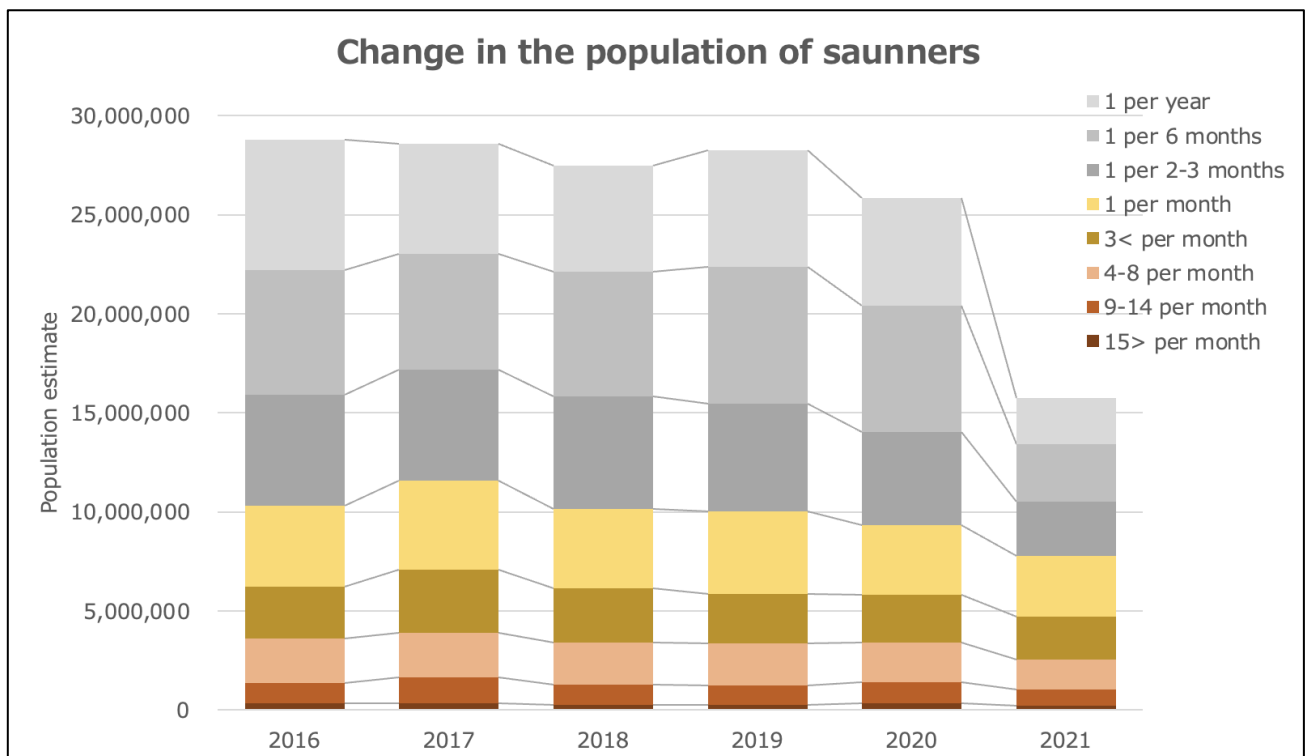


Population of sauna enthusiasts in Japan dropped by 10 million, marking largest decline since 2016

While urban areas remain strong, the decline is more obvious in rural areas.

Executive Summary

- The population of sauna enthusiasts (saunners) in Japan dropped from 25.8 million to 15.7 million probably due to Covid-19.
- When we look at the change by segment, the light user segment saw the biggest percentage decline.
- The decline in urban areas (Kanto, Kansai) was not big, which indicates that the recent sauna boom offset the negative impact of Covid-19.
- In 2021, people less frequently visit a sauna, which might have caused a "downward" segment shift (for example, "Heavy Saunners" to "Medium Saunners", and so forth)



Categorization of Saunners in this survey

- Heavy Saunners : Those who use a sauna at least four times a month
- Medium Saunners: Those who use a sauna at least once a month those
- Light Saunners : Those who use a sauna at least once a year

Overall trend from 2016

For the first time since the survey began, there was a significant decrease across all segments in 2021. Particularly, the light saunners segment led the overall declining trend, decreasing by more than 8 million people.

