EXPLORING WOMEN’S PERCEPTIONS OF THE CONSUMPTION SHIFT TOWARDS BRALETTE IN THE NETHERLANDS
ACKNOWLEDGEMENTS

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DISCLAIMER

1. This report, as part of the graduation project aimed at attaining the BA title from the Amsterdam University of Applied Sciences, has been written and/or compiled solely by me.

2. This project report (or any amended form of it) has never before been submitted by me or anyone else in the framework of a learning assignment aimed at the attainment of a certificate or degree, within the AMFI programme or elsewhere.

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4. All quotes from other sources are recognisable in the report by quotation marks and the sources of all my information have specifically been indicated.

June 12th, 2017
Amsterdam
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ABSTRACT

Throughout history, the needs of women in terms of lingerie have been known to change along with social elements of the time (van Amersvoort, 2017). Recently, it seems like a new shift has taken place in the female underwear industry: the bralette, a brassière with no wiring or padding in its construction, has been adopted by young women in the west and celebrated for its comfort and eclectic designs. Although existing reports offer extensive sales figures and trends resulting from the phenomenon, these disregard a consumer perspective on the subject. Moreover, the novel character of the bralette implies a meager body of academic journals on the topic. This research aims to take a different stand on the topic by exploring the consumer sentiment of the Dutch woman towards this new trend, using a mixed methods approach and an interpretive philosophy. The survey responses from fifty-five female participants as well as the eleven explorative interviews with Dutch lingerie consumers will allow, in addition to the grounded theory from the literature review, to understand consumer behaviour, motives, inspiration and trend diffusion in the context of this product. The thesis concludes with an article that covers highlights around the bralette consumer as well as potential implications for lingerie companies in the Netherlands.

Keywords: Bralette, Intimate Apparel, Influencer, Consumer Motives, Inspiration
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1. INTRODUCTION

In spite of being rarely visible to the exterior gaze, underwear plays a critical part in the fashion discourse and its connection with identity should not be understated (Tsaousi, 2011).

After gaining share in the global apparel market in 2016 (Euromonitor, 2017), the lingerie market has introduced a new type of brassière: the “Bralette”, a shapeless, soft bra designed without padding or wiring that has gained much traction among women in the West.

While several retailers successfully reacted to the trend such as Forever 21, H&M and Love Stories (NRC, 2017), many companies have struggled to jump on the bandwagon, such as lingerie behemoth Victoria’s Secret. After replacing some of their push-up bra shelf space with bralettes this year, their March year-on-year comparable sales reportedly fell by 13%, their worst loss in 35 years. The reason of this loss is thought to be that the little expertise, time and resources needed for the production of bralettes (De Rekenkamer, 2014) generated much lower margins than their wired underwear. This fall was further attributed to the outdated, hypersexualized marketing approach of the brand (Borchardt, 2017) and follows numerous criticisms from the public towards their 2014 “Perfect Body” campaign for presenting unrealistic body ideals (Peterson, 2014).

These facts propose a shift from last decade’s prominent body-shaping culture in female underwear towards a more natural aesthetic for lingerie, which I was encouraged to look further into.

Industry reports and forecasters have confirmed this shift through sales figures and have speculated it to translate female consumers’ new appeal for comfort and the “real” body (Euromonitor, 2017; Business of Fashion, 2017; NRC, 2017). However, the topic has not yet been tapped into by academics due to its novel character, while its main observations found in reports are based entirely on the supply side of the market.

The relevance of going further into the topic is therefore twofold: firstly, it would counter the current gap in academic literature around female underwear in a non historical context (Tsaousi, 2011) and around bralettes especially. Secondly, the little research that has been done on the topic is presented in reports with sales figures, but doesn’t go into consumer sentiment. I am therefore basing this thesis on these facts while attempting to gain better understanding of the consumer habits around the product.

Developing a sociological theoretical ground and a consumer-centric approach of the subject would help companies understand women’s sentiments towards bralettes and therefore maximize positive consumer responses by appropriately marketing the product (Anderson and Narus, 1998). Furthermore, the experiences consumers have with products are frequently interpretively different from those estimated by company managers (Fournier, 1998).

During this project, I attempt to understand this change specifically in the perspective of the consumer and in order to do so, largely focus my research aims on primary data. After a first general look at the phenomenon of bralettes in the Netherlands through questionnaires on the topic, the research will continue through semi-structured interviews with women who have a direct experience with the topic. In order to develop a complete and in-depth concept, I use an interpretive, mixed methods approach.

Since my personal views and the way I experienced the interviews are the basis for the interpretation of the qualitative data, the findings will consequently be a reflection of both the experiences lived by the interviewees and my personal interpretations. The used research methodology and design will be presented in detail in Chapter 3.
1.1 DEFINITIONS

The following concepts had to be defined in the frame of my study:

Bralette: A chest covering bra, provided for lifting and supporting the breasts without substantial compression of the latter. Their design usually excludes any padding or wiring, which is not to be confused with shapewear (unwired bra that compresses the breasts into a certain shape).

(Pedersen and Daniels, 2012)

1.2 RESEARCH OBJECTIVES AND RESEARCH QUESTIONS

This thesis aims to explore the experiences of Dutch women with the phenomenon of bralettes, and regards motives as an essential gauge to explain the consumer attitude towards the product. Eventually, the purpose of this study is to understand the shift towards bralettes through the lens of the Dutch female consumer.

The research question has been formulated as follows:

What is the sentiment of the Dutch female consumer towards the phenomenon of bralettes in the Netherlands?

As the research question takes a broad approach to the subject, I developed four sub-questions that will give a more distinct focus to the topic. First, I will seek deeper understanding of the consumer attitudes of these women towards bralettes (e.g. On which occasions they wear it, how much do they spend per bra on average etc.). The gathering of recurring patterns will be followed by an investigation of the motives behind them. Finally, I will identify the inspiration sources for these women and why this phenomenon is possible today, compared to a decade ago. The sub-questions are the following:

- What is the consumption behaviour of women in the Netherlands towards bralettes?
- What are the motives behind the consumption of bralettes for these women?
- Where do these women source their inspiration from?
- What made the phenomenon possible today?

The figure here-under presents each of the sub-questions with its corresponding literature.

Fig 1. Research Objectives and Literature Review

<table>
<thead>
<tr>
<th>SUB-QUESTIONS</th>
<th>REVIEWED LITERATURE</th>
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<tbody>
<tr>
<td>What is the consumption behaviour of women in the Netherlands towards bralettes?</td>
<td>Market analysis</td>
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<tr>
<td>What are the motives behind the consumption of bralettes for these women?</td>
<td>The five motivational dimensions (Sheth, 1975)</td>
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<td></td>
<td>The means-end approach (Gutman, 1982)</td>
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<tr>
<td>Where do these women source their inspiration from?</td>
<td>The Actor-Network Theory (Latour, 1996)</td>
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<tr>
<td>What made the phenomenon possible today? What changed over time?</td>
<td>A short history of lingerie</td>
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<td></td>
<td>Postmodernism in consumer culture</td>
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<td>The long tail (Anderson, 2004)</td>
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</table>
1.3 THESIS STRUCTURE

This thesis is divided in two main sections: the theoretical and the empirical categories. After announcing the topic of this thesis and establishing its context and structure in Chapter 1, the second chapter presents the literature review, where the relevant previous literature is discussed and theories that will support the empirical section are introduced. In Chapter 3, I use Saunnder’s ‘Research Onion’ (2007) to select the appropriate research methodology, research design, and collection methods for this thesis, and describe them exhaustively. Chapter 4 introduces the empirical part of the study and presents an interpretive analysis of the survey and interview results. These, in complementation to the theories previously discussed in the literature review are further discussed in Chapter 5. Finally, Chapter 6 presents the conclusions of this thesis, as well as its practical, academic implications and the limitations and suggestions for future research.

2. LITERATURE REVIEW

Introduction: An Overview

Due to the lack of existing academic research on the topic, this literature review is a preliminary step for the research question and provides a conceptual framework, drawn from different theories, which will lay the ground for discerning concepts like consumer motives, inspirations, and social context. These concepts will then be used as tools to analyse the empirical data and cover the posed sub-questions.

