

# “HEATTECH Nationwide Consumer Survey” Results And 2011 HEATTECH Products

Kensuke Suwa  
Director, Global Communication Division  
Uniqlo Co., Ltd.

## Lead-Up to HEATTECH Development

2001: “DRY” line of functional summer wear goes on sale  
Customers have high hopes not only for functional wear but  
also for functional innerwear.



Potential for a functional wear market



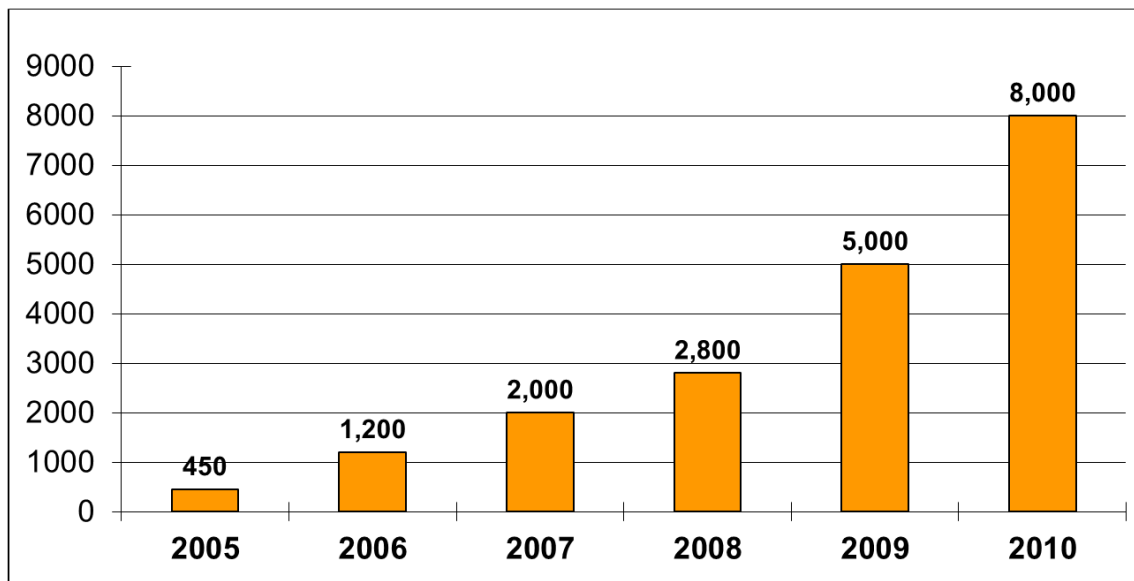
2003      Development begins  
DRY: functional summer innerwear  
HEATTECH: functional winter innerwear

Customer feedback lends itself to the continued evolution of HEATTECH

2003:	HEATTECH sales begin	Heat generation and retention functions
2004:	HEATTECH (Men)	Antibacterial and dry functions added
2005:	HEATTECH (Women)	Moisturizing function added
2006:	HEATTECH (Women)	Moisturizing function improved
2007:	HEATTECH (Men/women) HEATTECH (Women)	Stretch function added Moisturizing function improved
2008:	Global deployment begins	
2009:	HEATTECH (Men/women)	Anti-static and shape-retaining functions added
2010:	HEATTECH (Women)	Thread is made finer, leading to softer feel against the skin

## Annual HEATTECH unit sales

Cumulative total of units sold: Approximately 200 million (199 million)



HEATTECH units sold overseas increased dramatically; up approximately 150% over last year.

We carried out a nationwide customer survey asking a variety of questions including how many HEATTECH products consumers owned, where they wore HEATTECH and how their lives changed after wearing HEATTECH.

**【Sample breakdown】**

Area	Total	Men				Women			
		20s	30s	40s	50s	20s	30s	40s	50s
Hokkaido	144	18	18	18	18	18	18	18	18
Tohoku	248	31	31	31	31	31	31	31	31
Kanto	1032	129	129	129	129	129	129	129	129
Chubu	592	74	74	74	74	74	74	74	74
Kinki	520	65	65	65	65	65	65	65	65
Chugoku	192	24	24	24	24	24	24	24	24
Shikoku	104	13	13	13	13	13	13	13	13
Kyushu	376	47	47	47	47	47	47	47	47