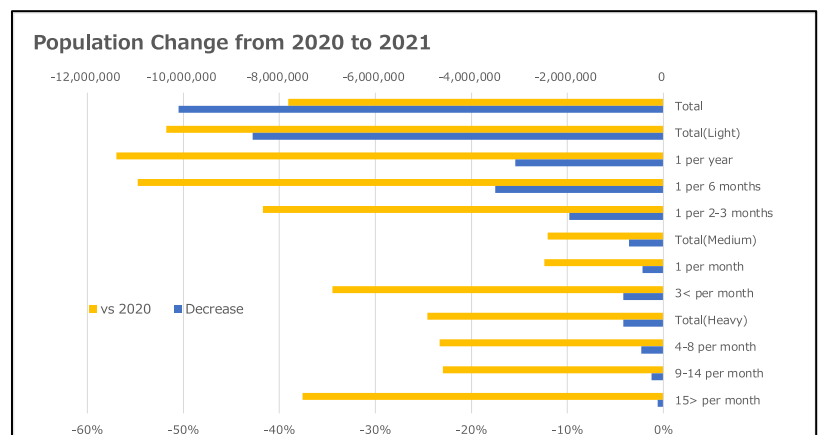
From 2020 to 2021, the heavy saunners decreased from 3.39 million to 2.55 million, the middle saunners from 5.92 million to 5.21 million, and the light saunners from 16.51 to 7.96 million. The total number decreased by roughly 10 million people from last year's 25.83 million to 15.73 million.

Population estimate

Type	Detail	Year					
		2016	2017	2018	2019	2020	2021
Heavy	15> per month	335,607	331,234	241,599	273,886	330,245	206,153
	9-14 per month	1,023,861	1,313,938	1,030,251	980,199	1,070,564	824,756
	4-8 per month	2,259,094	2,231,793	2,115,955	2,099,386	1,990,306	1,526,605
	Total(Heavy)	3,618,562	3,876,966	3,387,804	3,353,471	3,391,115	2,557,514
Medium	3< per month	2,622,476	3,210,086	2,742,581	2,499,785	2,416,852	2,138,038
	1 per month	4,085,519	4,492,789	4,017,765	4,163,305	3,510,887	3,075,090
	Total(Medium)	6,707,995	7,702,876	6,760,346	6,663,090	5,927,739	5,213,127
Light	1 per 2-3 months	5,570,640	5,604,977	5,671,362	5,456,381	4,697,138	2,736,900
	1 per 6 months	6,310,379	5,842,989	6,317,070	6,878,204	6,403,533	2,897,834
	1 per year	6,579,091	5,538,005	5,333,334	5,892,537	5,417,905	2,331,846
	Total(Light)	18,460,111	16,985,972	17,321,766	18,227,122	16,518,576	7,966,580
Total		28,786,667	28,565,813	27,469,917	28,243,683	25,837,430	15,737,221

Population Change from 2020 to 2021

Type	Detail	Decrease	vs 2020
Heavy	15> per month	-124,092	-37.6%
	9-14 per month	-245,808	-23.0%
	4-8 per month	-463,701	-23.3%
	Total(Heavy)	-833,601	-24.6%
Medium	3< per month	-833,601	-34.5%
	1 per month	-435,797	-12.4%
	Total(Medium)	-714,611	-12.1%
Light	1 per 2-3 months	-1,960,238	-41.7%
	1 per 6 months	-3,505,699	-54.7%
	1 per year	-3,086,059	-57.0%
	Total(Light)	-8,551,996	-51.8%
Total		-10,100,209	-39.1%



