

PORTABLE SANITATION INDUSTRY

BENCHMARK REPORT

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2024 PORTABLE SANITATION INDUSTRY BENCHMARK REPORT

Hello and welcome to our third annual Portable Sanitation Benchmark Report!

I want to start off by thanking the 500+ of you who shared your insights, making this our most comprehensive report yet.

We created this report to give you a clear snapshot of how others in our industry are performing so you can see what's working and where new opportunities may lie.

We hope these findings spark fresh ideas that help you run your business more smoothly and profitably. Thank you for trusting us to bring this information to you, and for everything you do to keep our industry growing strong.

Here's to another great year,



Jonah Chilton, CEO of ServiceCore



"We've been continually impressed by ServiceCore's annual benchmarking reports for the portable sanitation industry. Each year, they've become go-to resources for PSAI members. The insightful data helps our members understand the strategies driving success for the most accomplished PROs. PSAI is thrilled to welcome the release of the 2024 Portable Sanitation Industry Benchmark Report and deeply values ServiceCore's dedication to providing this report year after year."

Veronica Crosier, Executive Director, Portable Sanitation Association Intl. (PSAI)



ABOUT THIS REPORT

The 2024 Portable Sanitation Industry Benchmark Report is our most comprehensive report yet, offering valuable insights from over 500 portable sanitation operators across the US and Canada.

This year's report covers a wide range of topics critical to your business, including:

- Business Metrics
- Billing Practices
- Office Insights
- Operations
- Economic Trends, and more!

This report is designed to provide a clear snapshot of where the industry stands today and where it's headed, equipping you with insights to guide your business strategy in the year ahead.

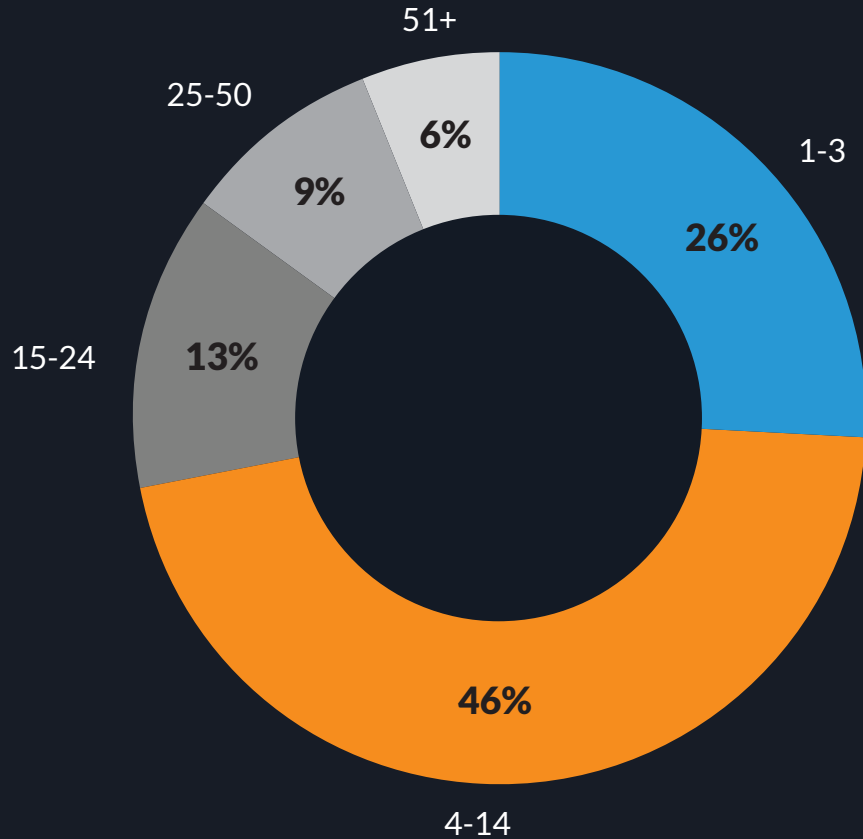


“Top PROs” are defined as portable sanitation businesses that have more than 20% profit margin. We’ll be referencing this throughout the report.

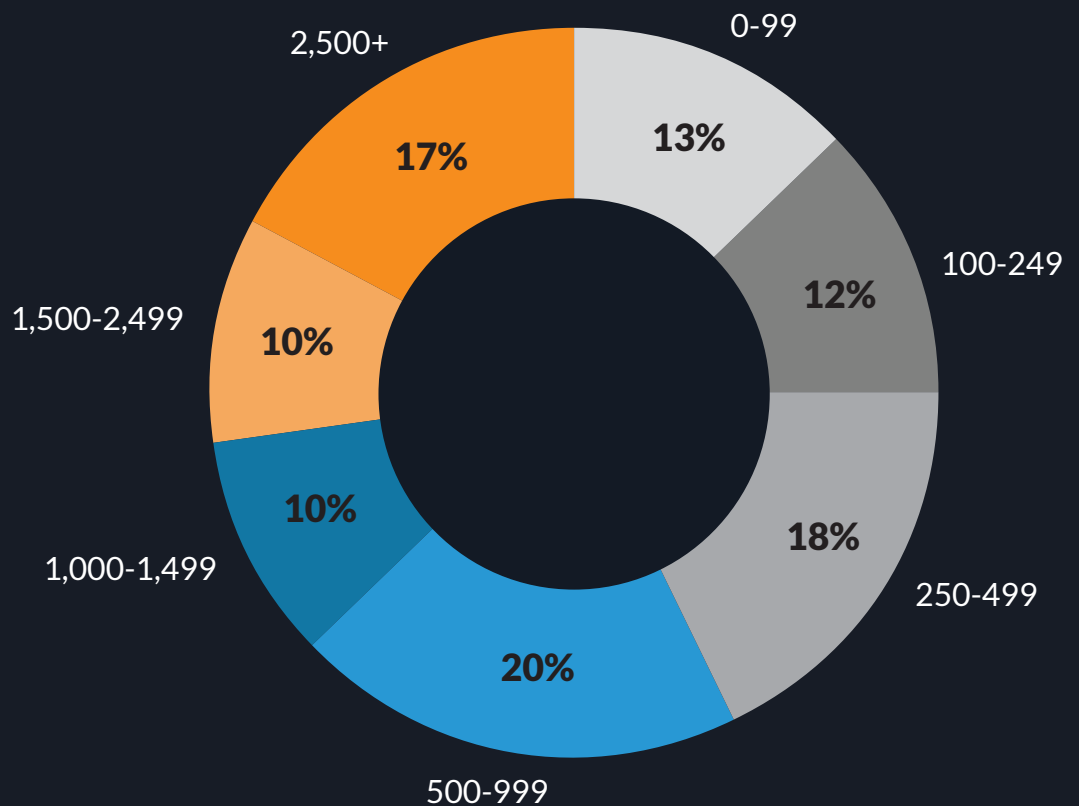
DEMOGRAPHICS

SURVEY RESPONDENTS

SURVEY RESPONDENTS:
NUMBER OF TRUCKS



SURVEY RESPONDENTS:
NUMBER OF PORTABLE TOILET UNITS



DEMOGRAPHICS

BUSINESS SIZES

SURVEY RESPONDENTS: ROLES



30%
Owner



19%
Ops Mgr.



15%
Office Mgr.

