

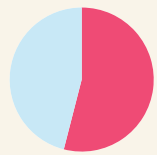
Tunnel Car Wash Trends (2023-2025)

How Membership, Retention, and Repeat Behavior Are Reshaping the Industry



75%

Industry Leader Mister Car Wash's Member Revenue



54%

Canceled Members That Still Return for Single Washes



15 - 19 Months
Average Subscription Length



Members
30 Washes per Year



Retail Customers
1-2 Washes per Year

Legend

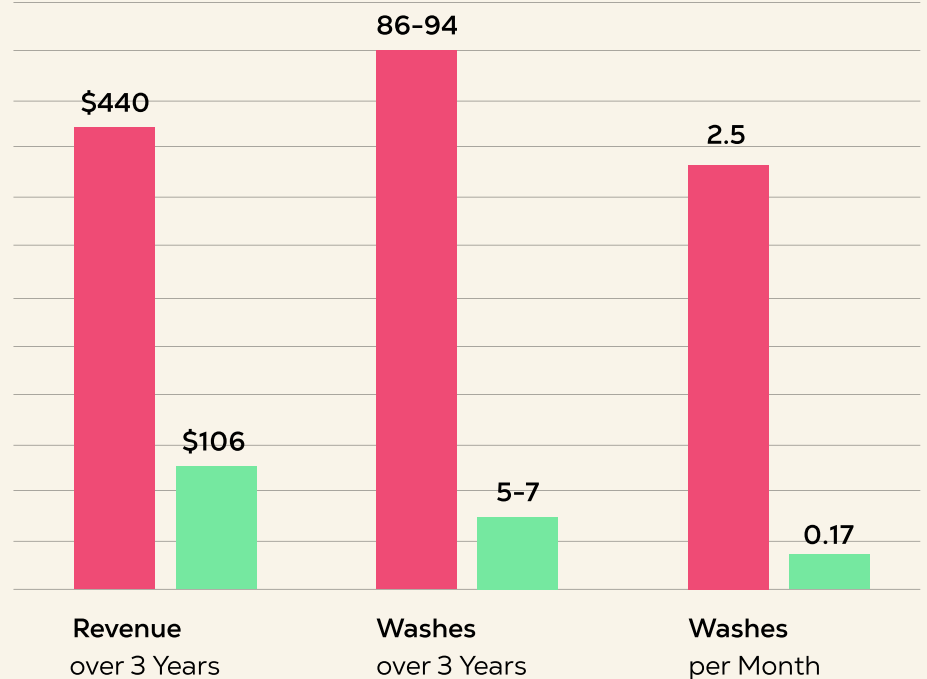
- Members
- Retail Customers

Emerging Trends

Retail revenue is shrinking but repeat visits from lapsed members are growing.

Revenue from memberships grew 16.6% YoY

"Memberships aren't just a revenue stream – they're the core business model now."



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Retail to Member: How Retention Powers Car Wash Revenue

U.S. Tunnel Car Wash Membership vs.
One-Time Usage Trends

2023-2025 REPORT

cinch

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Introduction

This report examines recent U.S. data (2023 onward) on tunnel car wash businesses – including both full-service and express tunnel operations – with a focus on customer behavior and revenue patterns. Key metrics such as the mix of one-time (pay-per-wash) customers versus membership subscribers, the revenue split between single-pay and recurring membership fees, membership retention/churn rates, and repeat business trends for non-member customers are analyzed. Data from industry publications, market research, and both independent operators and franchise chains are included to provide a comprehensive view.

Key Metric #1

The mix of one-time (pay-per-wash) customers versus membership subscribers

Key Metric #3

The membership retention and churn rates

Key Metric #2

The revenue split between single-pay and recurring membership fees

Key Metric #4

Repeat business trends for non-member customers are analyzed

Customer Mix

One-Time vs. Membership Customers

MEMBERSHIP ADOPTION

Subscription “unlimited” wash programs have become extremely popular in the tunnel car wash industry by 2023. **In fact, membership programs are now nearly ubiquitous across both independent and franchised car washes.**¹

An International Carwash Association (ICA) consumer study found that wash club memberships were the fastest-growing service, **with reported membership counts increasing ~43% from 2019 to 2022.**² This surge means that a large portion of tunnel car wash patrons have enrolled in monthly wash plans rather than paying per visit.

