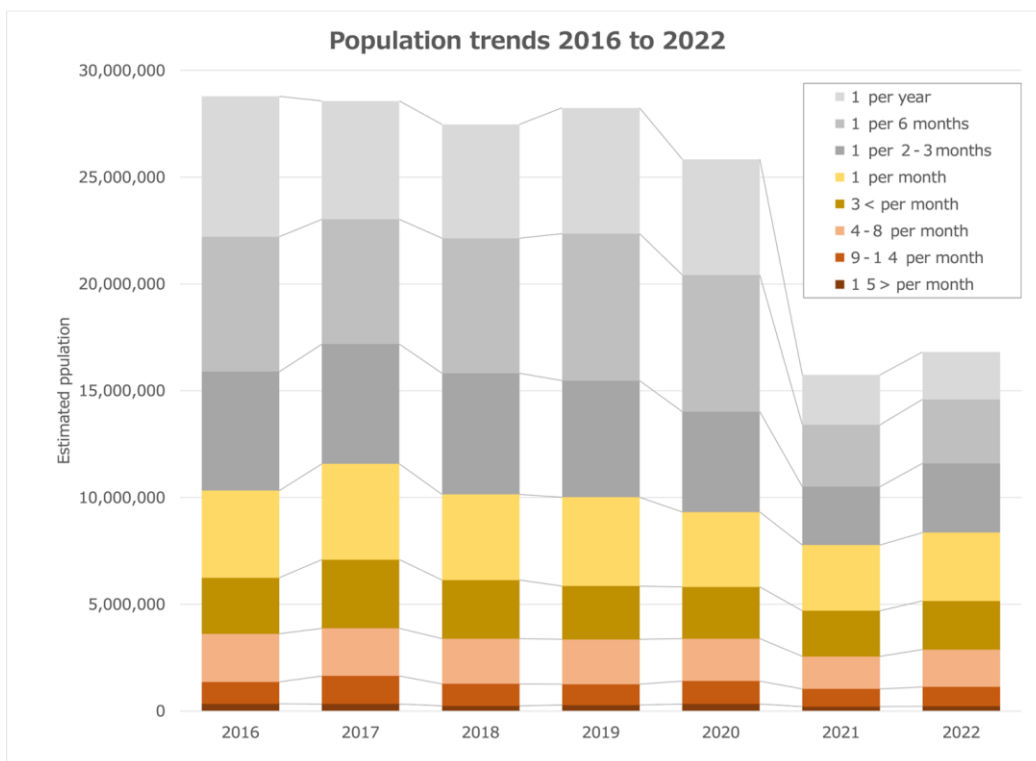


March 7th is the “Sauna Day” in Japan! Sauna enthusiast population is on a rise from last year's decline

One in four sauna users has used a private-room sauna

Executive Summary

- The population of sauna enthusiasts (Saunners) in Japan rebounded to 16.8 million from 15.7 million last year.
- The Heavy and Medium segments showed a robust recovery, while there's still a significant gap with the pre-covid population in the light segment.
- More than 25% of respondents said they had used a private-room sauna, highlighting a new trend in the Japanese sauna community.
- 53.9% of respondents indicated that Covid is the main reason for "not going to the sauna", followed by crowdedness (12.3%) and post-sauna sickness (10.6%).



Categorization of Saunners in this survey

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

Overall trend from 2016

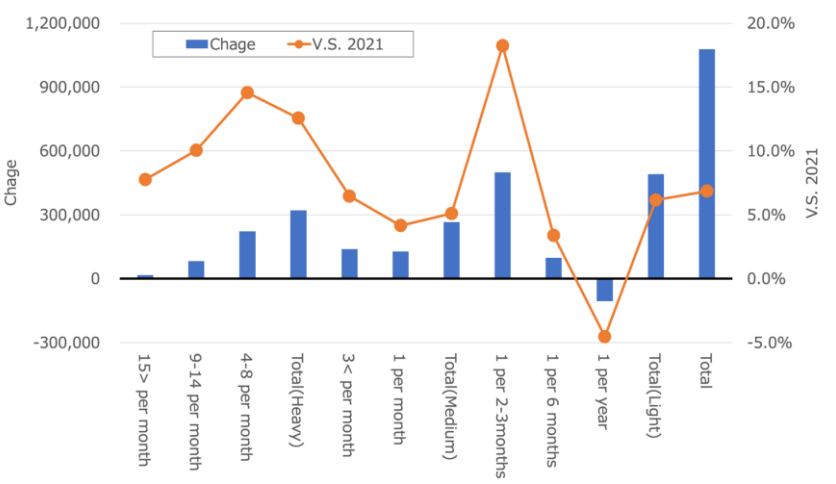
Our previous surveys have shown that there hasn't been a huge change in the population of sauna enthusiasts, contrary to the sensationalist reports in the mainstream media. While we saw a decline in the sauna population in the 2021 survey, in the 2022 survey, we found that the sauna population rebounded across all segments. The changes by segment are as follows: Heavy: 2.87mil (2.55mil in 2021), Medium: 5.47mil (5.21mil in 2021), Light: 8.45mil (7.96mil in 2021). Compared to the pre-covid numbers (2020), there was a significant decline in the population of the Light segment, while the Medium and Heavy segments showed a steady recovery.

