

The State of Independent Practice Vendors 2026

What 76,965 vendor listings, a 4,337-member graded segment, and a measured dead-site rate say about the market that sells to independent medical and dental practices. Every figure traces to a named query in the methodology appendix.

4,337

graded Tier-1 vendors
(verified live, June
2026)

48.6%

of graded billing/RCM
vendors have fewer
than 10 employees

2015

median founding year,
graded billing/RCM
vendors

8.5%

of probed vendor
websites were dead at
probe time

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Key findings

48.6% of the 2,448 graded billing/RCM vendors have fewer than 10 employees. The median graded billing/RCM vendor is a 10-person firm founded in 2015. Employee figures are GPH-estimated size bands.

Source: query Q-C1.

Half of graded billing/RCM vendors are younger than a decade. 49.8% of those with known founding years were founded in 2016 or later.

Source: query Q-C2; founding year known for 1,973 of 2,448 (80.6%).

1 in 12 vendor websites in the probed commercial core was dead at probe time.

8.5% of 6,295 probed domains; billing/RCM is the worst major category at 12.1%.

Source: query Q-CH1.

The market's two poles: billing is young and small, staffing is old and big. The median graded staffing and recruiting vendor was founded in 1988, and 82.6% have 250 or more employees -- against billing/RCM's 2015 median and 48.6% sub-10 share.

Source: queries Q-C1, Q-C2.

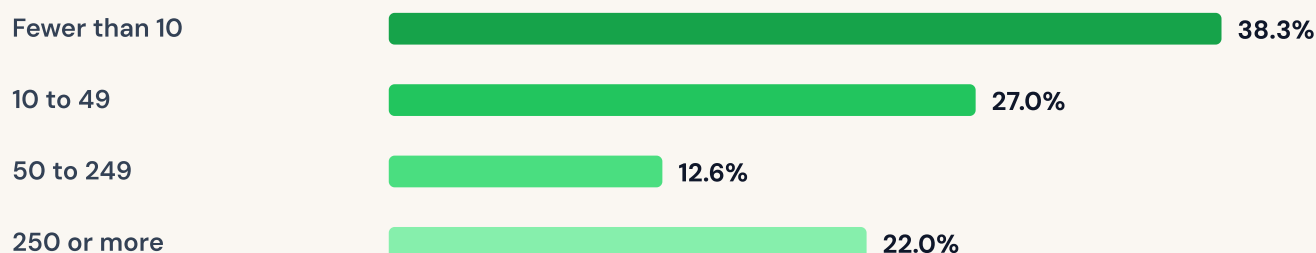
When practices ask for help, two-thirds ask about billing. Of 126 practices that used GetPracticeHelp's vendor-matching tool between April 14 and June 11, 2026, 67% (85) were seeking billing or RCM help. Early-stage sample, size disclosed.

Source: query Q-M1.

1. The graded universe: a census of 4,337 vendors

The full GPH directory holds 76,965 vendor listings across 25 service categories. Inside it sits a graded Tier-1 segment: 4,426 vendors that passed curation grading (2,689 grade A, 1,737 grade B). This report's census counts only vendors whose websites could be verified live as of June 2026: **4,337 vendors** (2,688 A, 1,649 B). Of the 89 graded vendors excluded, 22 were verified inactive; the remaining 67 could not be independently verified and are excluded under the verifiable-live rule. Only the verified-inactive count toward attrition.

Size structure of the graded universe (GPH-estimated bands; coverage 100%):



Graded Tier-1 vendors, verified-live sites only (n=4,337). GPH-estimated size bands. Source: query Q-C1.