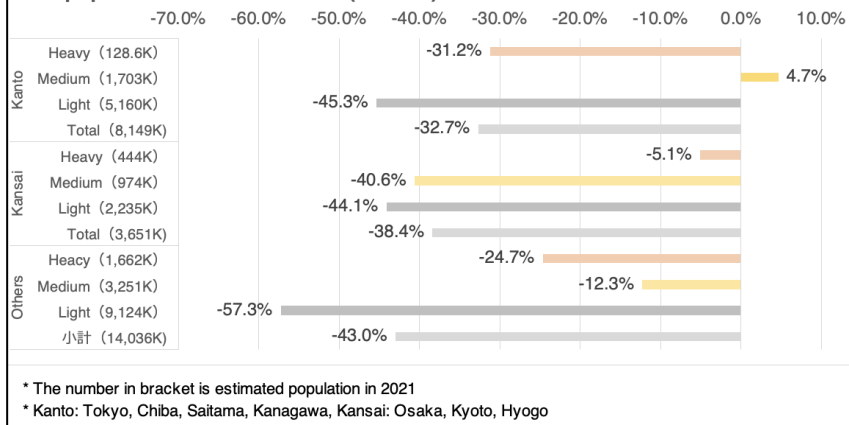
Regional analysis

The trend varied depending on the region: for instance, there was a moderate increase in the middle segment of Kanto(+4.7%) and a moderate decrease in the heavy segment in Kansai(-5.1%). In recent years, "sauna boom" has been reported in various medias. The survey suggests that the sauna boom in urban areas may have offset the negative impact caused by Covid-19. On the other hand, the decrease in saunners outside of the urban areas may be partly explained by the closure of old-style bathhouses loved by locals.

The population estimate(2021)

Region	Type	vs 2020
Kanto	Heavy (128.6K)	-31.2%
	Medium (1,703K)	4.7%
	Light (5,160K)	-45.3%
	Total (8,149K)	-32.7%
Kansai	Heavy (444K)	-5.1%
	Medium (974K)	-40.6%
	Light (2,235K)	-44.1%
	Total (3,651K)	-38.4%
Others	Heavy (1,662K)	-24.7%
	Medium (3,251K)	-12.3%
	Light (9,124K)	-57.3%
	Total (14,036K)	-43.0%

The population estimate of 2021 (vs 2020)