Population estimate

Type	Detail	Year						
		2016	2017	2018	2019	2020	2021	2022
Heavy	15> per month	335,607	331,234	241,599	273,886	330,245	206,153	222,139
	9-14 per month	1,023,861	1,313,938	1,030,251	980,199	1,070,564	824,756	907,618
	4-8 per month	2,259,094	2,231,793	2,115,955	2,099,386	1,990,306	1,526,605	1,748,919
	Total(Heavy)	3,618,562	3,876,966	3,387,804	3,353,471	3,391,115	2,557,514	2,878,676
Medium	3< per month	2,622,476	3,210,086	2,742,581	2,499,785	2,416,852	2,138,038	2,276,158
	1 per month	4,085,519	4,492,789	4,017,765	4,163,305	3,510,887	3,075,090	3,202,774
	Total(Medium)	6,707,995	7,702,876	6,760,346	6,663,090	5,927,739	5,213,127	5,478,932
Light	1 per 2-3 months	5,570,640	5,604,977	5,671,362	5,456,381	4,697,138	2,736,900	3,235,853
	1 per 6 months	6,310,379	5,842,989	6,317,070	6,878,204	6,403,533	2,897,834	2,995,830
	1 per year	6,579,091	5,538,005	5,333,334	5,892,537	5,417,905	2,331,846	2,226,030
	Total(Light)	18,460,111	16,985,972	17,321,766	18,227,122	16,518,576	7,966,580	8,457,713
Total		28,786,667	28,565,813	27,469,917	28,243,683	25,837,430	15,737,221	16,815,321

Change from 2021 to 2022

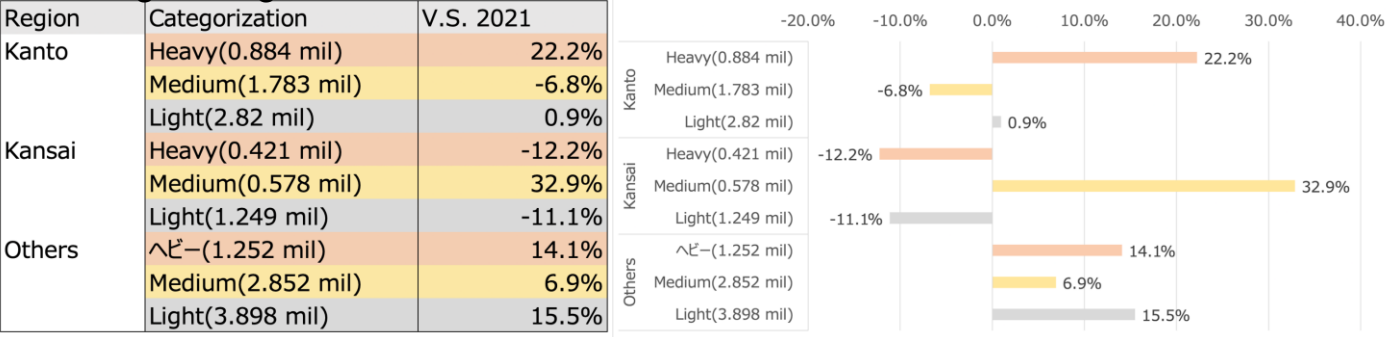
Type	Detail	Change	v.s. 2021
Heavy	15> per month	15,987	7.8%
	9-14 per month	82,861	10.0%
	4-8 per month	222,314	14.6%
	Total(Heavy)	321,162	12.6%
Medium	3< per month	138,120	6.5%
	1 per month	127,684	4.2%
	Total(Medium)	265,805	5.1%
Light	1 per 2-3 months	498,954	18.2%
	1 per 6 months	97,996	3.4%
	1 per year	-105,816	-4.5%
	Total(Light)	491,133	6.2%
Total		1,078,100	6.9%



Regional analysis

The regional analysis showed a large gap in the trend between different regions in Japan. In Kanto, there was a 22% increase in the heavy segment and a 7% decrease in the medium segment. In contrast, there was a 12% decrease in the heavy segment and a 32% increase in the Kansai region. We will continue to monitor the regional trend to identify factors contributing to the discrepancy between regions.

Percentage change from 2021

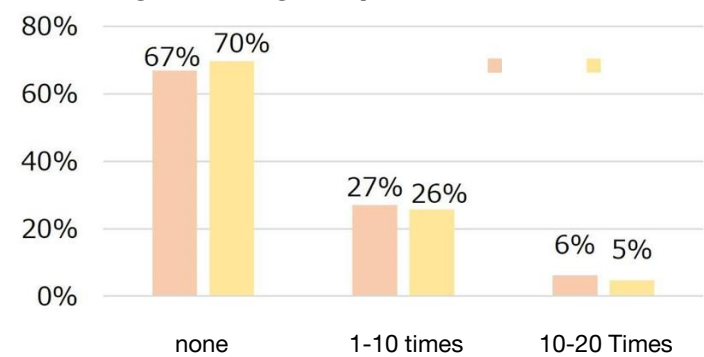


Figures in parentheses represent the estimated population in 2021.
Kanto includes Saitama, Chiba, Tokyo, and Kanagawa Prefectures. Kansai includes Kyoto, Osaka, and Hyogo Prefectures.
Others includes prefectures not included in Kanto and Kansai .