By vertical (16 categories shown; two categories totaling 3 vendors are rolled into the methodology notes):

CATEGORY	VENDORS	A / B	<10 EMP	250+ EMP	MEDIAN FOUNDED	MULTI-LOCATION
Medical Billing & RCM	2,448	1,532 / 916	48.6%	7.6%	2015	25.1%

CATEGORY	VENDORS	A / B	<10 EMP	250+ EMP	MEDIAN FOUNDED	MULTI- LOCATION
Healthcare Staffing & Recruiting	409	209 / 200	5.4%	82.6%	1988	42.0%
Credentialing Services	284	177 / 107	60.2%	5.6%	2016	30.3%
Medical Coding Services	185	131 / 54	41.1%	10.8%	2014	27.2%
Patient Financing & Payment Solutions	152	100 / 52	16.4%	46.1%	2001	28.9%
Healthcare IT & EHR	151	114 / 37	10.6%	46.4%	2003	39.1%
Practice Management Consulting	114	88 / 26	29.8%	18.4%	2006	27.9%
Medical Equipment & Supplies	104	60 / 44	22.1%	52.9%	2001	49.0%
Practice Financing & Loans	94	37 / 57	4.3%	73.4%	1984	44.7%
Compliance & HIPAA Services	87	52 / 35	19.5%	34.5%	2003	46.5%
Healthcare Marketing & Reputation Mgmt	76	46 / 30	26.3%	15.8%	2012	30.8%
Medical Transcription & Documentation	74	49 / 25	32.4%	31.1%	2000	28.8%
Healthcare PR & Communications	58	36 / 22	15.5%	17.2%	2002	43.1%
Medical Waste & Environmental Services	50	27 / 23	46.0%	30.0%	2004	50.0%
Telehealth & Virtual Care Infrastructure	29	19 / 10	13.8%	41.4%	2007	48.0%
Practice Valuation & Brokerage	19	10 / 9	10.5%	36.8%	2002	42.1%
All graded vendors	4,337	2,688 / 1,649	38.3%	22.0%	2011	30.2%

Live graded vendors only. Size bands GPH-estimated, coverage 100%. Median founded computed on known years (84.4% coverage). Multi-location share computed on location-known vendors (97.4% coverage). Source: queries Q-C1, Q-C2.

2. The billing/RCM long tail and the consolidation map

Medical Billing & RCM is the largest graded vertical by a factor of six -- 2,448 live vendors -- and the most fragmented of the large ones. Nearly half (48.6%) have fewer than 10 employees. The median firm has 10 people. The age structure says this is not a legacy market thinning out; it is a market still being entered:



Graded billing/RCM vendors with known founding years (n=1,973 of 2,448). Source: query Q-C2.

For anyone evaluating this vertical as a consolidation target, the long tail is the story: 1,190 live, graded sub-10-employee billing firms, with another 770 in the 10-to-49 band. The fragmentation is national, not regional -- in every state with 30 or more graded billing vendors, the sub-10 share runs between 31% and 68%.

DIRECTIONAL EXHIBIT

The consolidation map: graded billing/RCM vendors by state

Coverage basis, printed where the numbers live: 1,836 of 2,448 live graded billing/RCM vendors (75.0%) carry a state attribution. Per-state counts and ranks below are directional; they could shift if the unattributed quarter were placed. National figures in this chapter do not depend on state attribution.

STATE	GRADED VENDORS	<10 EMP SHARE	HEADCOUNT HHI
California	264	43.2%	1,210
Texas	230	50.0%	1,035
Florida	224	48.2%	889
New York	134	44.0%	462
New Jersey	88	45.5%	2,507
Illinois	83	49.4%	6,324
Georgia	71	49.3%	6,948
Pennsylvania	68	50.0%	2,416
Ohio	63	52.4%	1,189
Maryland	40	67.5%	8,958
Virginia	40	55.0%	2,383
North Carolina	39	46.2%	3,784
Colorado	38	63.2%	967
Tennessee	38	31.6%	1,596
Arizona	37	67.6%	1,917
Massachusetts	36	36.1%	7,568
Missouri	35	60.0%	9,293
Michigan	33	63.6%	4,141
Indiana	32	56.2%	1,214

STATE	GRADED VENDORS	<10 EMP SHARE	HEADCOUNT HHI
Washington	32	50.0%	2,119
24 states with fewer than 30 vendors	211	47.9%	--

Live graded billing/RCM vendors with state attribution. Headcount HHI is a concentration proxy built on employee-count shares, not revenue; it is inflated where one large employer sits in a small state cell. Source: query Q-R1.

