



The world of second-hand clothing in the clothing universe

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Introduction

The act of dressing yourself:

A matter of universal motivators

Picture yourself standing in front of a rack, torn between a vintage jacket and a brand-new piece fresh off the runway. At first glance, these choices may seem polarizing, the motivations driving the decision to buy clothes are remarkably similar—whether the garment is new or pre-loved

First and foremost, there is the quest for functionality and comfort. It doesn't matter if the garment has been pre-loved or is brand new; it must fulfill its practical purpose. Providing shelter, adapting to the weather and being appropriate for specific activities are requirements that do not distinguish between new and old.

Self-expression also plays a central role in this equation. People wear clothes to reflect their personal style, values, and their belonging to certain social groups. This desire to project an identity is not confined to a brand-new label; even a second-hand garment can speak volumes about who we are and who we aspire to be.

Furthermore, the perception of quality and value is a powerful motivator. Consumers are looking for clothing that offers durability and good value for money. This principle applies equally to a meticulously preserved vintage coat and a freshly launched dress from a popular brand.

Social and cultural influences know no boundaries between new and used. Fashion trends, peer approval, and social media influence guide purchasing decisions similarly in both cases. Whether it is an influencer rediscovering vintage pieces or a fashion-forward advertising campaign, shopping inspiration doesn't discriminate.

Finally, the pursuit of novelty and emotional satisfaction are universal drivers. The joy of acquiring something that makes us feel good is a powerful motivator. This search for happiness and fulfillment isn't restricted to new garments; a second-hand piece of clothing can evoke the same sense of pleasure

In this context, the importance of garment fit has become a decisive factor.

In a world where design has increasingly homogenized across brands, achieving a comfortable and well-tailored fit now holds greater significance than the label itself. With the exception of luxury brands—whose status remains prized among those familiar with their prestige and meaning—modern consumers place a higher priority on fit and comfort rather than the brand name.



The act of buying clothes is driven by basic motivators that do not differ between new and used. Functionality, self-expression, quality, social influences and the desire for personal satisfaction are constant forces that transcend the product category, redefining what really matters when choosing what to wear.

What is the meaning of clothes?

They are my current way of feeling

They are a necessity imposed by market trends

They are my way of attracting other people's attention

They are the way I can stand out uniquely

They are an essential product that I use to adapt to the weather in the best way possible

They are a great tool to fit into different social environments

They are an authentic representation of my personality

Chapter 1

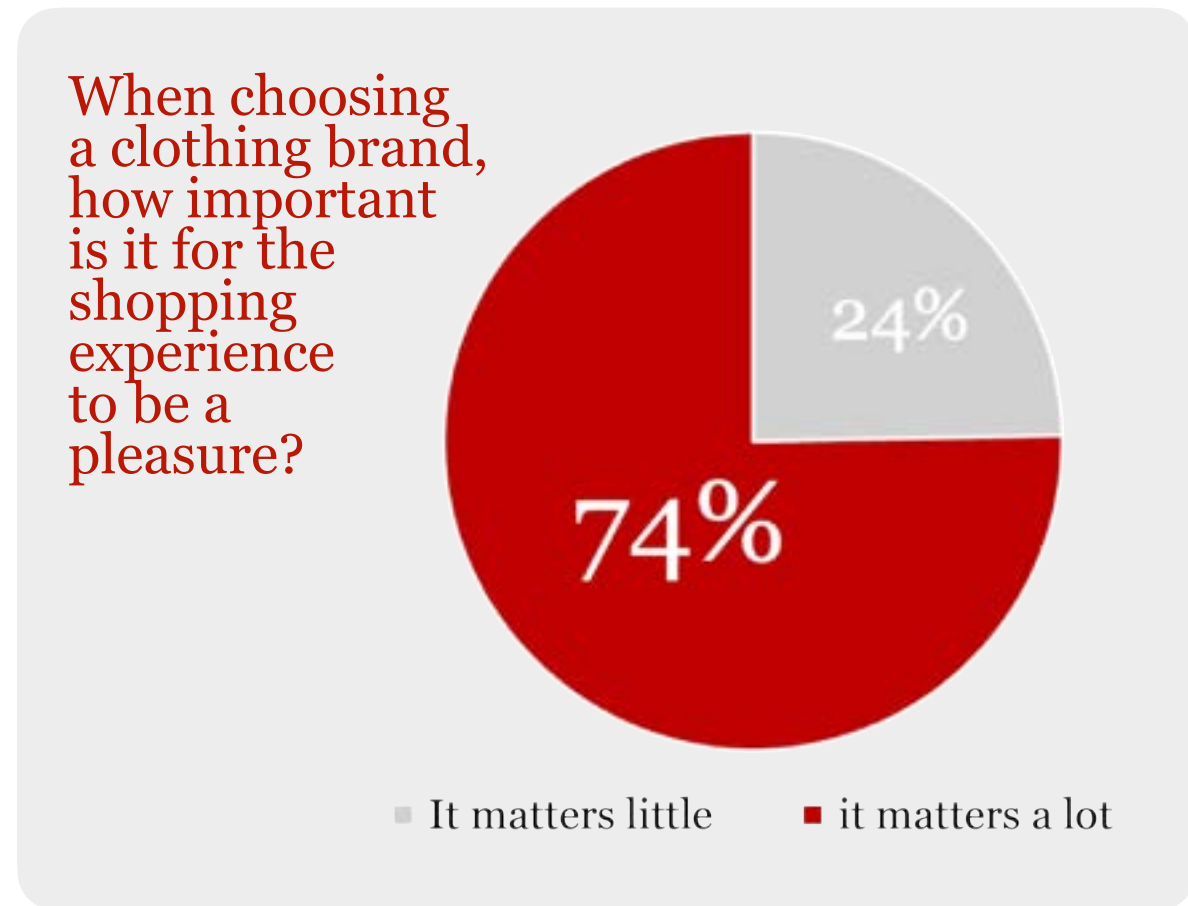
The sensory experience

The heart of clothes shopping

The purchasing process for both new and second-hand clothing is deeply connected to the in-person shopping experience. In this context, sensory stimuli at the point of sale serve as both powerful motivators and potential barriers when selecting a store or a garment.

The weight of sensory stimuli is undeniable. The tactile experience of feeling the quality of a fabric, the visual satisfaction of finding an attractive color or design, and the olfactory pleasure of a pleasant scent are aspects that deeply influence the purchasing decision. Whether in a high-end boutique or in a second-hand clothes store, in both cases these stimuli determine the perception of garment quality and value.

Consumers need to touch, see and smell clothes to be convinced about purchasing them, and this sensory experience is what often makes the difference between taking a garment home or leaving it on the shelf. However, these same stimuli can become barriers. In new clothes stores, an unattractive environment, messiness, or even poor lighting can deter shoppers. Similarly, in a second-hand store, the perception of clutter, lack of hygiene or an unwelcoming environment can be significant obstacles. The in-person experience not only motivates, but can also discourage, creating a psychological barrier that influences the final decision.

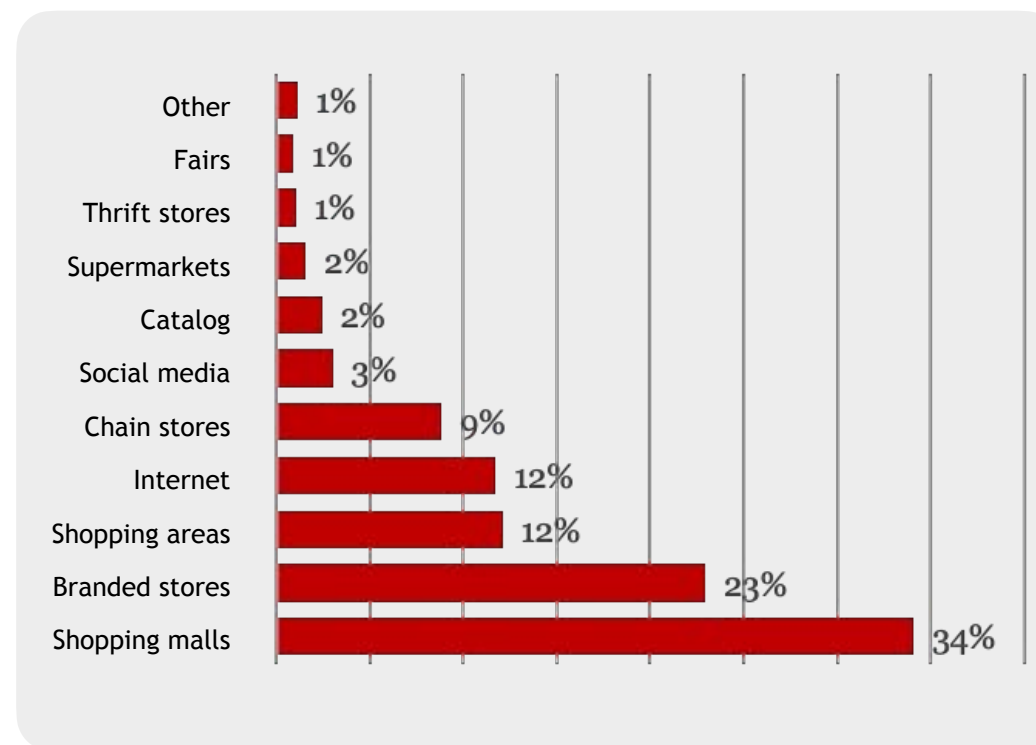
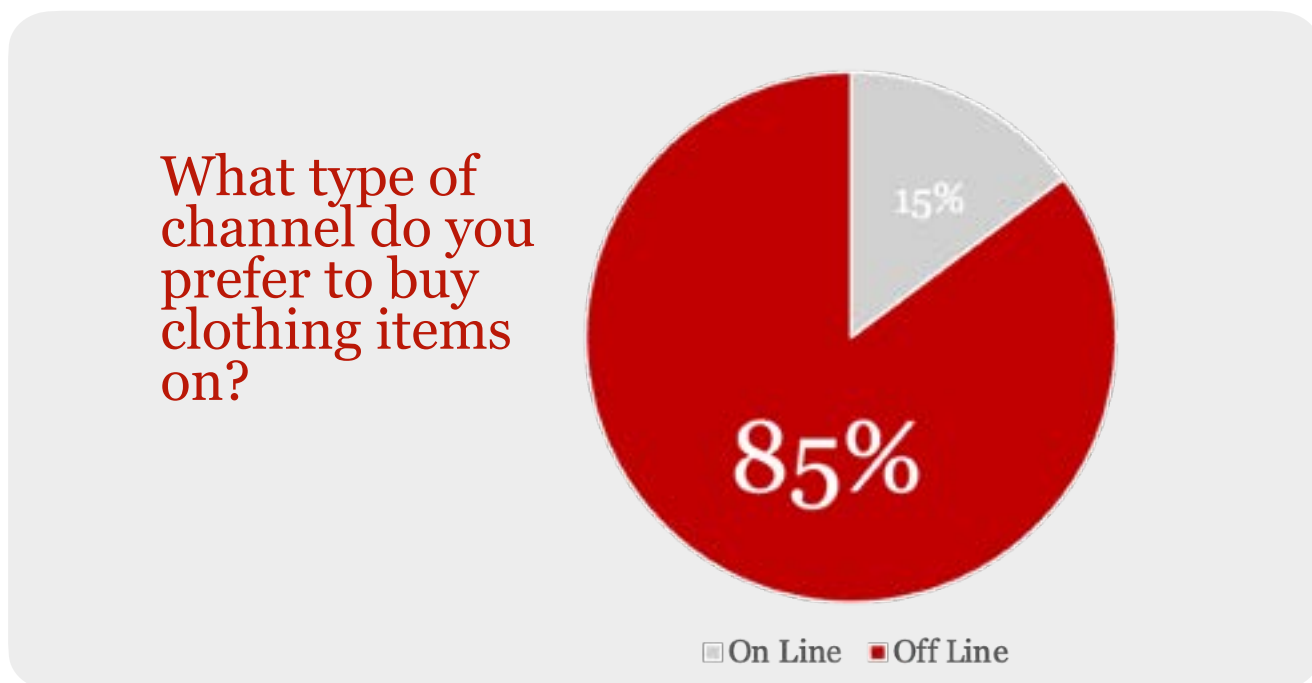


Chapter 1 The sensory experience

The role of digital media in this process is more focused on inspiration. Social media, blogs and online stores act as virtual showcases that present trends, styles and new ideas to consumers. This is where people discover new ways to dress, get inspired by the combinations and styles of influencers and celebrities, and create a vision of what they want to find when they go to a local store.

On the other hand, local stores are the stage where decisive interaction occurs. It is in these stores and markets where consumers can directly interact with garments, evaluate their quality and fit, and make informed decisions. The in-person experience allows for a tangible connection with the clothing that cannot be replicated in the digital realm. Customer service, store environment, and product layout play a crucial role in this context. A well-organized store with attractive interior design and exceptional customer service is more likely to attract and retain customers.

So, as consumers look for more than just purchasing clothing, they also look to enjoy the shopping process. Sensory stimuli are consolidated as the true protagonists in the act of choosing what clothes to buy and where to do so. While digital media inspires and motivates, physical stores provide the necessary interaction to make the final decision, demonstrating that both worlds, online and in-person, are complementary in the experience of buying clothes, whether new or second-hand.



The world of second hand clothes

Overview

The purchase of second hand clothes is intertwined in a specific web of cultural and social factors that shape both the motivators and the barriers. Understanding these elements is crucial to taking advantage of the opportunities presented by the current market. These factors are rooted in the category's history in the Colombian market, influenced by garment availability, consumers' purchasing power, the management of sales channels, and even myths and beliefs about the energy and stories that the garments could carry with them from their previous owners.

The economic factor is a powerful motivator. For many people, second-hand clothes represent an opportunity to acquire quality garments at significantly lower prices. In a context where fast fashion and luxury brands can be prohibitively expensive, second hand clothes emerge as an affordable alternative. But it is not just the price that drives consumers; the possibility of finding unique pieces adds special value for those looking to differentiate themselves and express their individuality.

These cultural and social factors, among others, will be explored in depth in this report. By understanding these dynamics, we can identify and take advantage of the opportunities present in the market, adapting strategies that resonate with consumers and overcome existing barriers. Thus, we redefine the perception and value of second hand clothes, transforming them into a conscious and appreciated choice within the diverse landscape of the Colombian fashion market.



The cultural dimension of second hand clothes

A journey through values and beliefs

In a second-hand market, each item of clothing tells a unique story, imbued with the lives of its previous owners. In Colombia, the decision to buy second hand clothes is not only influenced by economic factors, but also by a complex web of values, beliefs and cultural norms. These influences can act as both powerful motivators and significant barriers.



Chapter 3 The cultural dimension of second hand clothes

A. Reputational Component: the weight of “what will people say”

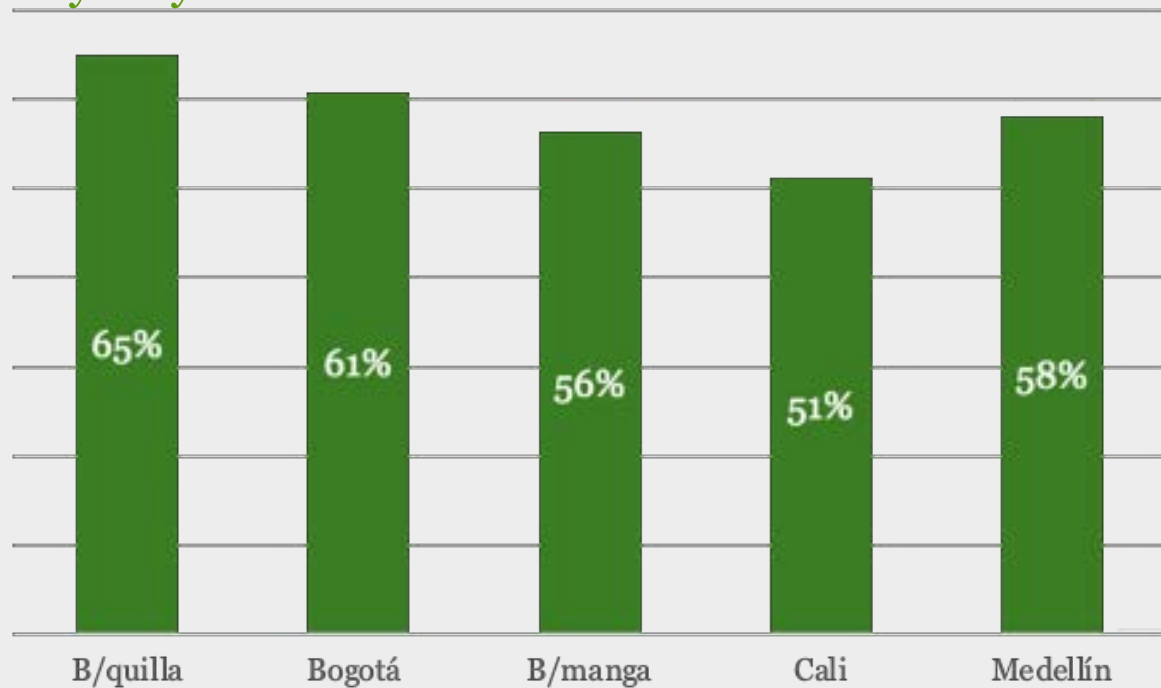
In Colombia, the decision to buy second hand clothes is not only influenced by economic factors, but also by a complex web of values, beliefs and cultural norms. The reputational component is one of the most notable ones. The thought of "What will people say if they find out I buy second hand clothes?" weighs on the minds of many non-buyers. This stigma is deeply rooted in people's personal economic reality, where buying second hand clothes can be seen as a sign of financial need, rather than a conscious choice. This negative burden inhibits many people from exploring the options offered by the second-hand market, for fear of being labeled or judged.

However, for rejecters and potential customers of second hand clothes, there are no indicators that suggest a generation of prejudices or negative conceptions towards those who buy second hand clothes, at least from an explicit verbalization. Their discourse is based on respect and freedom of choice, emphasizing that each individual must feel comfortable with their decisions. The way of dressing and the clothes are not necessarily the most important element of judgment.

In this context, although the fear of being judged persists, the dominant narrative among rejecters is one of tolerance and respect for each person's personal decisions. In contrast, for the User segment, naturally, they find affiliation with other users of second hand clothes and highlight their contribution to the environment and their intelligence in choosing this clothing alternative.