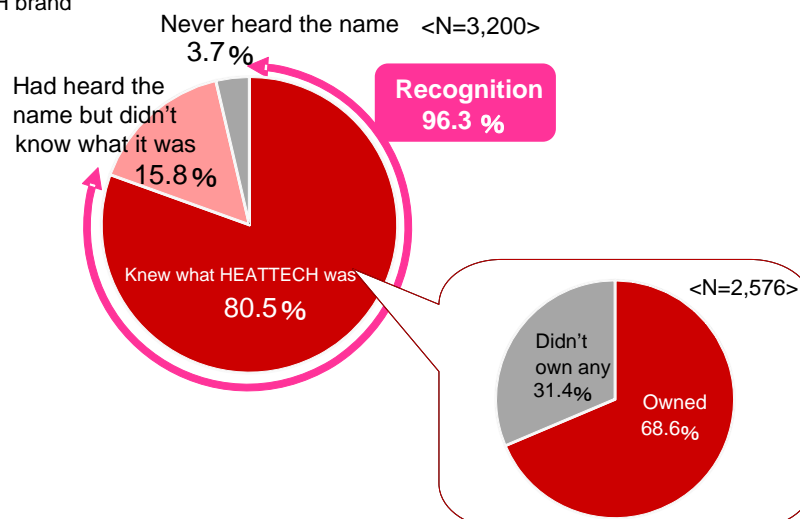
- The survey was carried out so that each area's weight would match its population and no bias would occur.
- The survey was planned so that a sample of at least 100 would be guaranteed for Shikoku, which has the lowest population.

## Recognition Rate: Over 90%

More than 9 out of 10 (96.3%) people surveyed recognized the brand

1 of 2 (55.3%) owned HEATTECH

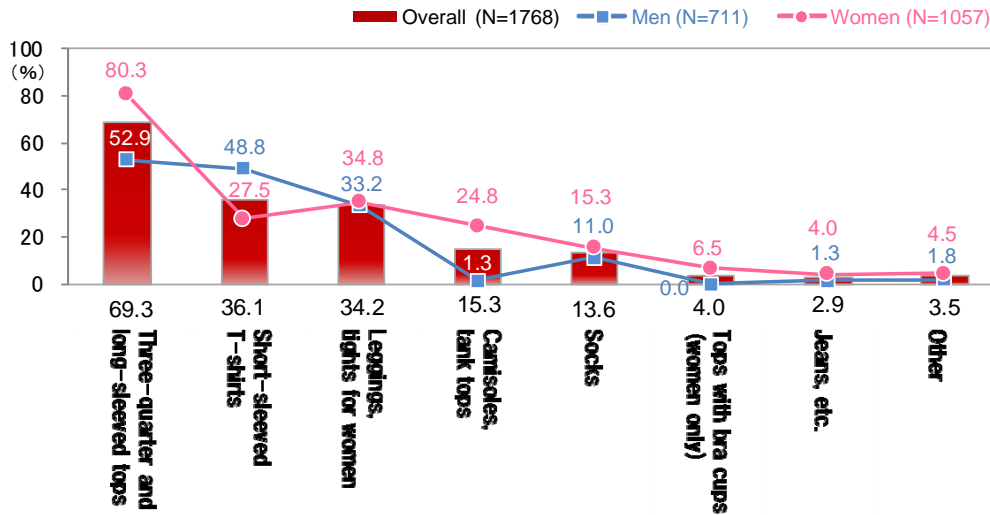
Graph 1) HEATTECH brand recognition



## 4.4 Items Owned on Average

Those surveyed owned a variety of items  
On average 4.4 per person

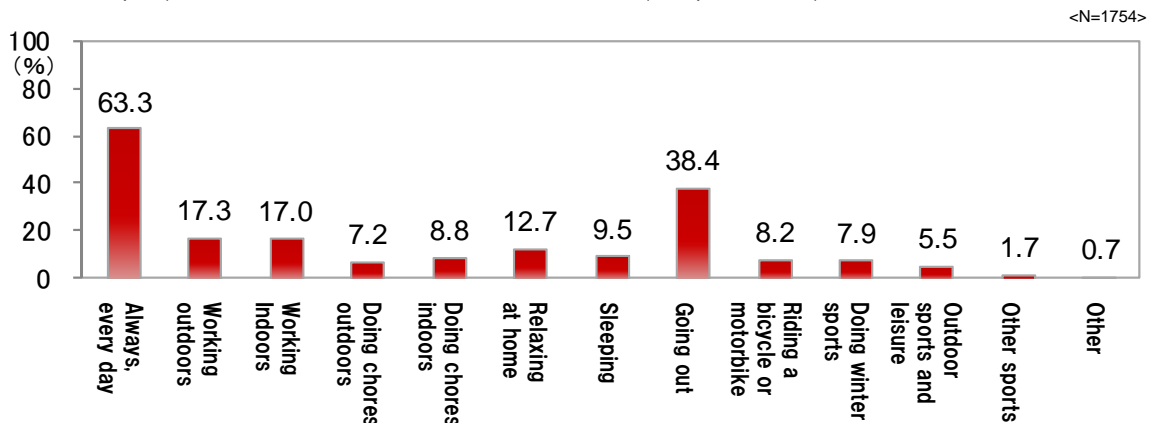
Graph 3) HEATTECH items owned (multiple answers)



