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INDUSTRY INSIGHT · AUGUST 2026

How 2026 is going, and how we got here.

Four calendar years of same-store carwash sites — January 2023 through July 2026.

METHODOLOGY

Same sites, measured the same way every month.

Every figure comes from a sample of sites in our network that were present in every month of the period being compared. Two samples, depending on how far back the comparison reaches.

2026 YEAR TO DATE

Jan 2025 – Jul 2026

2,200+	400+
sites sampled	operators

FOUR-YEAR TREND

Jan 2023 – Jul 2026

1,500+	350+
sites sampled	operators

HOW THE SAMPLE IS BUILT

A site counts in every month of a comparison or in none of it.

HOW TO COMPARE YEARS

2026 is January–July, matched against the same seven months of prior years.

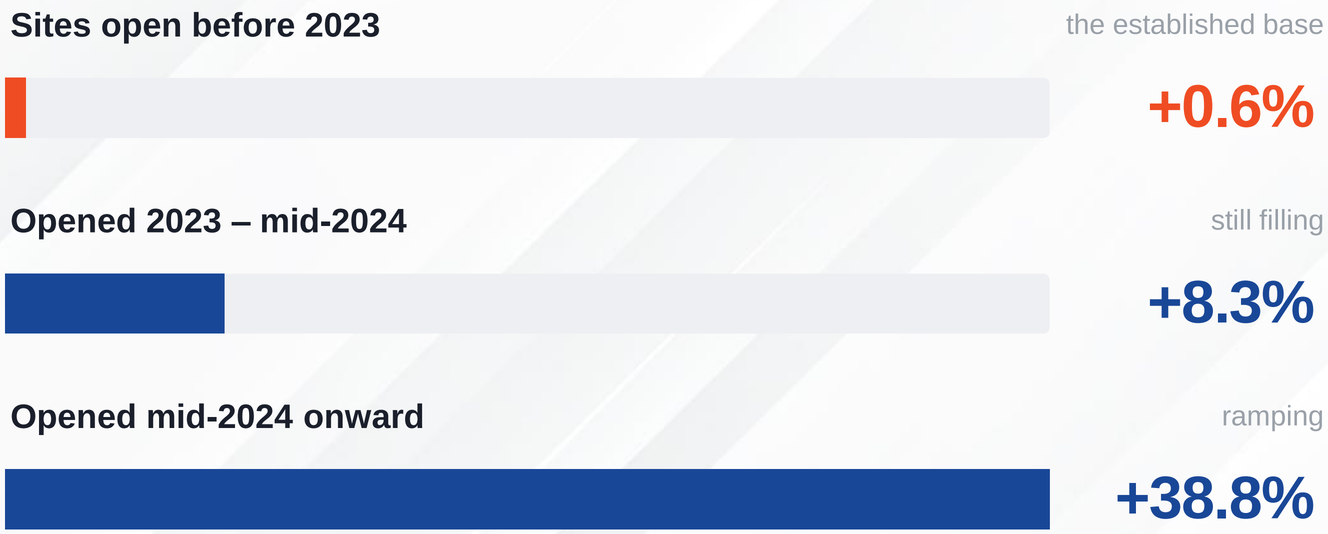
Sites that changed POS systems mid-period are included; individual months where the system transition corrupted membership traffic records are excluded from traffic and sales figures only.

01 · THE FINDING

Established sites have stopped adding members. Revenue grew anyway.

Revenue is growing. Membership units are not — at least not at established sites. The gap is price.

MEMBERSHIP GROWTH BY SITE AGE, 2026 VS 2025



The industry's unit growth is new capacity coming online, not existing sites growing.

WHERE ESTABLISHED SITES FOUND REVENUE

94%

of their member revenue growth came from price, not volume.

MEMBERSHIP GROWTH HALVED

12.4% → 5.5%

Membership base growth, January to July. 2,121 → 2,383 last year; 2,351 → 2,479 this year.

The full picture, per site per month.

January–July, against the same seven months of 2025.

MEMBERSHIP UNITS

	2025	2026	CHG
Recharges	2,298	**2,452**	+6.7%
New members sold	211	**210**	−0.4%
Members lost	184	**191**	+3.8%

REVENUE

	2025	2026	CHG
Total	$121,176	**$131,431**	+8.5%
Member	$74,871	**$84,742**	+13.2%
Retail	$43,985	**$45,329**	+3.1%

TRAFFIC

	2025	2026	CHG
Cars	10,083	**10,225**	+1.4%
Retail traffic	3,294	**3,240**	−1.6%

RATES

	2025	2026	CHG
Recharge ticket	$32.58	**$34.57**	+6.1%
Churn rate	8.02%	**7.81%**	−2.7%
Capture rate	7.11%	**7.22%**	+1.6%