Part one of the literature review gathers all existing data from reports on the lingerie shift towards bralettes, to support the assumption of such a shift. While part two and three of the literature review look at lingerie consumption on a macro level in society, I further zoom in on a micro-level, namely on the individual itself. Part two will dive into historical lingerie changes and today’s postmodern environment, to explain the relation between underwear and society. Part three will look at lingerie inspiration and adoption, followed by part four with a focus on consumers and their motives. Lingerie in this thesis is considered as an inherent part of fashion. This is why some of the theoretical concepts discussed in the next chapter will originate in fashion generally, but will be applied to lingerie specifically for this thesis.

Figure two, hereunder, offers an outline of the reviewed literature.

Fig. 2: Outline for Literature Review

<table>
<thead>
<tr>
<th>SUB THEME OF INVESTIGATION</th>
<th>FURTHER INVESTIGATION</th>
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<tbody>
<tr>
<td>Part One: Market analysis</td>
<td>Survey</td>
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<tr>
<td>- Introduction</td>
<td>- Survey with 55 female respondents</td>
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<td>- The Dutch lingerie market at a glance</td>
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<td>- The advent of the bralette</td>
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<td>- Conclusion</td>
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<th>Macro Level</th>
<th>Interview</th>
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<tr>
<td>Part Two: Setting the context</td>
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<tr>
<td>- Introduction</td>
<td>- Interview with lingerie historian Judith Van Amersfoort</td>
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<tr>
<td>- A brief history of lingerie</td>
<td></td>
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<tr>
<td>- The postmodern consumer</td>
<td>- Interview with sociologist and teacher Caroline Hanken</td>
</tr>
<tr>
<td>- The long tail theory</td>
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2.1 PART ONE: MARKET ANALYSIS

2.1.1 INTRODUCING THE LINGERIE MARKET IN THE NETHERLANDS

In order to support the initial statement of this thesis suggesting that the shift towards unwired lingerie is in fact happening in the Netherlands, a market analysis was performed. Starting with an overall market analysis to set an economical context, I then bring the focus on the sales of unwired lingerie specifically. Validity of the data was ensured by selecting reliable sources that did not date further back than 2015.

2.1.2 THE DUTCH LINGERIE MARKET AT A GLANCE

Women’s underwear was 2016’s most dynamic category in the Netherlands, with a value growth of 1% that is due to underwear gaining value importance in the eye of the consumer. The sector reaches €410 million or 9.53% of the womenswear market. Although 2016 saw Hunkenmöller BV and Intres BV as the largest players in the Netherlands, H&M recently gained share in the lingerie sector at their expense due to its low pricing strategy. Alongside the Dutch women being generally savvy buyers of apparel, the millennial consumers are further pushing the prices of lingerie down (Euromonitor, 2017).

Unwired lingerie is gaining traction in the Netherlands in both figure adjusting shapewear and bralettes (Business of Fashion 2015). Finally, a majority of lingerie advertisements today portray young, thin women who invoke sexuality and create cultural expectations for women (Tischner and Malson, 2008).

2.1.3 THE ADVENT OF THE BRALETTE

“The push-up category is looking old. The bralette, comparable to the mainstay of skinny jeans, looks like it will be here to stay.”

Cordeiro Grant, 2017
Throughout the gathered data for the market analysis, the link between unwired lingerie and comfort is recurrent. All sales reports used in this chapter suggest that the underwear purchasing behaviour of women in the west is currently shifting towards more comfortable styles (Euro-monitor, 2017; Business of Fashion, 2017; NRC, 2017). This is especially the case among the younger groups who demand unwired underwear, since the older generations tend to ask for more wired support (Business of Fashion, 2017). While this attraction for comfort has been apparent in underpants for a while, with an increase of 17% in brief sales in 2014 to the detriment of thongs (Business of Fashion, 2015), the bra category only significantly joined the movement last year, with the bralette reaching peaks in sales for a majority of lingerie retailers (NRC, 2017). CEO of lingerie brand Lively Michelle Cordeiro Grant predicts that the bralette is on a growth curve that will reach a plateau at one moment (Business of Fashion, 2017).

While last year’s revenue of underwear giant Victoria’s Secret plunged as mentioned in the introduction, the NRC (2017) and the Business of Fashion (2017) found that numerous disruptive niche brands for female underwear, such as Love Stories Intimates, have been attracting consumers exponentially in the Netherlands. Their bralettes are marketed with a female-centric focus on the wearer rather than on the observer (NRC 2017). The Business of Fashion further reports that a wider range of ethnicities is used in their advertisements (2017).

2.1.4 CONCLUSION:

The reports of NRC and Business of Fashion (2017) all suggest a new interest of the female consumer in the West towards comfort and also imply its translation into an increase in bralettes and briefs purchase amongst consumers. I will investigate further the link between comfort and bralettes as part of the empirical data.

Furthermore, it was noted that while millennials push down underwear prices, the younger generations also ask for more comfort. This combination places the bralette as an advantageous purchase candidate for the youthful consumer and can be dug into in the empirical data. In terms of inspiration, further attention can be directed towards marketing techniques for future empirical investigation.

Since these facts were all initiated from the side of the industry, it seemed useful to me to look further into consumer sentiment.

2.2 PART TWO: SETTING THE CONTEXT (MACRO-LEVEL)

2.2.1 INTRODUCTION

“Fashion isn’t just a piece of fabric; it’s everything around it. Fashion is what is happening to the world.”

van Amersvoort, 2017

Fashion in general is a system of change (Wilson, 1985) and always develops under specific socio-historical conditions (Entwistle, 2000). The following section gives the reader a short background on lingerie and touches upon the importance of sociological context to understand changes in Fashion and the body in dress. By zooming out and looking at the past, I aim to understand what societal elements influence change in the lingerie industry and the body through time.

Source: Hölscher, 1998
2.2.2 A BRIEF HISTORY OF LINGERIE

The aim of this chapter is twofold. Firstly, it will investigate the correlation between female underwear and the social world. Secondly, it provides a historical context for this thesis in regards to the bra, that will help me understand it today.

Studying the history of female underwear allows me to identify its connections to the presentation of the dressed body in a social setting and to discern the social, economical, political and technological forces of a particular point in time. It further offers a foundation to understand the complexity of the changing ideals of the female body through space and time (Tsaousi, 2011) and will therefore add content to the shift we are experiencing today.

Sociologists Crane and Bovone defined fashion as “the creation and attribution of symbolic values to material culture” (2006). Therefore, providing some background in underwear history to show how its shifts through time indicate compelling changes in women’s lives (Fields, 2007) implies that lingerie is in fact a part of dress in female identity design.

Since offering an in-depth description of female underwear across history has already been done multiple times (Shelley, 2000), my aim here is rather to give examples of, and explore important advancements in lingerie in the West with evident gaps.

In the past, underwear was created with as sole function to support the upper dress. For this reason, its design and performance changed in parallel to the latter (Tsaousi, 2011). Before the fourteenth century, underwear was not necessarily distinguished per gender. In order to retain a minimum of hygiene, everyone wore a long, washable shirt underneath their woolen or silk clothes that were difficult to clean (van Amersfoort, 2017). It is only after that period, that techniques to shape clothes in a certain way were developed, and that a new function was added to female underwear: the shaping of the body into the ideal silhouette of the time. Gradually, the attention was brought to the female waist and by 1600, the corset was born, narrowing the waist in order for the outer dress to form a skirt (Ewing, 1978). The French Revolution in 1789 came as a turning point, and with the abandonment of the ancien regime in France came the abandonment of constricting dress. The female youth of the day went back to a Greek statue style with see-through fabrics like mousseline. As a different top required different underwear, tight corsets and paniers made room for soft pantalons. These will shorten periodically throughout the 19th century until reaching the shape of underpants that we wear today (Adlington, 2014). While these changes are a telling example of the way underwear is influenced by political context, the industrialisation of the nineteenth century introduced new technologies and an economical change that allowed women to obtain more underwear in different materials and designs. A major case of social change influencing underwear can be the post-1950s increase in working women, which marked a form of social advancement and resulted in the well-known second feminist wave of women freeing themselves completely from the corset and the bra in general (throwing them in garbage bins, not burning them according to popular belief) as a symbol of protest (Adlington, 2014).