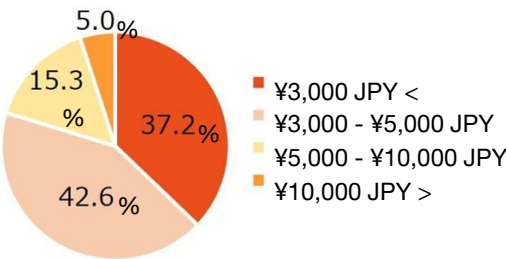
Private-room sauna

In recent years, private-room saunas have become increasingly popular in major metropolitan areas. In this survey, we found that over 25% of respondents (both male and female) have used a private-room sauna. It's worth noting that over 5% of both male and female respondents said they had been to a private room sauna more than 10 times. We expect this category to continue to grow, reflecting a steady demand from sauna enthusiasts.

Percentage of usage of private-room sauna in 2022



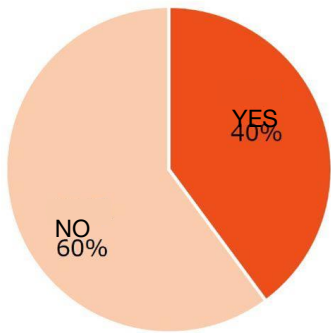
Fee per visit



Reason for not going to sauna

40% of respondents answered "I used to go to the sauna, but the number of visits has decreased or I stopped going". Covid was the most common reason, but several other reasons unrelated to the pandemic were also mentioned.

Do you go to the sauna less often
or have you stopped going?



Reasons	Percentage
Covid-19	53.9%
Crowdedness	12.3%
Post-sauna sickness	10.6%
I'm tired of sauna	9.9%
I don't have anyone to visit sauna with	9.7%
I don't have time to go to sauna now	5.1%
I don't want to be seen as just following crowds	3.8%
Others	13.7%

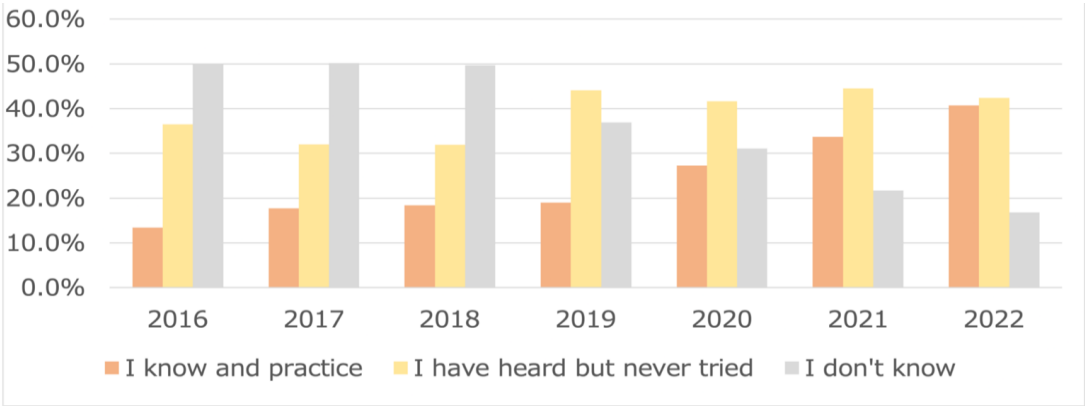
Recognition of hot and cold bathing

For hot/cold bathing (a sequence of "sauna→cold plunge→open air"), "don't know" has decreased since the survey began, while "know and practice" has been on an upward trend. Awareness and practice of hot/cold bathing has been increasing since 2019. We observed the same trend in the 2022 survey, and "I don't know" has continued to decrease since last year.

Recognition of hot and cold bathing

Year	2016	2017	2018	2019	2020	2021	2022
I know and practice	13.4%	17.8%	18.4%	19.0%	27.3%	33.7%	40.8%
I have heard but never tried	36.5%	32.0%	31.9%	44.1%	41.7%	44.6%	42.4%
I don't know	50.1%	50.2%	49.7%	36.9%	31.1%	21.7%	16.8%

Percentage out of people who visit sauna more than once a year



Methodology

- When: January 2023
- 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 (also referred to 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.



Organization:	Japan Sauna & Hot and Cold Bathing Research Institute
Abbreviated name:	Japan Sauna Institute
Establishment date:	October 15, 2015
Representative Director:	Reiji Tachibana
Official website:	http://saunasoken.jp
Email address:	info@saunasoken.jp
Twitter:	@sauna_soken