3. Concentration by vertical

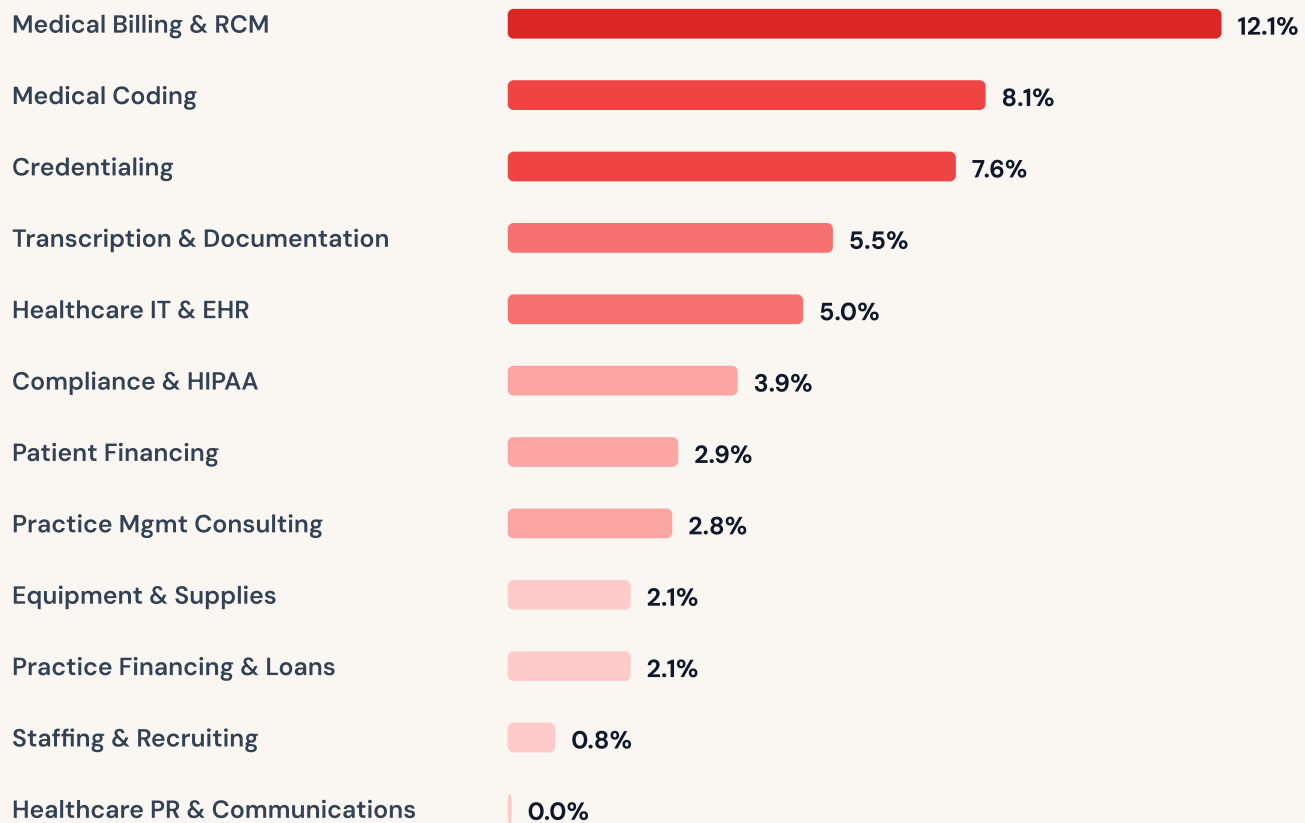
With headcount as the share proxy (revenue shares are not observable at this scale), the graded verticals split into three regimes. Fragmented: billing/RCM (HHI 2,109 driven by a handful of national firms over a vast tail), coding (1,362), marketing (937). Anchored: staffing (151 -- big firms, but many of them), patient financing (302), IT/EHR (433). Concentrated: practice management consulting (4,858) and telehealth infrastructure (5,059), where one or two large employers dominate the graded set. Billing/RCM's headcount HHI reads concentrated only because a few national employers dominate headcount; by vendor count it is the most fragmented large vertical in the set -- 2,448 firms, half under 10 people.

The consolidatable tail, sized: across all graded verticals, 1,660 live vendors have fewer than 10 employees -- 38.3% of the graded universe. 1,190 of them are in billing/RCM alone.