A further point to address in this chapter is the general lure of women in history to what is new in fashion and lingerie. To support this claim, I will use the nineteenth century lace as an example. Before that time, the available lace in central Europe was often handmade around the area of Flanders in Belgium. After the industrial revolution however, technology developments allowed a much faster production of lace on machines. Although this lace was much less delicate and complex than the handmade one, women in central Europe all wanted it because it was new (van Amersfoort, 2017).
As a conclusion, history shows that, in order to understand why women adopted the bralette today, it is important to look at the social, economical, political and technological context of the 2010s. The bralette is therefore not a product created out of nothing but an indirect consequence of how women today think, and of their current specific needs. It further shows that trends are attractive to individuals due to their novel character, although this claim cannot be considered as self-sufficient for today’s advanced market and consumer. The following chapter will introduce these complexities and place the consumer in the appropriate context before moving on to the empirical chapter.

2.2.3 THE POSTMODERN CONSUMER

After a short coverage of the historical baggage of lingerie, I found it necessary to consider the societal conditions of the present era, in which individuals evolve along with the institution of new dimensions (e.g. technological innovations). This places the Dutch consumer of bralettes in the correct environment and will be taken into account in the interpretation of empirical data.

While the consumer was considered as a rational and consistent actor in the modern era (Firat and Venkatesh, 1995), today’s postmodern times support a consumption that is more based on emotions, experience and enjoyment, thus making it more unpredictable. The postmodern consumer is therefore identified as being an individual who, freed from modern links, began to recompose these on the grounds of emotionally liberated choice (Cova, 1997). They do not want to listen to CEOs suggesting them how to live their lives (Cova, Kozinets and Shankar, 2007) which makes them less prone to marketing techniques. Boston University faculty director Susan Fournier said that consumers do not choose brands, they choose lives (1998) in an era where consumers have more pulling force on the market than ever (Knights and Morgan, 1993).

As I follow this view, I applied it to this thesis and the interpretation of empirical data. I consequently support the view that products and brands are not endorsed by consumers due to their brand value, but rather due to the value linked to consumers’ interests and life relevance.

In order to complement the postmodern consumer theory, I introduce the Long Tail concept (Anderson, 2004). The long tail, as depicted in Figure 3, is a theory suggested for the first time by journalist Chris Anderson in 2004, which supports the idea of a pre- and post-internet retailing era. In this regard, before e-commerce exploded on the web in the 2000s, retailers only had a limited shelf space in stores. Strategically, and ever since commerce started, that shelf space had been kept for a selection of products that retailers believed would find the highest demand among their customers. The graph for market demand was then depicted as the red part of the graph (the head). However, after the advent of the Internet and the introduction of a global interactive network, not only could like-minded people with interests and needs that did not fit into the mainstream demand gather into stronger niches or communities based on central interests, but shelf space became infinite and so did product offers addressing these niche groups. It is only then that the actual market demands could be depicted as an accurate curve (here, its tail). This exponential curve shows a market that in reality is extremely varied, and half of which is only available on these many, unlimited “e-channels” (Anderson, 2004).
In this thesis, the Long Tail theory, or the higher availability of variety products, is used as an aid to explain the more emotionally liberated choices of the postmodern consumers, as well as their higher pulling force in the market. This will in turn be of help when analysing consumer motivations and to understand how the phenomenon of bralettes can be present today.

2.3 PART THREE: ADOPTION AND DIFFUSION OF TRENDS

In order to set the ground for sub-questions two and three, it is necessary to understand where consumers find their inspiration for purchase and in what ways fashion trends spread through society. Why did the bralette take off today when ten years ago, it was unthinkable even with the already existing technology to create it? This chapter looks at the roles of different actors in society in relation to innovative products, using Bruno Latour’s theory of Actor-Network (1986) as a structural frame.

2.3.1 THE ACTOR-NETWORK THEORY (LATOUR, 1986)

The Actor-Network Theory (A.N.T.) of sociologist Bruno Latour uses natural, technological and social elements as determining and equal actors in the creation, the transmission and the fall of innovations in society.

An innovation, according to Everett Roger’s popular model of Innovation-Diffusion (1995), refers to an idea perceived as novel by an individual or a group of people. In this thesis, the definition will be applied to the bralette, which the empirical data support as being an innovation later in Chapter 4.1.

The A.N.T. explores the manner in which networks of actors are created around common interests and desires, how these come into being, are sustained and made durable over time. The emphasis is set on the strength of the associations between
the actors rather than to question its social or technological aspect (Latour 1988). In Latour’s theory, a network is described as an interrelated system of actors, of which the durability relies on the durability and strength of the links that hold it together. Because of continuous reconfigurations such as the advent of new actors, the escape of older ones or shifting alliances, the network will be mostly unreliable (Latour 1993). Latour defines an actor as a human or non-human entity whose existence is influenced by an entire network of heterogeneous elements. In order to simplify these networks of associations and connections, Callon refers to each actor as a “black box”, therefore making it appear like a single point element. Once the lid of the box is opened, a whole new network of black boxes that are interdependent and form the entity can be discovered (1986). This representation allows the A.N.T. to be presented as a network of clear actors while it actually portrays an infinite reality. By simplifying the complex actors, I will be able to focus on their synergies inside the network around a common interest.

As it is a common tool used in marketing analyses (Tsaousi, 2011), I primarily considered Roger’s Diffusion/Innovation model (1995) to explain the diffusion of the bralette. In this model, the rate of adoption of a trend by members of a social system is used as the relative rapidity for the theory. It is a curved graph built by four main components: the innovation itself, communicated through one or more channels, among members of a social system, over a period of time (Rogers, 1995). The curve depicts five groups of adoption: the innovators (the first to introduce the novel product to the market), the early adopters, the early majority, the late majority and the laggards.

Using this theory in this thesis however, would imply that the bralette was propelled and moved automatically through the masses by a few “brilliant inventors” until some rejecting members would subdue it. The A.N.T. however, rather sees the bralette as the result of “relative convergences” in each actor’s interests (McMaster, Vidgen et al., 1997:4). Law and Callon suggest that, after networks formed around similar interests and countless transformations in links and meanings took place, it is the role of technologists to propose projects and gather resources to accomplish those needs (1988). The latter then becomes real and moves solely if the connections between the actors are strong enough to hold them together as a whole. Only then can the project manifest the convenience, beauty and profitability sought at its initial form.

In this aspect, the A.N.T. is more complete than Rogers’ diffusion model, since it takes into consideration a broader range of factors behind the adoption of a trend. Latour cancels the idea of one or several actors (known as the innovators in the Diffusion theory) “possessing” power to automatically cause change. Instead, power will be exercised when the other actors in the network are persuaded to adopt the innovation and translate or reshape it according to their personal needs (1986). What actors can do however, in order to persuade others and get an innovation accepted, is to adopt strategies aimed at enrolling others and becoming indispensable by making them follow their interests and lifestyle (Latour 1986).

All in all, the Actor-Network Theory regards the success of the bralette as a result of associations between different actors in a postmodern society. Unlike Rogers’ theory of Innovation-Diffusion, the A.N.T. offers an alternative frame to explore the adoption of the bralette in the Netherlands instead of attempting to establish causality links. This adoption is not inherited and automatic but rather relies on a network’s development, in which each actor attempts to convince the others to adopt their view of how the common needs can best be solved. When combined to the Long Tail theory (Chapter 2.2.3), the A.N.T. provides context for the lingerie market in an Internet-era, where information transmission is no longer hierarchical. Instead, it is accessible to all via countless sources that add an infinite amount of factors into the equation. Finally, I believe the exploratory character of this theory will be a fitting match to the qualitative
data gathered in the interviews and will aid in simplifying the in-depth findings into a more structured model.

2.4 PART FOUR: UNDERWEAR AND THE CONSUMER (MICRO-LEVEL)

2.4.1 INTRODUCTION

After zooming out to society in Part Two and Three, this section of the literature review now zooms back in on the consumer as an individual, and looks at how and why he or she engages in certain Fashion phenomena. The chosen theories of the 5 Motivational Dimensions (Sheth, 1975) and the Mean’s End (Gutman, 1982) will help shed a light on the physical and psychological workings of the female Dutch consumer when looking at the bralette and analyse her motives and inspiration.

2.4.2 CONSUMER MOTIVES

Consumer motives are the driving force that leads individuals to take action and answer to their own needs (Schiffman et al., 2005). They are an essential part of this thesis since its aim is to understand consumer perception towards the bralette. The lack of insight into consumer psychology would leave only the physical expressions of the phenomenon, which are already analysed in the first section of this chapter. Furthermore, since this study follows an interpretive approach, the first hand experiences of the consumers are a substantial aspect of the project.