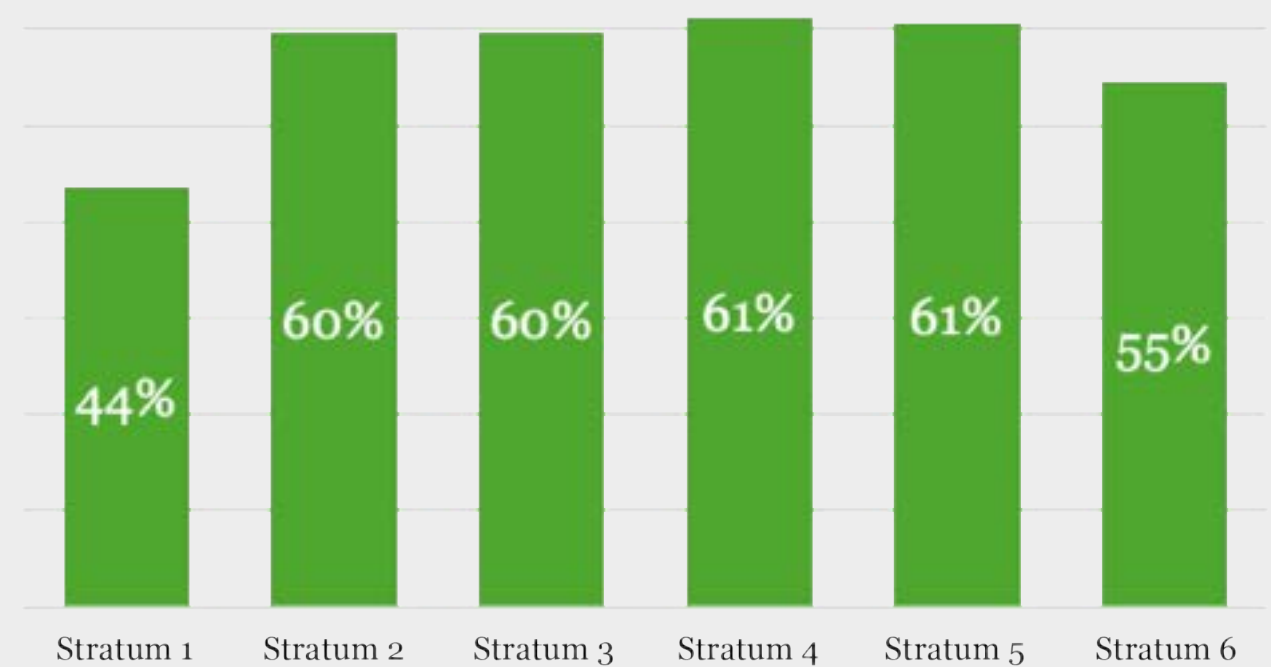


By City



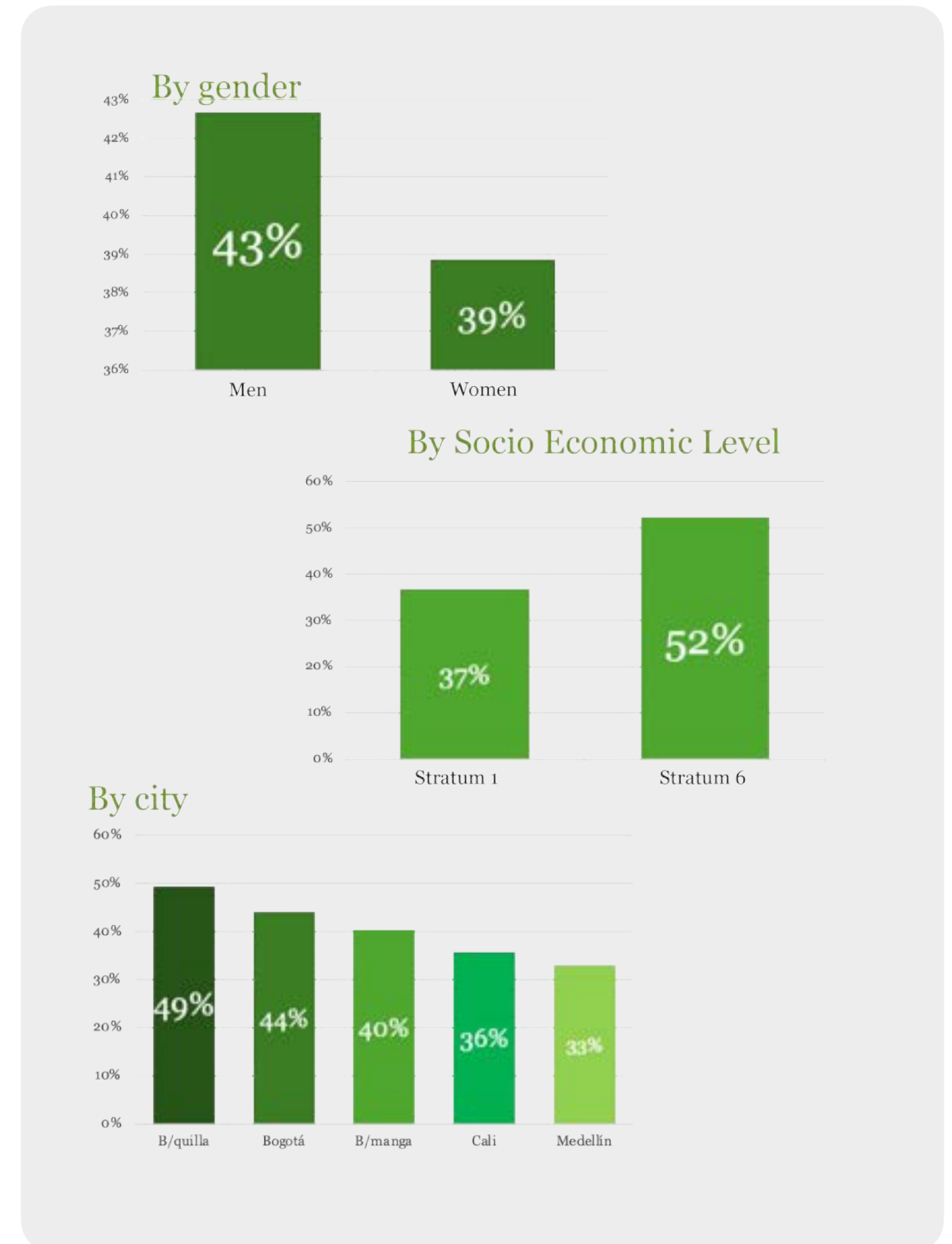
Think that clothes are a great tool to fit into different social environments.

By Socio Economic Level

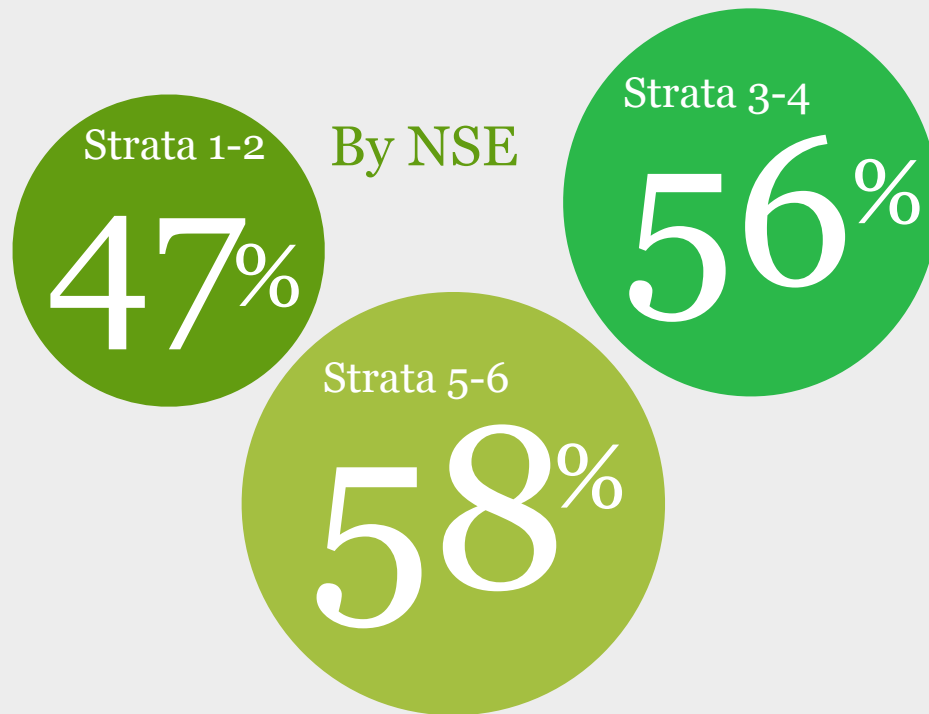


B. The Energy Dimension: the mysticism of second hand clothes

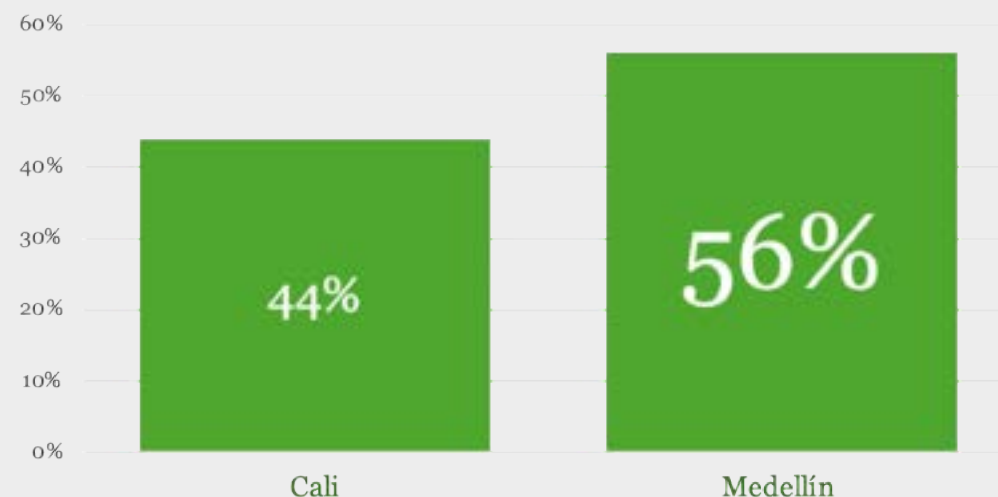
There is a spiritual and energy dimension in the perception of second hand clothes. In many cultures, including Colombia, clothing is considered an extension of the person and their energy. When purchasing second hand clothes, some believe they are also acquiring the energy of its previous owners, which can be seen as negative. This belief acts as a significant inhibitor, as many consumers prefer to avoid any connection with other peoples' pasts, especially if there are fears of negative influences.



53% Are worried about buying second-hand clothes because they are not sure about their cleanliness



Biggest differences between cities



C. Perception of Filth and Unknown Origin

Those who are opposed to buying second-hand clothing often view these garments as unclean or unhygienic. This perception is frequently associated to local stores or word of mouth within their social environment. Distrust in the origin of clothes creates discomfort because we do not know where they have been, what they have been used for or by what type of people. It is interesting to note that, when considering the possibility of knowing its origin, the history of a used garment presents two important contrasts. On the one hand, for some people it would be fascinating to know the history of a piece of clothing if it belonged to someone famous or relevant. However, this loses credibility when considering that a piece of clothing belonging to such a person would surely be in a museum or at a special auction. On the other hand, the possibility that the garments come from people who have died or had dark pasts is disturbing and not necessarily positive for a potential buyer.

Chapter 3 The cultural dimension of second hand clothes

D. Environmental Responsibility: a politically correct stance

Responsibility toward the planet and the environment has become a key motivator for purchasing second-hand clothing. In an era where sustainability and the circular economy are increasingly prioritized, buying second-hand is widely regarded as an ethically responsible and socially conscious choice. However, this motivator has not yet reached the point where it has become a primary purchasing driver. Many non-buyers, while not opposed to the idea, have not taken the step toward purchasing second hand clothes, viewing sustainability more as an ethical stance than a compelling necessity, as their primary motivators are functional.

When buying clothes, it is important...



Sustainability is:

An obligation of companies

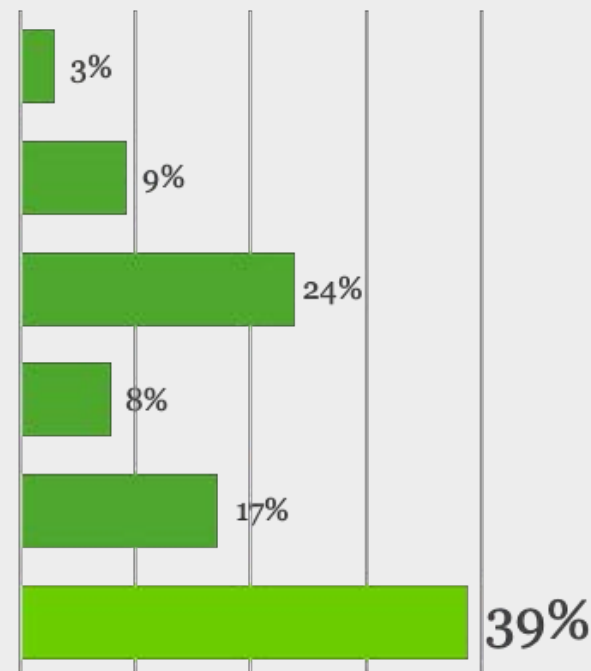
Social responsibility

Producing with high quality standards and respect for the environment

Minimizing the negative effects of my actions

Caring for the environment

Conscious and responsible consumption



59% Do not think about caring for the environment when buying clothes, because their contribution is based on other activities

56%	18 to 25 years	57%	Stratum 2	64%	Barranquilla
60%	26 to 35 years	61%	Stratum 3	61%	Bogota
62%	36 to 50 years	63%	Stratum 4	61%	B/manga
		59%	Stratum 5	56%	Cali
				54%	Medellin

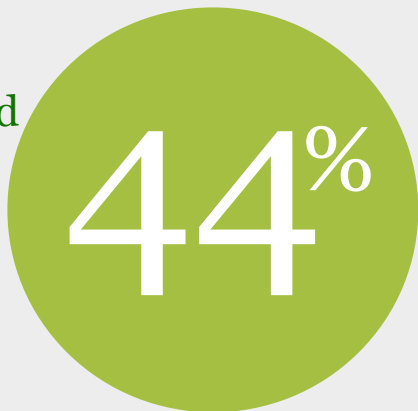
Chapter 3 The cultural dimension of second hand clothes

E. Vintage Style: a matter of personal compatibility

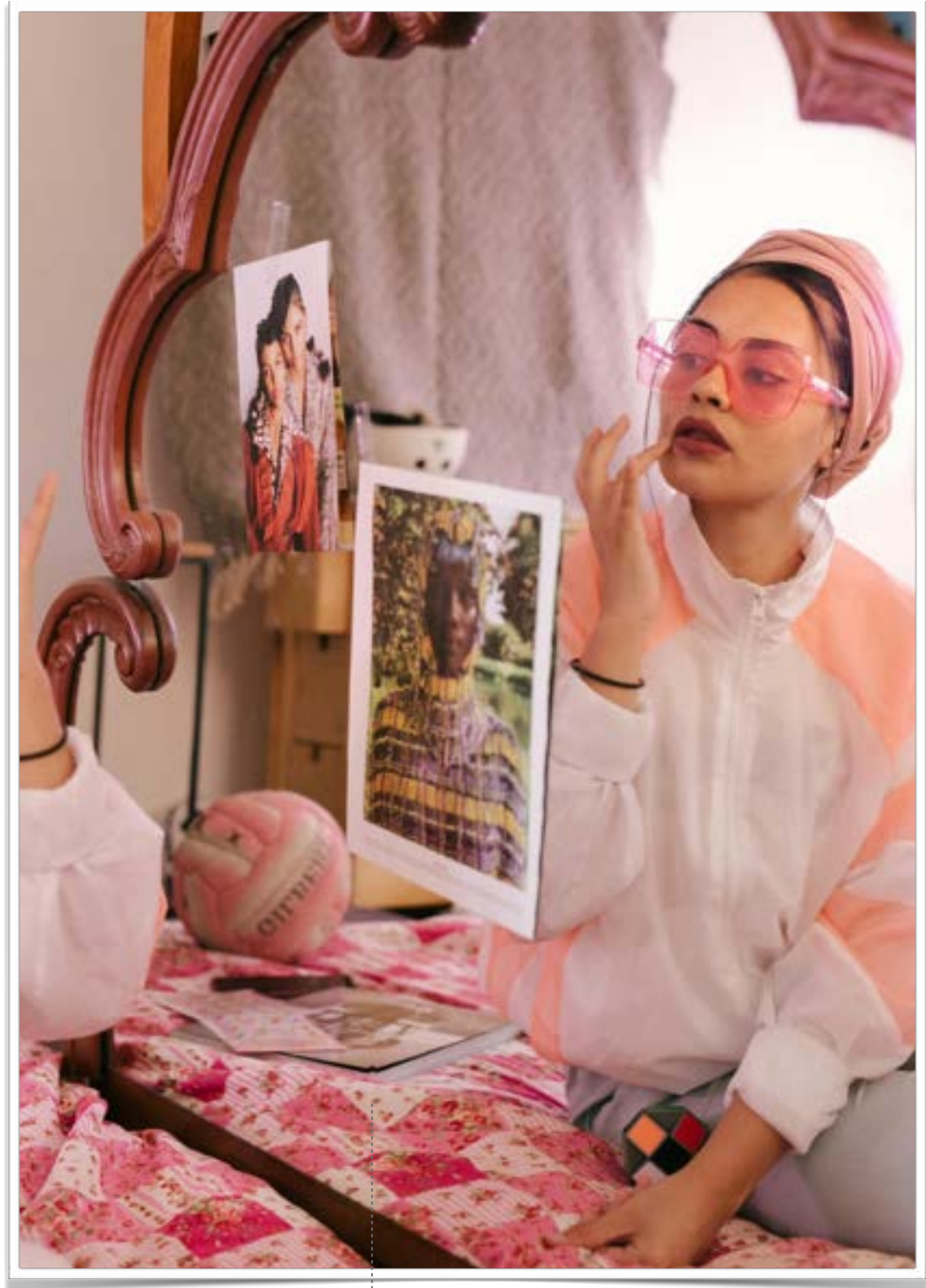
The vintage style also plays an interesting role. Although it is often automatically associated to second hand clothes, its acceptance largely depends on compatibility with an individual's personal style. There is no unified cultural position on the value of vintage style, making it neither a deal-breaker nor a universal barrier, but simply a definition of style for some.

What was the reason why you bought a used item of clothing last time:

I found a garment that I liked



I found a unique item of clothing that is hard to find



Chapter 3 The cultural dimension of second hand clothes

F. The Cultural Dichotomy: what should be vs. reality.

In this context, there is a dichotomy between what should be and cultural reality. While there are strong statements about the importance of not judging someone by their appearance, the reality is that clothing remains a powerful tool to label and segment people into cultural "tribes" or socioeconomic segments. The ideal of not limiting someone based on their appearance clashes with everyday practice, where clothing still serves as a marker of identity and belonging.

G. Cultural Differences and Weather Factors.

Differences in clothing between cultures and societies also play an important role. In Colombia, weather and environmental factors influence the perception of fashion. Colder weathers are considered to lead to people to dress better, with more elegant and better designed clothes, a perception that applies to both new and second-hand clothing. This weather factor becomes transversal and affects the choice of clothing in several regions of the country.

H. The Pandemic and the Reaffirmation of Comfort.

Finally, the pandemic has profoundly influenced how clothing is perceived. Comfort has gained prominence, redefining the use of clothing for different occasions. This has promoted a greater use of casual clothing, moving formal clothing to the background. This trend towards comfort has been reflected in both new and second hand clothes purchases, shifting consumer priorities in favor of garments that offer comfort rather than elegance.



Needs are about more than warm clothing

Exploring the needs for safety, sense of belonging and self-esteem associated to second-hand clothing in the Colombian context

The purchase of second hand clothes in Colombia is motivated by principles of personal need, self-expression, self-esteem and the need to belong.

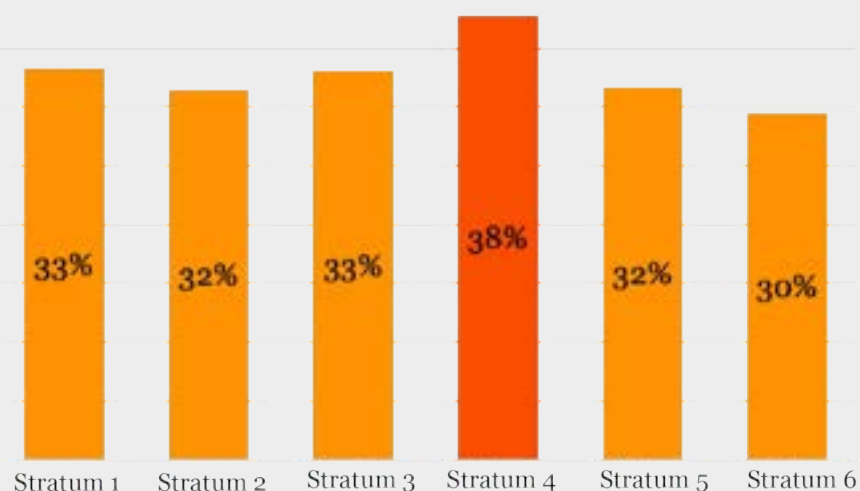
Across all segments (users, rejecters and potential users of second hand clothes) and variables such as gender, social class, age and city, clothing and fashion represent a conscious and express manifestation of personality.