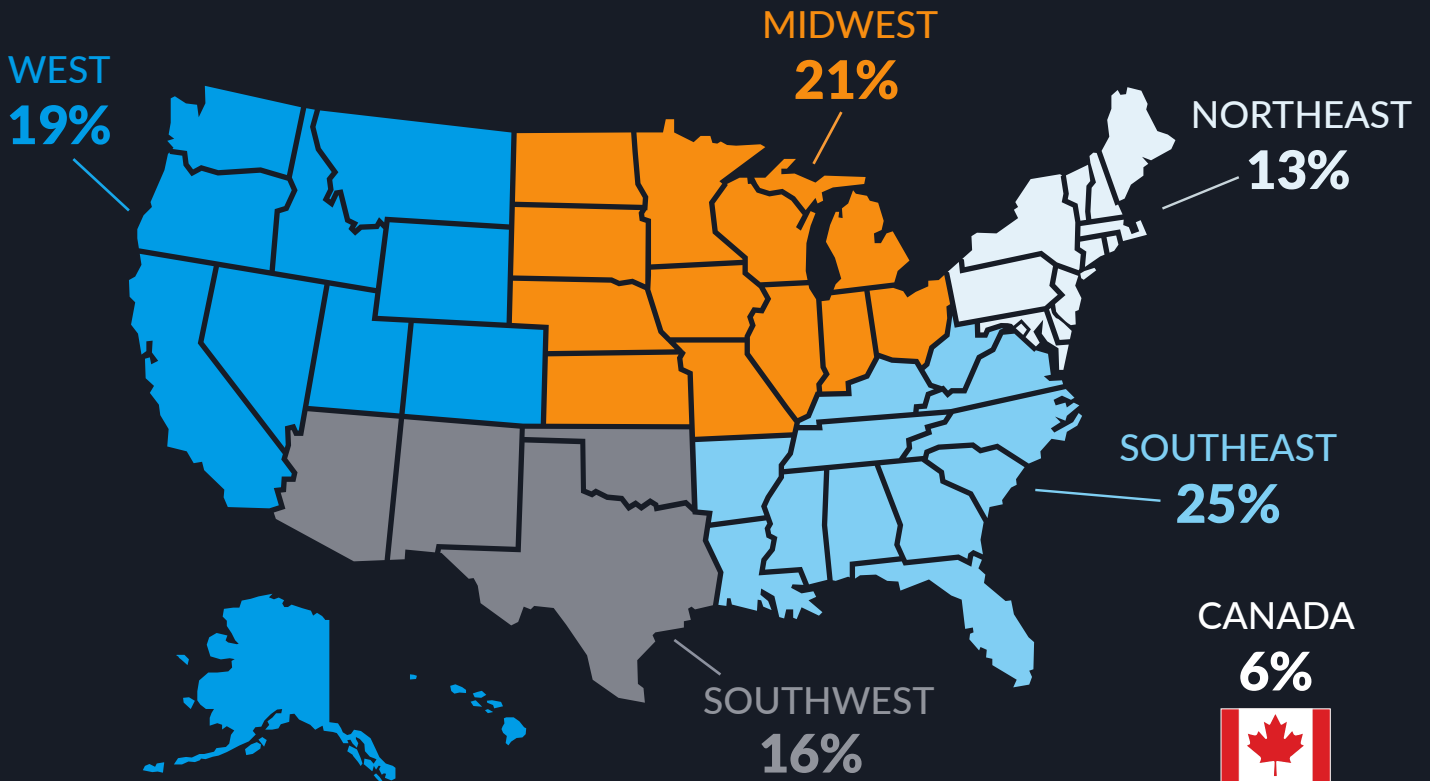


36%
Other



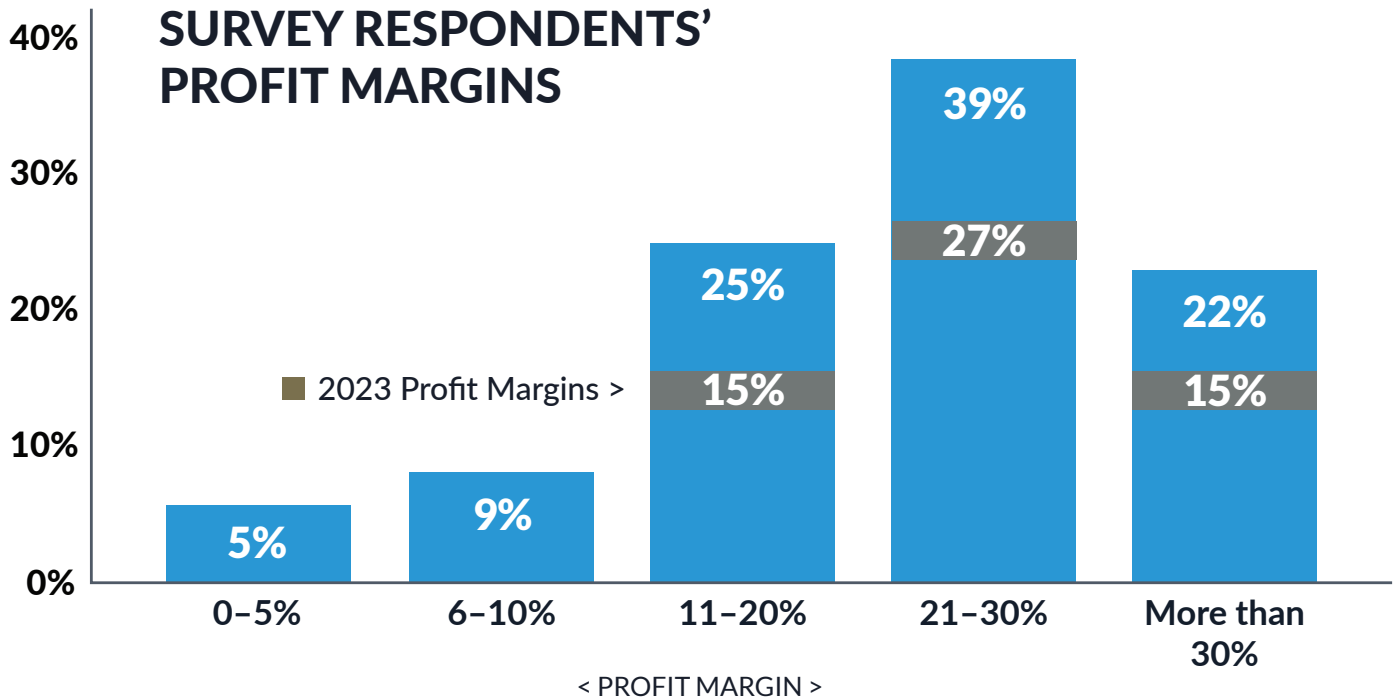
SURVEY RESPONDENTS: AVERAGE YEARS IN BUSINESS

SURVEY RESPONDENTS: REGIONAL BREAKDOWN



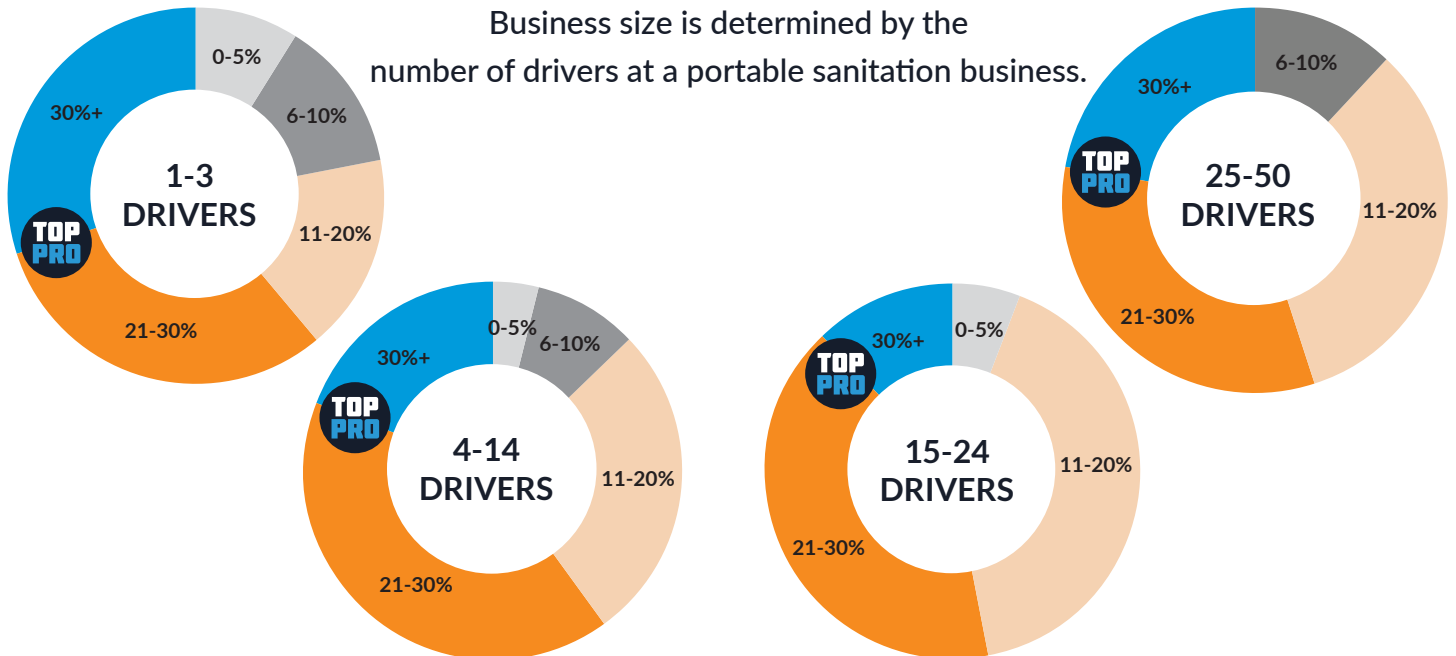
PROFIT MARGINS

In 2024, PROs reported significantly higher profit margins than in 2023. Businesses reporting profit margins above 10% increased **51%** year over year.



PROFIT MARGINS BY BUSINESS SIZE

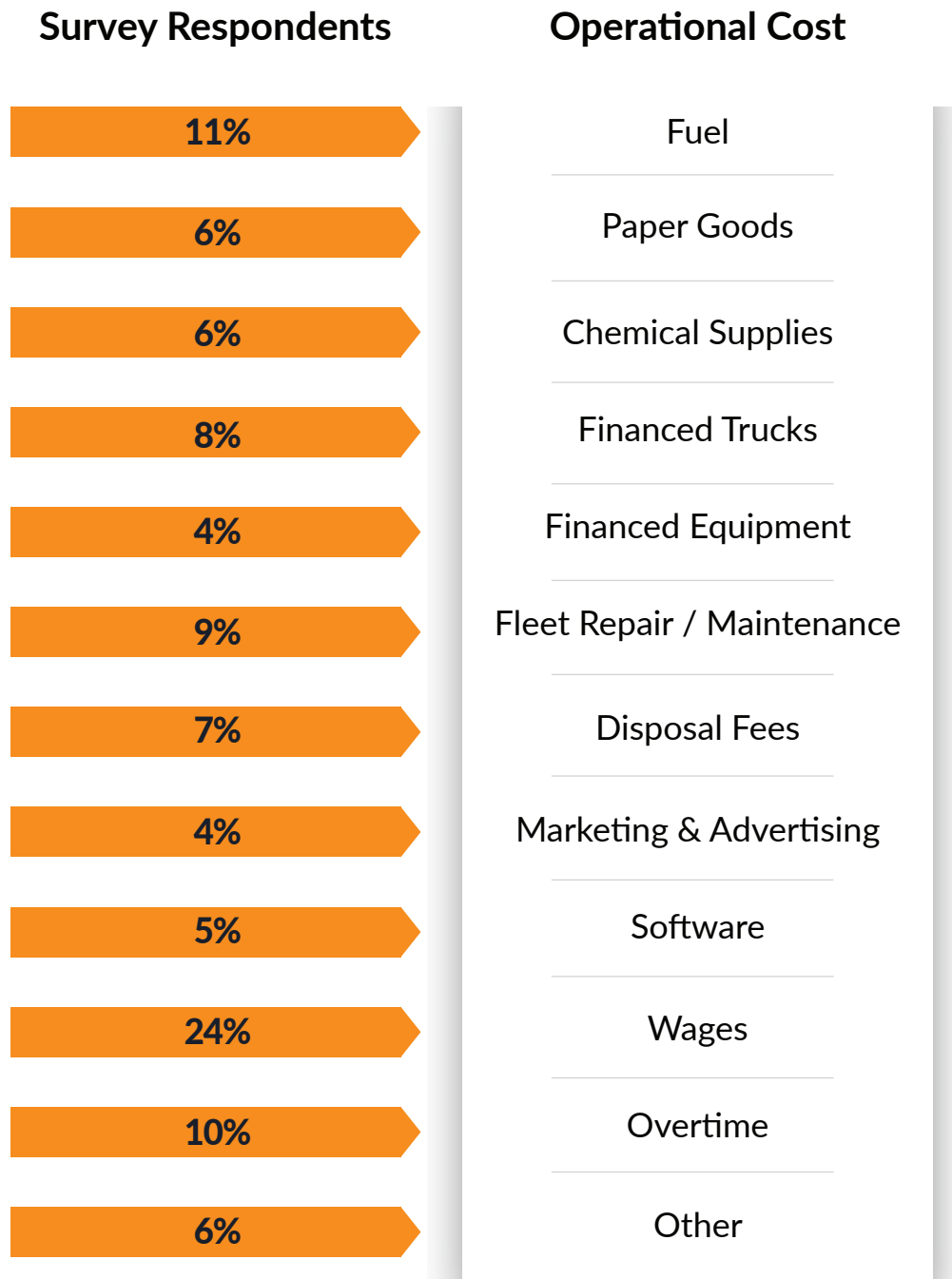
Business size is determined by the number of drivers at a portable sanitation business.



OPERATIONAL COSTS

The following chart is a breakdown of operational costs. You can use this chart to see how your operational costs compare to other PROs.