The traditional way of researching consumer motivations through qualitative research is to focus on product features and benefits. This method however, often fails to go deeper into the psyche of the consumer and leaves the researcher with a wide range of one-dimensional responses. In order to prevent this to happen, I am using Gutman’s Means-End approach (1982), which proposes that the consumer values and motives are the main construct that explain decision-making. By assuming that consumers consider the bralette as the means to an important end, the method explains how the product selection leads to a state of achieved desire for the woman. The method is visualised in three intertwined levels: product attributes, direct consequences of use, and personal values (Lin, 2002). By starting with the question “Why do you wear bralettes?” and repetitively asking “Why is this so important to you?” to the subjects of my interviews, I will enter the Means-End value chain at potentially any level and jump through the different layers, from practical subjects (Attribute) to the most abstract ones (Value) as shown in Figure 6.

Invented by Gutman in 1982, the theory sustains that consumers consider products based on the values they want to satisfy. For example, an individual might buy an Eastpak bag. The main attribute they seek with it is quality. For them, the functional consequence is time optimization, which can further lead to the abstract value of security.

Fig. 4: The Means-End Value Chain (Gutman, 1982)
While the means-end value chain identifies the values and motives behind a consumption, the next theory helps to distinguish and categorize the different types of goal states that the individual wants to reach into five categories. In 1975, Jagdish Sheth developed the following Five Motivational Dimensions: (1) the functional motives, related to the product's technical functions, such as the waterproof aspect of a raincoat, (2) the aesthetic-emotional motives, such as style, design and comfort of a product, (3) social motives, that relate to prestige and status the individual gains from the product, (4) situational motives, such as availability or price discount, (5) and finally the curiosity motives, which are trials for innovative products.

This theory was used as an analytical frame in the empirical chapter for the construction of survey questions as well as the coding and analysis of interview results.

The combination of these two theories provides a solid basis for the exploration of the Dutch consumer’s experience with bralettes. Another important aspect that will be taken into account by me however is the belief that consumer psychology and life in general are multidimensional. Thus, the consumer motives that impact on their behaviour are too. This means that the explorations in this study are not working towards a strict categorization of consumer types but rather towards the acceptance that each individual is complex and layered and is thinking and behaving on multiple levels.

2.5 CONCLUSION AND IMPLICATIONS OF THE LITERATURE REVIEW

As mentioned before, due to the lack of academic journals on the topic or of consumer-generated data, the relevant literature for this particular topic has been designed to firstly, collect some facts about the bralette in the perspective of the lingerie retailers and secondly, to set some theoretical ground for the appropriate collection, generation and analysis of data in the empirical chapter of this thesis.

The market analysis supported my initial sentiment of a shift towards the sales of bralettes in the Netherlands and all sources sustained that comfort was a crucial consumer value when it comes to lingerie. This will be designed consequently as a recurrent theme in the primary data gathering. Also, the young age of the bralette wearer that was reported in several sources will be used as an indication to find relevant subjects for the survey and interviews.

The theoretical part of the chapter established that social, economical, technological and political context correlate with lingerie and its transformation through history. As for today, consumers in a postmodern society seem to be lead more by their emotions, which adds relevance to this research on the consumer sentiment around bralettes. They further have increasing demand power, refusing to let companies dictate how they should live.

The advent of the Internet allowed the rise of thousands of niche markets. The bralette as a trend, according to the Actor-Network theory, was born from a common interest or problem around which actors created connections. This network is influenced by an infinity of human and non-human elements. Once the links between these elements became strong enough, the now evolved problem was solved by technologists (here, retailers), creating into a tangible project. Although the power to influence the network around the bralette is in the hands of all actors and their attitude towards the product, a few can still prevail by making their opinion indispensable.

Finally, the motivations of these women for adopting the bralette can be varied and influenced by personal desires or the exterior environment. It is then essential to use
the means-end approach in the qualitative data, an efficient manner to link consumer behaviour, motives, and values towards bralettes (Gengler and Reynolds., 1995) and therefore sub-questions one and two.

The literature review further confirms that there is a lack of research in consumer perception in the lingerie industry. By placing the emphasis on empirical data, this thesis is the first step for lingerie retailers toward understanding a new type of consumer.

3 METHODOLOGY

3.1 RESEARCH APPROACH

In order to select the appropriate methods for the design of this thesis, I used the Research Onion as shown on Fig. 7. The selected methodology is based on the belief that the perceptions and interpretations of an individual by themselves construct a social reality. The interaction with individuals with as purpose to gain understanding of their experiences is therefore a valid means to gather data (Mason, 2002). In addition to this, Fashion can be seen as a complex system of messages, since it is impossible to ignore who interprets those messages (Wilson, 1985). This view implies that in the case of this study, the data that was gathered will be interpreted and decoded through my perception.

Starting with the outer layer of the onion, the research will be interpretive, which adopts a philosophy stating that in the social world, one cannot theorise with set “laws” just as it is done in physical science (Fournier, 1998). Therefore, understanding the diversity between individuals in their roles as social actors is essential for me. This philosophy fits the aim of this thesis, which is not to explain or create definitions for consumers towards bralettes but rather to explore their perceptions of the movement.

Although this subjective view and high impact of individual perspectives on the data mean that the primary findings will not be able to be generalized, the method allows the addition of much depth into the project.
As heavily impacted by personal viewpoints and values, primary data cannot be generalized but allows to add great depth to the study (Saunders et al., 2009). The research will be inductive, also known as theory-generating, since the aim of this paper is to explore and understand consumer perceptions, not proving a hypothesis. Although the literature review indicated that some lingerie shapes are shifting, I will now go deeper into the subject. This will be possible via the mixed methods approach, which by mixing qualitative and quantitative research findings, allows triangulation for an investigation of the topic on different levels (Mason, 2002).

By starting off the empirical research with the quantitative data, the thesis will:
- gain a comprehensive look at the principal consumer patterns for bralettes;
- give a direction for the interview design;
- understand why these women responded the way they did.

3.2 DATA COLLECTION METHOD

3.2.1 QUESTIONNAIRES - QUANTITATIVE DATA

A cross-sectional survey was built in order to gain an overview of the women's behaviour and choices towards bralettes that was insufficient in the literature review. These surveys were a first step before achieving first insights and being able to design pertinent interviews accordingly.

Design

The survey was divided into two distinct directions for the respondents: "I never/seldom wear bras" (the negative consumers) and "I Sometimes/Often/Always wear bras" (the positive consumers). Out of all respondents, 19 were negative consumers while 36 were positive consumers of bras. Both groups included similar questions when possible, such as "What elements are more inspiring to you in terms of lingerie?", out of which the possible responses were factors such as Magazines, Social Media, Friends or Family, Company Commercials, Television, Blogs and the Male Gaze. The identical question building was done primarily due to the difficulty to be exclusive with negative consumers when sending out surveys but also with the anticipated aim to compare both groups’ responses with each other.

According to the motivational dimensions theory of Sheth (1975), products have to be considered on multiple dimensions per consumer. Therefore, when logical, questions were built in a manner that could accept several responses or gauges (e.g. "To what extent do the following influence you?").

Although most of the questions were designed around consumer behavior and motivations, the last theme of the questionnaire was created around marketing. This was done while keeping in mind the market analysis findings saying that many of the campaigns for major lingerie retailers today are getting out of fashion, compared to the new, smaller lingerie brands representing a wider array of women.

I presented seven lingerie campaign images of different styles, containing both bralettes and non-bralettes. The ads were purposefully differentiated, among which a blonde and slender Forever 21 model wearing a push-up bra, and a plus size model from Aerie. Hereunder, the seven images are represented in a collage.
The questionnaire was further designed with the inclusion of responses covering the five Motivational Dimensions of Sheth as well as intrinsic and extrinsic motives to link the empirical data to the literature review. Finally, open questions such as "What are you still missing in the lingerie industry today?" were posed to both negative and positive consumers, to add some context to the initial consumer perception approach.

Sampling

The quantitative data was collected from fifty-five female participants, all of which were approached through the social media platform Facebook and selected on the basis of their gender. All of the women belonged to the age group of Millennials (in this case, from 17-32 years old).

Analysis

The analysis of the findings started with the observation of statistical charts generated by Google Forms [2017]. Several patterns in behavior were pointed out for women using bralettes (or not), after which, I transferred the responses into excel to identify links that were not evident directly.
3.2.2 ONE-TO-ONE SEMI-STRUCTURED INTERVIEWS

"Through the personal stories of the people, you get a sense of the time and of the fashion."