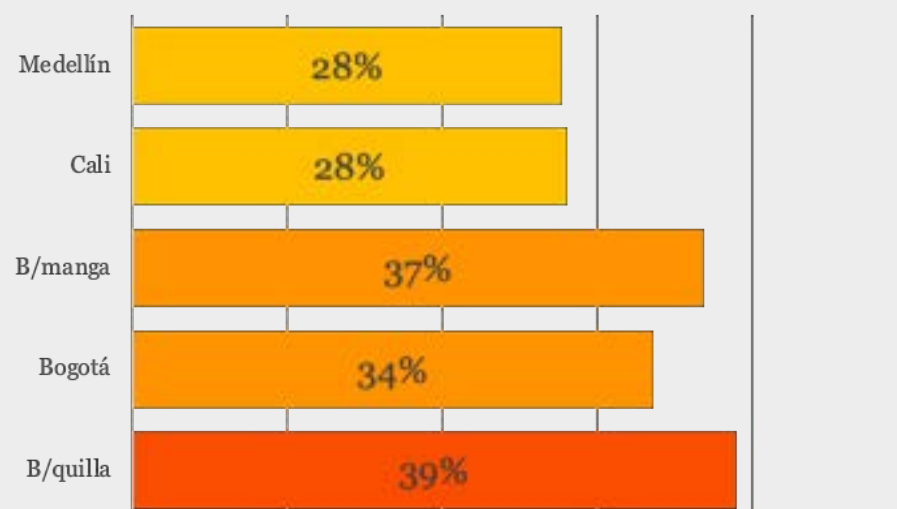
Chapter 4 Needs are about more than warm clothing

33% think that second-hand clothes for sale are in poor condition

By Socio Economic Level



By city



A. Safety and Functionality

Purchasing clothing, whether new or second-hand, is rooted in the need for both security and functionality. Imagine a potential buyer in Bogotá, carefully assessing a jacket in a second-hand store. Their main concern is whether the jacket will provide them with the necessary warmth on the city's cold days. However, when it comes to second hand clothes, this concern for functionality is intertwined with doubts about hygiene and the origin of the garment. The possibility that a used garment may be contaminated or have been worn under questionable circumstances adds a layer of complexity to this safety need. Uncertainty about a garment's past may deter some buyers, who prefer the perceived safety of new clothing.



Chapter 4 Needs are about more than warm clothing

B. Self-expression and Personal Style

Clothing is a powerful tool of self-expression. Every piece of clothing we choose communicates something about who we are and how we want to be perceived by others. Consider a young woman looking for a vintage dress to stand out at a themed party. For her, fashion is not merely about dressing appropriately; it's a way to express her personality and creativity. The uniqueness of second hand clothes offers an opportunity to differentiate yourself and experiment with styles that are not easily found in conventional stores. Fashion allows people to tell their own visual story, and second hand clothes, with their unique character and often vintage styles, offers a perfect platform for this self-expression.

When buying clothing:

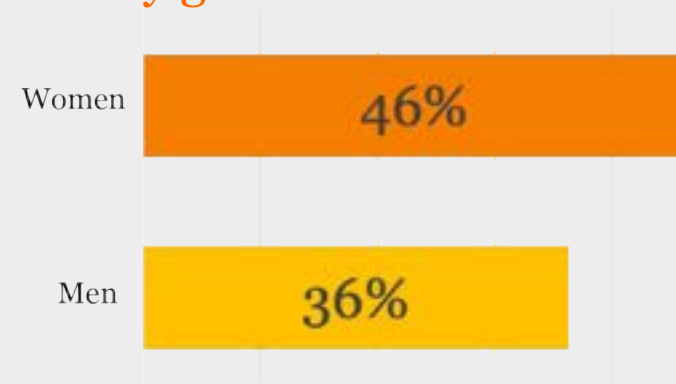
20% Look for unique items when buying clothes

18% Look for clothes that not everyone has

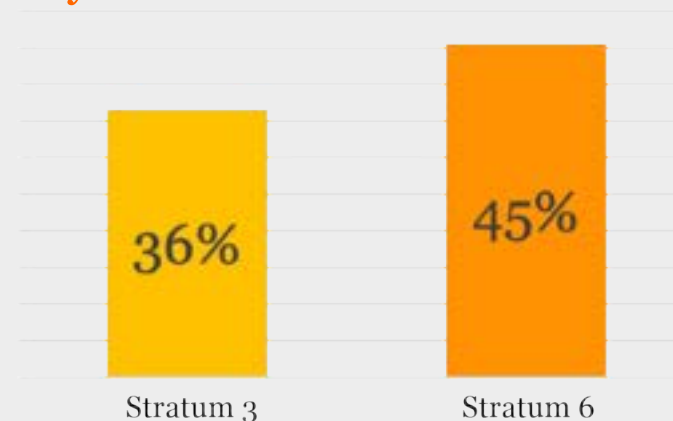
41%

Get inspired by social media from people with a similar style to theirs when deciding what clothes to buy

By gender



By Socio Economic Level



By city



Then buying clothes, you look for information to decide which product to choose from:

8%
Influencers

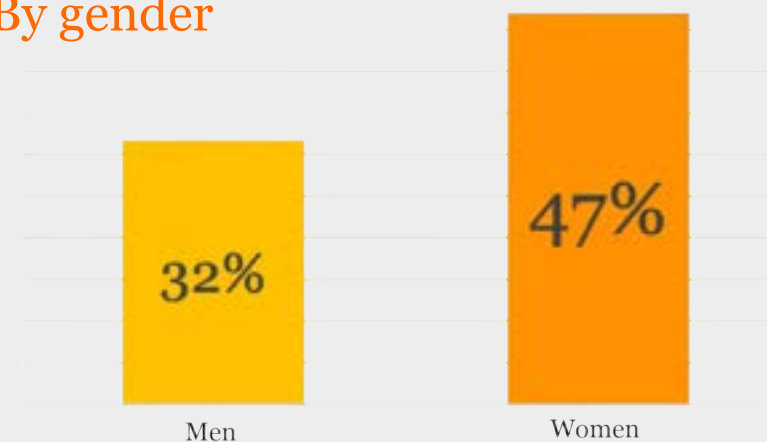
30%
Family or friends

39%
Social media

C. Sense of belonging and Social Validation

The desire to belong and gain social validation has a profound impact on our purchasing decisions. Imagine a teenager in Cali, swayed by their friends and the trends they encounter on social media. To fit in and be accepted, they choose clothes that resonate with the norms and expectations of their social group. Social validation becomes a crucial factor, and second hand clothes can be both an advantage and a disadvantage in this context. If the social environment values sustainability and individuality, second-hand clothing can be viewed positively. However, in more conservative or materialistic circles, choosing second hand clothes can be stigmatized. The opinions of friends and family provide the necessary safety to reaffirm our clothing choices, reflecting the importance of validation in the construction of our social identity.

By gender



Chapter 4 Needs are about more than warm clothing

D. Gender Differences in Confidence in Clothing

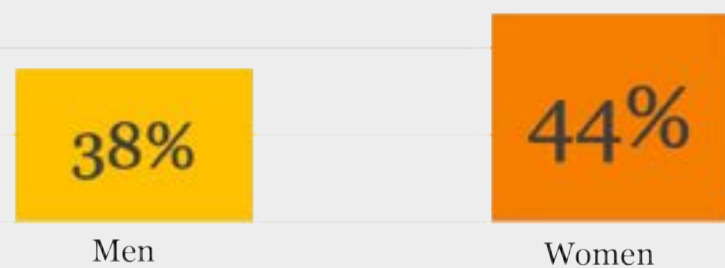
Clothing has the power to significantly impact our self-esteem, and gender differences play a crucial role in this dynamic. Let's think about a woman who carefully chooses an outfit for a job interview. For her, clothes make her feel comfortable and attractive, contributing to her sense of independence, freedom and confidence. For women, fashion and clothing are intertwined with the need for recognition and the search for beauty. A figure-flattering, perfectly fitting garment can boost self-esteem in a way that few other things can. Whether new or used, these are the variables that define women's preference for a garment.

In contrast, men's purchasing motivations tend to be more functional and goal-oriented. They often buy clothes to replace worn-out items, for special occasions, as part of annual or seasonal routines, during sales, to meet specific needs, or to avoid repeating outfits. This approach to shopping is typically more deliberate and rational. Men tend to reflect on the need for the garment, budget optimization

and price/quality ratio, practicality at the time of purchase and the quality and durability of the garments. However, quality and fit also play an important role in building their confidence. A well-tailored suit can do wonders for self-perception and self-confidence.



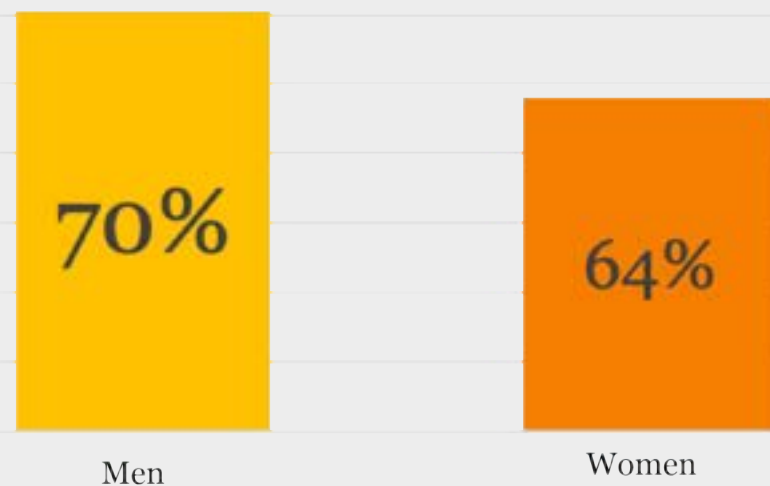
I'm always looking for clothes that can become part of my wardrobe



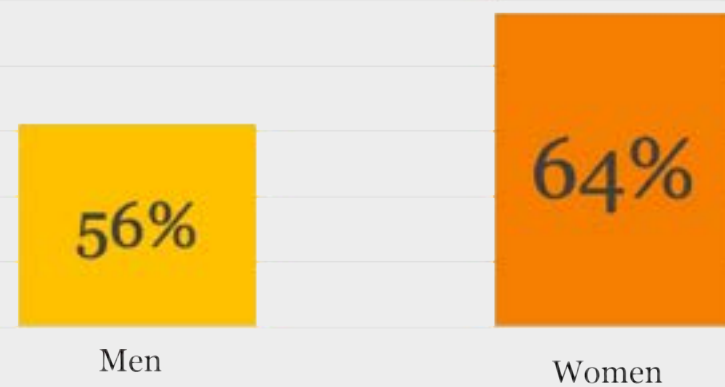
I buy clothes only when I need to replace an item.



I prefer to plan my clothes shopping based on my needs.



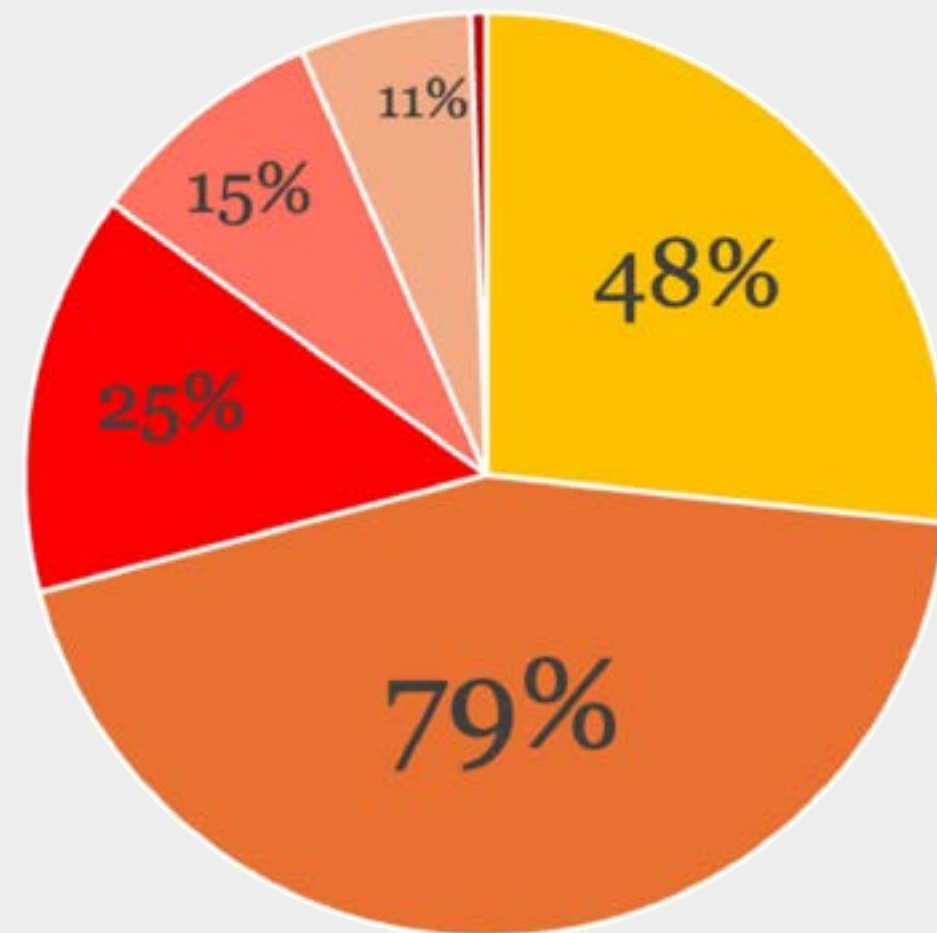
My clothes are the way I can stand out uniquely



E. Solidarity and Emotional Satisfaction

Donating second-hand clothes to those in need brings a profound sense of emotional fulfillment. Imagine a family giving a bundle of clothes to a community affected by a recent flood. This act of giving not only helps those who receive the garments, but also reinforces solidarity and altruism in the person who donates. This way, a family of lower socio-economic level sees handing down clothes to their loved ones or to people who are close to their social network as a contribution to the well-being of the people they appreciate, reinforcing the bonds of belonging and improving their self-esteem. This is where a challenge for the second-hand clothing industry arises: competing with this self-perception of solidarity. For many people, giving second hand clothes to those in need is an act loaded with emotional and moral value, greater than mere commercial exchange. The used clothes industry is competing directly with this feeling of doing good of being seen as a generous and caring person, which makes it difficult to obtain garments for resale.

What do you normally do with clothes that you are no longer going to wear?



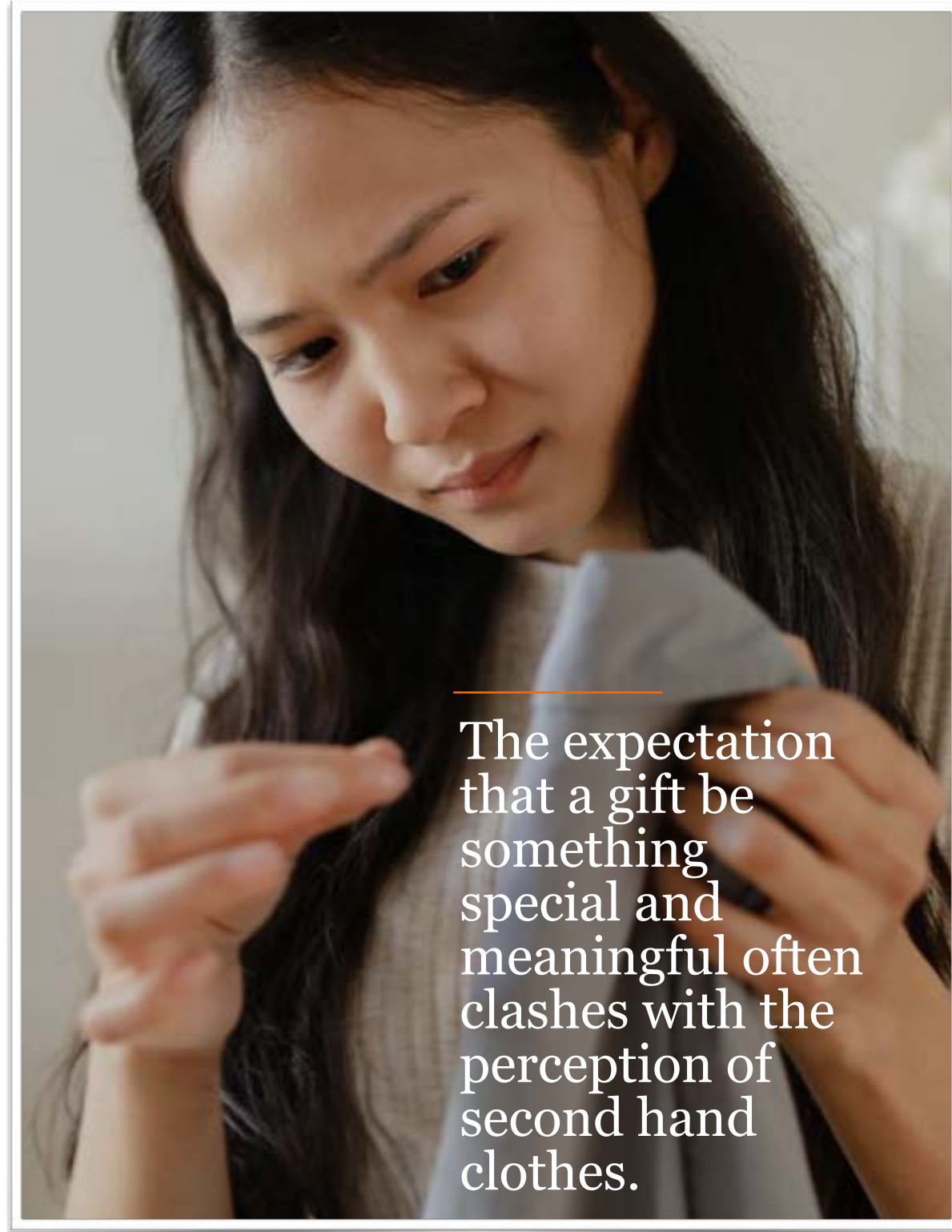
- Hand them down
- Donate them
- If possible, turn them into rags
- Sell them
- Throw them in the trash
- Other

Chapter 4 Needs are about more than warm clothing

F. Giving is different from donating or inheriting

Choosing to give second-hand clothes as a gift on a special occasion to family or friends can be perceived as a controversial choice. Let's picture someone who decides to give a used item of clothing to a close friend. The expectation that a gift will be special and meaningful often clashes with the negative perception of second hand clothes. The idea of giving something previously owned as a gift may spark feelings of inferiority or lack of consideration for the recipient, who might interpret the gesture as an attempt to minimize the importance of the occasion.

Additionally, factors like size, color, and style can create complications, making new clothes appear to be a safer gift option. The uncertainty as to whether the used item will fit perfectly or be to the recipient's liking reinforces the perception that the new item is a more careful and thoughtful choice. Despite the emotional value and history that a used item of clothing can carry, these practical and cultural concerns often overshadow the sentimental aspects.