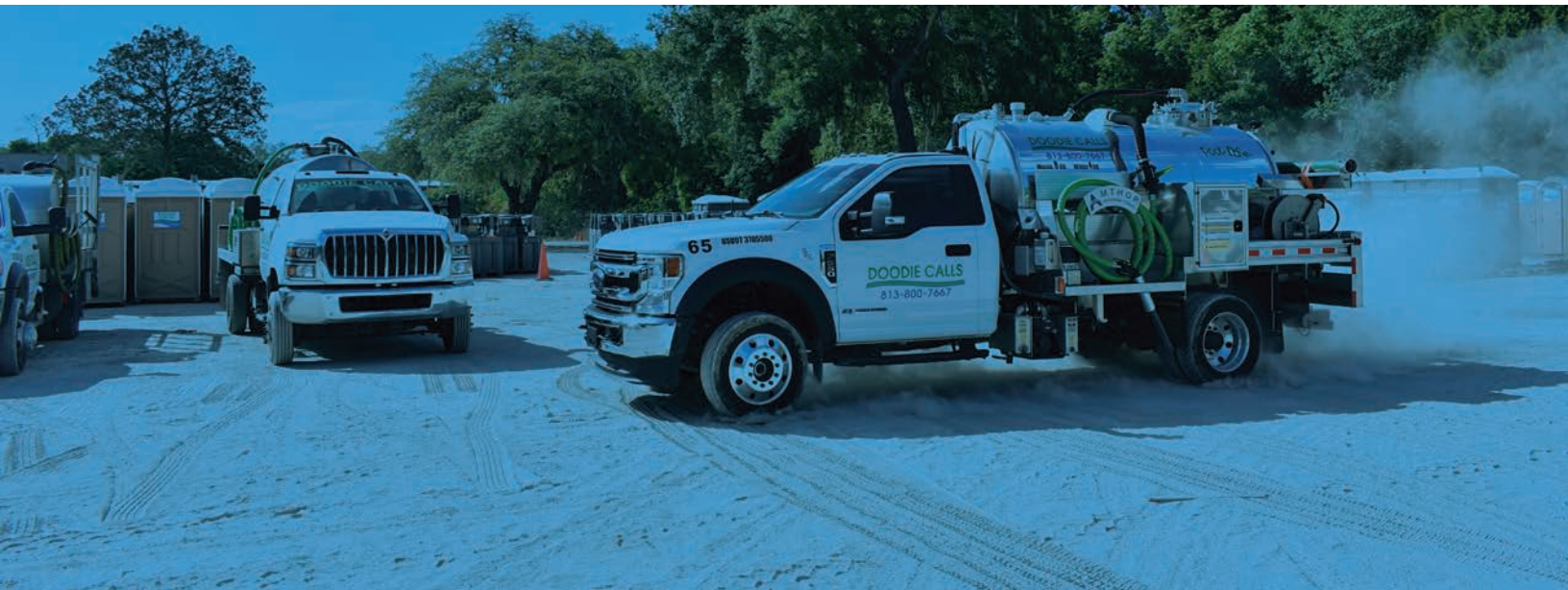
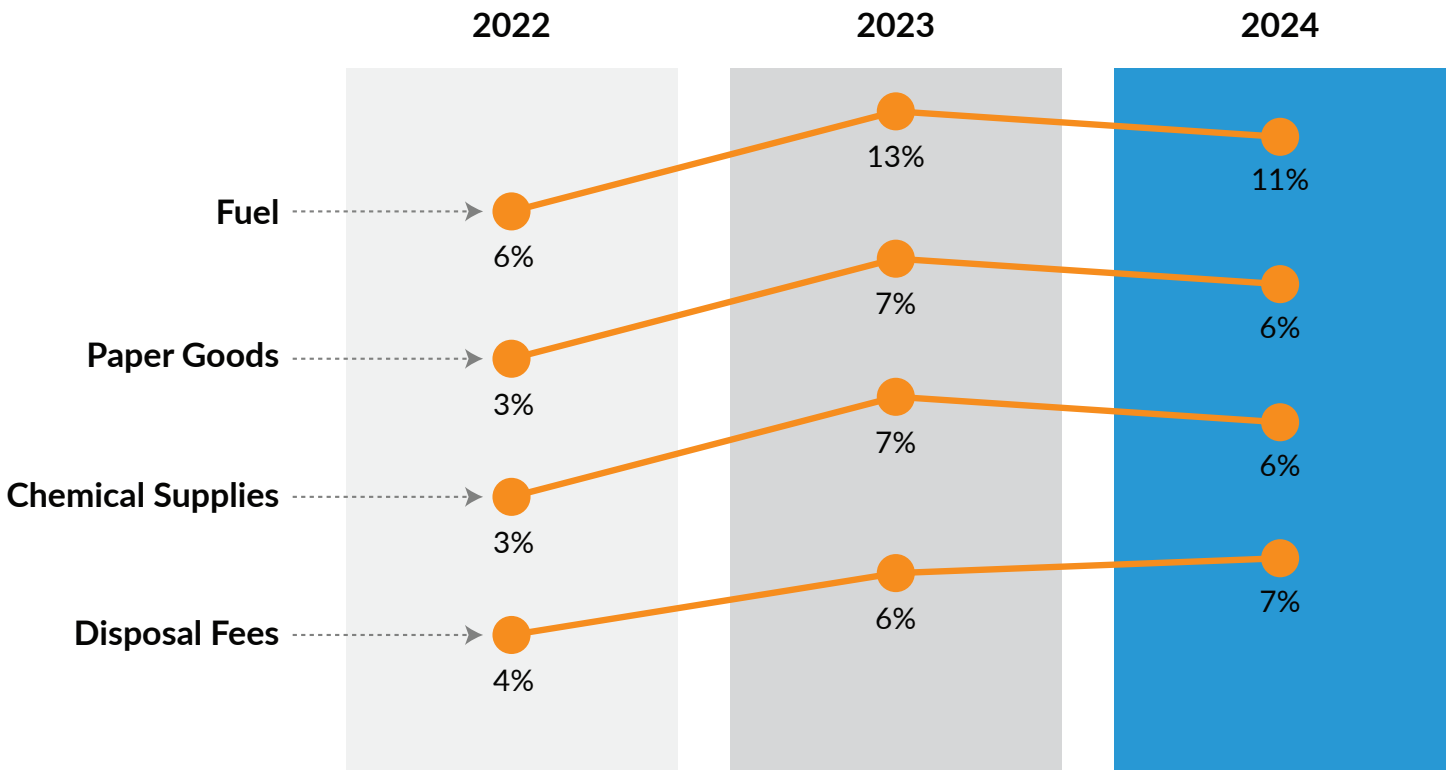
OPERATIONAL COST AS A PERCENTAGE OF REVENUE



OPERATIONAL COSTS

Operational costs as a whole have come down year over year from their highs in 2023, except for disposal fees. The continued rise in disposal fees may be due to a number of factors, such as rising labor costs, tighter regulations, and disposing of a higher volume of waste.

Here are a few notable changes from 2022–2024:

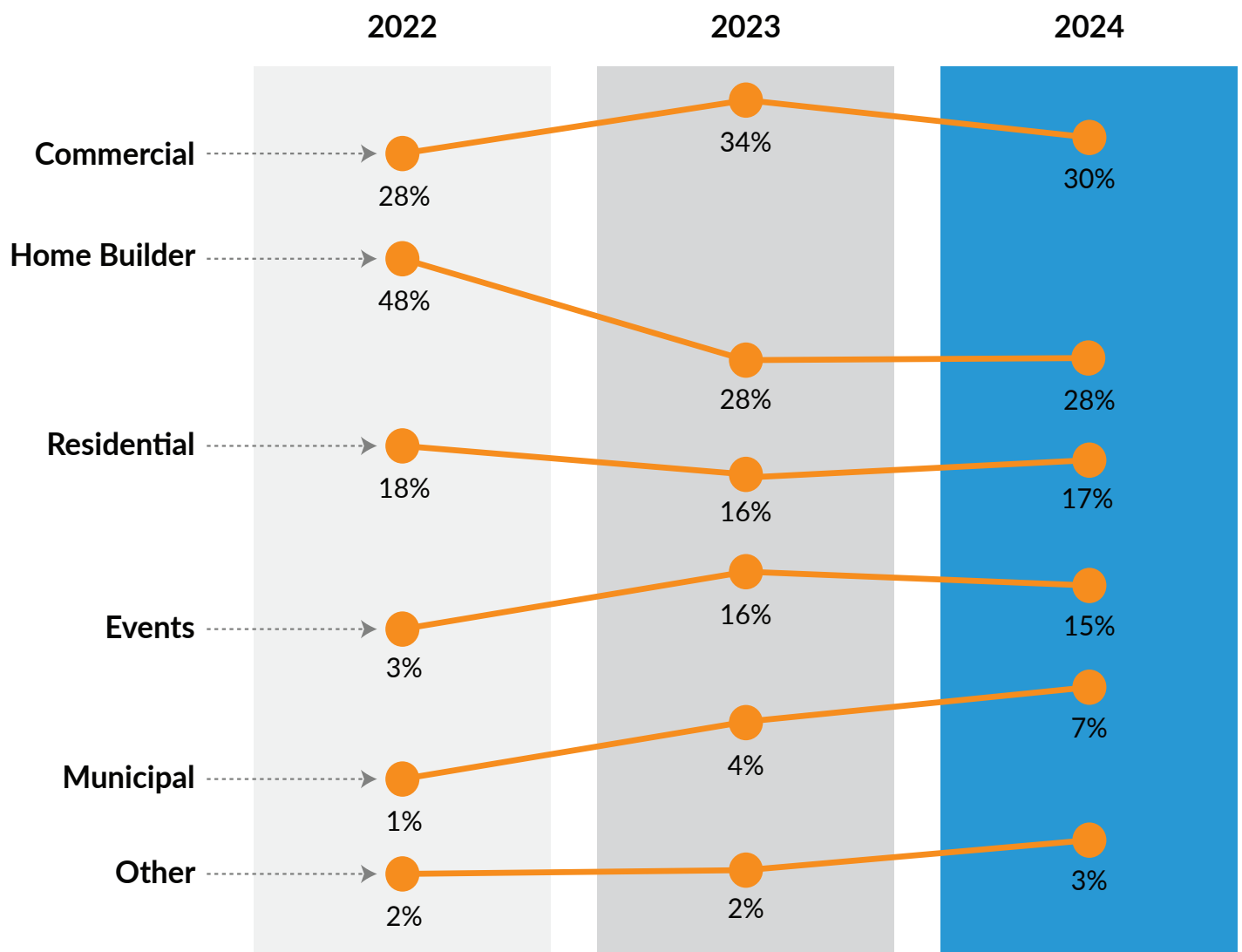


END MARKETS

Commercial construction and **home builders** continue to be the largest drivers of revenue, but revenue from home builders was flat year over year. We're starting to see interest rates come down slightly, but unless they come down significantly, we're not going to see the home builder category jump in 2025.

While revenue from **municipalities** is a smaller percentage of total revenue, it has risen 600% since 2022. One factor that could be contributing to this rise in revenue from municipalities is the increasing (and unfortunate) number of natural disasters that require portable sanitation.