PREVALENCE ACROSS OPERATORS

Nearly all types of tunnel washes (express exteriors and full-service alike) now offer some form of unlimited or loyalty membership.¹ Even small independent wash owners have adopted these programs to drive customer loyalty. *Industry experts note that essentially “nearly all car washes” stand to benefit from a well-run membership program.*¹ In short, both franchise chains and independents have widely embraced memberships.

SHARE OF CUSTOMERS AS MEMBERS

The proportion of customers who are members (vs. one-time users) has climbed significantly. While exact percentages vary by location, many express tunnel operators report that **a substantial share – often over half – of their frequent customers are now unlimited-plan members.** For example, at Mister Car Wash (the nation’s largest express tunnel chain with 500+ locations), **over 2.1 million customers are active members, and these Unlimited Wash Club subscribers comprised about 75% of all wash sales in late 2024.**³ This indicates that only roughly one-quarter of their wash volume comes from non-member (“retail”) customers. Other large express chains similarly report a majority of regular users on subscriptions. Smaller operators may see a lower membership share, but the trend is toward growing membership penetration across the board.

¹ carwashadvisory.com ² jbsindustries.com ³ ir.mistercarwash.com

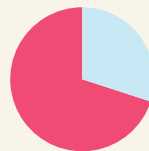
EXAMPLE BENCHMARKS

Industry analytics suggest a **mature car wash site (operating ~2–3 years)** typically builds an **active member base of around 3,000 subscribers** on average.⁴ In such cases, those thousands of members represent a significant portion of the location's repeat customer base. Some high-volume express washes approach **membership rates of ~70% of their customer base**; beyond that level, new sign-ups mainly replace existing retail customers.⁵ In other words, once ~70% of a wash's frequent users are on a plan, there are fewer one-time customers left to convert.⁵ This illustrates how dominant membership usage has become among loyal car wash customers.



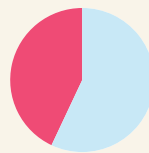
75%

Industry Leader Mister Car Wash's Member Revenue



70%

Membership Rates Among Entire Customer Base



43%

Increase Membership Counts from 2019–2022

“Subscription “unlimited” wash programs have become extremely popular...

“Some high-volume express washes approach **membership rates of ~70%** of their customer base.”

⁴ carwashmagazine.com ⁵ drb.com

Revenue Breakdown

One-Time Payments vs. Memberships

SHIFTING REVENUE MIX

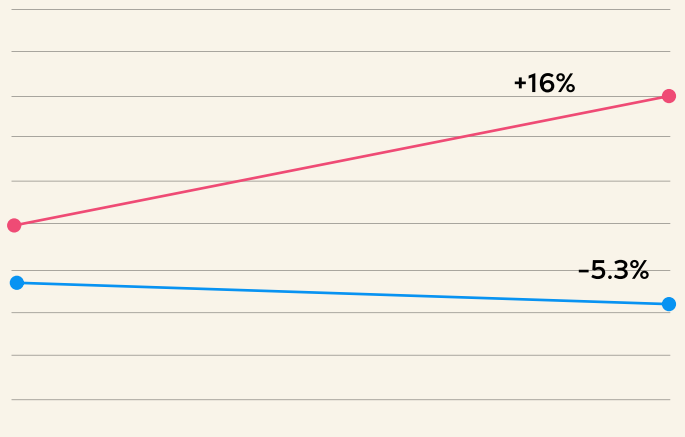
Recurring monthly membership fees now account for a large (and growing) share of revenue at tunnel car washes, eclipsing one-time wash sales in many cases. **Industry-wide, the business model is shifting from single retail transactions toward a subscription-driven model.**⁴ Data from 2024 shows robust growth in membership revenues alongside stagnation or decline in pay-per-wash sales, indicating that more consumers are opting for unlimited plans.

MAJORITY OF REVENUE FROM MEMBERS

At many operations, **membership subscriptions contribute well over half of total wash revenue.** For instance, as noted above, Mister Car Wash derives **approximately 75% of its wash revenue from Unlimited Club members,**³ with only ~25% coming from one-time pay-as-you-go customers. This 70–75% subscription revenue share is a clear indicator of how entrenched the model is at large chains. Other express tunnel brands report similar figures in which memberships generate the lion's share of income. Even some full-service tunnel washes (which traditionally relied on à la carte sales) have introduced membership tiers that now contribute meaningful recurring revenue streams.