The expectation that a gift be something special and meaningful often clashes with the perception of second hand clothes.

Chapter 4 Needs are about more than warm clothing

G. Emotional Attachment and Detachment from Clothing

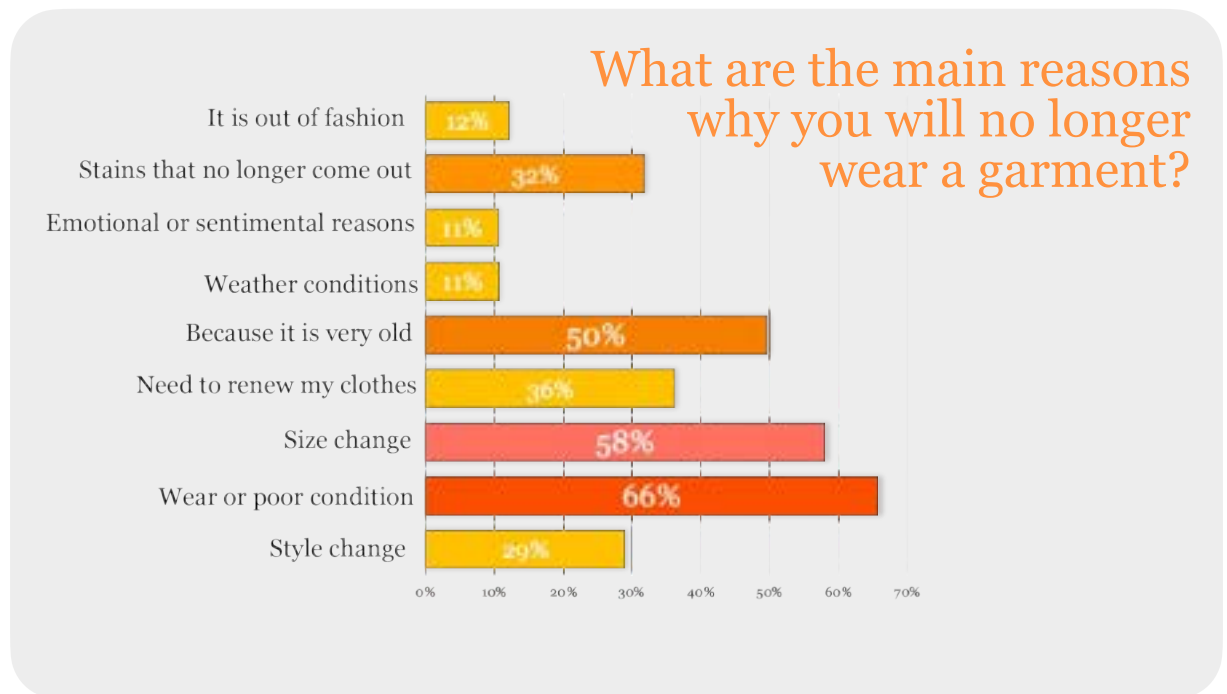
From an emotional standpoint, getting rid of clothes does not seem to have a significant impact, either positive or negative. However, it is pertinent to consider a few considerations that vary between men and women, offering a nuanced view of this phenomenon.

Men tend to have a stronger attachment to clothing, which translates into a higher emotional cost when parting with it. This attachment is not just rooted in sentimentality, but also in practical considerations. Each piece of clothing symbolizes a future shopping endeavor: the effort of going out, searching, selecting, purchasing, and adjusting to a new item. Let's think of a man, attached to his favorite jacket. To him, this jacket is not just a piece of clothing, but a practical solution that meets his needs for functionality and style. Getting rid of it means anticipating the task of replacing it, which entails a considerable emotional and practical cost. It is the fear of effort and the uncertainty of finding a garment that meets the same expectations that makes the attachment stronger.

In women, since the frequency of purchase is usually higher, attachment may be lower. However, the emotional burden of getting rid of a garment is more closely linked to the reasons behind the decision. Imagine a woman forced to get rid of a dress because she has lost weight, and it no longer fits her.

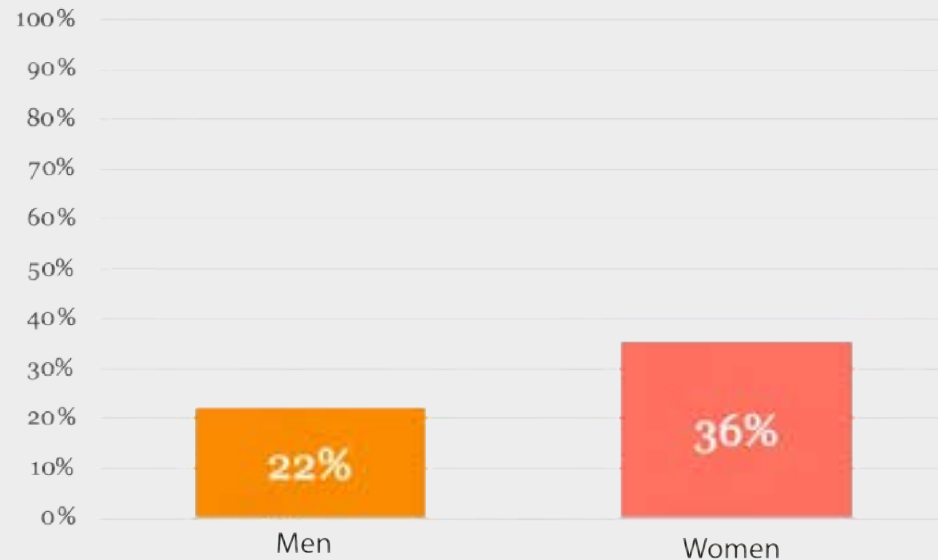
This act is more than just a practical decision; it is a confrontation with one's own body image and self-esteem. The garment becomes a tangible reminder of unwanted physical changes, generating an emotional burden of anger and frustration. Letting go of the garment means not only the loss of a piece of clothing, but an emotionally charged experience that reflects her internal struggles with self-image.

These differences in experiences underscore the emotional complexity involved in the act of giving away clothes. For many men, clothing represents a valuable and functional resource that is difficult to replace. For many women, the garment can be loaded with personal meaning related to their body image and self-esteem.

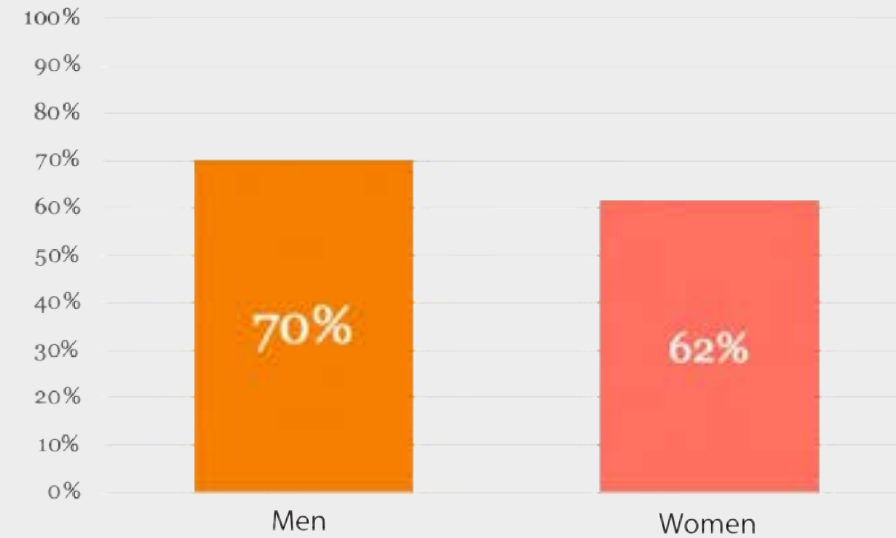


Gender differences in the reasons to stop wearing a garment

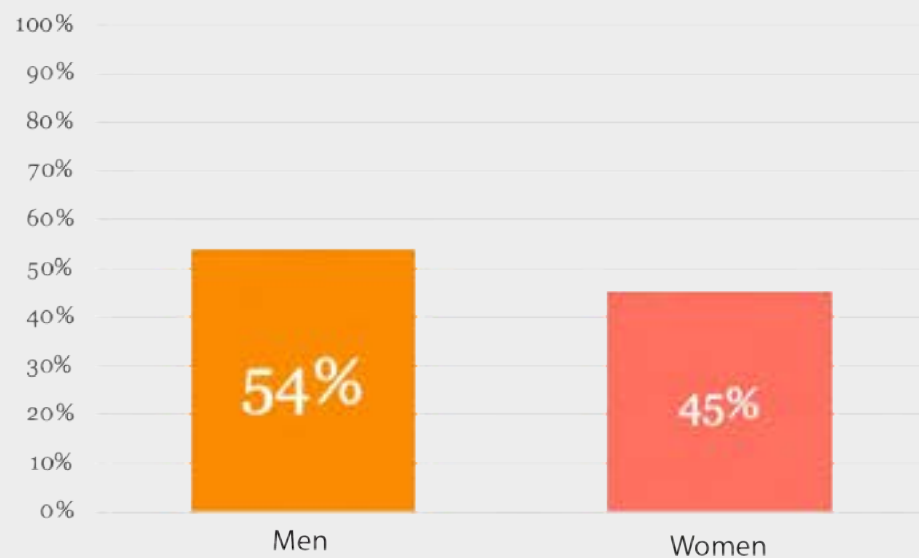
Change of style



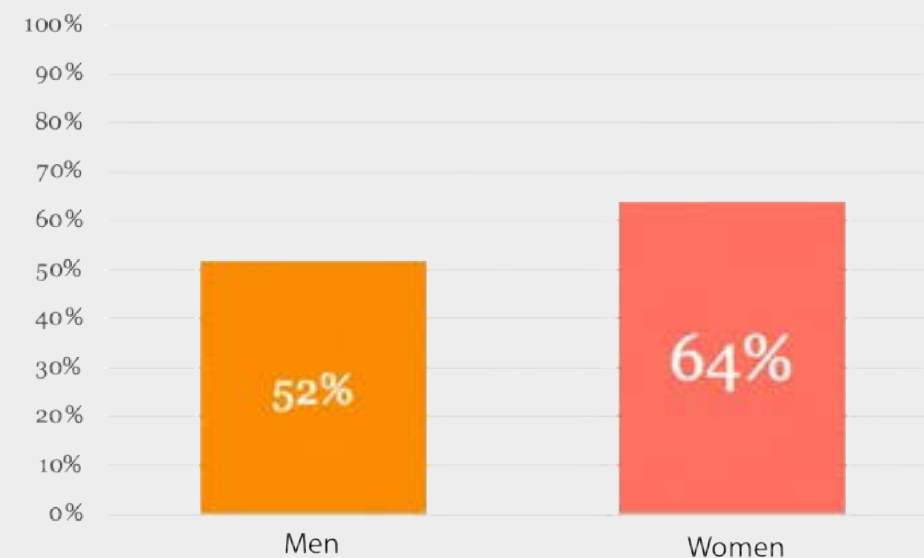
Worn out clothes



They are very old



Size change



Marketing in clothes shopping

Second hand clothes must be first class

The impact of communication on fashion is not limited to traditional advertising. In the case of women, inspiration is rooted more organically. It is common for people to notice the look and style of television presenters, artists or celebrities in general. These public figures serve as role models, and their influence is reflected in future purchasing intentions. Women are significantly more likely to pay attention to stimuli and communications that depict clothing or styles they wish to emulate, whether consciously or unconsciously.

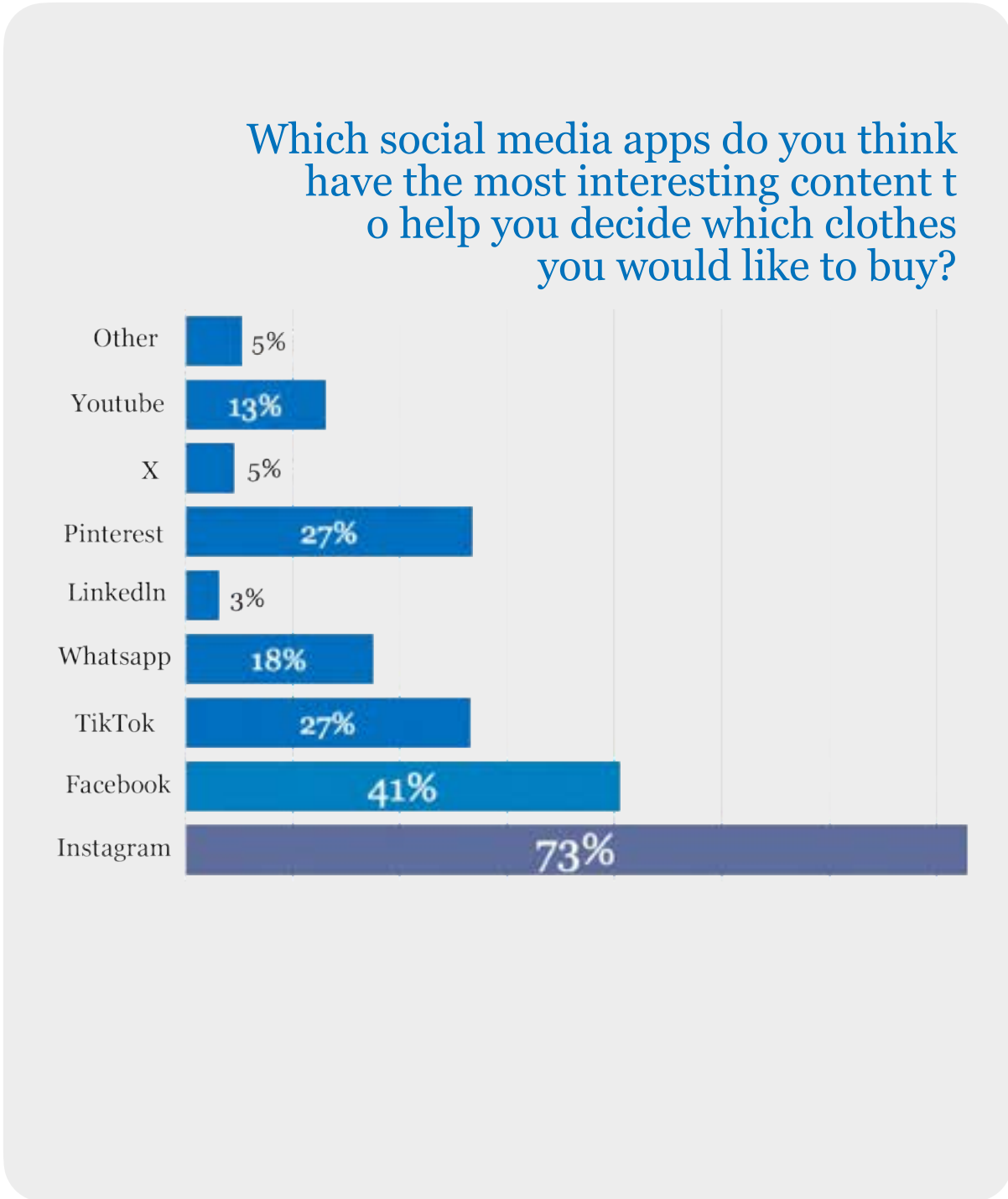


Chapter 5 Marketing in clothes shopping

For men, the dynamics are different. Their purchasing process is almost entirely completed at the point of sale. It is in the store where they find their inspiration, make the choice and the final decision. The physical environment of the store is crucial, as their purchasing motivations are based on the style that defines them. The in-store shopping experience provides the frame of reference and the main criterion for their choice.

In the realm of social media, the algorithm is king. Platforms such as Instagram, TikTok and Pinterest, with their graphic and multimedia content, are key sources of inspiration. Algorithms present random information based on previous searches and consumption of related content. This influence is subtle and not always conscious; people don't explicitly look for information or inspiration in the category, but they are influenced by what the algorithm shows them.

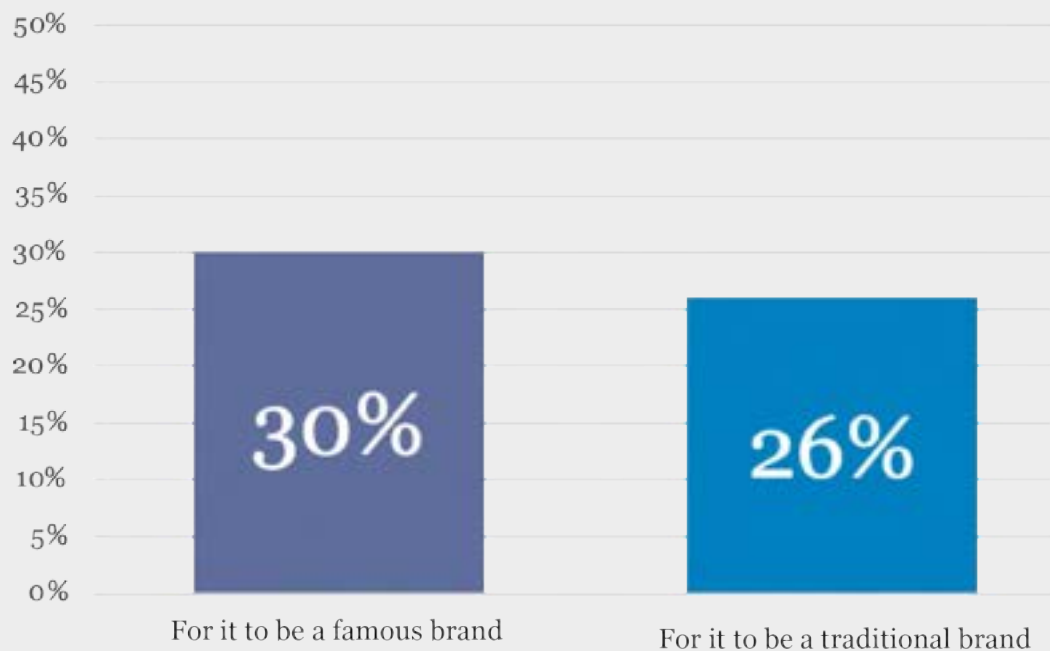
Although, to a lesser extent, Facebook Marketplace, Shein and Temu also influence inspiration and search through their suggestion and recommendation algorithms. For shoppers with very specific styles or those interested in cult or specialty pieces, the process is more conscious and stricter. These shoppers follow specific accounts or personas that generate desire and inspiration, allowing for more structured purchase planning.



Chapter 5 Marketing in clothes shopping

However, apart from a few isolated cases, there is no specific recollection or interest in campaigns or advertising that encourage purchase or lead to action, both in the purchasing process of second-hand clothing brands and in traditional clothing brands. This phenomenon highlights the importance of the media and social media in fashion inspiration, beyond conventional advertising methods.

When choosing a clothing brand, it is of little or no importance...

