Total | | \$624 | 25% |

2011 list of largest U.S. travel nurse staffing firms

Information Provided:

- We estimate that four firms generated \$50 million or more in travel nurse staffing in the U.S., making up 62% of the market.

Largest travel nurse staffing firms in the U.S.

Ranked by estimated 2010 U.S. temporary staffing revenue

| Rank | Company | 2010 U.S. Staffing Revenue (\$M) | Market Share |
|--------------|--------------------------|---|---------------------|
| 1 | AMN Healthcare | \$275 | 31% |
| 2 | Cross Country Healthcare | \$180 | 20% |
| 3 | C&A Industries | \$53 | 6% |
| 4 | Reliant Healthcare | \$50 | 6% |
| Total | | \$558 | 62% |

2011 list of largest U.S. locum tenens staffing firms

Information Provided:

- We estimate that six firms generated \$50 million or more in locum tenens staffing in the U.S., making up 66% of the market.

Largest locum tenens staffing firms in the U.S.

Ranked by estimated 2010 U.S. temporary staffing revenue

| Rank | Company | 2010 U.S. Staffing Revenue (\$M) | Market Share |
|--------------|--------------------------|----------------------------------|--------------|
| 1 | CHG Healthcare | \$421 | 23% |
| 2 | AMN Healthcare | \$284 | 16% |
| 3 | Jackson Healthcare | \$194 | 11% |
| 4 | Cross Country Healthcare | \$122 | 7% |
| 5 | Team Health | \$98 | 5% |
| 6 | On Assignment | \$66 | 4% |
| Total | | \$1,185 | 66% |

2011 list of largest allied health staffing firms

Information Provided:

- We estimate that nine firms generated \$50 million or more in allied health staffing in the U.S., making up 29% of the market.

Largest allied health staffing firms in the U.S.

Ranked by estimated 2010 U.S. temporary staffing revenue

| Rank | Company | 2010 U.S. Staffing Revenue (\$M) | Market Share |
|--------------|------------------------------------|----------------------------------|--------------|
| 1 | AMN Healthcare | \$116 | 5% |
| 2 | Jackson Healthcare | \$108 | 5% |
| 3 | Supplemental Healthcare | \$92 | 4% |
| 4 | Adecco | \$82 | 3% |
| 5 | Sun Healthcare Group (CareerStaff) | \$72 | 3% |
| 6 | C&A Industries | \$70 | 3% |
| 7 | Kforce | \$56 | 2% |
| 8 | CHG Healthcare | \$53 | 2% |
| 9 | Medical Staffing Network | \$51 | 2% |
| Total | | \$700 | 29% |