INDUSTRY GROWTH DATA

Market research by software provider Rinsed underscores this trend. In Q3 2024, **member revenue across U.S. car washes jumped +16.6% year-over-year, while retail (one-time) revenue declined 5.3%.**⁴ This reflects customers converting from paying per visit to subscribing. By Q4 2024, the pattern continued: membership sales were up ~13% YOY even as retail sales fell ~7%.⁴ The result is that an ever-larger proportion of total income comes from memberships. In fact, the combined same-store sales growth in late 2024 was driven almost entirely by membership gains.⁴



Member vs. Retail Revenue in Q3 2024

³ ir.mistercarwash.com ⁴ carwashmagazine.com

80/20 INCOME DISTRIBUTION

It is often observed that **a relatively small segment of loyal customers (the unlimited plan members) can contribute a disproportionately large share of revenue.** In one analysis, *“members of an unlimited wash plan are considered part of the top 20% of customers who contribute around 80% of a car wash’s income.”*⁶ While individual results vary, this highlights that subscribers tend to be the most frequent (and valuable) customers. These heavy users generate steady recurring fees and visits, whereas infrequent one-time customers make up a smaller slice of annual revenue. As unlimited programs have grown, the stable revenue base from memberships has become crucial to profitability for both franchise chains and independent wash owners.

ONE-TIME SALES STILL IMPORTANT

Though memberships dominate the revenue mix in many cases, one-time (“retail”) wash sales are not negligible. They typically encompass new customers trying the service, infrequent users, gift card redemptions, and former members who didn’t renew. In 2023–2024, retail revenue has even seen modest upticks in some quarters due to factors like weather-driven demand. For example, an industry report **noted retail (non-member) visits were up ~3.9% in early 2025 alongside slight price increases, contributing to a 6.8% rise in retail revenue for that period.**⁴ So while the overall trajectory favors memberships, operators still pay attention to boosting one-time sales through promotions and drive-up traffic, especially to feed the membership pipeline.

“Members of an unlimited wash plan are considered part of the top 20% of customers who contribute around **80% of a car wash’s income.**”

⁴ [carwashmagazine.com](https://www.carwashmagazine.com) ⁶ [carwashmag.com](https://www.carwashmag.com)

Membership Retention

Rates and Fall-Off (Churn)

RETENTION IS CRITICAL

With so much revenue tied to subscriptions, car wash operators are highly focused on membership retention and minimizing churn. Overall, **membership programs have shown strong retention, with the vast majority of subscribers continuing month to month.**

Consumer surveys and operational data from 2023–2024 indicate that once someone joins an unlimited wash club, they are very likely to keep it – although economic factors and competition can impact how long they stay.

HIGH RENEWAL INTENT

According to ICA research, **roughly 88–92% of car wash members report that they plan to renew or continue their membership.**²⁴ This was a notable improvement in churn metrics by 2023. (In 2019, renewal intent was a bit lower, but by Q3 2023 an ICA Pulse survey showed **92% of members intended to stick with their plan.**)⁴ Such high self-reported renewal intent implies that most customers are satisfied with the value of their unlimited plans. Many view it as a routine utility or “must have” once enrolled.

AVERAGE MEMBERSHIP TENURE

Actual retention data shows that the average subscription lasts on the order of 1 to 1½ years. One industry analysis of millions of member accounts found that **individual (single-vehicle) monthly subscribers stay around 15 months on average, while family or multi-vehicle plan subscribers last about 19 months.**⁴ This suggests an average member lifespan well over a year (and family plans approaching two years). In other words, a typical customer who signs up will keep paying for 15–19 months before canceling. This is an average – many members stay far longer, and some cancel in just a few months, but it provides a benchmark for retention. Notably, this average tenure appears to have extended in recent years (past estimates pegged average membership length around 8–10 months, but improved customer experience and commitment have increased it to well over a year in 2023+).

“Many view [membership] as a routine utility or **“must have” once enrolled.**”

² jbsindustries.com ⁴ carwashmagazine.com

CHURN RATES

Membership “fall-off” or churn is usually measured as the percentage of members canceling in a given period. Thanks to the strong retention noted above, churn rates at car washes tend to be relatively low on a monthly basis – but they do exist and have been creeping up slightly as programs mature. In late 2024, Rinsed reported that **overall churn had increased about 6.0% year-over-year (with involuntary churn from credit card failures up 8.7% and voluntary cancellations up 5.3% YOY).**⁷ This indicates a mild rise in churn, possibly due to economic pressures (inflation, tighter budgets) and the fact that newer subscribers now include more “late adopters” who might be less committed.⁴ Still, churn is far from alarming – it’s more a normalization as membership pools expand beyond just the most die-hard car enthusiasts.