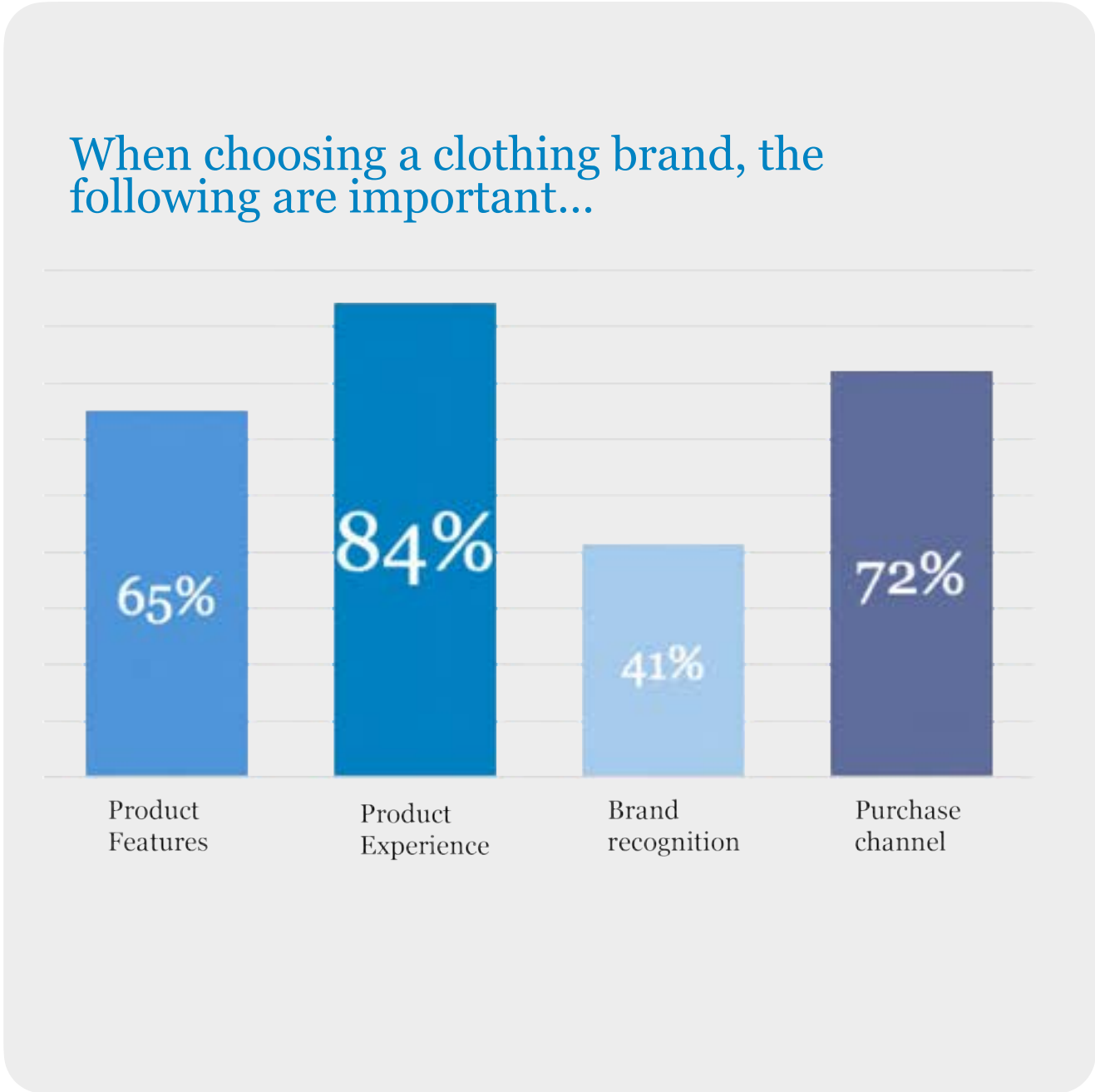


Chapter 5 Marketing in clothes shopping

A. Brand positioning: seeking function and status

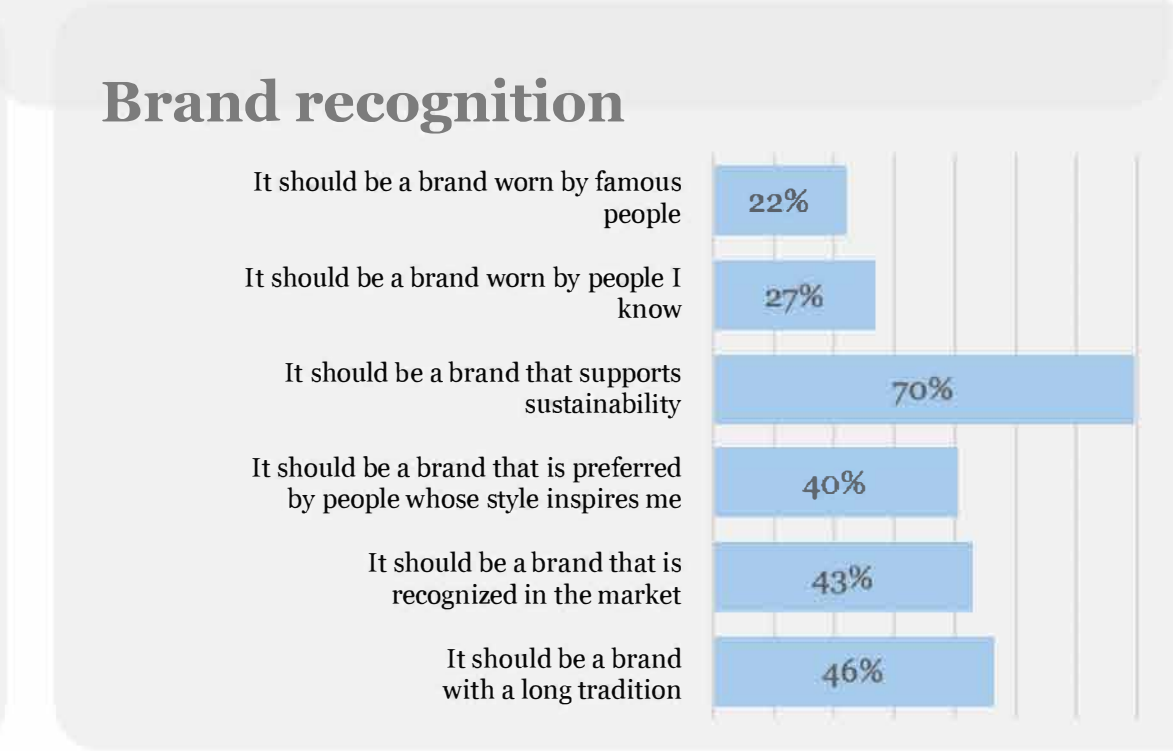
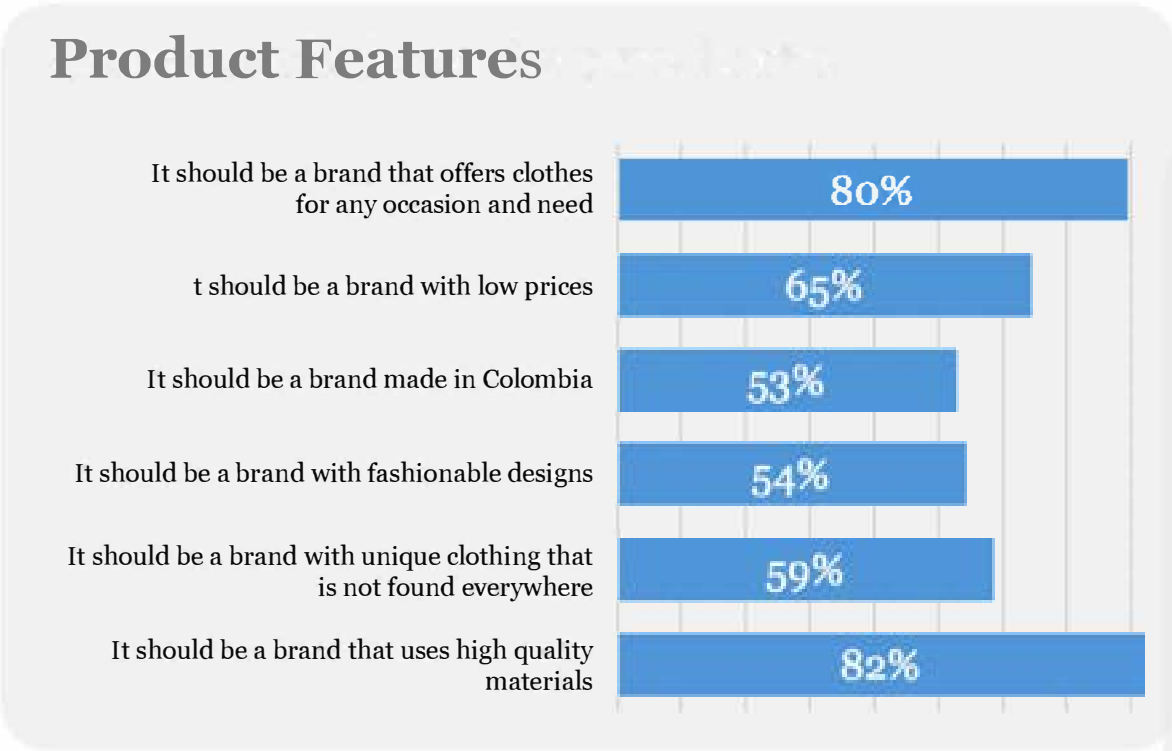
In the world of fashion, the role of manufacturing brands varies significantly between men and women.

For women, brand preference from its conceptual meaning is not as marked. Instead, they are more inclined to those that have been proven, through use, to offer specific functional benefits, especially in terms of aesthetics. For example, a brand of jeans that a woman prefers not because of the brand name, but because of how they fit her figure, enhancing her style and comfort, and she becomes loyal to it because she knows it is difficult to find another one that fits her the same. The shape and fit of bottom garments, such as jeans and pants, and the variety of styles in top garments, are the decisive factors. On the other hand, men show a more conscious preference for certain brands due to their cultural significance. For them, choosing a brand is not only based on aesthetics, but also on the status and recognition it offers. Brands such as Levis, Diesel and Americanino stand out in their selections, not only for their reputation, but also for their quality and durability.



Chapter 5 Marketing digital shopping

When choosing a clothing brand, the following are important...



Chapter 5 Marketing in clothes shopping

When projected into hypothetical scenarios where money is not a limitation, aspirations change slightly. In high-income strata and in cities like Barranquilla, desires arise for luxury brands such as Lacoste, Gucci, Prada, Tom Ford, Ermenegildo Zegna and Tommy Hilfiger. These brands represent an aspirational dream, a symbol of success and sophistication. However, actual contact with them is limited, given their high cost, the scarcity or non-existence of stores locally and the exclusivity associated to them.

At lower levels, aspirational brands are still more commercial, such as Chevignon, Levis, Americanino, Adidas and Nike. These brands offer a balance between accessibility and recognition, allowing consumers to enjoy a sense of achievement without the need to shell out large sums of money.

In contrast, when looking at the least preferred brands, these are associated to a low quality/price ratio, either through user experience or word of mouth.

For second hand clothes users, the brand has little relevance. Their focus is not on finding clothes from well-known or luxury brands, but on discovering pieces that complement their style.

The rarity of finding luxury brands on the second-hand market means that the brand is currently a less significant factor in their purchasing decisions, but this variable could change if a visible offer were to show up and allow access to a fashion universe that the local market currently does not offer, even in the world of new garments.





B. Trusting the channel brand: beyond the manufacturer's brand

In the fashion world, especially in second-hand clothing, trust in the sales channel is essential, and the lack of knowledge on the brands of these channels becomes a significant barrier for consumers. This lack of familiarity limits access, since it is the channel's brand, rather than the manufacturer's, which offers reliability and support in the purchasing process. When consumers face problems with garments, it is the sales channel the one that must be liable and provide solutions, not the manufacturer brand.

Currently, there is no broad knowledge of brands specialized in the marketing of second hand clothes. However, when the idea of a specialized and well-established sales channel is put forward, the reaction is positive. The perceived advantages of having a strong and recognized brand in the second hand clothes market are numerous and clear.

Chapter 5 Marketing in clothes shopping

Credibility first. A sales channel with an established brand offers greater consumer trust. The perception is that a recognized brand will be more responsible and transparent in its operations.

Second, greater control and rigor in the processes is assumed. A well-established sales channel guarantees better practices in the reception, cleaning, restoration and general handling of garments. This rigorous process ensures that the garments offered are in optimal condition, which reduces risk for the consumer and improves overall satisfaction.

And third, the possibility of claims or guarantees is very attractive. Knowing that they can turn to a trusted sales channel to resolve any issues provides a peace of mind that is currently lacking in the second hand clothes market. This support strengthens the relationship between the consumer and the sales channel, creating a safer and more pleasant shopping experience.

Let's picture a buyer willing to explore the second hand clothes market. The presence of a sales channel with a recognized brand gives them the confidence to venture into this experience. You know that behind each garment there is a rigorous process that guarantees its quality and that, in case of any inconvenience, they have reliable support.

This approach not only makes the purchasing decision easier, but also opens up new opportunities to market second hand clothes in a growing market.

Building a strong brand in the second hand clothes sales channel not only addresses current barriers, but also inspires trust and confidence in consumers, transforming market perception and creating a more favorable environment for everyone.



Chapter 5 Marketing in clothes shopping

C. The transformation of the shopping experience: from the warehouse to the boutique

The on-site shopping experience is one of the biggest challenges when it comes to second hand clothes. For many, the idea of entering a second-hand store conjures up images of clutter, overcrowding, and aesthetically unpleasant spaces. Even those who have never been in one of these stores share common perceptions: places with no coherent order, no defined classifications or sections, with a saturation of garments that makes it difficult to see and makes choosing complicated. These spaces, often located in poor and not always safe areas, lack aesthetics, reminiscent more of small warehouses than fashion stores. Strange or unpleasant odors reinforce these negative impressions.

A transformative vision is proposed in response to these perceptions: to turn the experience of buying second hand clothes into something memorable and attractive. Let's picture stores that emulate the strategy of displaying new clothing brands, with a carefully designed environment, music, inspiring brand visuals and attractive window displays. The olfactory experience must also be considered, creating an environment that is not only pleasing to the eye, but also to the sense of smell.

Moreover, buying second hand clothes is seen by regular shoppers as an exciting adventure, an underground plan that takes buyers to explore not-so-everyday areas of the city. This journey, although fraught with risk due to being in less safe areas, offers a different experience, full of emotions and discoveries.

35% think that places to buy second-hand clothes are messy and smell bad

65% think that the process of buying second hand clothes should be just as pleasant as buying new clothes

63% I would like to feel the same confidence in brands from second-hand clothing stores as in those from new clothing stores

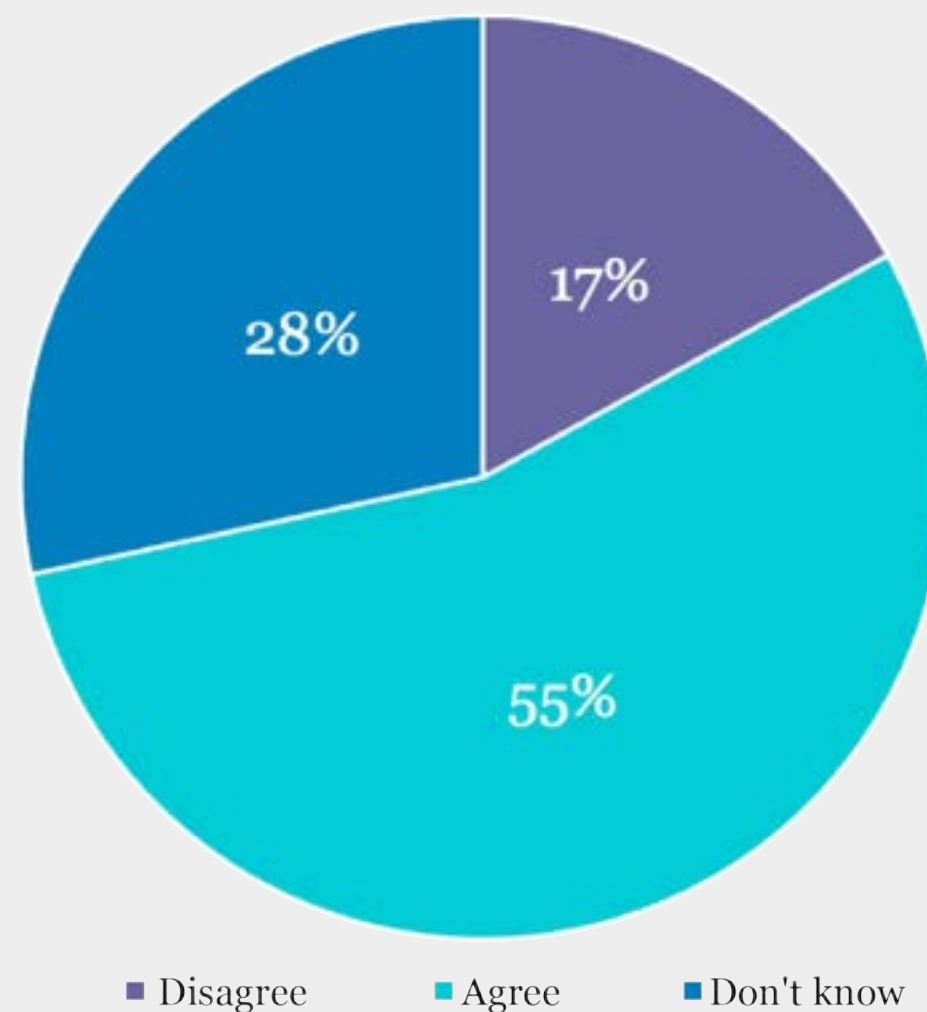
Chapter 5 Marketing in clothes shopping

D. The price of second hand clothes and the value of austerity

In the second-hand fashion scene, price is a central point of debate. The naysayers, those who are adamant and aloof about the idea of buying second hand clothes, are the harshest on cost. For them, a second-hand item should have a price that does not exceed 25% of the value of the same item when it was new. This group sees price as a direct reflection of the depreciation and diminished use of the garment and the core of its value proposition, which compensates for the low quality of sales and after-sales service.

However, regular second hand clothes buyers, with deeper knowledge and experience on the category, offer a different perspective. They argue that fair prices are between 30% and 50% of the value of a new garment. For this group, buying second hand clothes is not simply a matter of financial need, but an intelligent consumption strategy. Saving and budget optimization become great motivators, allowing them to make purchases more frequently and diversify their wardrobe.

Buying second hand clothes would allow me to save more than any sale on new clothes



Chapter 5 Marketing in clothes shopping

These shoppers see second hand clothes as an opportunity to maximize their investment, similar to the satisfaction new clothing buyers feel when they take advantage of discounts at seasonal promotional events. Access to clothing at reduced prices not only allows these consumers to renew their wardrobe more frequently, but also gives them the impression of being smart and strategic shoppers.

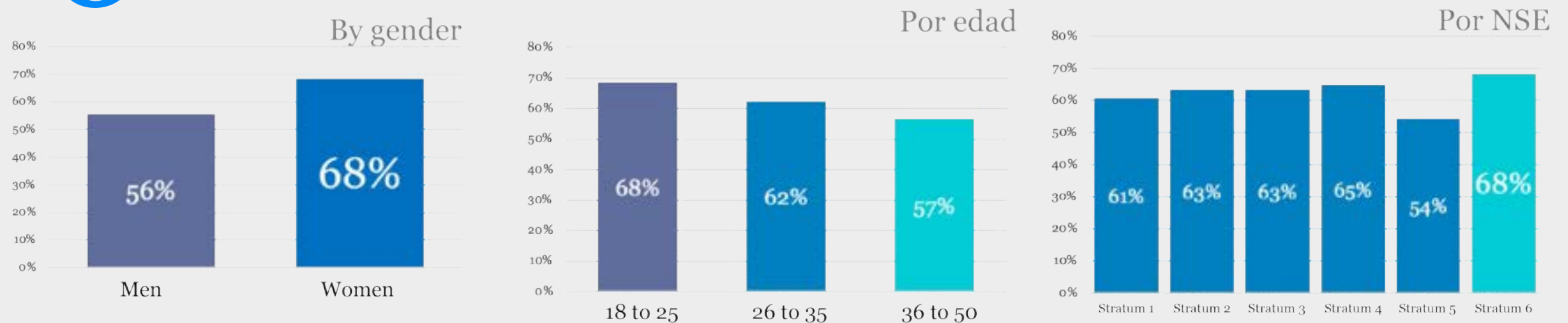
For a second hand clothes buyer on a budget, every item of clothing represents a chance to save and an opportunity to find unique pieces at a fraction of the original cost. This approach not only allows them to expand their wardrobe, but also to experiment with different styles and access unique pieces, without the financial burden of buying clothes from exclusive brands that have these characteristics.