PERCENT OF REVENUE BY END MARKET

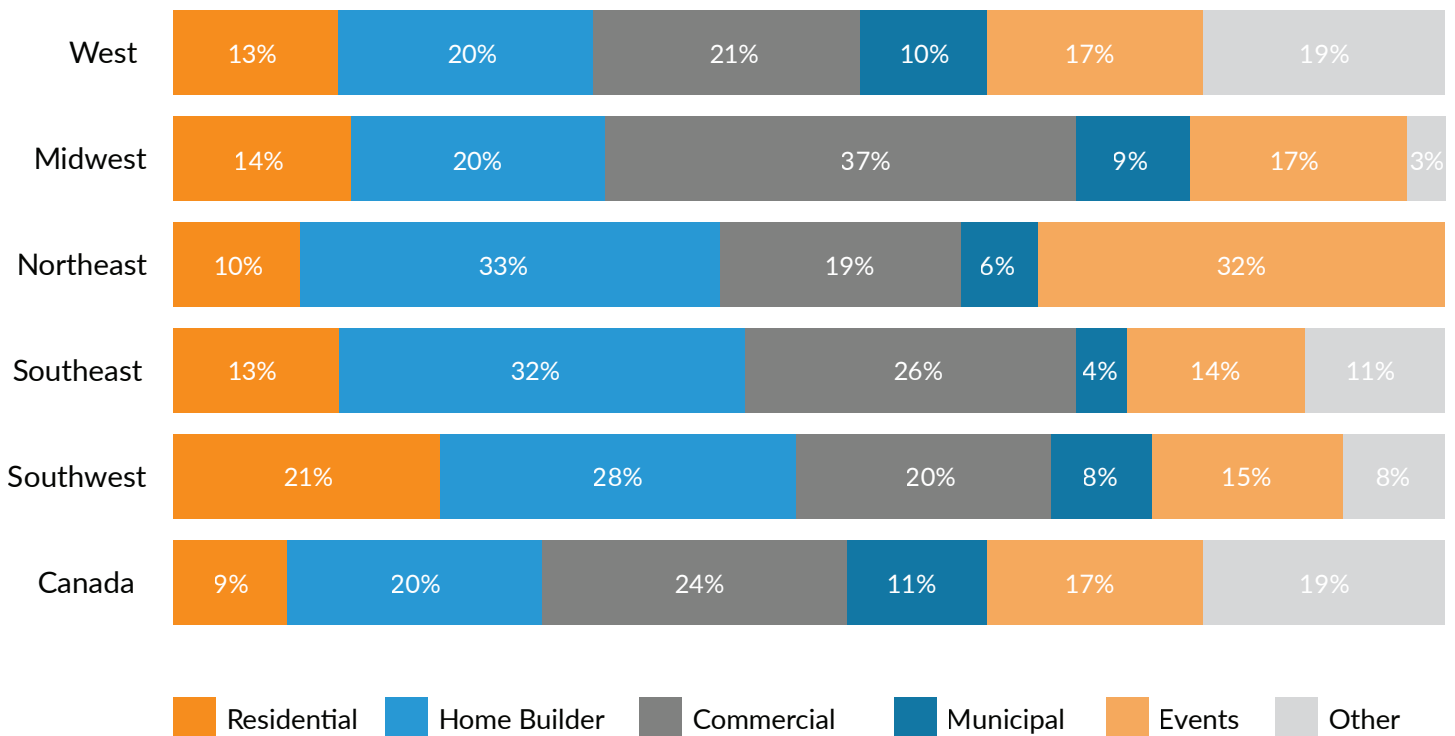


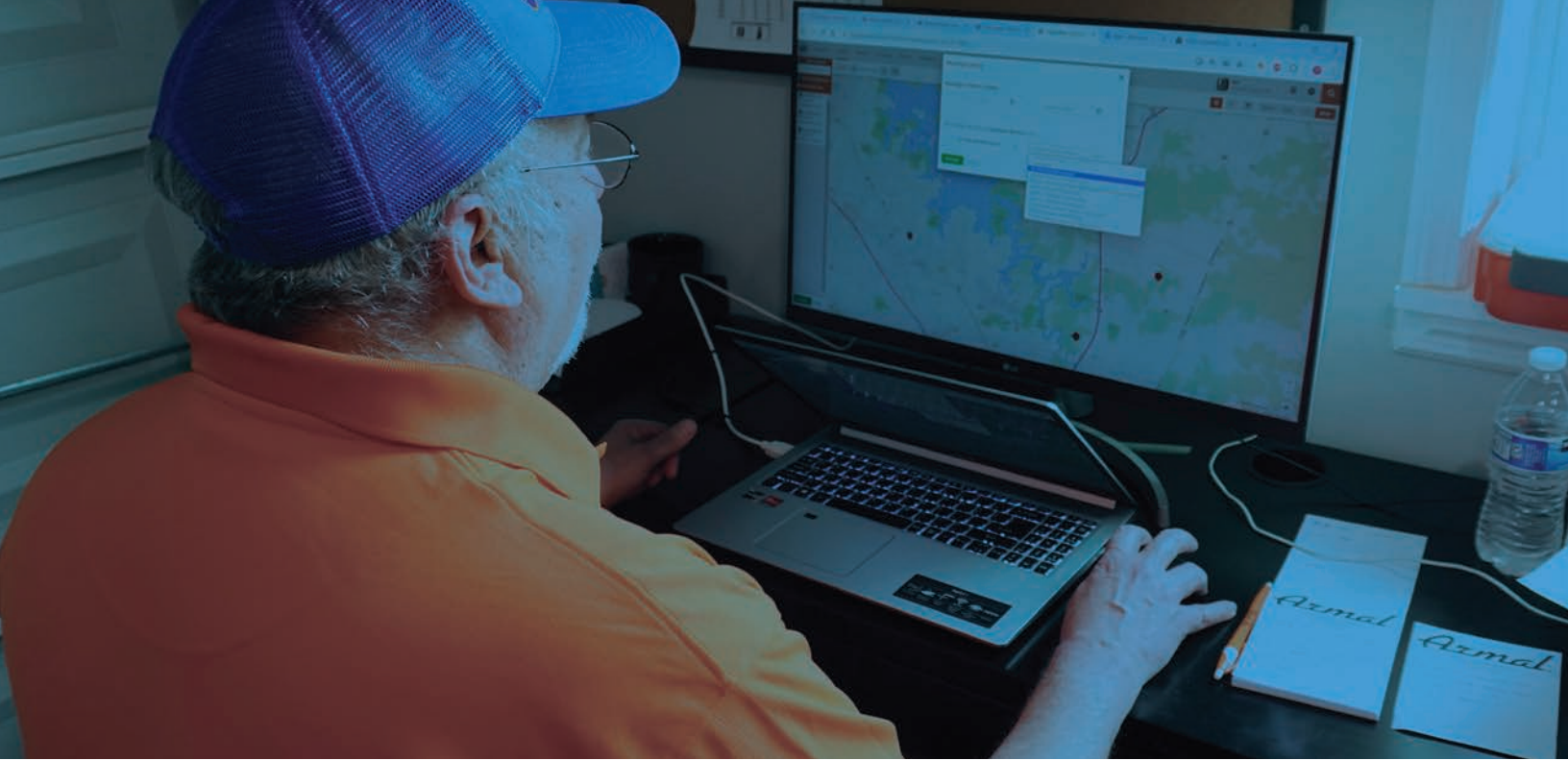


END MARKETS

In 2024, revenue from events in the Northeast was very strong compared to other regions. While home builder and commercial categories continue to dominate all regions, this year's fastest growing category is municipal.

PERCENT OF REVENUE BY END MARKET

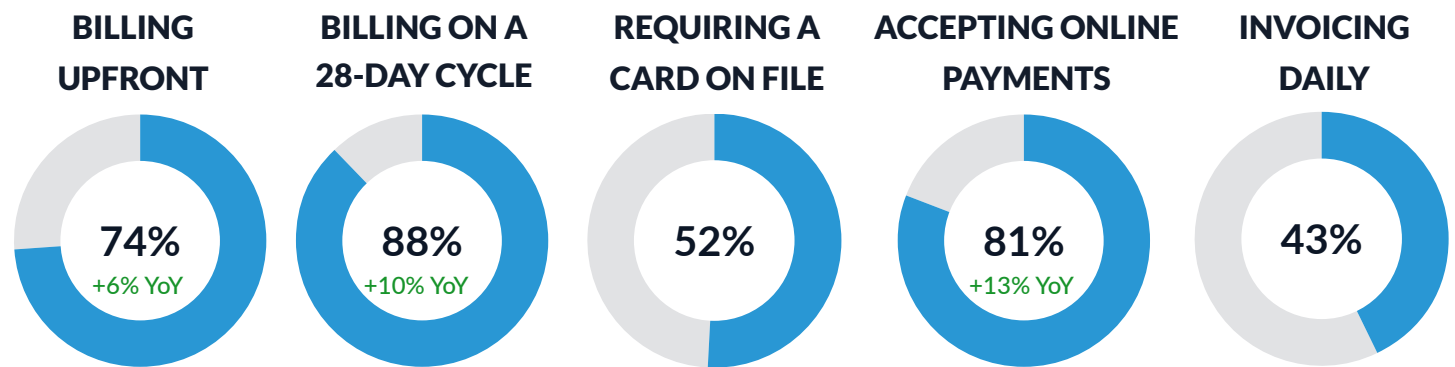




BILLING

BEST PRACTICES

PRO billing practices continue to trend towards billing customers upfront and on a 28-day cycle. The most notable year-over-year increase came from PROs making it easier for their customers to pay their invoices by accepting online payments.

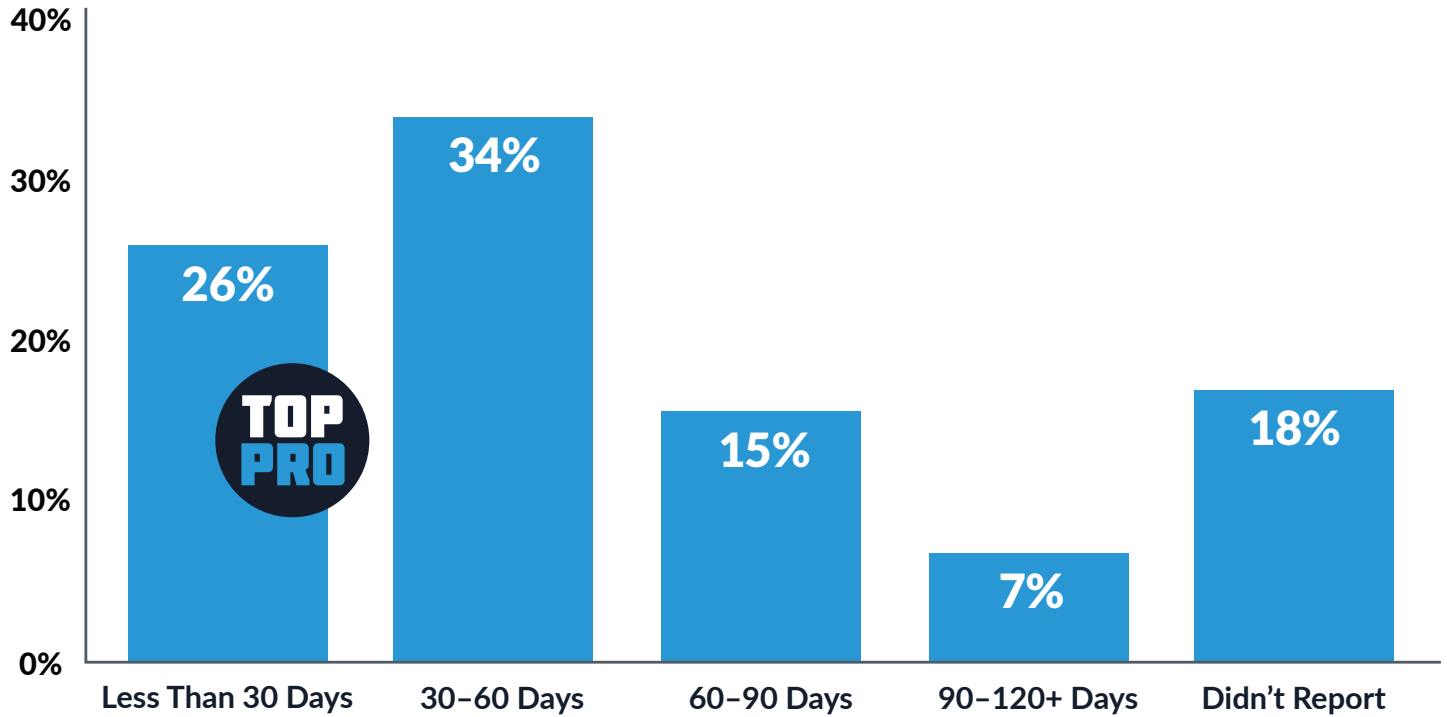


In 2024, PROs increased billing on a 28-day cycle by 10%. With a 28-day billing cycle, there's a total of 13 billing cycles every year, rather than 12 which is used for monthly billing cycles. 28-day billing helps owners get paid per service and easily prorate customers on a weekly basis. **91% of ServiceCore's customers are billing on a 28-day cycle.**