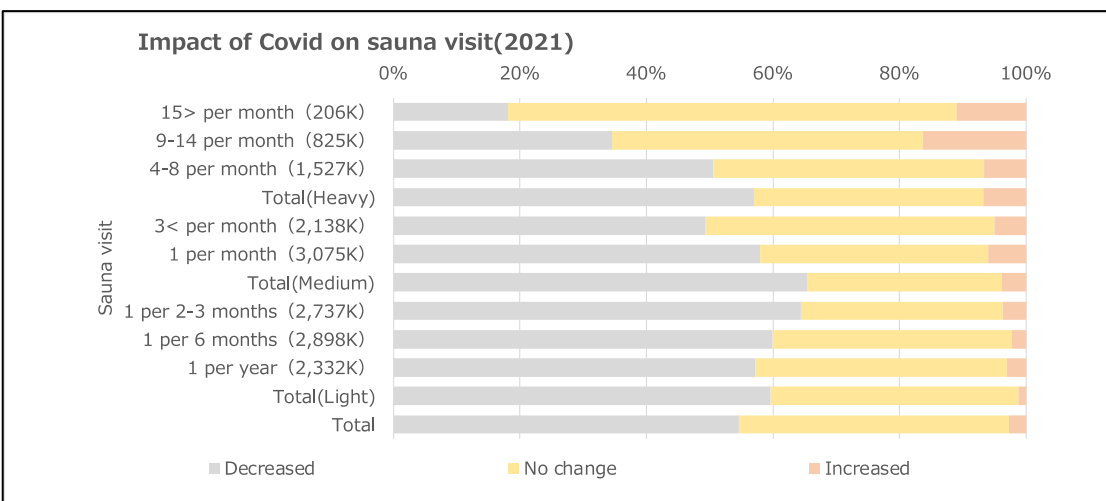


Covid's impact on bathing

Looking at the impact of Covid-19 by segment, heavy saunners were less likely to answer that the frequency of visits has decreased and more likely to answer that their frequency has increased. On the other hand, the opposite is true for light saunners. It is possible that there was a shift across different segments. For instance, some former middle saunners might have become light saunners, while some former light saunners might have stopped going to the sauna, which may have a significant impact on the decline in the number of saunners.

Impact of Covid on sauna visit(2021)

Type	Detail	Decreased	No change	Increased
Heavy	15> per month (206K)	18.1%	70.9%	11.0%
	9-14 per month (825K)	34.6%	49.1%	16.3%
	4-8 per month (1,527K)	50.5%	42.8%	6.6%
	Total(Heavy)	57.0%	36.3%	6.7%
Medium	3< per month (2,138K)	49.2%	45.7%	5.0%
	1 per month (3,075K)	58.0%	36.0%	6.0%
	Total(Medium)	65.5%	30.6%	3.8%
Light	1 per 2-3 months (2,737K)	64.4%	31.9%	3.7%
	1 per 6 months (2,898K)	60.0%	37.8%	2.2%
	1 per year (2,332K)	57.3%	39.7%	3.0%
	Total(Light)	59.6%	39.2%	1.2%
Total		54.6%	42.7%	2.7%



Recognition of hot and cold bathing

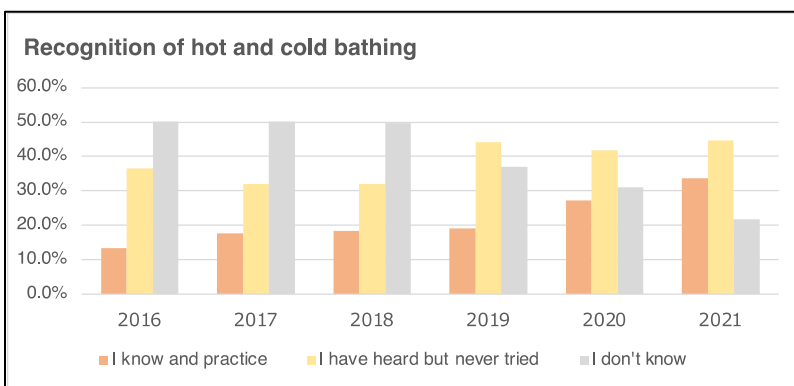
As for hot/cold bathing (cycle of "sauna→ cold plunge→ open-air "), "I don't know" has decreased since the survey began, while "I know and practice" is on an upward trend.

Awareness and practice of hot/cold bathing has been increasing since around 2019 thanks to the sauna boom.

Recognition of hot and cold bathing

Year	2016	2017	2018	2019	2020	2021
I know and practice	13.4%	17.8%	18.4%	19.0%	27.3%	33.7%
I have heard but never tried	36.5%	32.0%	31.9%	44.1%	41.7%	44.6%
I don't know	50.1%	50.2%	49.7%	36.9%	31.1%	21.7%

Percentage in those who visit sauna more than once a year



Methodology of survey

- When: December 2021
- Sample: 5,015 males and 4,985 females aged 18-69 in Japan
- Method: Internet survey (the estimated population was calculated using estimates from the Statistics Bureau of the Ministry of Internal Affairs and Communications).

<About us>

Japan Sauna & Hot and Cold Bathing Research Institute (commonly known as Japan Sauna Institute) is a general incorporated association. We conduct a wide range of research on sauna to promote the mental and physical health of people around the world.



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