In this context, the second-hand fashion industry has the opportunity to redefine its value proposition. By highlighting shopper intelligence and access to exclusive garments at a very competitive price, you can appeal to a broader segment of consumers, those who value economy without sacrificing style.

Price is no longer just a number but a symbol of ingenuity and adaptability, inspiring more people to explore the world of second-hand fashion.

62%

believe they can save a significant amount of money by buying a few second-hand garments



Chapter 5 Marketing in clothes shopping

E. Treasure hunting: a great product value in second-hand fashion

In the world of second-hand fashion, buyers become modern explorers who are not just looking for clothes, but also opportunities to discover exceptional pieces. For them, the main expectation is to find clothes in very good condition, often practically new. But beyond their status, what really captures their imagination are the pieces that accentuate their personal style, those not commonly found in their everyday business environment.

Every garment has the potential to be a trophy: sports collections from decades past, cult garments with unique designs, or pieces imbued with specific cultural meanings. These are not just clothes; they are fragments of history, references to a specific sociocultural era that add an extra layer of value and meaning.

Consider a shopper who walks into a secondhand store hoping to find a hidden treasure. They're not looking for just any t-shirt, but rather a garment that has a story, something that speaks to a specific era or offers a design that is no longer found in contemporary stores. For them, finding a luxury brand at a bargain price would be exceptional, although they know that this is a rare gem in the local market.

Secondhand fashion isn't just for those looking for predictable basics. It is for the adventurous, those who understand that there is a great limitation of colors and sizes in the current offer. They do not get there with a clear idea of what they want, but with the willingness to find unexpected treasures that align with their tastes and express their individuality. It is an experience that transforms the routine of shopping into an exciting hunt, where discovery is as rewarding as the acquisition.



Chapter 5 Marketing in clothes shopping

One of the services that these buyers would value in the current offer is the possibility of customizing and adjusting garments in the same store. This practice is seen not only as added value, but as an extension of the act of discovery. They are willing to pay extra for this service, as long as the prices are fair and reflect the value of the garment.

Implementing strict processes to handle clothes (from receiving and handling to disinfection and cleaning) is essential. These processes must not only be rigorous, but also clearly communicated to gain consumer trust.

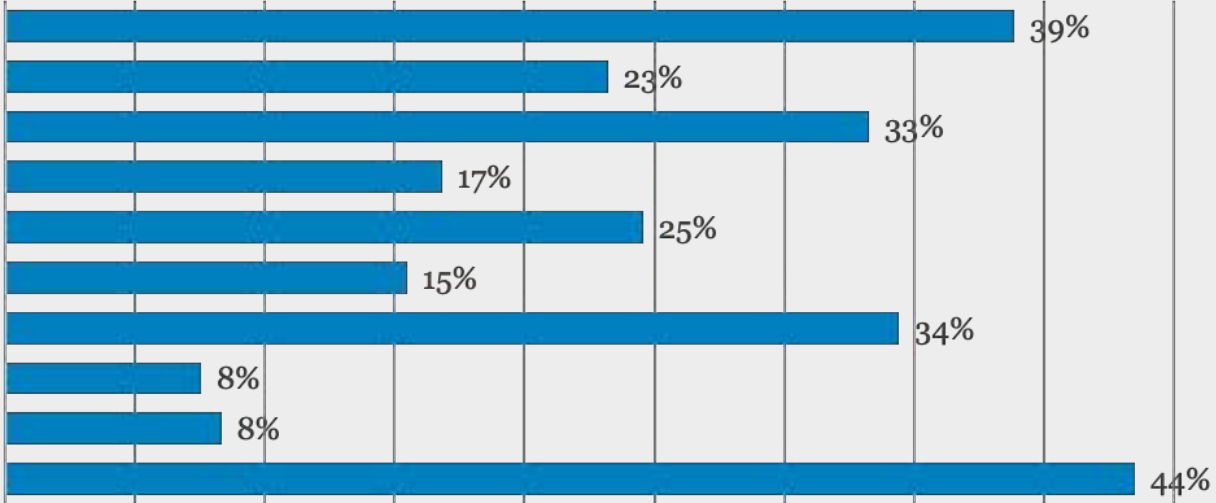
For many, clothing labels are irrelevant. They are only occasionally checked to confirm size, material or authenticity.

This attitude reflects a lack of interest in the place of manufacture, under the assumption that most garments come from the East. However, for true retro or collectible treasure hunters, authenticity and originality are crucial. These careful buyers examine stitching and other indicators to ensure they are purchasing something genuine and valuable.

Second-hand fashion is thus redefined as a treasure hunt. Each item discovered is not just a piece of clothing, but a find that combines style, history and a personal sense of achievement. The shopping experience becomes an adventure full of possibilities, transforming the second-hand fashion market into an exciting and rewarding field to explore.

What motivated you to buy second-hand clothes?

- I don't care whether I buy new or second-hand clothes, if they have a design that I like and are in good condition
- A second-hand clothing store came up on one of my social media apps and I liked a garment that I saw
- Buying second-hand clothes is more environmentally friendly
- I found a garment that is very difficult to find, it is a unique piece
- I found a fair where they were selling second-hand clothes
- I had a special event, and I was looking for a garment for the occasion
- I found clothes from a brand I like at a better price
- I found a person from the entertainment industry who was selling a garment that I liked
- I'm always looking for second-hand clothes to buy
- I found a garment that I liked



Chapter 5 Marketing in clothes shopping

F. The Game of Channels: between online and local stores in fashion

In today's fashion landscape, online and physical channels play complementary roles, each with their own challenges. Online channels, with their organic content, inspire consumers from the comfort of their homes. Women, in particular, show a slightly higher propensity to purchase less expensive clothing online. However, this enthusiasm is hampered by several reservations. Choosing the right size, not knowing how the garment fits, and distrust in product delivery are significant barriers.

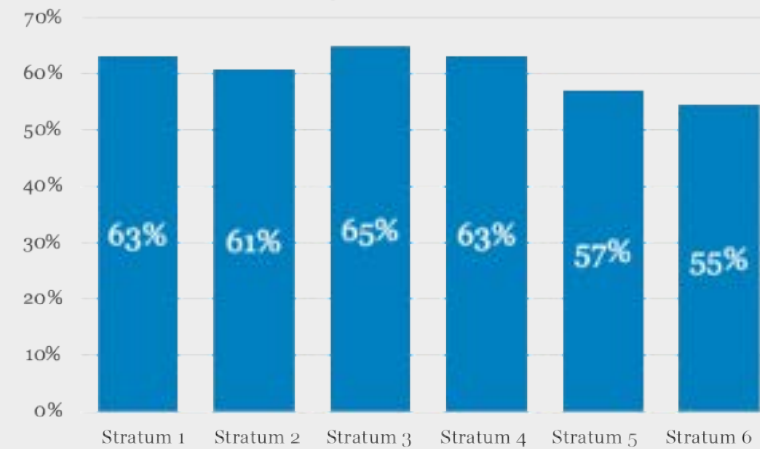
Buying clothes online requires greater cognitive effort. Consumers must pay attention to every detail of the information provided to minimize the perceived risk, which becomes even more crucial in the case of second hand clothes. The inability to examine the garment in person adds a layer of uncertainty that many prefer to avoid.

The in-person shopping experience remains irreplaceable for many. Feeling the fabric, trying on the garment, smelling the material: these actions are a comprehensive part of the purchasing process. The tangibility of clothing, the physical contact with the product, provides reliability that online channels cannot yet replicate.

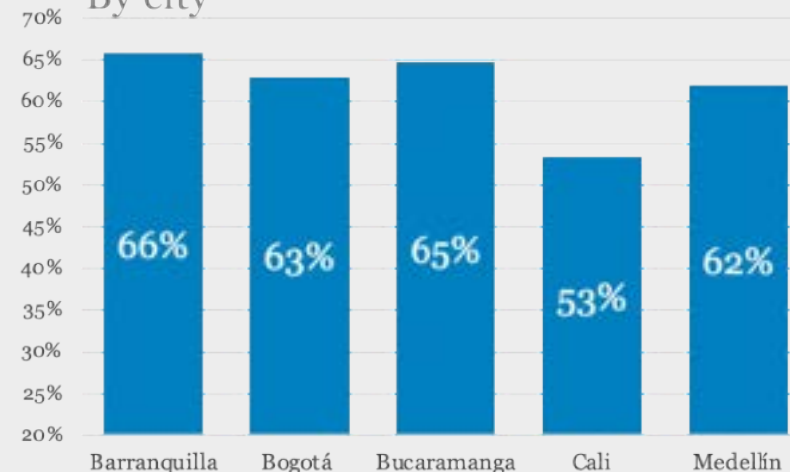
62%

Would not buy second-hand clothes on online channels because it is difficult to know what condition they are in

By Socio Economic Level



By city



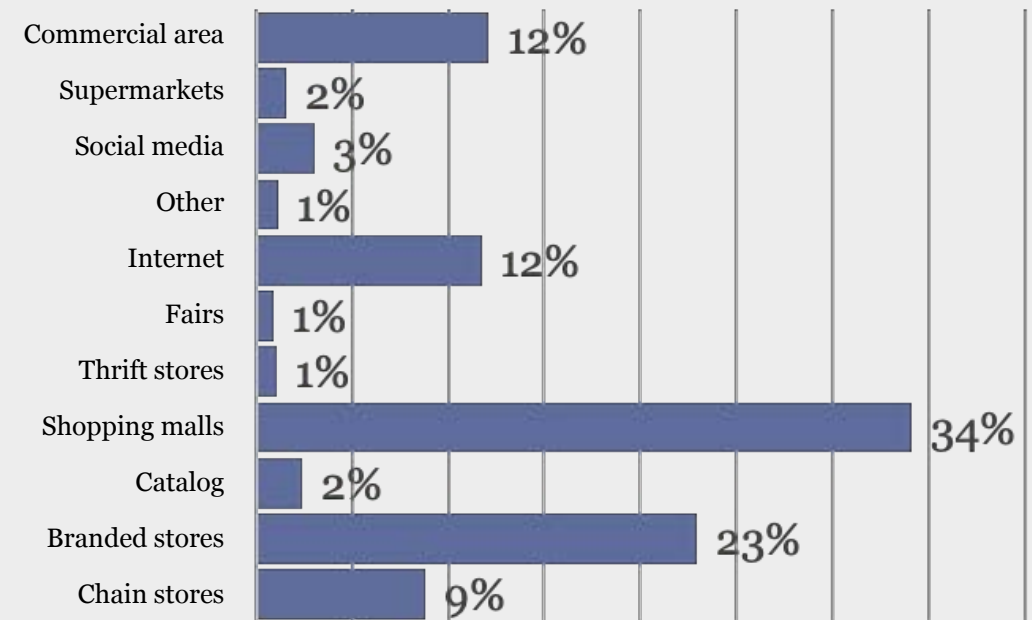
Chapter 5 Marketing in clothes shopping

For second hand clothes buyers, the online channel serves more as an informational tool. It is useful to have a first approach to the item, but the preference is to close the transaction in person. However, there is one interesting exception: collectible or cult items, such as sports jerseys and classic clothes, can be more easily sold online if the seller provides detailed information and clear photographs that provide reassurance and convey the quality of the item. The perception of scarcity, highlighting that these are unique pieces, can speed up the decision to purchase online.

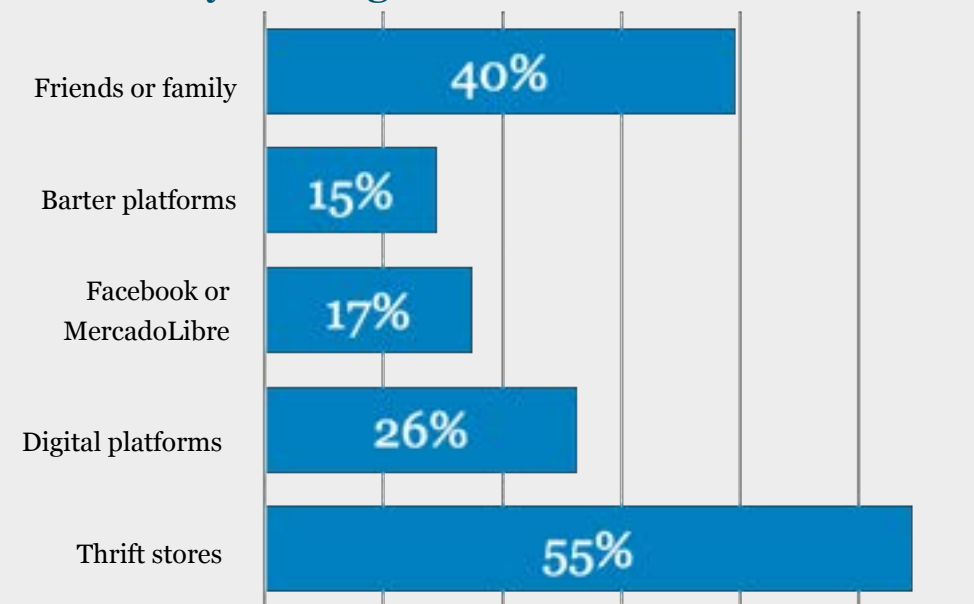
As for physical channels, there is a preference for locations that integrate a varied offer of brands and styles. Traditional shopping malls in each city, with their mix of shops and experiences, are favorites. To a lesser extent, shopping arcades or fashion clusters also attract shoppers.

Imagine a young woman browsing Instagram, getting inspired by the styles of influencers and online stores. However, when it comes time to purchase, the desire to touch, try on and experience the garment in person brings her to a local mall. There, among a variety of options, she finds the garment she saw online, now tangible and real.

Where do you prefer to buy clothes?



Where have you bought second-hand clothes?



What are the things that concern you the most when buying clothes through online channels?

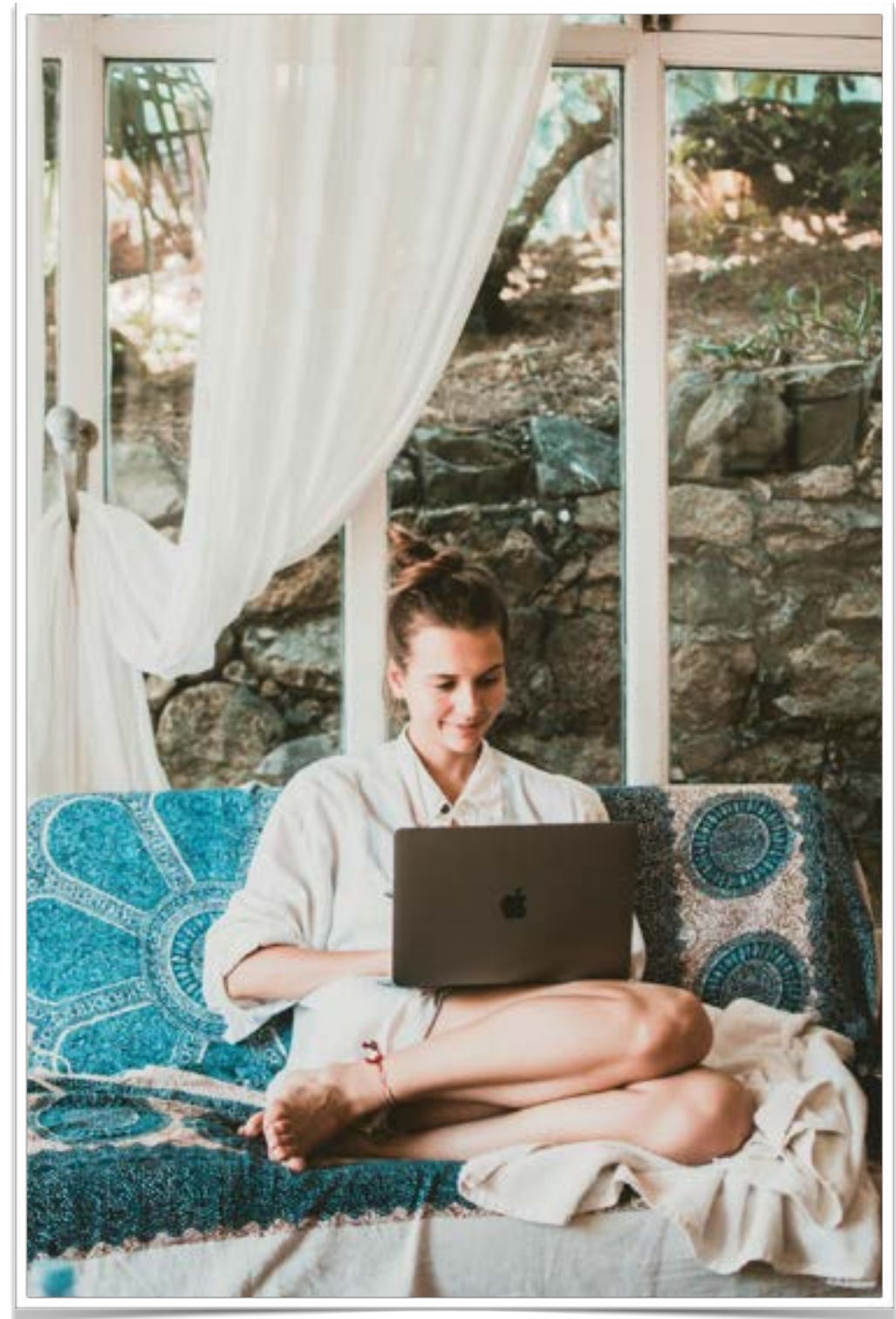
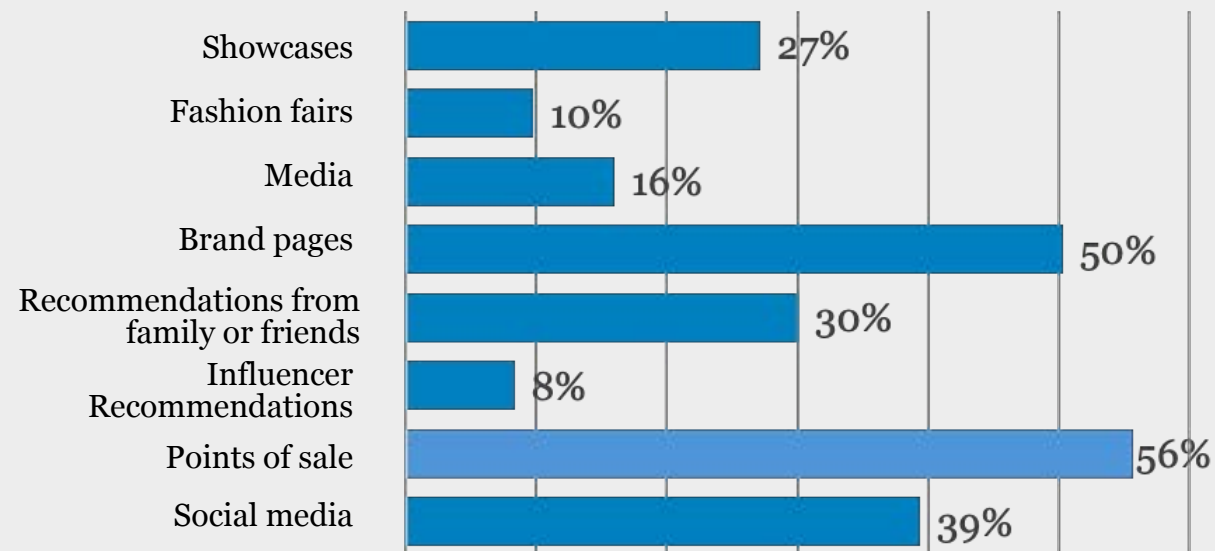


If you had to buy second-hand clothes, what characteristic would be most relevant when deciding about where to buy them?