Interview with lingerie historian Judith van Amersvoort, 2017

Design

After gaining an initial insight into the bralette consumer’s experiences through the analysis of the quantitative data, I created a table (cfr. Fig. 8 in appendix for details) to provide the readers with a visual summary of the questionnaire analysis and build a starting direction for the interviews. My four initial sub-questions are shown on the left, in the middle the conclusions and patterns that refer to each one of these questions, and on the right, the corresponding questions that were used for the further exploration of consumer sentiment in the qualitative research.

The interviews were constructed in a semi-structured manner, where the interviewer prepared a schedule in order to keep some control of the discussion while allowing flexibility in the participant’s responses. That way, the interviewer could explore the feelings of the interviewee about bralettes in great depth, while once in awhile, leading the discussion back to the main themes (Thompson et al., 1989). In order to keep consistency in the interview structure, the interviewees primarily discussed their consumption behaviour towards the bralette, after which the chronology of the main sub-questions was kept.

One specific technique used as a sub-part of these interviews was the means-end approach, which as described in part four of the literature review, is a deep and individual questioning method that aims at understanding the sometimes subconscious reasons of the consumers’ value decisions (Gutman, 1982). This makes possible the reaching of greater abstraction and understanding of qualitative data. After starting with the question: “Why do you wear bralettes?”, I went on asking why until I reached the deepest level possible of abstraction.

Sampling

In-depth interviews were performed with five Dutch women who agreed to participate: Karlijn (21), Annemarijn (23), Renee (24), Larissa (20) and Gaia (22). All of them were part of the same age group, following the literature review results showing a preference of bralettes amongst the younger generations mostly. All except one of them (Larissa) were positive consumers of the bralette.

After following the questionnaire results and asking the girls about their inspiration sources for lingerie on social media, their responses lead to several names of Dutch women with influential accounts, whom I contacted for interviews. Out of them, Instagram artist and photographer Daantje Bons, Feminist Art Fest creator and Facebook influencer Jolien Spigt, Photographer of Dutch girls in the intimacy of their homes Ramona Deckers, and journalist for Vileine magazine Cathelijne Blok responded positively and were used as subjects to gain an influencer perspective on the phenomenon of bralettes.

In order to explore the subject from different angles and therefore increase the validity of the gathered data, interviews were overall conducted with persons of varied relations to the topic. This triangulation allowed a better understanding of the consumption of unwired lingerie, its motives and inspiration for women in the Netherlands. Aside from the four consumers of bralettes, one negative consumer, and the four social media influencers, I further interviewed a lingerie historian (Judith) and a sociologist and specialist of the body and the dress (Caroline) to get insight on some unsolved theoretical applications on the case.
3.2.3 DATA ANALYSIS METHOD

The qualitative data was analyzed according to Thompson et al’s (1989) take on the interpretive philosophy. There are two phases of analysis for the qualitative data: in the first one, each interview is interpreted one at a time, and in the second one, they are compared in order to identify patterns. I transcribed either the complete text, or important sections for the discussion, after which I read them one by one to establish an understanding of all the world views of the respondents. Finally, recurrent themes will be colour coded and connections will be made between the interviews.

4. FINDINGS

In order to analyse the empirical data with a mixed methods approach, I joined the responses of the quantitative surveys and qualitative interviews for greater triangulation of the data. I further separated the findings into different themed chapters that related to my four sub-questions, which ensured a complete coverage of the topic.

4.1 CONSUMER BEHAVIOUR

The knowledge generated in this part of the questionnaires is complementary to the findings of the market research. After looking at the survey responses, it was possible to identify some behavioural patterns of the bralette consumers.

Out of all respondents, a majority of 30.9% reported to wear bralettes often. A total of 72.72% of the women were positive consumers (Sometimes, Often, Always) and 27.23% were negative consumers (Seldom, Never). The positive consumers further mentioned the bralette as being the second most present type of bra in their wardrobe (37.5%), closely after the lightly lined bra (42.5%).

Fig 7: Bra types
Which of the following bra types are you most likely to have in your wardrobe?

The respondents further support the market analysis findings reporting that millennials push down the bra prices, as a great majority of them (54.3%) spends an average of 20€-40€ per bra.
Fig. 8: Average spending on a bra
How much do you spend on average on a bra?

![Graph showing average spending on a bra](image)

When asking on which occasions these women wear the bralette, the following results came out:

Fig 9: Wearing occasions of bralette
On which occasions do you usually wear a bralette? (Multiple answers possible)

![Graph showing wearing occasions of bralette](image)

As shown here-above, 55% of the girls wear bralettes primarily when they want to relax, while 47.5% wear it when they want to go on a fun night out and 32.5% when they go to work. The next section on consumer motivations will attempt to establish the benefits that the bralette gives these women during these activities. The element of comfort appears to be essential, as Daantje reported in her interview on wearing bralettes when going out at night: "It all depends on my mood really. I used to put a lot of effort in my lingerie when I was younger. Now, I just want to be able to dance and be comfortable when I go out." When talking about the relevance of the bralette as a lingerie product, Ramona says that out of all the girls that she photographs nowadays, none are wearing hard shell bras anymore.

4.2 CONSUMER MOTIVES

While the first part of the findings was focused on the physical expressions of the bralette consumption, this chapter aims at a better understanding of the consumer psyche and introduces the emotional aspect that is situated at the core of the research question.

Although the average budget for a bra in the last section could suggest that an affordable price holds a prior place for the positive consumers, this assumption was ruled out when the survey responses for the determining factors of lingerie purchase were analysed.
As seen above, “Price” came out as the fourth most important factor only when purchasing lingerie (after design, comfort and quality), with more responses suggesting it is instead “somewhat” influential to the respondents. When asking the subjects during the interviews, never did price come out as a reason for the purchase of the bralette. “Of course price is important to me, and it is a great bonus that bralettes are so cheap. But to be honest I would rather buy something that I like and feel good in, since I have to wear it every day. So to me, price comes second.”

However, a major response to be highlighted here is the prevalence of design and comfort above all else. With only one differential vote, the two criteria share the first place of importance in lingerie purchase. This trend was maintained with the following question.

Most of the positive consumers answered “Because it feels comfortable” (Comfort, 74,3%), “Because I find them sexy” (Seduction, 42,9%) and “Because it feels more natural” (Authenticity, 31,4%). While these numbers support that the differentiating tangible value gained from the bralette for these women is comfort, they further add the dimensions of beauty and authenticity to the reviewed literature, which were also recurrent in the qualitative research. The latter was used as a means to reach a deeper psychological level of these motives and get to the core of their needs, partly through the Means-End approach.

Renee joined the three dimensions by saying: “Traditional bras are very uncomfortable and oppressive. I think sexiness should be comfortable. Lingerie is something that should support your body and make you comfortable in your own skin instead of shaping it or hurting you.”. As Ramona feels that beautiful, sexy lingerie is important for herself, Karlijn, instead, often chooses comfort over looks. But she adds: “What is great with the bralette, is that for the first time, it gives me both!”. During the conversation with Gaia, she mentions that: “I think that what is attractive with this trend of bras is that it comes in between the comfortable aspect that many girls look for nowadays but keeps the nice designs, which were usually always very tight in the past.”. The bralette, according to its consumers, is one of the first brassières that successfully taps into the two most important aspects for this consumer simultaneously.
The Means-End approach was used next in order to attempt to establish a link between consumer behavior and underlying motives. Out of five subjects questioned following this approach, four only achieved the end value stage of the chain. Add some girls only beauty?

The three following graphs represent the answers that I received for each dimension brought up dimension.

Fig. 12: A Means-End value approach on the bralette consumption

In all of the cases above, the initial comfort, beauty and shape-free character issued by the bralette lead to higher psychological confidence through comfort, beauty and authenticity. This allowed me to reach a deeper understanding of the origins of consumer preferences and suggests that physical garment attributes can have a direct impact on the wearer’s psyche.

The first step for me was to apply Sheth’s Five Motivational Dimensions theory to the empirical responses I received. I then created a visual map as seen in Fig. 13.

Fig 13: The 5 Motivational Dimensions of the bralette

* seldomly mentioned - ** often mentioned - *** prevalently mentioned
Due to the previously established fact that motivations are multidimensional and that a physical state can lead to a similar mental one, some of the responses were placed in multiple dimensions. As seen on the graph, a greater number of the responses belong to the aesthetic-emotional motivational dimension.