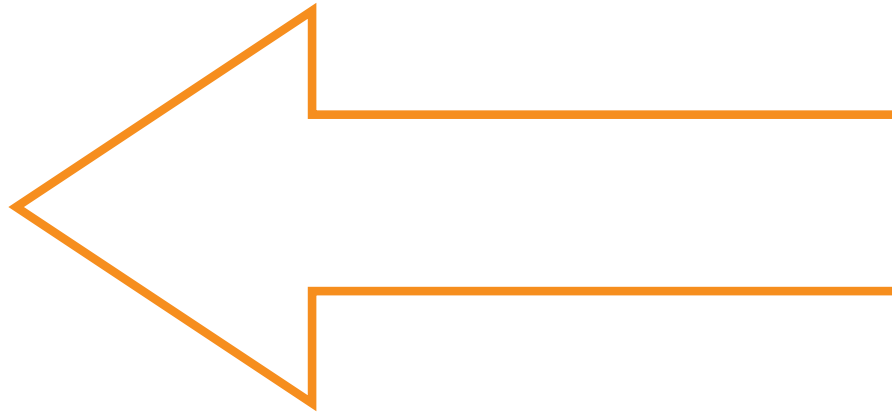
BILLING

ACCOUNTS RECEIVABLE

ACCOUNTS RECEIVABLE BALANCE



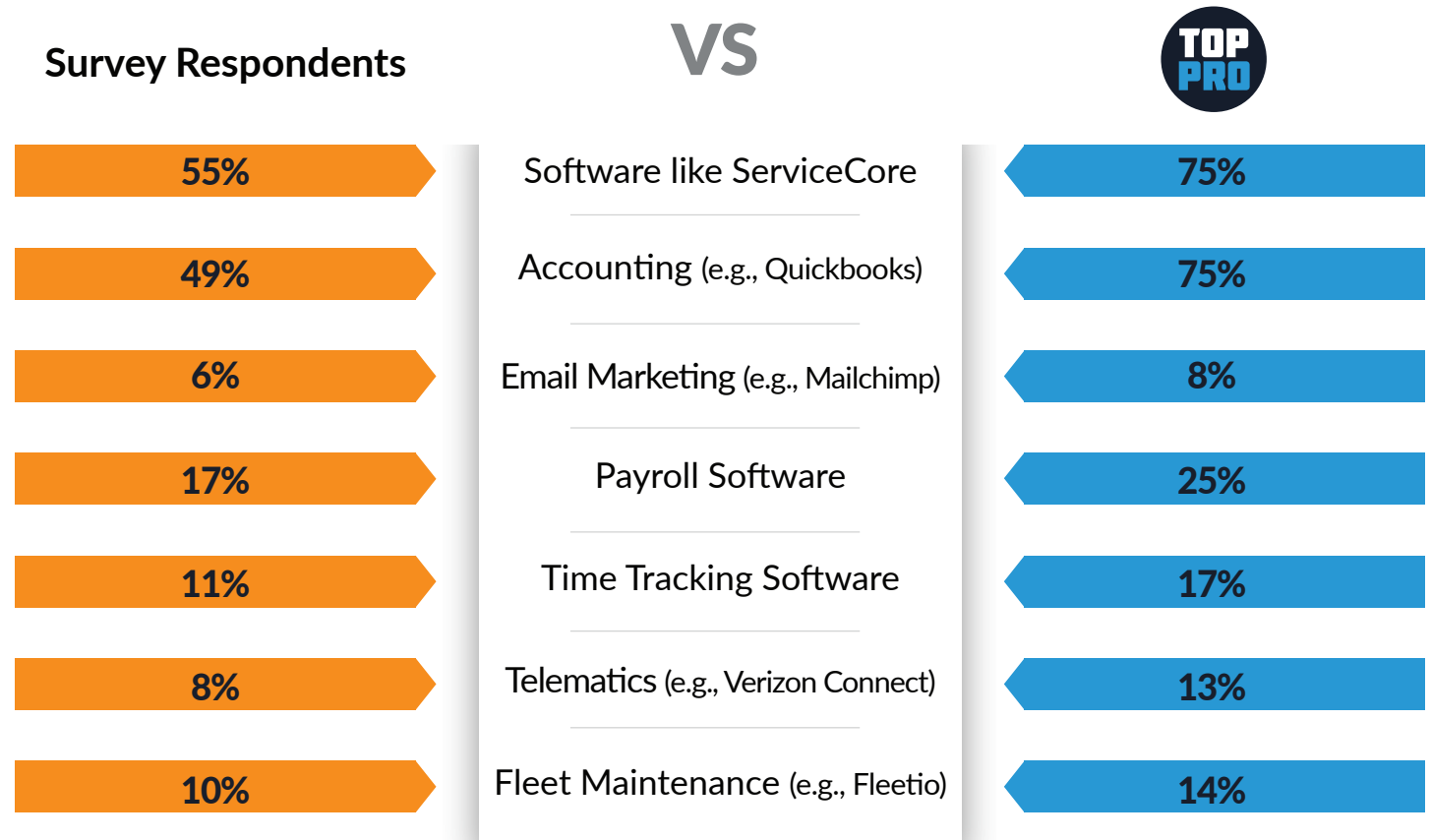
97% of ServiceCore's customers that are invoicing daily have less than 30 days outstanding AR.



BUSINESS MANAGEMENT

SOFTWARE TOOLS

Top PROs (those with a profit margin of 20% or higher) are leveraging software tools to run their businesses. We're seeing a slow decline in the number of PROs that are running their business on pen & paper, but many are resistant to change. Top PROs have figured out that software tools can help their business become more efficient—and efficiency can increase profit margins.



BUSINESS MANAGEMENT

TERMS AND CONDITIONS



We asked portable sanitation operators how they handled their **terms and conditions**. The results were mixed. This is an area of opportunity for those that have no formal agreement.

Electronic signature via online platform (e.g., DocuSign)	21%
Included in an online order form	20%
Verbal agreement over the phone (confirmed by email)	18%
Email acknowledgment from the customer	17%
On a mobile device or tablet at the time of delivery/service	4%
No formal agreement, terms are implied or verbal	20%

TOP 10 MARKETING METHODS

We asked PROs how they market their portable sanitation business. Top PROs (those that have 20% or more in their profit margins) don't just rely on customer referrals. They are investing in a combination of the following marketing channels. Here are the top 10 results in order of popularity.

1. Customer referrals
2. Branding on trucks
3. Local sponsorships (e.g., events)
4. Social media
5. Search engine optimization (SEO)
6. Google Ads
7. Online directories (e.g., Yelp)
8. Event planners
9. Email marketing (e.g., special offers)
10. Billboards

EMPLOYMENT

HIRING & BENEFITS

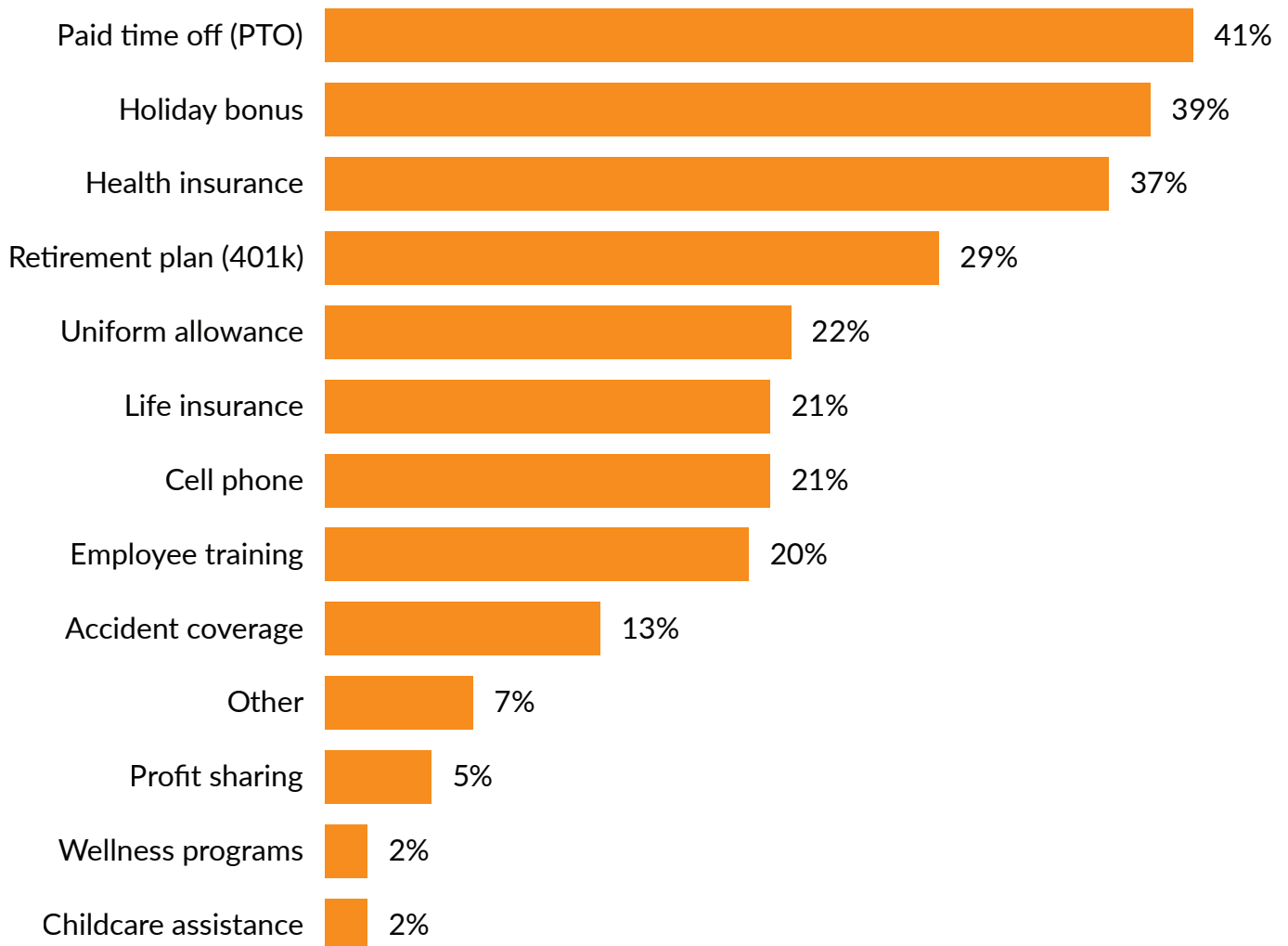
In 2024 PROs hired fewer new employees, but **58%** of survey respondents say they plan to hire more employees in 2025.

AVERAGE NEW HIRES &
EMPLOYEE TENURE IN 2024



EMPLOYEE BENEFITS

We asked PROs about the benefits they offer their employees. Offering a holiday bonus is one of the more popular strategies for rewarding employees and retaining them. Here are all of the benefits:





EMPLOYMENT

EMPLOYEE SATISFACTION

In this year's benchmark report survey, we asked PROs about the tactics they use to keep employees happy and minimize turnover. Here's what survey respondents said was working:

1. Competitive Pay and Financial Incentives

Offering competitive wages, as well as bonuses (holiday, annual, and performance-based) and gift cards were the most frequently mentioned strategies for retaining employees.