## Worn on All Occasions

Worn as an everyday item both indoors and out  
regardless of occasion

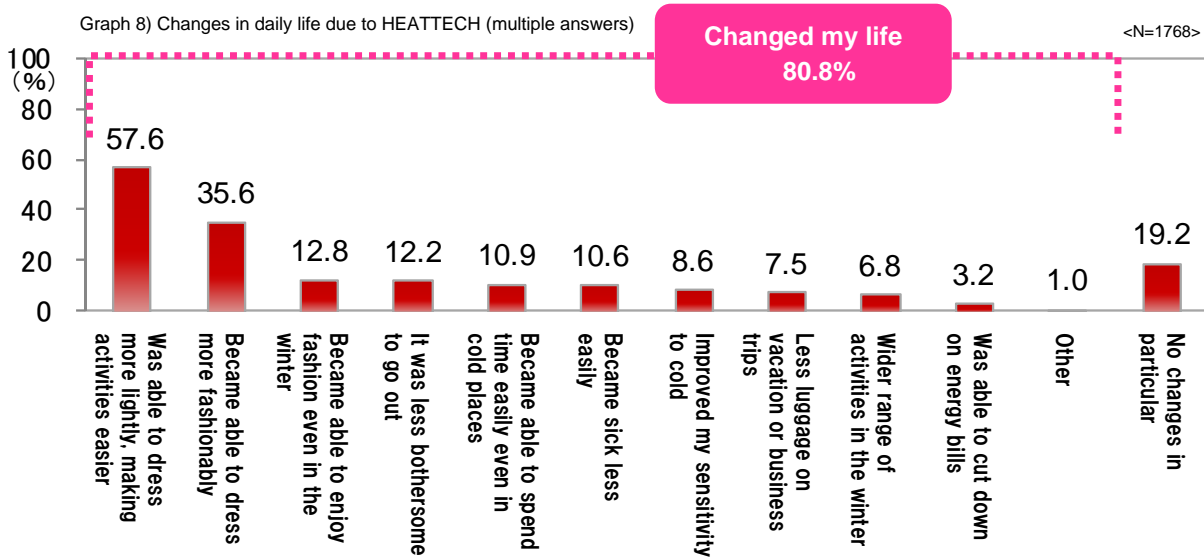
Graph 7) Where customers wore HEATTECH last winter (multiple answers)



<N=1754>

## HEATTECH “changed my daily life” (80.8%)

People reported outward changes, such as a engaging in a “wider variety of activities” and dressing “more fashionably,” but HEATTECH also influenced people inwardly, helping them enjoy winter more proactively



## Real stories from happy HEATTECH customers

It gave me more chances to play outside with my kids  
(39, male civil servant, Kagawa)

I work in the food processing industry so I'm cold during the day, but thanks to HEATTECH I am able to handle my job in good health.  
(59, female part-time worker, Hyogo)

I'd always worn it in winter, but after the earthquake when I couldn't use my heater I put on layers of HEATTECH and got through it. Even multiple layers don't feel heavy, so even when I went to deliver supplies and rescue people it was easy to move, which really helped.  
(40, female housewife, Fukushima)

It's thin and warm so I don't have to pack big, bulky bags when I travel.  
(29, male civil servant, Okinawa)

## Real stories from happy HEATTECH customers

- After the earthquake, I didn't have a heater and it was really tough, but we made it through wearing HEATTECH. (37, male technician, Miyagi)
- I wore it after the earthquake. It was great, because we couldn't use the heating due to the power outages and the kerosene (oil) shortages. (34, female part-time worker, Miyagi)
- After the earthquake, it was priceless when it came to enduring the cold. It wasn't bulky either, which was great when we had to go to the shelter. (30, female housewife, Fukushima)
- I put it on the night of the earthquake, and not even the elementary school gymnasium we took shelter in was cold. (46, office worker, Tokyo)
- On the day of the earthquake, I had to walk home through the March weather for three hours, but I made it all the way home without catching a cold. (50, female office worker, Tokyo)
- When I couldn't go home because of the earthquake and had to wait two hours for the bus in the cold weather, I was glad I wore it as a body warmer. (30, female part-time worker, Kanagawa)