The next step was to understand whether these motives were more intrinsic or extrinsic according to Deci and Ryan’s (2000) model. For example, do women pursue sensuality for their own satisfaction or their partner? The following question provided me with an impression of their perception on the matter.

**4.3 MARKETING**

This section of the findings is based on the market analysis results, the postmodern consumption theory and the survey analysis that all suggested a loss of interest in lingerie advertisements by bralette consumers. The aim of this chapter is to understand the perception and attitude of the latter towards marketing in the lingerie industry. Starting by exploring what these women dislike, I will then attempt to understand their preferences and what they feel like they are missing.

Six out of the seven interview subjects on mainstream lingerie advertising claimed to be dissatisfied with the way mainstream lingerie companies market their products, the three main reasons being the abundance of models with unrealistic body expectations, limited diversity and oversexualised images. Karlijn declared: “I don’t want to look at a woman staring at me sexually when I shop. It gives me the feeling that I should above all be sexy and attractive to someone else.”

From the marketing question presented in the research design, a large majority of women (43.6%) chose picture 7 from Lonely Lingerie. The ad embodied several traits that differentiated it from the rest: the atmosphere is spontaneous and seems digitally untouched, with a model a woman leaning casually against the sink of what appears to be her own home, with a white unlined bra and brief, no makeup, messy hair and visible pubic hair. The second choice was the only other ad of the same brand with 20.5% of votes, in which a woman of colour is wearing a bralette in natural light as seen in Figure 14 (see options “C” and “F” on the graph).

**Fig. 14: Favourite lingerie ad of the bralette consumer**

Of the following, pick your favorite lingerie ad:
When asked to justify their choice, 62% of women’s open answers revolved around one theme: the natural and relatable character of the image (this theme will be addressed in detail in Section 4.5).

The brands that have been doing it “right” for a while and came up repetitively were: La fille d’O, Love Stories Intimates, MarieYat and Calvin Klein. Their diverse model choices and untouched branding are what struck the bralette consumers most. In order to attend to their needs, they suggest companies should pay more attention to diversity, especially when it comes to gender and cultural topics.
I arouse in #mycalvins

Calvin Klein

Adwoa Aboah, Model

“I love the ads for Calvin Klein underwear. They give a unisex and bizarre kind of feeling that can still be super sexy. I think it’s just a matter of old perception and new perception.”

Ramona Deckers, 2017
The idea of La Fille d’O is all about saying: “This is your body. You should respect it and you can also present it in something that reflects your body even more instead of transforming it with for example push up bras.”

Cathelijne Blok, 2017
However, Daantje, Cathelijne and Ramona all mentioned a hypocrisy amongst certain brands who were trying to cater to them for mainly commercial purposes. Daantje claimed: “There is one problem. Mainstream brands pick up on this trend and use it as a marketing strategy, but they end up not being as inclusive as they say and not making any actual changes, because the rest of their brand culture does not follow.” Ramona further supports that it comes across as fake.

All in all, the findings in this chapter support the theory of postmodernism claiming that C.E.O.s have less power on consumer purchasing decisions, as well as the idea that consumers don’t choose a product for the brand value, but they choose according to the value of their own lifestyle. In other words, the bralette consumer actively seeks products at brands that are in line with their own lifestyle.

4.4 INSPIRATION

With the aim to offer an answer to the third sub-question of this thesis, the following data gathers the different actors that come into play when a positive consumer builds an opinion and taste around lingerie. A survey question about their inspirational sources for lingerie offered the following responses.

Fig. 15: To what extent do you think the following influence your preferences in lingerie?

For all positive consumers, the top three sources have a common ground: Social Media (1st), Friends or Family (2nd) and Your Partner (3rd). All three sources represent direct or word-of-mouth sources that are not actively targeting the subject. This again supports all previous data on a general lack of trust by the consumer. Surprisingly however, the same question for negative consumers brought opposite results, with Social Media arriving last.

This pushed me to investigate into the latter, and approach women who specifically were reported to have leverage on the initial subjects through social media.

After conducting interviews in both the influential and initial groups, the most common response justifying the attraction of bralette consumers towards social media was that it offered platforms for communities who have similar interests but don’t relate to the mainstream market to find each other.

Daantje explains that, as social media is one click away, it is easy for people to create communities all over the world, especially with Facebook and Instagram. It is how like-minded people create a sense of togetherness around similar values or ideas, and in that sense feel less alone.

When investigating deeper into what made these influencers prone to be seen as such, it seems as if strong values and authenticity were a factor of attraction. According to Jolien, Instagram is a platform where women can display their lifestyle,
and inspire others to adopt it: “It’s about copying each other and trying to fit in in some way. And when you see someone wearing something unapologetically and outside of the box that you like, you think: ‘Hey, this is also a possibility, I’m going to do it as well’ and you feel less alone somehow.” Annemarijn mentions that with the growth of bralette adopters, fast-fashion corporations such as H&M and Forever 21 take over the idea and once it is out in the stores, it loses its initial originality.

Instagram artist Daantje believes that although most girls are wearing the bralette for comfort and beauty today, it started as a statement by showing it on social media. While the positive consumers chose the influencers as their source of inspiration, three of the latter: Cathelijne, Ramona and Daantje, referred to female artists showing themselves in bralettes as their own inspiration for it. Cathelijne takes Beyoncé as an example, and after mentioning the criticisms the artist faced for using visual media platforms for commercial purposes, she shared her admiration for using her “natural” body and wearing the bralette to start a discussion and make a point about diversity.

Cathelijne adds: “I think it is interesting to see that original marketing campaigns are soon going to be beaten by influencers or girls on social media. And I very much hope those girls will be the leaders or starters of their own campaigns.”

4.5 INNOVATION ORIGINS AND ADOPTION

In order to establish the bralette as an innovation according to Rogers’ definition of the term, the following question was posed:

Fig. 16: Past purchase behaviour
Did you use to purchase bralettes in the past?

With an overwhelming majority of responses (89.7%) for “No, never” and “Yes, but less than nowadays”, the respondents then justified their response with the answer “Because they are now socially accepted as beautiful” (42.5%). Further, Renee adds that to her, all garments that are available in the big stores become accepted as beautiful by society, since the mainstream sellers invest in it to target the masses.

These reactions support that, to the eye of its consumers, the bralette is a novel product, a trend. This justifies in turn the use of the A.N.T. later in the research, but raises the question:

Why is this trend possible today?

For this section of the findings, I will set focus on the comfortable aspect of the bralette, as the consumer motives analysis gathered that comfort was the primary functional
benefit of wearing the bralette for the positive consumers. After establishing this, the interviews constituted a determining part of the research, as they helped comprehend the search for the product attribute of comfort that was formerly secondary. As seen earlier in the brief history of lingerie, the latter often changes along with the environment in which it is considered. The data was screened and three patterns of social context for the popularity of comfort came out:

1. Age: younger girls often get really insecure due to their changing bodies, says Ramona. It takes a while to accept it and choose comfort over beauty, but as she grew older, Daantje cared less and less about what people thought. Ramona, Jolien, Cathelijne, Daantje, Annemarijn, Renee, Gaia and Karlijn have all reported that they were mildly to extremely dissatisfied with their bodies as teenagers and have more confidence today.

2. Level of activity: historian Judith suggests that women are becoming increasingly active. In addition to working more hours since the nine-to-five day is getting longer, an increasing amount are taking on studies, and creating a family. The choice of comfort is a way to support this active state, as opposed to, for example, 1950s housewives who were still wearing stiff underwear due to their rather inactive state.

3. The “natural” body: while this subject has been touched upon in section 4.4 on marketing, the girls repeatedly reported that what characterized this era is that people are striving towards greater diversity. Not only in sizes and shapes, but also in cultures and gender.

4. A biological lifestyle: sociologist Caroline and historian Judith both bring up the current appeal of society towards a biological lifestyle. More and more women move towards biological foods, recycled fabrics and vintage garments and “this mindset also translates into their aesthetic values” says Judith. She further stresses that throughout history, topwear and underwear have always been interdependent and correlating. To her, the longing for bras and comfortable dress fits perfectly into this movement, with as example the current trend of lounge wear being worn outside one’s home.

As themes one and two have been relevant themes for several decades already, or even since always, they can not possibly provide a complete answer to why women adopted the bralette. For this reason, points three will be dug further into in the qualitative data.