2. Respect and Communication

Listening to employee feedback and maintaining open, transparent communication were widely cited as essential. Making employees feel valued and a part of the culture was key.

3. Flexibility and Work-Life Balance

Providing flexible schedules and accommodating employees' personal and family needs helps retain staff. Many businesses highlighted creating a "family first" culture.

4. Positive Work Environment and Perks

Employee appreciation activities like company events, meals, or parties was commonly mentioned. Additional benefits like quality equipment, safe workspaces, and personal growth opportunities also contribute to satisfaction.



OPERATIONS

DRIVERS

Less than half of the PROs surveyed said that they require their drivers to take photos before or after servicing a unit. Taking photos isn't just to cya, it can help you provide better customer service, and empower your sales team to up-sell customers if they have proof of overuse. Here are some other driver-related benchmarks:



Avg unit service time



Avg OT paid per week



Avg days/week running routes

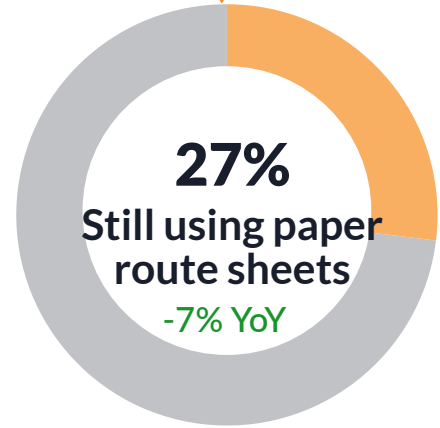
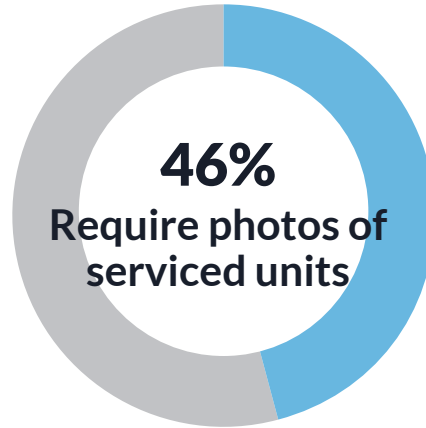
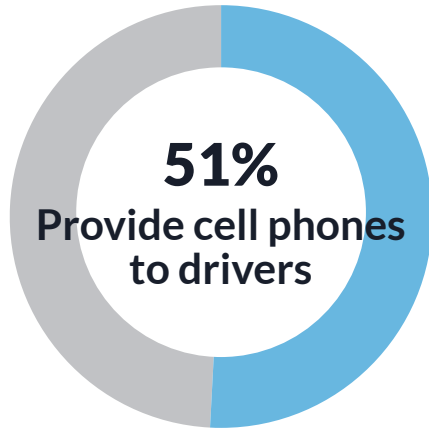
TOP CERTIFICATION/TRAINING REQUIREMENTS

1. CDL
2. Drug testing
3. Defensive Driving / Driver Safety
4. OSHA 10

OPERATIONS

DRIVERS

ON-THE-JOB



51% of PROs said they provide cell phones to their drivers. The top reasons on why PROs do not provide phones to their drivers was that drivers prefer to use their own phone, or they didn't want to deal with the hassle/cost.

We're starting to see a decline in PROs that use paper route sheets. This is likely due to more PROs that are adopting routing software that saves time and reduces mistakes.



If your units are overused, taking photos are a great way for your sales team to talk to the site contact about adding units.





OPERATIONS

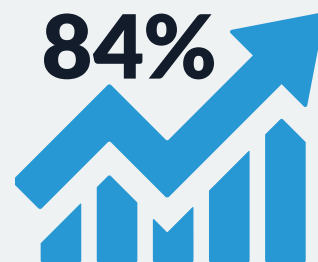
TRUCKS & EQUIPMENT

A common sentiment in the portable sanitation industry is a general curiosity about “what everyone else is doing.” If you don’t believe us, just scroll through the PTN Facebook group. Most of the questions on PTN revolve around trucks and equipment. The goal of the following section is to shine a light on *what everyone else is doing*.

HERE’S HOW LONG PROS KEEP THEIR VEHICLES ON AVERAGE:



250k
MILES



In 2024, 84% of PROs have seen a rise in the cost of their insurance.

Potential Future Trend: Engine Regulations

30% of PROs are concerned about future engine regulations, and 5% are testing electric vehicles. While it’s unlikely that the Trump administration will impose engine regulations in the near-term, it’s something to keep an eye on in the future.

Top 3 insurance companies used by PROs:
Progressive, Erie, and State Farm

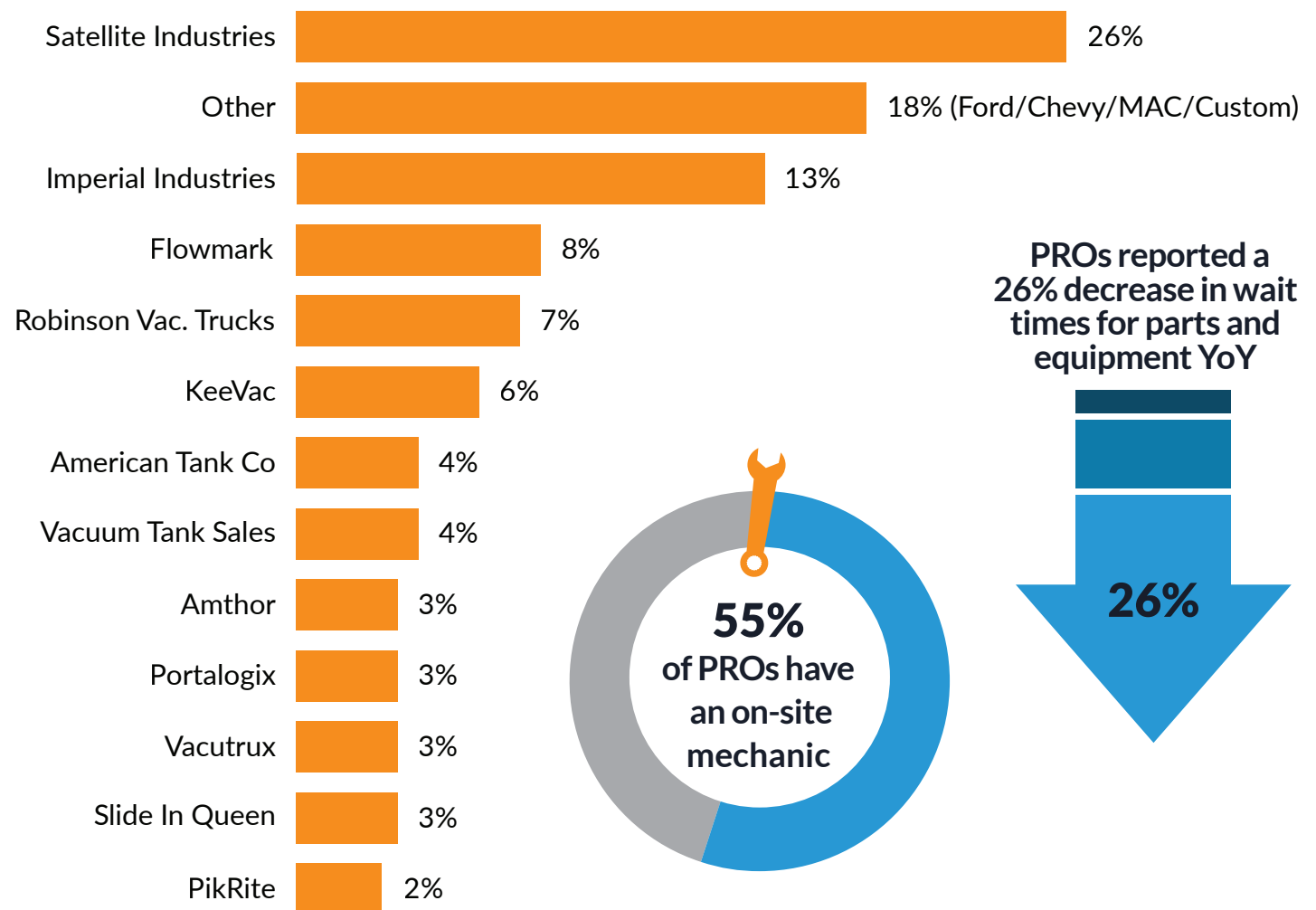
OPERATIONS

TRUCKS & EQUIPMENT

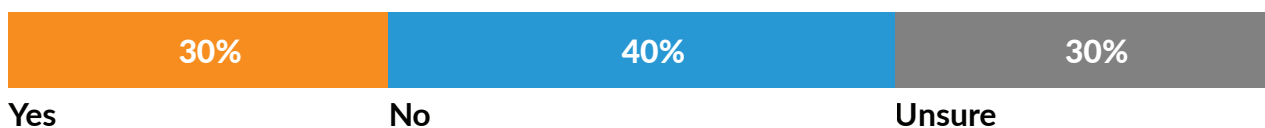
HERE'S HOW PROS PURCHASE THEIR TRUCKS



HERE'S WHO THEY PURCHASE TRUCKS FROM



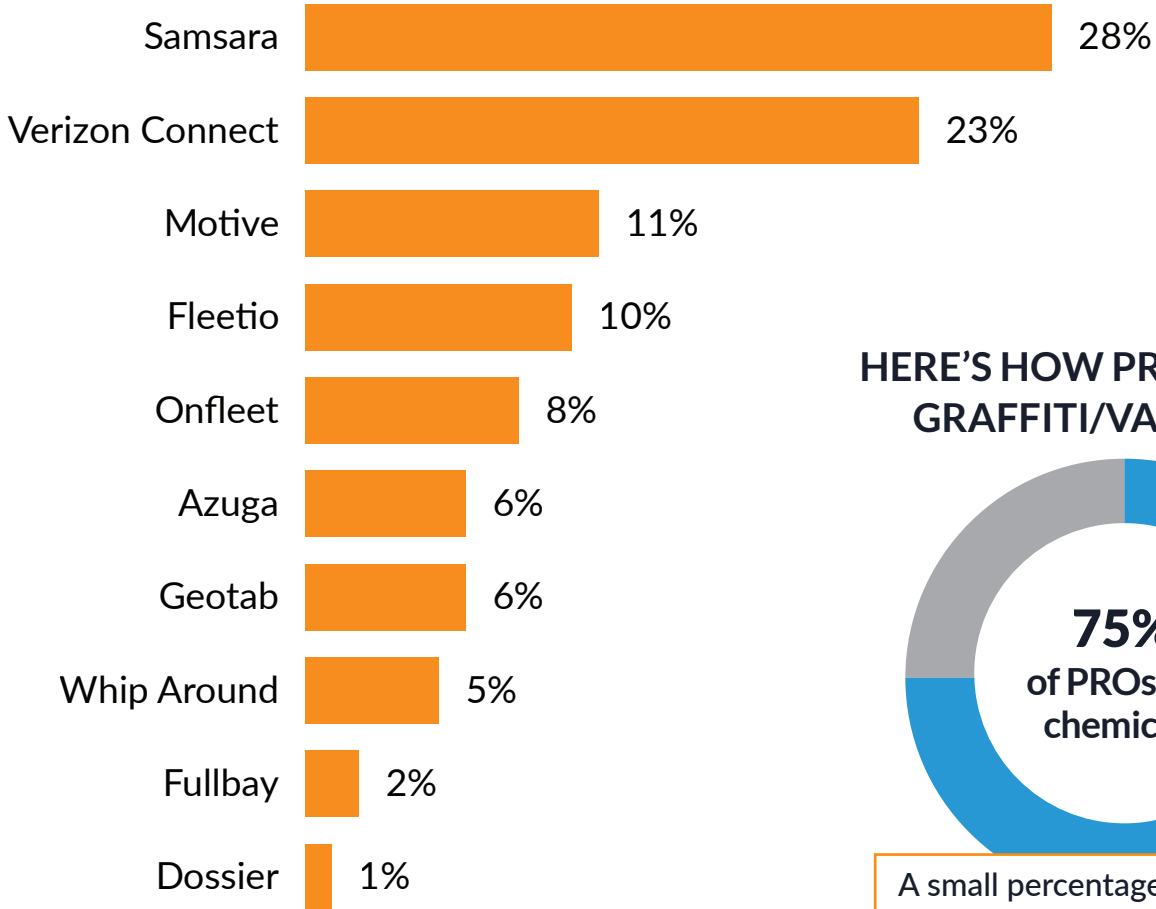
ARE PROS CONCERNED ABOUT FUTURE ENGINE REGULATIONS?