This balance between the online and the physical store creates a unique mix in the world of fashion. Digital channels inspire and engage, while physical channels close the sale and satisfy. It is a game of perceptions and realities, where each interaction has its place and time, taking the consumer on a journey that mixes the best of both worlds.

When you think about buying clothes, where do you look for information to decide which product to choose?



Chapter 5 Marketing in clothes shopping

G. The Triad of Choice: Design, Quality and Value in Fashion

In the intricate process of choosing a piece of clothing, three factors stand out as the fundamental pillars that guide purchasing decisions. These elements not only determine which garments end up in our wardrobes, but also reflect our aspirations and value criteria in fashion.

Design, the expression of personal style

The first factor is design. It is not just about how a garment looks, but how it aligns with the identity and personal style of the person choosing it. Design encompasses the overall shape of the garment, its fit, the type of piece and its uniqueness. Imagine a young woman who finds a jacket with a unique cut that perfectly complements her urban style. That jacket isn't just a piece of clothing; It is a statement of who she is. Design is an extension of the individual, a means of communicating without words, a reflection of personality and taste.

Quality, the feeling of tangible value

The second factor is quality. When evaluating a garment, consumers look for tangible signs of quality: the feel of the material, the stitching, and the brand name. Think of a male executive, who, upon touching a high-quality cotton shirt, feels the immediate difference compared to a lower-quality garment.



Chapter 5 Marketing in clothes shopping

That feeling of durability and well-being that comes from a well-made garment provides internal satisfaction. Quality becomes a promise of longevity and comfort, attributes that are deeply valued.

Value for money, the wisdom of the smart buyer.

The third factor is the quality/price ratio. Finding a garment that offers an excellent combination of price, quality and meaning transforms the buyer into a smart consumer. It is the joy of discovering a deal that seems too good to be true: a high-quality garment at a fraction of the original cost. Not only does this make the purchase financially satisfying, but it also elevates the act of shopping into an enriching experience. A young man may feel particularly savvy when he finds a designer coat at a thrift store for a fraction of the original price, a symbol of his ability to find and understand value where others do not.

Beyond these three main elements, any additional benefit or feature of the garment is simply “nice to have”. These extras are not essential to the purchasing decision, but they can add an extra touch of appeal.

In short, design, quality and value for money form the essential triad that guides purchasing decisions in fashion. These factors reflect not only selection criteria, but also the aspirations and values of the modern consumer. In the end, each chosen garment is a testament to the perfect combination of personal style, tangible value and the wisdom of the smart shopper.



Chapter 5 Marketing in clothes shopping

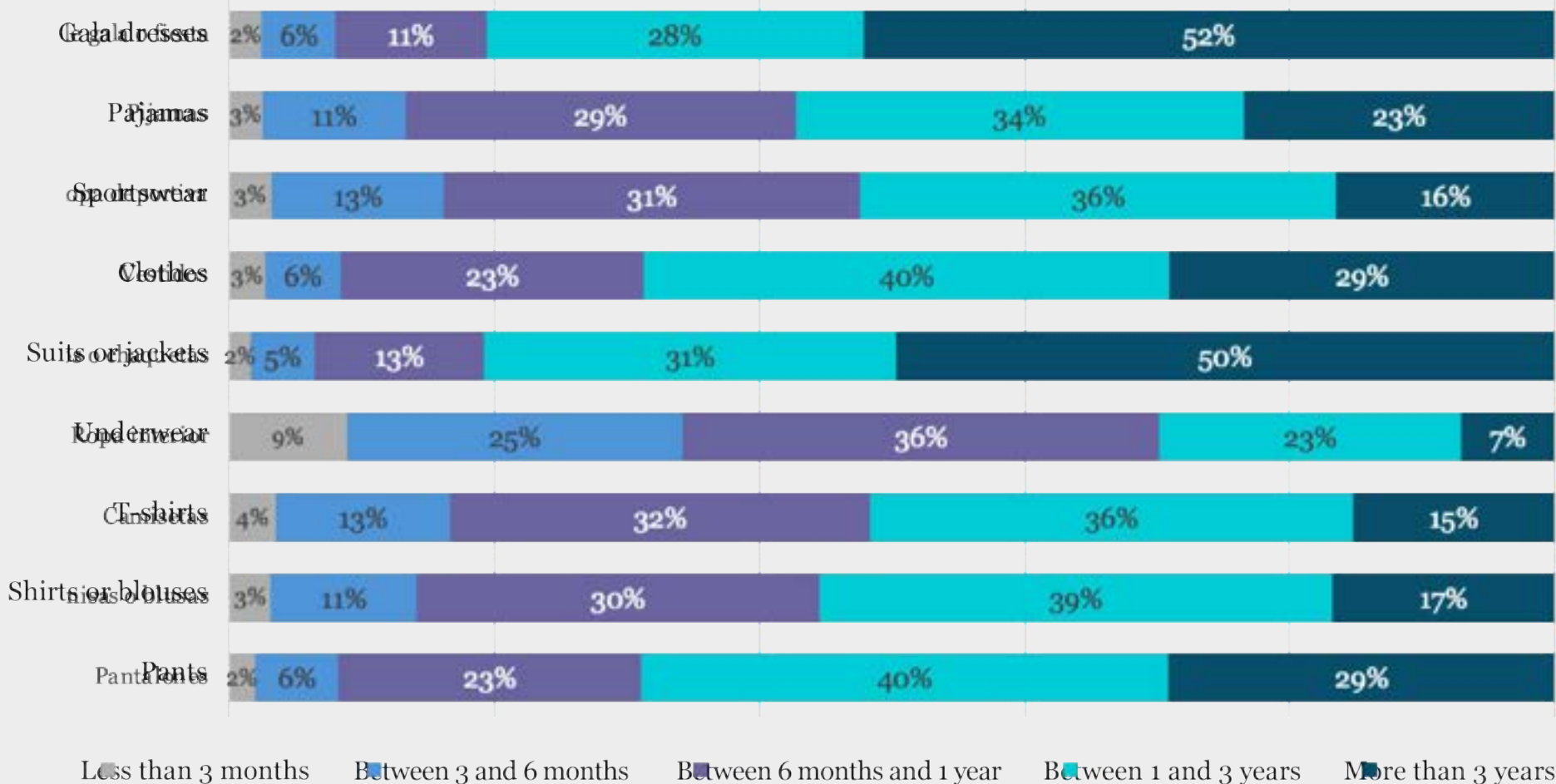
H. The Lifespan of Clothes: An Emotional and Practical Journey

The life cycle of a garment is a complex and subjective issue, influenced by a variety of factors such as brand, perceived quality, frequency and occasion of use, and the occupation of the wearer. Despite this subjectivity, some trends and justifications can be identified based on data and observations.

Garment lifespan, an overview

For bottom garments, such as jeans and pants, the average use time ranges from 2 to 4 years. These essential and versatile pieces withstand regular and often more rigorous use. Top garments, such as T-shirts, jackets, shirts and blouses, have a shorter lifespan, usually 1 to 2 years. The main reason is visible wear and tear and the need to keep a fresh, clean appearance.

What do you think is the average lifespan of this type of garment?



Chapter 5 Marketing in clothes shopping

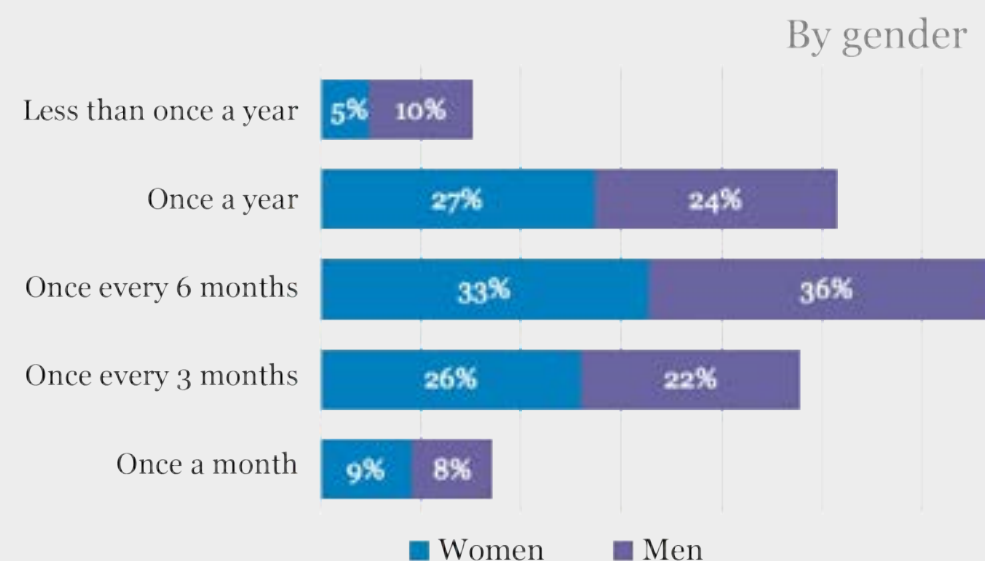
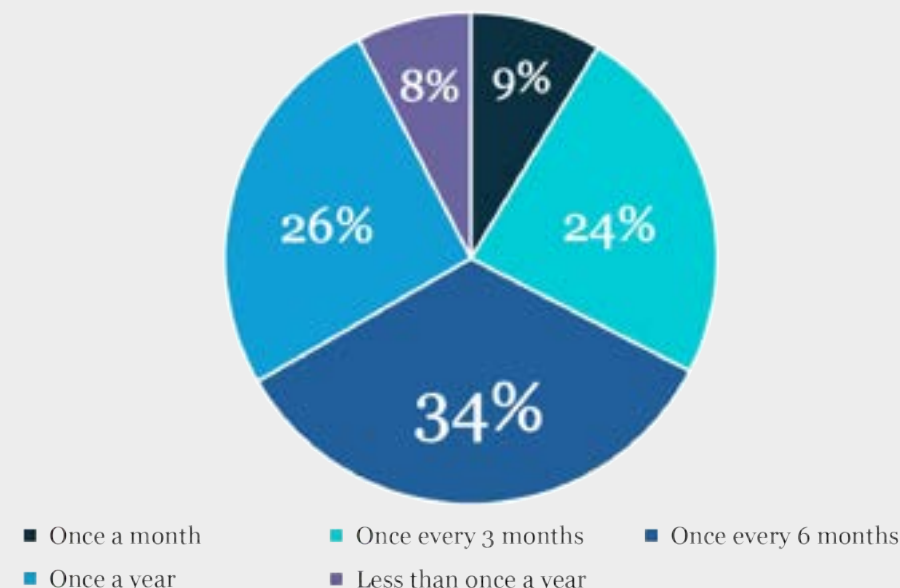
Specificities of use: men and women

There is a noticeable tension among men in the use of T-shirts and shirts, particularly due to wear and tear and deodorant and perspiration stains in the armpit area. This aesthetic and hygiene problem often speeds up the replacement cycle of these upper garments. Women, on the other hand, develop a special relationship with their jeans. A pair of jeans that fit well becomes a treasure worth preserving. Women tend to extend the life of these jeans as much as possible by wearing them more regularly than tops, which need to be changed more frequently to keep the wardrobe fresh.

Used clothing users, a different approach

Second-hand clothing users display particular behavior compared to naysayers and potential second-hand clothing buyers. These consumers tend to place even greater value on clothing in general, leading them to strive to extend the life of their wardrobe. This conscious and careful approach probably influences the ritual of buying and discovering treasures, which makes them worth preserving as long as possible.

How often do you check your closet to determine which items you will not be using again?





The challenge of getting rid of clothes

The process of getting rid of clothes that will no longer be worn is driven by emotional and practical considerations. Every decision to discard a garment is accompanied by memories and personal assessments that go beyond simple functionality. It is an act that reflects not only a path in style or needs, but also a transition in the user's life.

For many, especially those who appreciate sustainable fashion and second-hand clothes, prolonging the life of a garment is a value statement. It is not simply a matter of finance, but a way to honor the history and use of each piece of clothing.

Mindsets

in second-hand clothing
in Colombia





Understanding consumer mindsets is key to entering the purchasing universe of audiences in a relevant, pertinent and memorable way.

In our field research, we have understood that second hand clothes have a place in every corner of Colombia, regardless of city, social class, age or gender.

Digging deeper into the data, we found specific patterns in consumer behavior toward clothing, and specifically toward purchasing second-hand clothing.

This exploration led us to identify three distinct profiles, each with unique motivations and barriers. Understanding these differences is crucial to designing strategies that dismantle prejudices and take advantage of opportunities, aimed at growing this segment in the country.

In this chapter we will talk about the specificities of these 3 profiles to understand how to reach them.

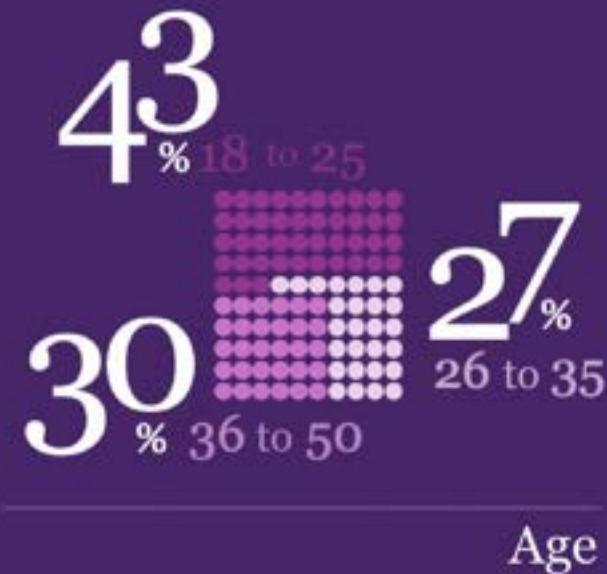
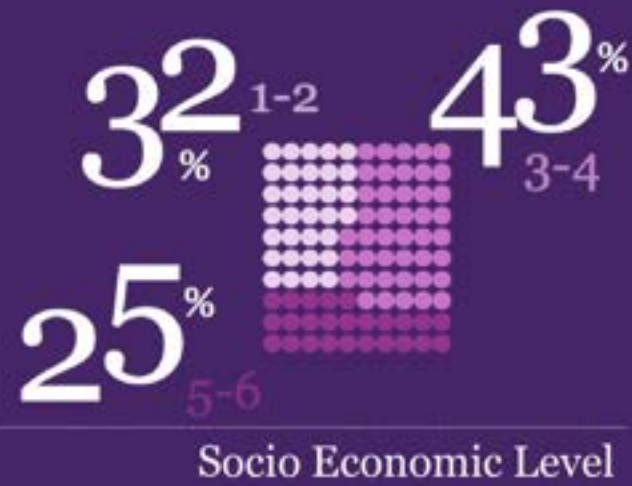




1. Dogmatic

“True tradition is not a repetition, but a conscious and valuable preservation of heritage”

T.S Elliot



Demographic profile



Dogmatic

In a constantly changing world, the dogmatic mindset finds strength in tradition, quality and the safety of the known, preserving what is valuable while others rush to the new.

This is a purchasing mindset whose identity is deeply intertwined with traditions and the status quo.

The dogmatic mindset is not defined by its age; its characteristics transcend generations, bringing together older youth under the same banner of conservative values. For this person, clothing is not simply clothing; it is a powerful tool to identify with their social group. Brands with history and a good reputation are their closest allies, as they represent more than quality: they symbolize status and belonging.

This purchasing mindset does not seek new experiences, but rather expects better experiences within the brands that it already knows and trusts. Familiarity is their safe ground. This loyalty to brands is almost unwavering, especially when they offer the status that is so highly valued.

The issue of sustainability for the dogmatic mindset is more a question of discourse than action. They see environmental responsibility as something that should be managed by businesses and governments, not by them as individuals. This mindset is reflected in their spending habits: they are more likely to throw away clothes they no longer wear rather than looking for ways to recycle or donate them. They change their wardrobe when they feel a need for personal renewal. Regarding second hand clothes, the most important barrier is the perception of the garments being dirty.



Motivators & Barriers



Would buy a used item of clothing if it is from a brand they have always wanted and can afford
 VS 71% eclectic
 70% progressive



Would buy a used item of clothing if it is from a well-known brand store that I trust
 VS 12% eclectic
 10% progressive



It is important for clothing brands to have a long tradition
 VS 49% eclectic
 43% progressive



Would buy a used item of clothing if it is from a well-known brand in the market
 VS 46% eclectic
 37% progressive



BRANDS

Motivators

& Barriers



56%

Would buy a used item of clothing if it was a garment that I considered unique

VS 55% eclectic
54% progressive



62%

Buying second-hand clothes worries me because I'm not sure how clean they are

VS 56% eclectic
49% progressive



57%

Buy clothes only when they need to replace an item

VS 53% eclectic
52% progressive



47%

My clothes are charged with my energy and therefore this happens with everyone's clothes

VS 42% eclectic
38% progressive



69%

Would buy a used item of clothing if it was a garment that not everyone has

VS 60% eclectic
57% progressive



GARMENTS



The dogmatic mindset finds no real value in environmentally friendly discourse. The idea of paying more for sustainable products is not convincing. They prefer to invest in what they know and trust, and sustainability-focused proposals often seem abstract and lacking in tangible benefit.

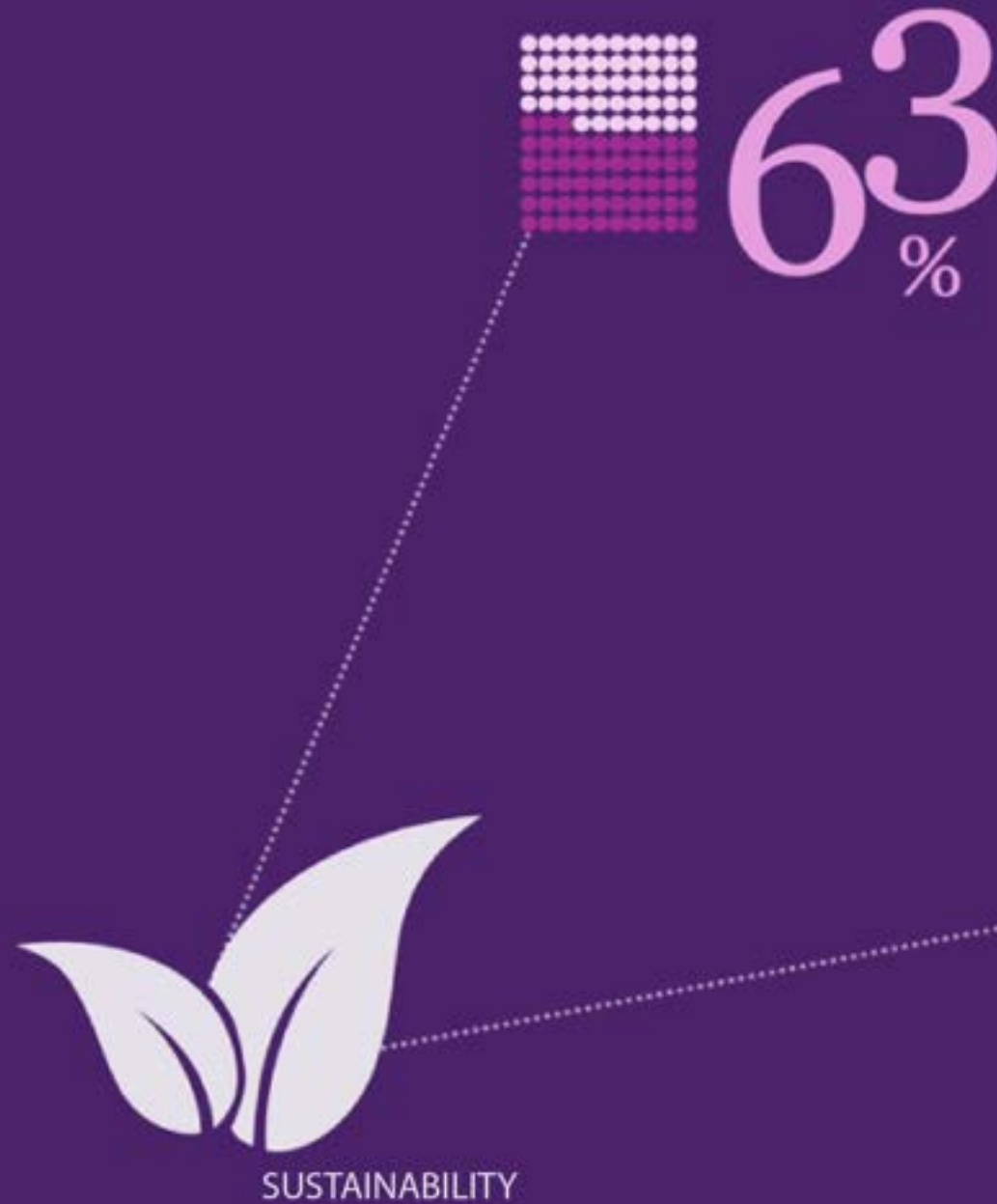
They prefer to use products and services that they already know and trust and are reluctant to adopt innovations unless they are widely accepted and tested by society. This preference for what is familiar is also reflected in their inclination towards products with a story behind them, which gives them a sense of authenticity and connection with their values.