4.5.1 DIVERSITY

When discussing body inclusivity with my subjects, all agreed upon the initial description of Daantje: diversity has to do with the shift of women looking at which type of woman they are and bringing the focus onto their individuality. Cathelijne says the perception of women is actually slowly shifting already in all sorts of disciplines, such as the movie or music industry. An increasing amount of strong women are portrayed in big media, and offer a broader definition of femininity that was not available in the sector twenty years ago.

Daantje, Cathelijne and Jolien all mention feminism as an important tool to spark inclusivity. As Cathelijne explains, today’s feminism is reaching for some new objectives. While the first wave of feminists fought for their political right to vote, the second wave in the sixties created a loud battle on the body that regarded a tough woman as a non-feminine one. The third wave opened the boundaries of feminism.
to bring it outside the West to seek for universal equal rights. Although the latter is far from achieved, Cathelijn and Daantje both speculate that feminism today has entered a fourth wave that is busy looking at the different types of women, with a message that all backgrounds should be positioned equally.

“This wave is not about just white men vs. white women anymore,” says Cathelijn. As this movement seems to align with the reasoning of the bralette consumer that has been researched so far, no causality links should be established but I will consider it as an actor in the network around the bralette.

The interviewees mention the responsibility of mass media when it comes to progress in female ideals. “Why create one universal ideal? There isn’t one example of a ‘good’ female in the world. Perhaps you prefer one type as an example and I don’t, or the other way around,” says Cathelijn. Daantje further reports “I believe this bralette movement also has something to do with this longing for inclusivity. It’s going more towards the natural body and is freeing in a sense of letting go of unrealistic ideals.”
4.5.2 THE “NATURAL” BODY

Throughout the last chapters, the term “natural” body was brought up multiple times. In order to create an accurate social definition for it, I enquired sociologist Caroline Henken about it.

In the interview, she clarified that the word “natural” was relative to the time and place in which it is used. Therefore, it is a normative idea.

In history, one will notice that the word was used to describe what society considered as being “good, nice, in the norm” and stands against something that is not seen as such anymore. Thus, when speaking of today’s “natural body”, one would refer to what is seen as ideal or normal in this era in terms of body figure. If this idea is juxtaposed to the growing appeal of diversity, the definition of a natural body today could be to just let the body be whatever it is, in opposition to the constricting culture of shapewear that is typical of last decade (Judith).

4.6 THE NEGATIVE CONSUMER

As the subject of this thesis is the perception of the shift towards bralettes for the Dutch consumer, it was essential to include the analysis of the negative consumer data for the completion of my findings. This addition highlighted some patterns of the positive consumer as being outstanding or out of the norm in comparison to the rest.

Throughout the responses, I repeatedly came across an interesting component: it appears that most of the respondent who did not wear bralettes did so partly due to their larger size of breasts. The following survey answers suggest that a lack of support (50%) was a primary reason for their rejection of the product.

Fig. 17: Why do you never wear bralettes?

This was only confirmed in the open survey question “What do you feel is missing in the lingerie industry?”, where a coded identification system accentuated that these women were longing for brassières that combine a beautiful design and support (40%) on the one hand, and on the other hand, more bralette options for larger cups (33.3%). The two patterns point towards a target group that is not catered to properly in their consumer needs for lingerie.

Several results for the group were interesting to look at when juxtaposed to the positive consumer group responses. For example, in the importance of different criteria in their choices of lingerie, while the positive consumer presented design and comfort as most determining criteria for purchase, the following responses came out for the present group:
Fig. 18: Determining criteria for negative consumers
To what extent do the following criteria influence your lingerie purchases?

One can see that comfort inarguably comes out as a secondary factor here, with design prevailing in importance. When asked to comment on this result in the interviews, negative consumer Larissa explained that comfort was essential to her well-being in terms of lingerie, but that she often had to choose between design or comfort due to her particular bigger size. She further supposes that perhaps, the results of this survey relate more to women knowing that choosing comfort as a priority would imply a bra with an unaesthetic design, and therefore design prevails.

The final and most surprising trend compared to the positive consumers is the one of the inspiration sources as shown on Figure 19.

Fig. 19 Inspiration for negative consumers
To what extent do you think the following influence your lingerie purchases? (Negative consumers)

The general pattern for negative consumers shows a much more adverse perception of lingerie inspiration, as the answers pull more towards the lesser options (“Not at all”, “Very Little” or “Neutral”) than for the positive consumers. Moreover, Social Media and Friends & Family, which dominated the positive group, came out with the most unfavorable answers from the non-consumers. “Your Partner”, “Magazines”, “Social Media” and “Blogs” were the only options receiving a mildly positive response. This could suggest a higher faith in big media than the first group.

Larissa goes on by saying that the two main options for her E cup breasts are to either shop in an exclusive lingerie boutique where bras are of quality and beautiful but extremely expensive, or to go towards seamless or shapewear for comfort but only to find boring designs. Most bralettes nowadays only bring support up to a C or D cup.

Finally, she adds: “What I would really love, is a bra that looks delicate and girly, but that I can still afford.”
5. DISCUSSION

This chapter makes its way into answering the initial sub-questions of the thesis and eventually, respond to the main research question:

What is the sentiment of the Dutch female consumer towards the phenomenon of bralettes in the Netherlands?

As the design of the sub-questions gradually move towards the deeper layers of the topic, so does the research. Therefore, after attending all sub-questions I will use Bruno Latour’s Actor-Network theory to encompass all the findings and give them a simplified structure.

5.1 WHAT IS THE CONSUMPTION BEHAVIOUR OF WOMEN IN THE NETHERLANDS TOWARDS BRALETTES?

The findings for this chapter on consumer behaviour suggest that hard shell bras are slowly making their way out of the positive consumers’ wardrobes, to leave room to the bralette, which is now in average the second most present bra. Women also report purchasing more bralettes now than they did in the past, which supports the general sales increase reported in the market analysis of the literature review.

While price was described in the literature review as being pushed down increasingly by young consumers, the data that was gathered exclusively from millennials supported that claim with a low average budget to be spent on a bra. However, it should be noted that for them, price is appreciated but is however not a priority in their criteria for underwear purchase. The positive consumer further wears her bralette on many occasions, may it be inside to relax or on a fun night out, which places the bra as a multifunctional product in the underwear category.

5.2 WHAT ARE THE MOTIVES BEHIND THE CONSUMPTION OF BRALETTES FOR THESE WOMEN?

A further investigation into consumer sentiment confirmed the postmodernist view introduced in the literature review, sustaining that consumer needs are today lead by emotions. This was done with an application of Sheth’s five motivational dimensions, which presented the aesthetic/emotional dimension as gathering a majority of the consumer motives from the primary data.

The most critical result of this chapter was the importance of two factors above else in the eyes of the bralette consumer: beauty and comfort. Although the latter is by far the dominant reason for consumers to purchase bralettes, the design factor should not be underestimated, as the combination of both creates the unique selling point of the bralette and a perfect middle-ground to cater to the consumer needs.

Additionally to its ability to give a causality link to consumer behaviour and motives, the means-end approach demonstrates that the functional aspects of the bralette, when worn by the consumer, are translated into corresponding psychological feelings (ex: Comfortable fabric leads to emotional comfort).

This again explains why shifts in underwear are often supported by social context (van Amersvoort, 2017): because the physical comfort translates into the mental state or values that the wearer wants to gain.
5.3 WHERE DO THESE WOMEN SOURCE THEIR INSPIRATION FROM?

Over the past years, the subjects have developed a general scepticism towards mainstream lingerie marketing due to a portraying of the woman that is too sexualized and creates unreachable body ideals. Instead, they would like to see representations of women that are more realistic and relatable, but also more diverse in their choice of models. Companies should however adopt this perspective holistically in their communication to the consumer, at risk of being perceived as fake or ill-intended.

This lead these women to retract from the mainstream market and instead, use social media platforms to find like-minded people and create niche communities. These tendencies both support the loss of faith in corporations seen in the postmodern theory as well as the long tail theory, that explains that these consumers have turned themselves towards smaller, niche communities of consumers of similar values through the Internet.

Further, it justifies the word-of-mouth and non-commercial character of their three main inspiration sources: “social media”, “friends & family”, and “their partner”.

The sources of inspiration on Social Media are specifically the “influencers”, who can be seen as actors of the A.N.T. who adopt strategies to enrol others and be indispensable by making them, literally, “follow” their lifestyle. Consumers who admire these values get a chance to adopt them and interpret them according to their own lifestyle. In this case, these influencers, in turn, can take inspiration from other influencers big artists who make a statement about diversity through big media, such as Beyonce.