Headcount-share HHI = $10000 \times \text{sum of squared employee-count shares per category}$. A proxy, labeled as such everywhere it appears. Source: query Q-C1 (sums), definition in methodology.

4. Vendor attrition: the dead-site rate

GPH probed the websites of 6,295 vendors in the directory's commercial core. 536 -- 8.5%, about 1 in 12 -- were dead: domain gone or site permanently down. A manual audit of a stratified sample of those dead classifications measured a 5% false-positive rate (n=75), which holds the dead-site rate in an 8.1-8.5% band. A further 6.7% could not be independently verified and are excluded from the churn figure.



Hard-dead rate (dead_site only) among probed domains, categories with 100+ probes. Domains that could not be independently verified are excluded rather than counted as attrition. Source: query Q-CHI.

The pattern matches the size structure: the verticals with the longest small-firm tails churn hardest. Billing/RCM -- youngest, smallest -- loses members at 15 times the rate of staffing and recruiting (12.1% vs 0.8%). Inside the graded set the pattern repeats: of the 22 graded vendors verified dead at probe time, 21 were grade B.

5. Geography: where the supply sits

Across the full live directory (76,009 listings; 96.9% carry a state attribution), supply concentrates where practices concentrate -- Texas (3,039), California (2,909), Florida (2,733), New York (2,366) -- but the floor is high everywhere: 41 states have at least 1,000 live listings. Billing/RCM supply is far more top-heavy than the directory overall: Texas (632), California (570), and Florida (486) hold 34% of state-attributed billing listings between them, against the same three states' 12% share of the directory as a whole.

▼ All states: live directory listings (billing/RCM in parentheses)

TX — 3,039 (632)	NY — 2,366 (369)	NC — 1,886 (109)
CA — 2,909 (570)	OH — 2,039 (133)	IL — 1,879 (210)
FL — 2,733 (486)	PA — 1,954 (132)	TN — 1,858 (116)

MI – 1,790 (111)	CT – 1,497 (41)	MS – 1,191 (16)
GA – 1,700 (173)	SC – 1,490 (40)	NE – 1,136 (25)
LA – 1,639 (55)	OK – 1,471 (37)	WV – 1,083 (9)
AZ – 1,602 (119)	MN – 1,465 (62)	NH – 974 (18)
VA – 1,589 (111)	OR – 1,392 (46)	WY – 968 (29)
MO – 1,588 (68)	NV – 1,307 (61)	ND – 935 (4)
NJ – 1,581 (216)	AR – 1,304 (34)	SD – 914 (13)
WI – 1,579 (48)	KY – 1,299 (39)	ME – 865 (11)
WA – 1,575 (100)	IA – 1,291 (16)	RI – 863 (8)
AL – 1,564 (56)	UT – 1,248 (72)	DE – 809 (13)
MA – 1,557 (116)	KS – 1,242 (39)	AK – 801 (7)
CO – 1,548 (107)	MT – 1,221 (14)	HI – 748 (12)
MD – 1,536 (95)	NM – 1,220 (11)	VT – 648 (8)
IN – 1,508 (71)	ID – 1,208 (24)	DC – 60 (23)

Live directory listings with state attribution (73,669 listings; 96.9% of the live directory). Source: query Q-G1.

6. What practices ask for (early telemetry)

Of 126 practices that used GetPracticeHelp's vendor-matching tool between April 14 and June 11, 2026, 67% (85) were seeking billing or RCM help. This is an early-stage sample and we report it with its size attached. Nothing below category level clears this report's minimum cell size of $n \geq 10$, so nothing below category level is reported.

One reading, offered with that caveat: the vertical where practices most often ask for help is also the vertical with the most fragmented supply and the highest vendor attrition. If that demand pattern holds as the sample grows, the billing/RCM long tail is not just a consolidation story; it is a selection-burden story for the practices doing the choosing.

7. Methodology

Data

All supply-side figures derive from the GetPracticeHelp vendor directory as of June 11, 2026: 76,965 listings across 25 service categories, with a graded Tier-1 segment of 4,426 vendors, per-field provenance, third-party firmographic enrichment on 23,502 listings, and website-liveness

probes on the 6,295-listing commercial core. The directory and its grading are described at /data-licensing/.