15 – 19 Months

Average Subscription Length

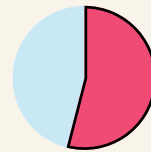
CHURN BENCHMARKS

To put retention in perspective, if the average member stays ~15 months, that implies a monthly churn around 6–7% (since each month a small fraction cancel). Annually, that might equate to roughly 50% of members turning over. However, many operators are achieving better rates. Some top-performing washes report **annual membership retention above 90%**, meaning annual churn of under 10%. In fact, industry consultants suggest best-in-class programs aim for extremely low churn – on the order of **<5% annually** (including cancellations and credit card drops).⁵ Such low churn would correspond to the vast majority of members renewing year after year. While 5% annual churn is an aspirational target (achieved by only the most effective programs with loyal customer bases), it underscores the focus on keeping members happy. Common retention tactics include high-touch customer service, added perks for long-term members, “win-back” offers for those who try to cancel, and in some cases discounted annual plans to lock customers in. Longer-term commitments (e.g. 6-month or 12-month prepay memberships) have been explored to boost retention, though many customers still prefer month-to-month flexibility.⁴

⁴ carwashmagazine.com ⁵ drb.com ⁷ news.rinsed.com

FORMER MEMBER BEHAVIOR

Even when churn does occur, it doesn't always mean the customer is lost forever. A noteworthy trend is that many canceled members continue to patronize the car wash occasionally as one-time customers. ICA data suggests **54% of former unlimited members still returned to the same wash for single washes after canceling.**⁸ This indicates that over half of the people who drop their subscription remain at least somewhat loyal to the business (they might downgrade to paying per wash, perhaps during seasons they need it less), whereas 46% leave entirely or go to competitors.⁸ This pattern highlights the importance of re-engaging canceled members, since a good number will still come back for repeat business (and potentially could be convinced to re-subscribe in the future).



54%

Canceled Members That Still Return for Single Washes



46%

Canceled Members That Leave Entirely

“Overall, membership programs have shown strong retention, with the ***vast majority of subscribers continuing month to month.***”

⁸ [instagram.com](https://www.instagram.com)

Repeat Business Patterns

for One-Time Customers

ONE-TIME VS. REPEAT BEHAVIOR

Understanding how non-members (retail customers) behave is crucial, since they represent potential future members and incremental revenue. The question is: if someone visits a tunnel car wash as a one-time customer, do they come back again? How frequently do pay-per-wash customers return, if at all? The data suggests that **while many one-time customers do return, their visit frequency and long-term value are much lower than that of members.**

Converting these infrequent users into regulars – ideally into subscribers – has become a key strategy for operators.

“If someone visits a tunnel car wash as a one-time customer, ***do they come back again?***”

VISIT FREQUENCY

There is a stark difference in visit frequency between members and non-members. Unlimited club members wash **about 2.4–2.6 times per month on average**, essentially a wash every week or two. In contrast,¹ pay-per-wash customers tend to visit far less often – in many cases only a few times per year. For example, if a casual customer only comes during seasonal needs (after winter road salt, before a big event, etc.), they might wash perhaps 4–6 times a year or even less. While exact industry averages for non-member frequency are hard to pin down, the difference is illustrated by revenue per customer: over a 3-year period, **an average repeat retail customer spent only about \$106 total, whereas an average subscription member generated about \$440 in that same time.**⁴ This ~4x higher lifetime value (LTV) for members underscores that non-members are simply not coming in nearly as frequently. In essence, the typical one-time customer might return occasionally (perhaps on the order of 1–2 times per year at a given wash), whereas a member might visit ~30 times per year.

¹ carwashadvisory.com ⁴ carwashmagazine.com

3-Year Customer Lifetime Value (Revenue)	Subscription Member	Pay-Per-Wash Customer (Repeat)
Approx. Revenue 2023–2025	\$440⁴	\$106⁴

The table above compares the cumulative revenue from an average member vs. a repeat one-time customer over 36 months. Members bring in roughly 315% more revenue than retail customers,⁴ reflecting their much higher visit frequency and loyalty.