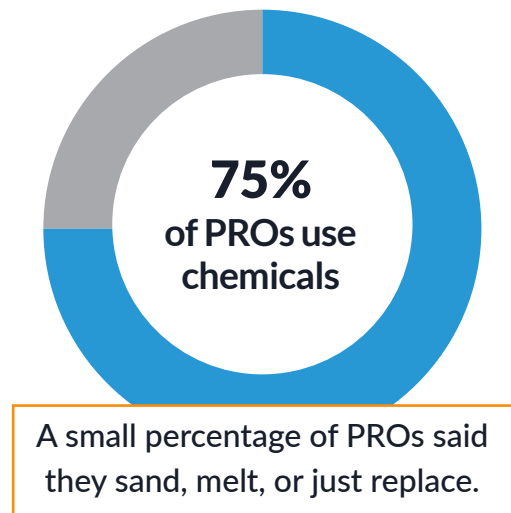
OPERATIONS

TRUCKS & EQUIPMENT

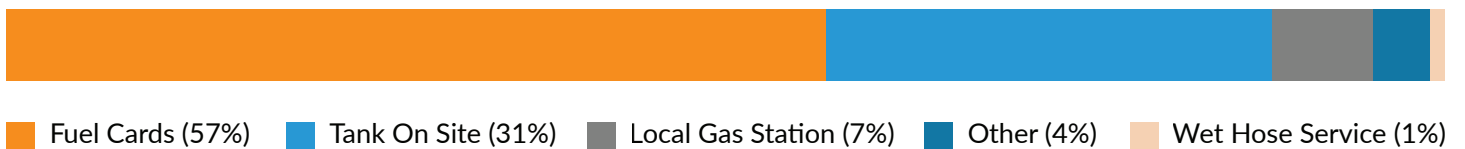
FLEET MONITORING SOLUTIONS THAT PROS USE



HERE'S HOW PROS REMOVE GRAFFITI/VANDALISM



HERE'S HOW PROS FUEL THEIR VEHICLES



UNLOADING PRACTICES

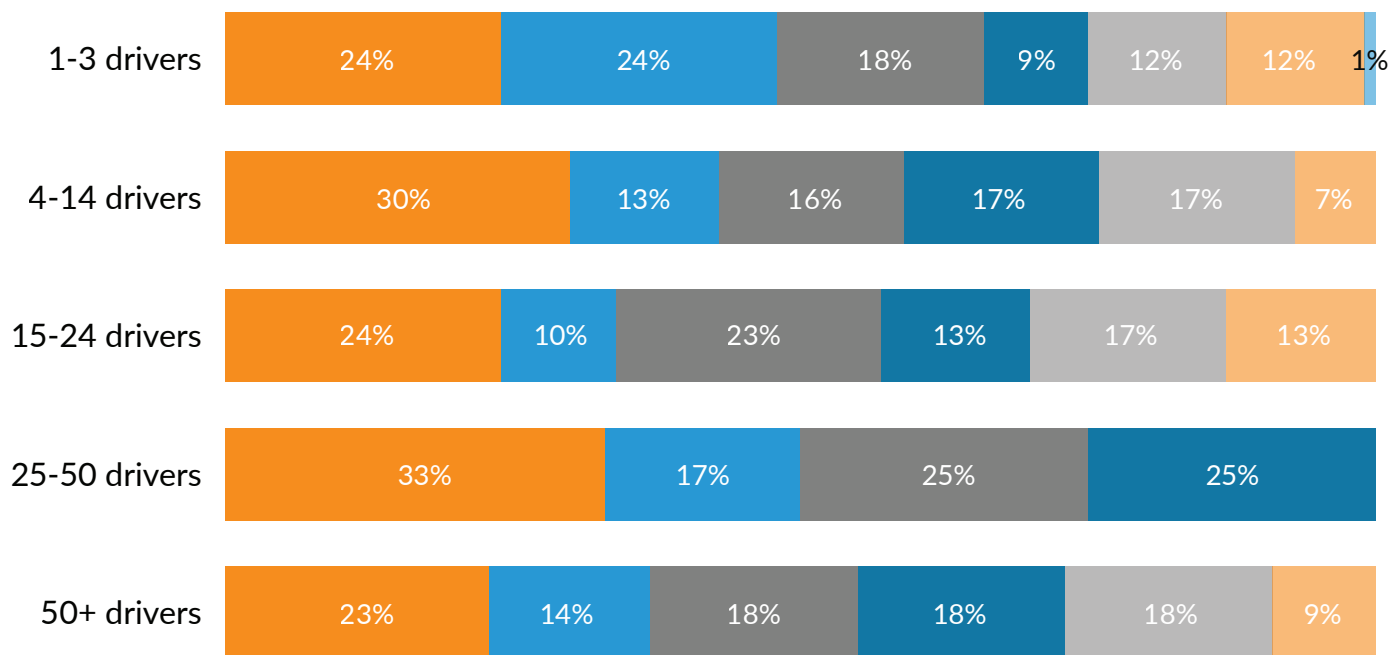




OPERATIONS

TRUCKS & EQUIPMENT

HERE'S HOW PROS STRUCTURE THEIR FLEETS



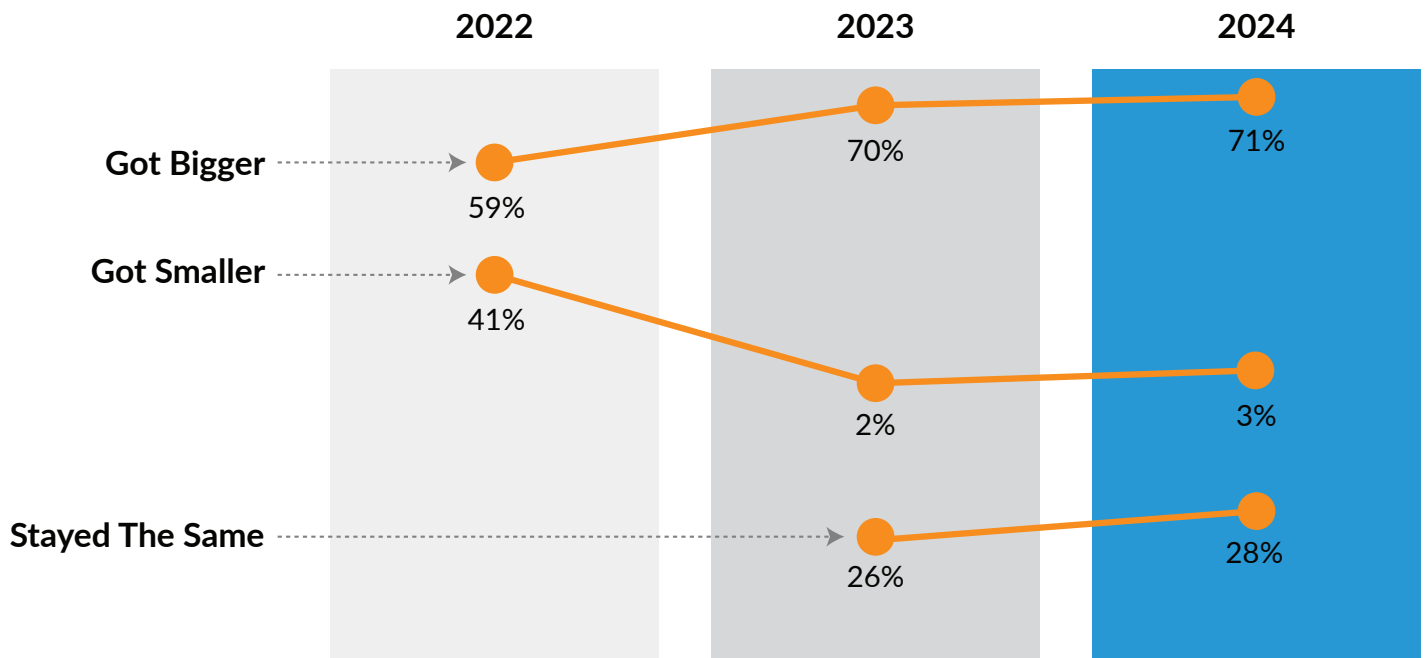
- Pump Trucks
- Slide-Ins (Tank Style)
- Flatbeds / Stake Beds
- Vacuum Trucks / Tankers
- Pickup Trucks w/ Trailers
- Water Trucks
- Other

2024 ECONOMIC RETROSPECTIVE

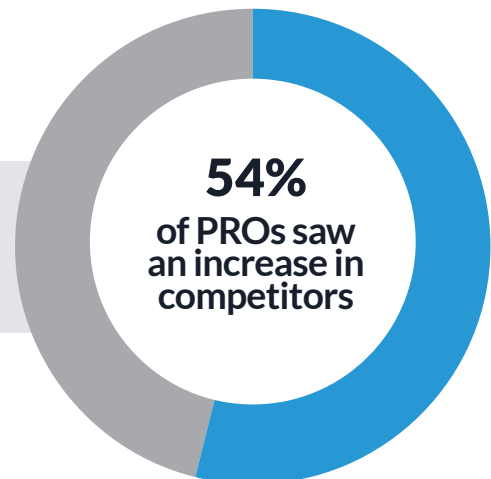
LOOKING BACK

In 2024 service area growth was flat year over year compared to the **19%** growth in service areas that we saw from 2022 to 2023. What we have seen in 2024 is more competition. PROs have reported a **17%** increase in their competitors since 2022.