Rules this report follows

Verifiable-live basis. Vendors whose websites could not be verified live at probe time -- verified inactive (536 directory-wide) or not independently verifiable (420) -- are excluded from every current-market statistic (census, fragmentation, concentration). Only verified-inactive vendors count toward attrition. Liveness verification used automated checks; sites whose access controls prevented programmatic verification were excluded rather than assumed dead. Verifiable-live directory: 76,009 of 76,965 listings; graded set: 4,337 of 4,426.

Aggregates only. Published figures are counts, distributions, medians, and indices. Employee figures are GPH-estimated size bands. No listing-level firmographic data appears in this report.

Coverage stated where it binds. Founding years are known for 84.4% of the graded set; medians are computed on known years and say so. State attribution covers 96.9% of the live directory, 80.2% of the graded set, and 75.0% of graded billing/RCM -- which is why the state map is labeled a directional exhibit and the national numbers carry the headlines.

Minimum cell size $n \geq 10$ for anything derived from matching-tool telemetry; no identifiable practices, ever.

Demand telemetry held to the same bar. GPH also observes search telemetry across the directory. It was audited against the same reproducibility standard as every figure here and did not clear it for v1 -- the sample composition could not support category-level demand claims. Those analyses return as the sample matures; the bar does not move.

Definitions

Graded (Tier-1) vendor: a directory listing that passed GPH's curation grading, assigned grade A or B.

Size bands: GPH-estimated employee bands (<10, 10-49, 50-249, 250+) built from third-party firmographic signals.

Headcount HHI: $10000 \times$ the sum of squared employee-count shares within a cell. A concentration proxy -- headcount share, not revenue share -- inflated where one large employer sits in a small cell.

Hard-dead: website probe returned a dead domain or permanently down site. Single-probe basis; a stratified manual audit of the dead classifications measured a 5% false-positive rate ($n=75$), holding the published 8.5% in an 8.1-8.5% band. Domains that could not be independently verified (6.7% of probes) are excluded, not counted as attrition.

Multi-location: more than one distinct location extracted from the vendor's own website.

Named queries

Every published figure traces to one of the queries below, run read-only against the production directory database on June 11, 2026.

Q-T1 -- graded topline

Count of graded vendors by grade, verifiable-live basis. Returns 4,337 (2,688 A / 1,649 B); 89 excluded: 22 verified inactive (21 B / 1 A) and 67 not independently verifiable (all B).

Q-C1 -- census and fragmentation by category

Per category: vendor count, grade split, size-band counts, footprint, state-attribution coverage, and headcount sums for HHI. Live graded basis.

Q-C2 -- founding-year distribution by category

Year-level founding counts per category (known years, 1800-2026 guard); medians and cohort shares computed from the distribution.

Q-R1 / Q-R2 -- billing/RCM state map and its coverage basis

Per-state count, sub-10 share, and headcount HHI for live graded billing/RCM vendors with state attribution (1,836 of 2,448; 75.0%).

Q-CH1 -- attrition by category

Probed domains per category with dead-site counts; categories shown at 100+ probes. Core figure: 536 of 6,295 hard-dead (8.5%; stratified manual audit measured 5% false positives, n=75, so the rate holds at 8.1-8.5%). 420 domains (6.7%) not independently verifiable are excluded.

Q-G1 -- live directory density by state

Live listings and billing/RCM listings per state (73,669 of 76,009 verifiable-live listings carry a state attribution; 96.9% coverage on the live basis).

Q-M1 -- matching-tool category share

Matching-tool sessions by requested category, April 14 to June 11, 2026 (n=126); only cells with n>=10 reported.

What this report does not claim

It is not a census of every vendor in the United States; it measures the GPH directory, whose construction and coverage are documented at </data-licensing/>.

Headcount HHI is not revenue concentration.

Per-state billing/RCM ranks are directional (75.0% attribution basis, printed on the exhibit).

No demand-by-geography claims are made in v1; the telemetry did not clear the reproducibility bar.

Cite this report

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Journalists and analysts: the underlying aggregates and methodology notes are available on request, and the dataset behind the report is documented at [/data-licensing/](#). A PDF edition is available [here](#).