REPEAT VS. ONE-AND-DONE

Not all one-time customers become repeat customers. Some might try a new car wash once (perhaps using a coupon or while traveling) and never return. However, many do come back when they need another wash. Recent industry data indicates that **the growth in retail (non-member) sales is largely driven by returning customers** rather than entirely new ones. In early 2025, over **50% of the increase in retail wash revenue came from repeat retail customers, and over 40% came from former members returning as retail customers.**⁴ This means roughly 90%+ of retail sales growth was from people who had used the business before (either as past retail customers or past subscribers), whereas brand-new customers contributed only a small portion of growth.⁴ It highlights that repeat business from one-time users is a significant factor – car washes rely on familiar faces coming back, even if those customers are not on a plan.

⁴ carwashmagazine.com

TYPICAL RETURN RATES

While exact “return rate” statistics for one-time customers (e.g. what percentage of first-time customers return for a second visit) are proprietary and vary by operator, the consensus is that **customer loyalty is much stronger among members than non-members**. A non-member’s behavior can range from frequent (some people just prefer to pay each time but still come often) to very sporadic. On average, though, their repeat rate is low. The average non-member’s few visits per year pale in comparison to a member’s usage. As noted, some analyses suggest casual customers might average only 5–7 total washes over three years.⁴ That could be interpreted as perhaps only ~1–2 visits in a given year if they didn’t convert to a membership.

“Some analyses suggest casual customers might average **only 5–7 total washes over three years.**”

CONVERSION TO MEMBERSHIP

Because one-time customers generally don’t return as often, **operators aggressively try to convert these single-pay visitors into members to boost repeat business**. Conversion rates from retail to membership are an important metric. At a newer location with a small existing member base, conversion might be in the low single-digits (only ~2–3% of non-member visitors sign up). But at mature sites with a sales-focused culture, **conversion rates can reach the high single or even double digits (near ~10% of retail customers converting to a monthly plan).**⁴ Industry guidance suggests aiming to convert roughly **8–10% of first-time customers into subscribers** as a strong benchmark.⁹ Many express washes station employees at the pay stations to pitch the unlimited plan to every retail customer, precisely to increase the likelihood that a one-time user becomes a loyal, repeating member. This strategy is paying off – it’s reflected in the declining retail revenue share and growing membership counts across the industry.

⁴ carwashmagazine.com ⁹ slamcarwashmarketing.com

REPEAT USAGE TRENDS:

Another trend is that one-time customers who do return tend to do so on their own schedule (often weather-dependent or need-based), whereas members drive habit-based usage. For example, during inclement weather spikes (e.g. lots of road salt in winter), even non-members will come out for a wash more frequently, temporarily boosting repeat visits from casual customers.⁴ However, in steady state, members are the ones coming regularly, while non-members trickle in when the need arises. Some operators use loyalty programs (point rewards for each paid wash) to encourage one-time customers to return more frequently even if they don't join the monthly club.

Trend #1

Members have higher lifetime value than retail customers.

Trend #2

Growth in retail sales is driven by returning customers rather than entirely new ones.

Trend #3

Members return habitually while retail customers return sporadically.

“Industry guidance suggests aiming to **convert roughly 8–10% of first-time customers** into subscribers as a strong benchmark.”

⁽⁴⁾ carwashmagazine.com

Summary of Repeat Behavior

In summary, the **“typical” one-time customer at a tunnel car wash might only come back a handful of times (if at all), unless they are converted into a member.** Those who do return as retail customers contribute some ongoing revenue, but their long-term value is far lower than that of subscribers.⁴ The industry’s recent data reinforces this: members wash far more often and for longer duration, whereas non-members are more transient in their usage. As a result, the focus for operators (independent and franchised alike) remains on: attracting new customers with a great first experience, converting as many as possible to membership, and providing excellent service to keep members renewing. By doing so, car wash businesses maximize repeat visits and revenue, whether from recurring subscriptions or from loyal pay-as-you-go patrons who return regularly.

Sources: The above insights are drawn from 2023–2025 industry reports, including the International Carwash Association’s consumer studies and Pulse™ surveys, car wash trade publications, and data analytics reports (e.g. Rinsed industry trend reports), as well as examples from large operators and independent owners. Key references have been cited inline for verification, providing a data-backed picture of the tunnel car wash market’s customer and revenue dynamics in the post-2023 landscape.

¹ carwashadvisory.com

² jbsindustries.com

³ ir.mistercarwash.com

⁴ carwashmagazine.com

⁵ drb.com

⁶ carwashmag.com

⁷ news.rinsed.com

⁸ instagram.com

⁹ slamcarwashmarketing.com