SERVICE AREAS



PROs HAVE SEEN A 17% INCREASE IN COMPETITORS SINCE 2022

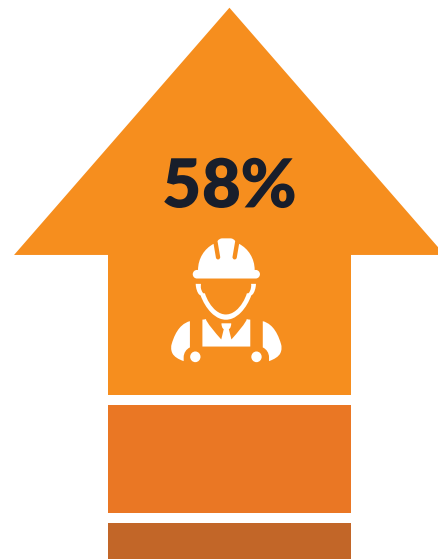
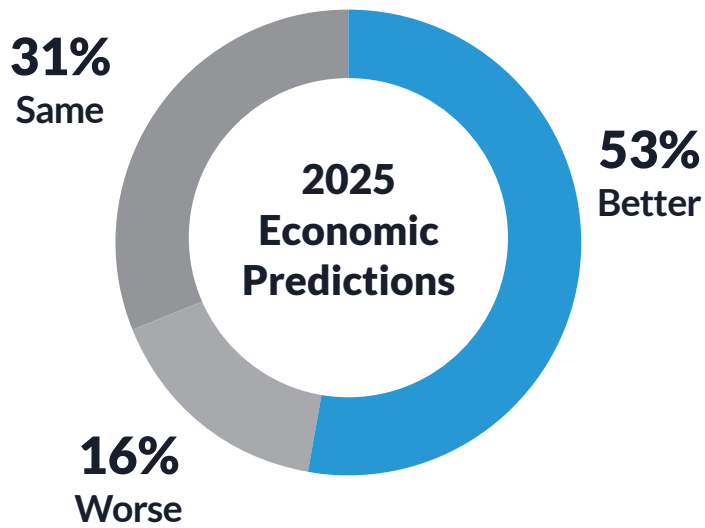




2025 ECONOMIC OUTLOOK

LOOKING FORWARD

The economic outlook for 2025 is much better than it was for 2024. PROs that predict that the economy will be more favorable for the portable sanitation industry in 2025 jumped up **71% YoY**. To support that growth, PROs plan on hiring more employees in 2025 than they did in 2024.

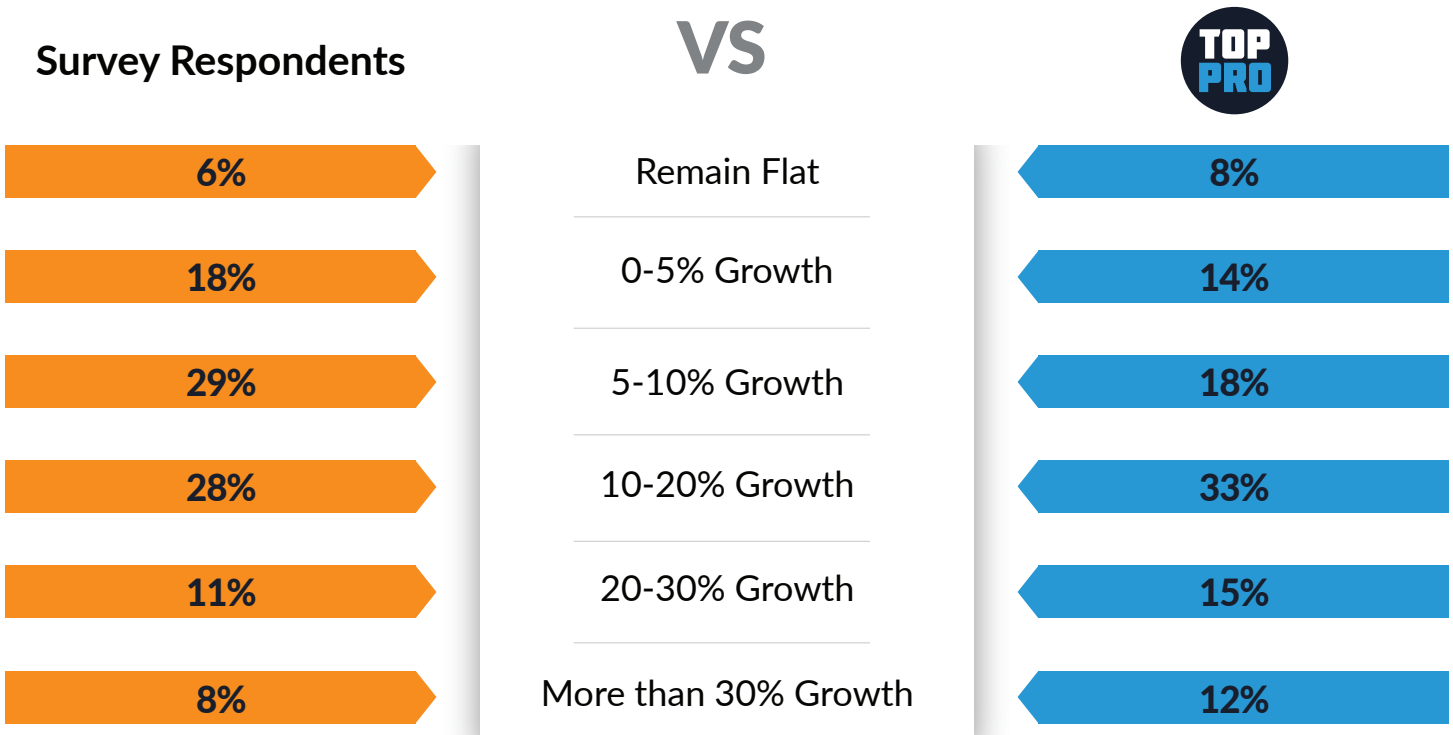


58% of PROs plan to hire more employees in 2025 than they did in 2024.

2025 ECONOMIC OUTLOOK

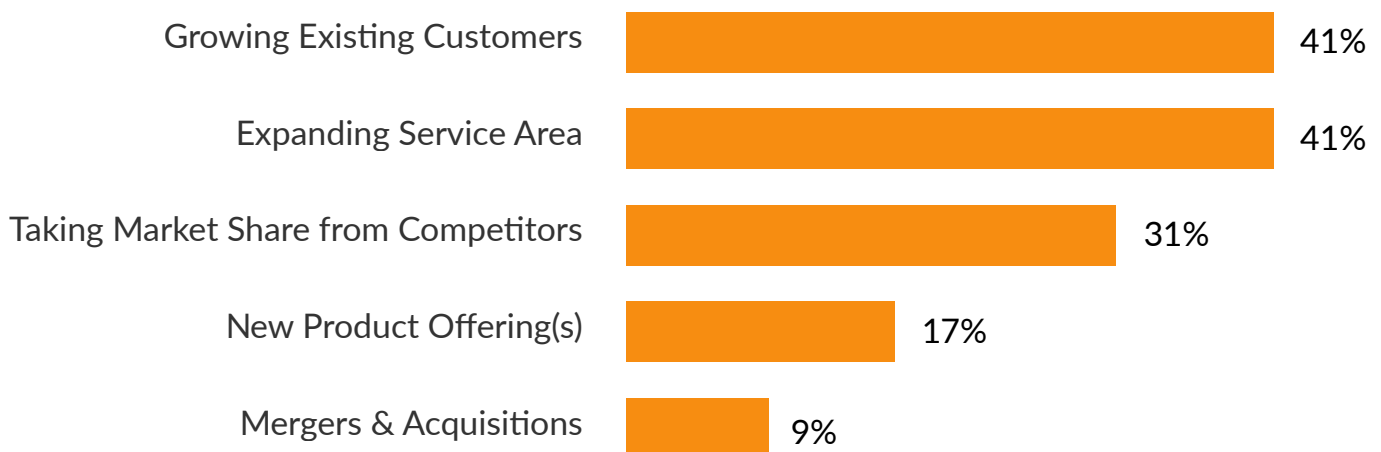
LOOKING FORWARD

We asked PROs how much growth they expected to see in 2025. Top PROs (those with more than 20% profit margins) are expecting higher growth percentages in 2025.



GROWTH AREAS

In 2025 PROs have more aggressive growth plans. PROs that plan on expanding their service areas jumped up **52%** from 2024. Taking market share from competitors and offering new products also jumped up **29%** and **55%** respectively.

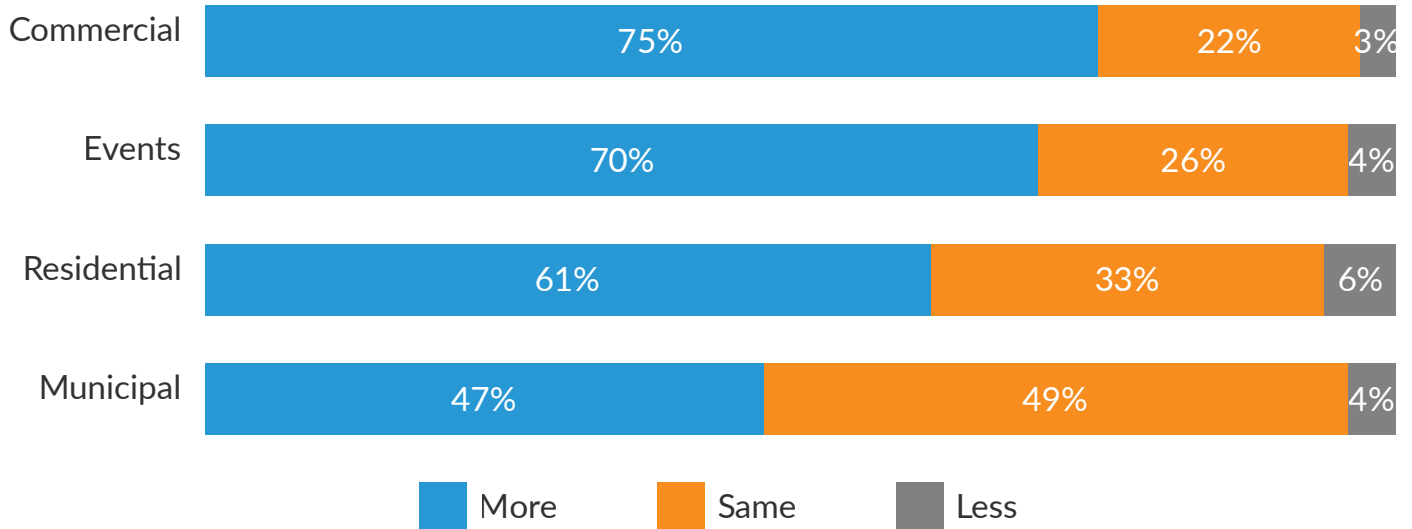


2025 ECONOMIC OUTLOOK

LOOKING FORWARD

GROWTH AREAS

In 2025 PROs expect more growth in commercial, events, and residential than they did in 2024, with residential jumping up **25% YoY** (municipal is relatively flat YoY).



We hope this report has helped you compare how your portable sanitation business is doing compared to others. We'd like to thank all of the operators that took the time to fill out our benchmark survey! Without you this report wouldn't have been possible.

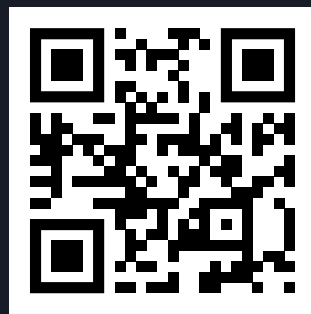
ABOUT SERVICECORE

Get More Done. Stress Less.

Make your portable sanitation business more efficient. Cut wasted time, manage jobs, optimize routes, track inventory, and automate billing. All with one tool that's easy to use and works with QuickBooks.

If you'd like to make your business more efficient and profitable, scan below or visit servicecore.com/schedule-a-demo to request a demo.

Scan to see how
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