5.4 WHAT MADE THE PHENOMENON POSSIBLE TODAY?

The starting point to answering this question was to understand why there is a sudden appeal towards the factor which differentiates bralettes from its predecessors; in this case: comfort.

Following the theories in the literature review, social and political contexts of today are used to explain this shift in consumer need. From the qualitative data, four topics were identified as causes of a need for comfort for the bralette consumer: (1) maturity and age, (2) the level of daily activity of the consumer, (3) an organic trend that praises the natural body and (4) a longing for female diversity that is influenced by the fourth feminist wave. Due to their novel character, the two last topics have higher relevance for this shift.

The bralette, with its soft and simple construction, can be easily seen as following the “natural body” of women and therefore, be inclusive of all shapes. However, the concept of “natural” should be taken carefully, as its definition is relative to what is seen as “normal, good” in that period of time. Considering that the past five years have known a growing trend towards healthy living and social diversity in the West, the new definition of “natural” or what is nice has grown to fit that mindset. Therefore, this thesis presents the term “natural” as being “close to its passive, original state” that differs from the shapewear culture of the early 2000s. It is this new definition of what is nice and in the norm that is thought to have influenced the bralette consumer towards new consumer needs.
5.5 THE NEGATIVE CONSUMER

The inclusion of the negative consumer in the research indicated a product rejection that was not justified by a lack of aesthetic interest but by the unsuitability of product attributes for larger breasts. As most of the questioned negative consumers have a bigger cup size, this unsuitability is due to a lack of physical support from the construction of the bralette, which usually supports sizes up to a C or a D only. With lingerie options ranging from beautiful but expensive bras to supportive shapewear with monotonous designs, these consumers are left in the middle with no options that offer the comfort and beauty that the bralette does to smaller sizes.

All in all, these results show the ideals of body diversity brought by the bralette are not all-encompassing, as the product excludes an entire segment of consumers. This opens a new path for future research in the field of product development. By investing in product development and creating bralettes that offer enough support for the bigger sizes, lingerie retailers have the opportunity to tap into an entire group of consumers whose needs in this upcoming product category have so far been overlooked.

5.6 AN OVERVIEW: THE BRALETTE AND THE ACTOR NETWORK THEORY

As the findings suggest a reality of multiple human (influencers, consumers, retailers) and non-human (social media, environmental context) actors influencing the Dutch woman’s perception of the bralette, the Actor-Network theory of Bruno Latour previously introduced in the Literature Review will be the main structural frame to interpret the findings of my research.

In order to provide a common structure to present the bralette trend and how it was introduced and adopted by the Dutch consumer, this section uses the A.N.T. of Bruno Latour that was introduced in the literature review and applies it to the empirical findings earlier bestowed. Considering that the A.N.T. is a model that involves a monumental amount of actors that are interwoven into a complex network of relationships, it is important that this chapter considers, as suggested in the theory, representing each actor as a single black box.

As the several social layers established in 4.5 creating a context for the place and time of the network, women gathered around the common need for a beautiful and comfortable option for underwear.

In the adapted model (Fig. 21), the bralette holds a central position the bralette, the one of common interest or gluing element of the network holding the actors together. Although all the presented actors (gathered from the earlier findings) are interwoven, only the more obvious links are depicted, as the relationships between all factors are infinite.

The right side of the graph first presents (1) the social factors that influence our particular woman’s taste in lingerie today, containing the aspects of (1.1) age, (1.2) an appeal for organic, (1.3) an active lifestyle, (1.4) diversity and (1.5) the “natural” body as seen in section 4.5 of the findings. According to the A.N.T., the bralette was developed a direct consequence of these two actors, once the links between the initial actors became strong enough and the initial (10) technologists gathered the resources to solve the lack of comfort and beauty in lingerie. These technologists consist of mostly independent retailers such as La Fille d’O, Love Stories Intimates and Lonely Lingerie whose marketing aligns with the demands of the human actors of the network.
Fig. 20: The actor-network theory and the bralette
Once the product entered the market, it was endorsed by some women in the community (6), (7), and (8) who spread their lifestyle more or less according to their ability to persuade others. As social media provides a perfect platform to get coverage, build up and present one’s lifestyle, many of the stronger actors can be found on these digital networks (6) persuaders 1 and (7) persuaders 2).

As mentioned by influencers Cathelijne and Daantje, fast-fashion brands pick up on niche movements gaining importance. Recently, a (11) second group of technologists/retailers, such as Forever 21 and Victoria’s Secret, tapped into the segment and introduced the bralette as a trend to the mainstream. The intervention of this actor offered greater coverage of the bralette, as well as a “normalisation” of the product. As discussed with Caroline, this normalisation can add to the concept of “natural”, or “ideal” for this era. This explains why the (9) mainstream “consumer 2” comes in later in the process as an actor and endorser of the bralette because they find it beautiful.

As Latour’s A.N.T. suggests in Chapter 2.3, the actors and their network are in constant development, as their meaning and values change through new associations and changing interactions. In this sense, it was important to distinguish the different consumer groups (6), (7), (8), (9) from each other, as they join the network at different points in time and their differing relationships to the product influenced the meanings they give to the bralette.

In this perspective, the first endorsers stand closer to the social factors at the origins of the network creation, while the later incomers are positioned closer to the big retailers (newly defining the bralette as “in the norm”, “accepted as beautiful”). This holistic view allows me to propose a classification of associated meanings of the bralette per consumer type, where the initial actors formed the community around common interests of social diversity ideals. This meaning, which is present among the early persuaders, then gradually leaves room to the practical, and aesthetic attributes of the product (beauty and comfort), the more the network evolves. Therefore, as shown on Fig. 20 with the grey arrow, I suggest that, while the bralette was initially charged with abstract symbolic value (social/political context), the product became increasingly valued for its tangible features, that correspond the the primary meanings given to the bralette by all newly entering actors.

5.7 RESEARCH LIMITATIONS AND FUTURE RESEARCH —

Although this thesis is the outcome of a meticulous and forceful approach to research, I am aware of its shortcomings. Firstly and most importantly, the research was conducted in a very limited amount of time, due to a late change of approach. In two and a half months, I did not reach the level of completion that I initially sought, in spite of a driving motivation. Secondly, the interpretive approach to the research implies that a certain level of objectivity cannot be reached. This is due to the importance of qualitative data for the research question and to the analysis of primary data by myself. Finally, the exploration of the negative consumer’s perceptions should have been approached more in-depth, with more than one subject to interview for higher validity of the data. This would have introduced a new dimension to the relevance of my findings and allowed to introduce a potential solution for the identified problem. Instead, it will be considered as a promising path for future research in the field of product development, and open doors to a new consumer group who needs a higher technical performance in order to endorse the bralette.

The results reached through the exploration of the consumer in this thesis can further be used as a starting ground for the understanding of this woman’s needs, or for future investigation in the field of marketing for lingerie.
6. CONCLUSION

According to many industry officials, the bralette is a phenomenon that is currently gaining share in the Dutch lingerie market for the first time (NRC, 2017; Euromonitor, 2017). However, little is still known about why this change came to be and how it is actually perceived by the consumer. This interpretive study provides some emotional and social context for the adoption of the bralette in the Netherlands, and can be used as a tool to help lingerie retailers be more in line with the Dutch consumer. The bralette was popularized by an online community of women with mutual interests, who could not identify with the mainstream media. By redefining the concept of the natural body, the bralette has now been endorsed by fast-fashion retailers and is seen by consumers as a unique middle-ground between comfort and design. Future research is further suggested in the field of product development, in order to adapt the bralette to the physiology of women with larger breasts and therefore, cater to their needs.
SECONDARY DATA:


**EMPIRICAL DATA:**

- Pire, N (2017). Interview series with influencers Darantje, Ramona, Jolen, Cathelijne
- Pire, N (2017). Interview with lingerie historian Judith van Amersvoort
- Pire, N (2017). Interview with teacher/sociologist Caroline Hanken

**LINKS:**

- https://www.google.com/patents/US8235602
- https://www.npo.nl/de-rekenkamer/04-12-2014/KNL_1663954
- https://www.researchgate.net/figure/282912642_fig2_Figure-2-The-research-onion-Saunders-et-al-2012
- https://rockresearch.com/understanding-consumer-decision-making-with-means-end-research
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<td>Bralettes are considered by consumers as a trend.</td>
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