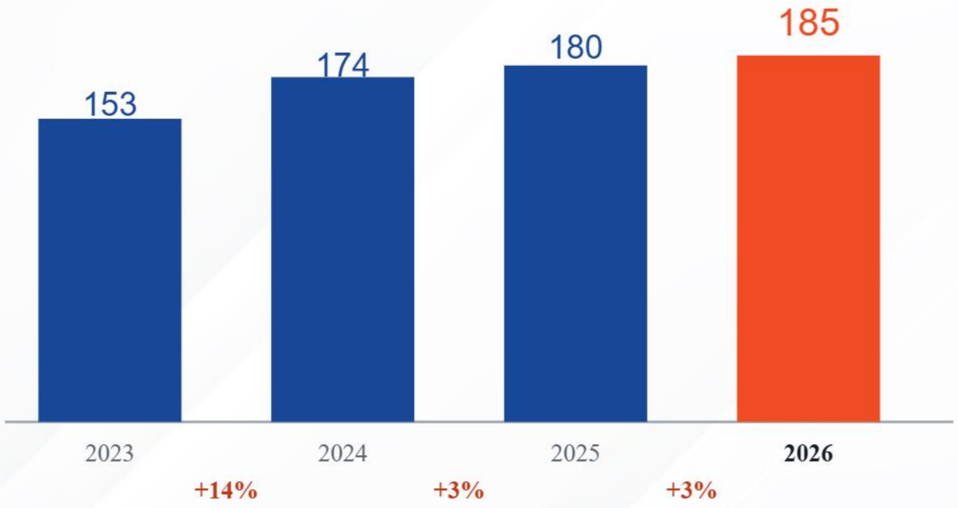
Churn rate fell even though members lost rose 3.8%: more members left because the base is larger, not because retention got worse.

Two years near 10% growth, then 2.3%.

January–July of each year, same sites throughout, per site per month.

RECHARGES PER SITE

MEMBERS LOST PER SITE PER MONTH



VOLUME FLATTENED

Recharge growth held near 10% for two years, then fell to +2.3%. Members added per site fell from 288 to 92.

SALES NEVER DECLINED

New sales rose every year, 185 → 195 per site per month. Losses rose faster in count, 153 → 185, because the base grew 24%.

TICKET DID THE OPPOSITE

Recharge ticket went $29.77 → $34.89, up 17.2%. Capture rose 5.30% → 6.41% and member revenue share 45.6% → 58.2%.

Traffic moved the calendar. Sales followed it.

Total cars per site by month, 2026 against 2025. Member sales tracked traffic in every month.

2025 2026 Shaded: the two months genuinely down on traffic

CONVERSION DIDN'T CHANGE

6.40% → 6.48%

Capture rate, Jan–Jul. Sites converted traffic at the same rate all year. Sales moved because traffic moved.

February **+19.3%** → **+23.7%**

traffic to member sales · 243 → 300 sold

April **−4.9%** → **−8.8%**

traffic to member sales · 194 → 177 sold

A Northeast blizzard in February, then the warmest March on record and the second-warmest spring in 131 years. February traffic ran 19.3% ahead and sales 23.7% ahead. April and June gave it back.

Traffic was up 1.4% across seven months; member sales were flat at −0.4%. The selling season moved. It did not shrink.

Payment failure follows the calendar, not the operator.

Involuntary churn rate by month. The same shape repeats every year: a February trough, a summer peak.

15–34% rise from the February trough to July, in every year of the series

TWO THINGS TO TAKE FROM THIS

A July spike is normal. Comparing July to February and concluding something broke is a misread of the calendar.

The curve stepped down in 2025 and again in 2026. Billing is quietly getting better, not worse.

WHERE CHURN DIDN’T RISE

Voluntary churn held at 4.31% in 2023 and 4.30% in 2026. Involuntary fell from 3.38% to 3.17%. Retention did not deteriorate — the base outgrew the sales that feed it.

Monthly rates from the full network series; annual voluntary and involuntary figures from the same-store panel.

The wider subscription economy is on the same curve.

Streaming, fitness, and subscription businesses at large, 2024–2026.

STREAMING · PREMIUM VOD

12% → ~7%

subscriber growth, 2024 → 2025 — the first single-digit year on record (Antenna).

+19.5% price inflation in 2025; ad-free tiers up **54%** since 2021.

Netflix's stated strategy in mature markets: **grow ARPU, not subscribers** .

Cost is the #1 cancellation reason — cited by **45%**.

FITNESS

66.4%

average gym retention — roughly one member in three lost each year.

Cancellations up **8% YoY** in the first half of 2026.

"Selling memberships is easy; keeping members is where gyms fail."

SUBSCRIPTION ECONOMY

+11%

subscription businesses' growth over the S&P 500 (Zuora Subscription Economy Index).

47% of consumers who canceled a subscription cite a price increase — the top reason.

THE PATTERN Mature subscription markets grow on price — then win on **retention and value.**

07 · THE WRAP-UP

Price is carrying the market. The base is holding.

Four takeaways from four years of same-store data.

01

Price did the work

94%

of established sites' member revenue growth came from price, not volume. Recharge ticket rose \$29.77 → \$34.89 in four years.

02

Unit growth is new capacity

+38.8%

membership growth at sites opened since mid-2024, against +0.6% at the established base. The industry grows by opening sites.

03

Demand held its shape

6.48%

capture rate, against 6.40% last year. Weather moved the selling season — conversion never moved. Sales followed traffic.

04

Retention didn't crack

4.30%

voluntary churn, level with 2023's 4.31%. Involuntary fell 3.38% → 3.17%. The base outgrew the sales that feed it.

For established sites the growth levers are no longer unit count — they are **ticket, capture, and keeping the base**.