

Sauna, rituals & the next phase of bathhouse growth

October 6, 2026

Key early findings from the 2026 Bathhouse & Thermal Wellness Development Benchmark Survey conducted by Global Wellness Institute's Hydrothermal and Consulting Best Practices Initiatives. This working analysis includes 47 distinct operator/developer responses, including 37 currently operating businesses. Expansion plans and guided experiences feature prominently in this primarily U.S.-based sample.

62% have or plan a large-format/event sauna

21 of 47 respondents report having one; eight plan one. The survey defines this as a sauna designed for group programming, rituals, Aufguss, guided experiences or events. Among currently operating respondents, **17 of 37 (46%) have one** and six plan one. Pre-opening responses are included only in the full-sample figure.

77% offer or plan guided thermal programming

19 respondents report regular programming, nine occasional programming and eight planned programming: 36 of 47 in total. Among currently operating respondents, **25 of 37 (68%)** report regular or occasional programming.

43% of operating respondents select "Aufguss / sauna rituals"

16 of 37 operating respondents select this programming option. Among the 25 operating respondents reporting regular or occasional guided programming, **16 (64%)** select it. The questionnaire combines Aufguss and sauna rituals in one option; it cannot establish Aufguss adoption separately.

Rituals feature in future revenue plans

11 of 47 respondents (23%) identify sauna rituals/thermal programming as a future revenue-growth driver. This measures expectations, rather than proven revenue from rituals.

Event sauna adoption varies within the sample

14 of 35 U.S. respondents (40%) report having an event sauna; seven plan one. Among the 12 respondents reporting locations outside the U.S., including multi-country responses, **seven (58%)** have one and one plans one. These small groups are not national market benchmarks.



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62% expect multiple locations within three years

29 of 47 respondents expect two or more locations, compared with **10 of 47 (21%)** reporting multiple locations today. Four are unsure about future location count. Fourteen respondents expect at least four locations, including six expecting 10 or more. These are intentions, not confirmed openings.

62% are in development or have operated for five years or less

The sample includes **10 pre-opening respondents**, nine that opened within two years, 10 operating for two to five years and 18 operating for more than five years.

44% of operating respondents disclosing revenue report \$300,000+ monthly

15 of 34 operating respondents providing a revenue range report average gross monthly revenue of at least **US\$300,000**. Three operating respondents do not disclose. Pre-opening respondents are excluded. Gross revenue is not profit, and the open-ended top category prevents calculation of a precise average.

68% of operating respondents report reaching positive cash flow

25 of 37 operating respondents report having reached positive cash flow; five have not and seven are unsure or decline to answer. Of the 25 reporting positive cash flow, **15 (60%) reached it within 12 months**. Pre-opening answers are excluded.

30% report opening investment of \$5 million or more

14 of 47 respondents report at least **US\$5 million**; **19 of 47 (40%)** report at least **US\$2 million**. Four are unsure or decline to answer. Figures include pre-opening respondents and should not all be described as completed project expenditure.

Nearly half of operating respondents reporting a timeline took two years or longer

15 of 31 operating respondents providing a development timeframe (48%) took two years or longer from concept to opening. Nine report 12-24 months and seven under 12 months. Six operating respondents are unsure or decline to answer.

Large facilities report substantial revenue in this sample

All six operating facilities of 20,000-39,999 square feet report US\$300,000+ monthly gross revenue. Two of three operating facilities of 40,000 square feet or more report that range; one does not disclose. This does not establish profitability or show that size causes higher revenue.



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Guided programming extends beyond sauna rituals

Among the **25 operating respondents reporting regular or occasional guided programming**, 19 select private group events; 17 sound/music experiences; 16 Aufguss/sauna rituals; 15 each breathwork, guided contrast therapy and social/community programming; 14 meditation/mindfulness; and eight recovery/performance sessions. Multiple selections were allowed.

Day passes remain the leading access model

23 of 47 respondents (49%) select day pass/single visit as their most important access model. Looking ahead, **32 (68%)** identify general admission/day-pass traffic as a growth driver. Memberships and private events are each selected by 15 respondents.

Treatments and planned amenities broaden the offer

23 of 47 respondents (49%) describe treatments as core or an important secondary revenue stream. Planned additions include outdoor areas (10), warm/vitality pools (nine), traditional sauna, cold plunge and café/F&B (seven each), event saunas (six), and private ritual suites, treatment rooms, steam rooms and cold rooms (five each). Multiple selections were allowed.

Staffing and training deserve attention

25 of 47 respondents (53%) select staffing and training as something prospective owners often underestimate. Development/construction costs are selected by 29, permitting/code requirements by 24, and opening timelines by 21. These reflect respondent perceptions, not measured cost overruns.

About the research and media attribution

Source: *2026 Bathhouse & Thermal Wellness Development Benchmark Survey*, Global Wellness Institute Hydrothermal and Consulting Best Practices Initiatives; Cassandra Cavanah, Vice-Chair, Hydrothermal Initiative, and Lisa Starr, Chair, Consulting Best Practices Initiative. Working data snapshot: October 6, 2026.

Results are self-reported and directional, with a primarily U.S.-based sample (35 of 47). They do not size the global market or establish representative national benchmarks. Denominators vary by question; percentages are rounded. Financial responses remain confidential. No organizations are identified as participants in this brief.

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