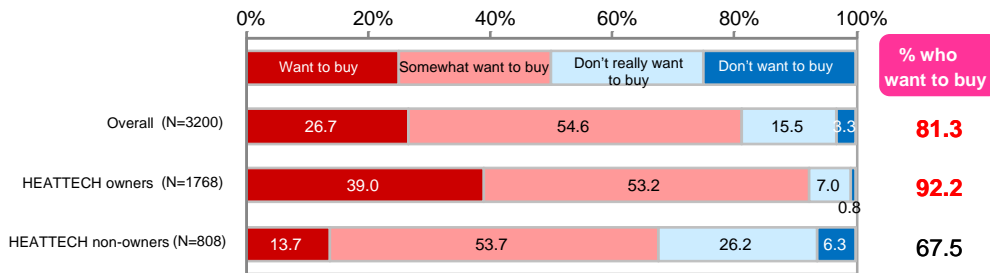
Continuous assistance, responding to customer needs this fall and winter season as well

People who think they will wear HEATTECH more this year than last: 91.5%  
People worried about the winter cold due to energy saving: 52.8%

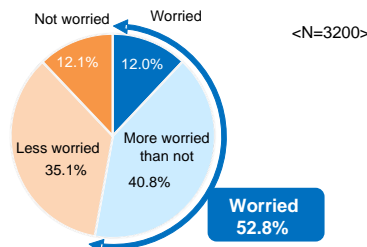


## Heat-retaining innerwear market expanding due to energy conservation

Graph 11) Purchasing trends for this year's HEATTECH items



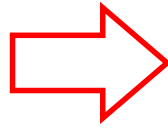
Graph 12) Are you worried about the cold this winter?



## Improvements made based on customer feedback from 2010

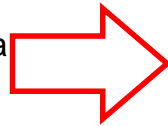
【Large volume of Customer feedback】

- Because people wear layers in winter, odors from perspiration is a problem
- Would like a deodorizing function on undergarments regardless of season



Men's  
Deodorizing  
function added

- It'd be nice to have innerwear with a gentler texture...
- Would like something that isn't stressful (feels heavy) to wear



Women's  
Moisturizing  
function improved  
Weight lightened

12

**New!**

## Deodorizing function added

Unique process deodorizes by absorbing and neutralizing sources of odors, such as perspiration on clothes.

Still deodorizes effectively even after repeated washing.



13

## ① Softer to the touch

- Texture softened by adding whey, which includes natural amino acids.
- Friction between the material and skin reduced by making the thread exceedingly thin. Also made it possible to reduce weight by 10% while retaining full functionality.

## ② Three new HEATTECH bra tops

- Tops with bra cups made with HEATTECH material

### Four features of BRATOP

- ① Double-layered structure on the interior of the cup diffuses absorbed moisture to dry quickly.
- ② Uses a soft cup for a natural fit.
- ③ Support increased thanks to larger two-layered structure on the front.
- ④ Two layers on the side support the bust and show the bust line beautifully.



**NEW!**

## ③ A wide variety of colored patterns

Compared with last year an even greater variety of colored patterns to choose from for each item, including borders, dots and flower patterns: From 2 to 6 types

### ■ Items that had new patterns introduced last year (continuing this year)

HEATTECH crew neck T (long-sleeved)

HEATTECH turtleneck T (long-sleeved)

### ■ Items receiving new patterns starting this year

HEATTECH BRATOP (3 types)

HEATTECH U-neck T (short-sleeved)



HEATTECH Bra Camisole

HEATTECH Bra Tank Top

HEATTECH Bra U-neck T

**New!**

**New!**

**New!**

**New!**

## Special designs for kids

- ① Taking into account the higher activity level of children, the hem is 2 centimeters lower than a regular T-shirt, which means this design won't let children's stomachs become cold.
- ② New HEATTECH tank tops  
Both boys and girls can wear this item.



**New!**

## Sales target: 100 million units

Heading into this winter, which is expected to be bitterly cold, we will be ready to greet our customers with (a new and improved) HEATTECH (lineup) <sup>J1</sup>

J1

Braketed language is optional thought I think it makes the statement more impacting. John  
John, 2011/08/23