For the dogmatic mindset, quality is paramount. They prefer to buy less, better-quality garments, and are willing to pay a premium price for brands they perceive as durable and well-made. This search for quality is closely linked to the importance given to its social image. The perception of how others see them is crucial, and their purchasing decisions are strongly influenced by the desire to project an image of success, stability and respect within their social community.

Their lifestyle reflects a conservative approach, following traditional norms and rules, and guiding their decisions by ethical and moral principles that they consider fundamental.

Motivators

& Barriers



63%

I try to do what I can to care for the environment, so I don't think about it when I make my purchases.

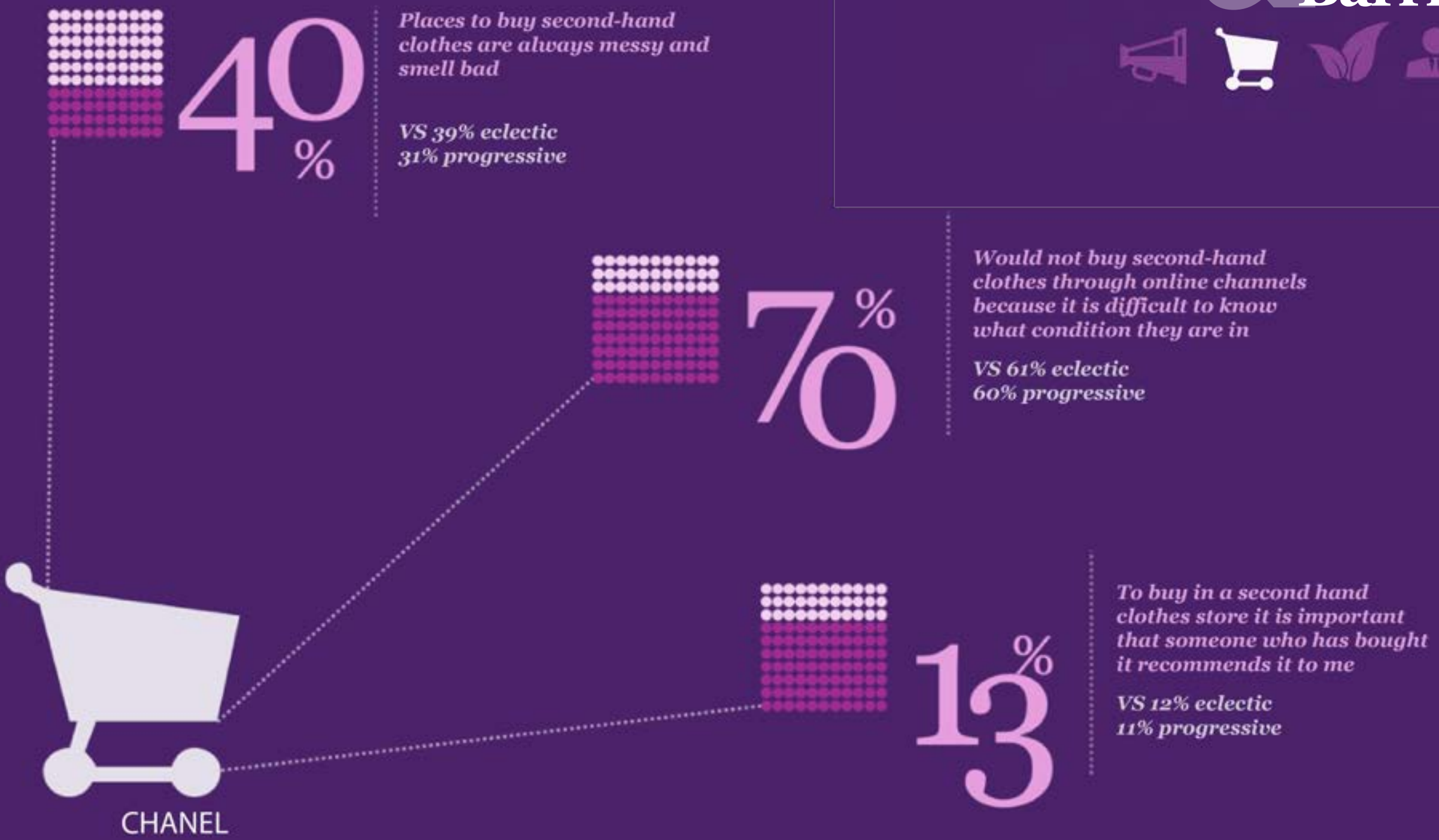
*VS 58% eclectic
60% progressive*

70%

The government should be primarily responsible for environmental sustainability in Colombia

*VS 61% eclectic
69% progressive*

Motivators & Barriers



Chapter 6 Dogmatic Mindsets

They prefer word-of-mouth recommendations or reviews from trusted sources; advertising campaigns that are too innovative or disruptive can be discouraging.

Although not chasing the latest trends, the dogmatic mindset appreciates exclusivity. They like to own items that are not easily accessible to everyone, which reinforces their sense of level status and distinction. This emotional connection with their belongings reinforces their resistance to parting with them.

You are prudent in their financial decisions, prioritizing stability and economic safety. Less likely to make impulsive purchases.

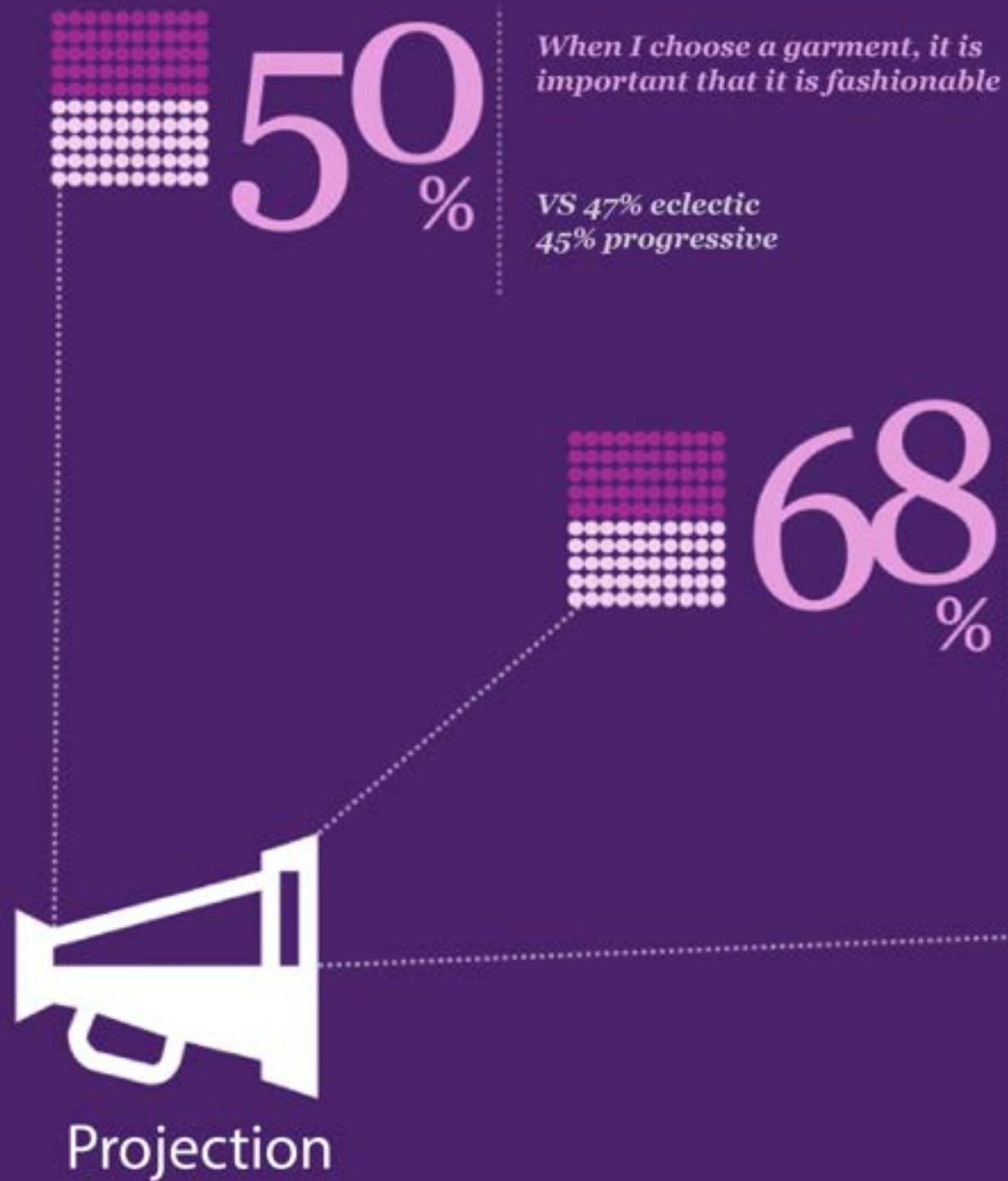
A distinctive feature of this mindset is its belief in the energetic charge of second hand clothes. For them, clothes are not just fabrics, but carriers of the energies and experiences of their previous owners. This mindset is rooted in their personal perception of the world, making them more reluctant to buy second-hand clothes and always preferring new garments that they consider free of external influences, unless they find garments of high personal or brand value.

In short, the dogmatic mindset is the guardian of tradition in a rapidly changing world. Their attachment to historical brands and their resistance to new

experiences reveal a constant search for status and safety. And even though the sustainability discourse surrounds them, they choose to stand firm in their beliefs, trusting that others will take the lead in protecting the planet.



Motivators & Barriers

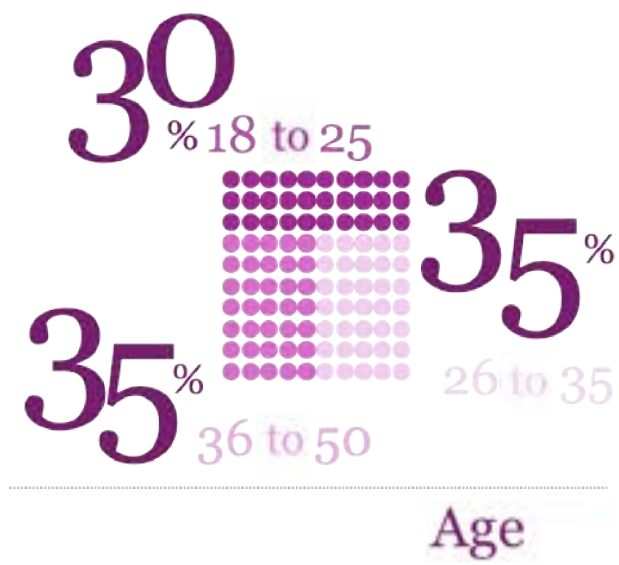
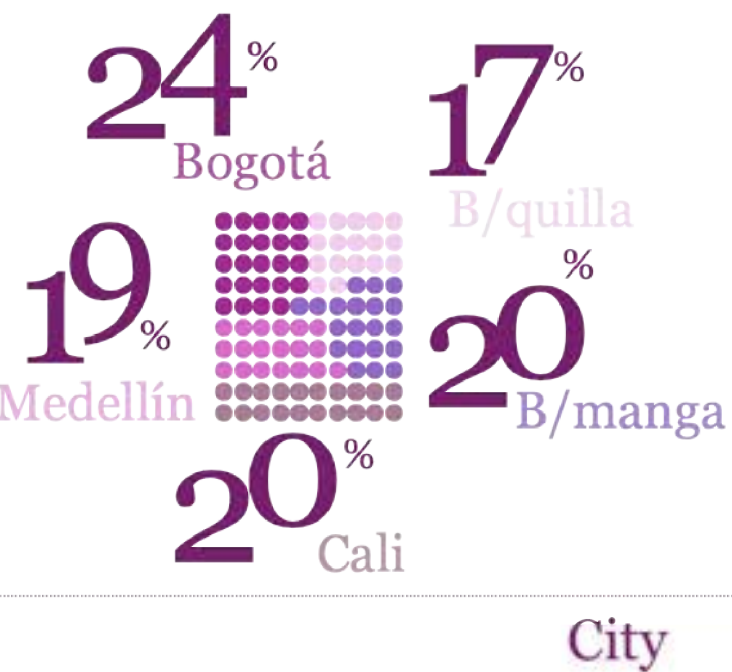
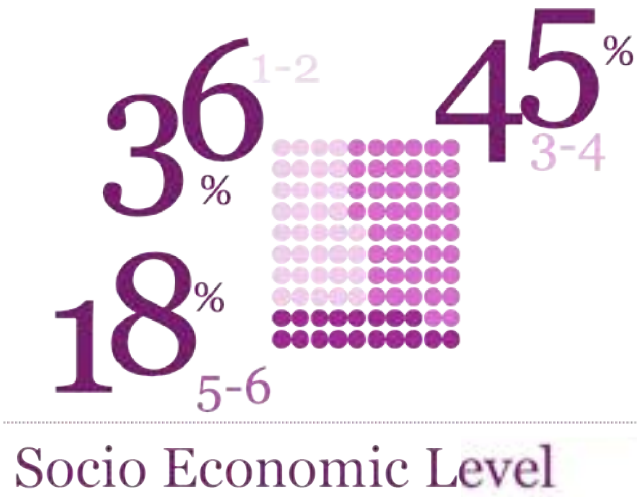




2. Eclectic

“Be yourself, everyone else
is already taken”

Oscar Wilde



Demographic profile



Eclectic

In an environment saturated with ephemeral trends, the eclectic mindset finds its way by exploring, valuing authenticity and embracing diversity with an open mind and a pragmatic heart.

This purchasing mindset is characterized by its exploratory nature and pragmatic approach to life.

The eclectic mindset is, by principle, exploratory. They are not tied to social trends or traditions, and this freedom allows them to feel comfortable with themselves in any context. They don't seek to attract attention or stand out; in fact, going unnoticed is a situation that they find completely comfortable. Their inner safety is not in search of external validation.

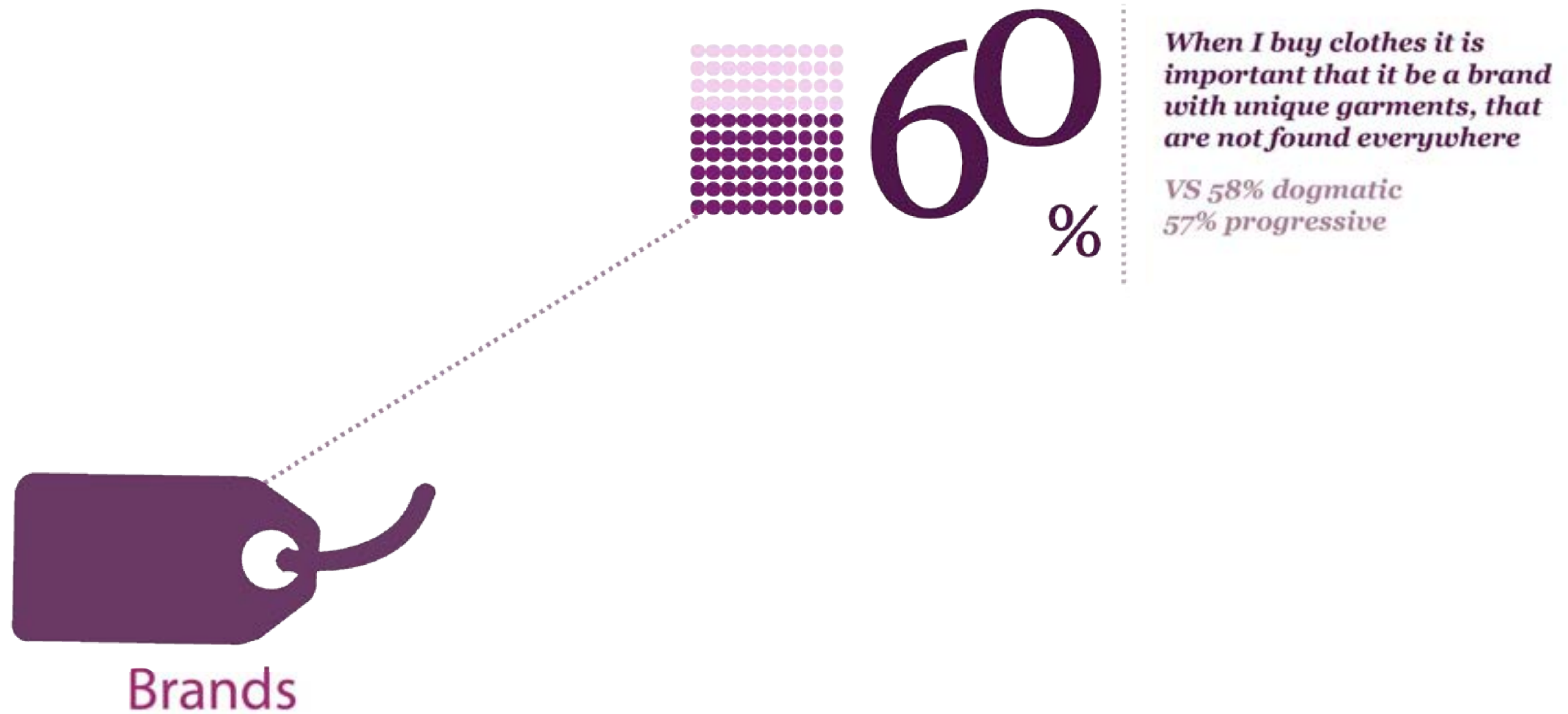
Unlike other mindsets, the Eclectic is not satisfied with empty speeches. They need to see to believe, for example, when it comes to environmental discourse. Words must be backed up by concrete facts that show how any event directly impacts their life in the present. This direct relationship with everyday reality makes them more demanding and selective in their beliefs and actions.

This mindset is clearly reflected in their relationship with clothing. They tend to give practical use to clothes that they no longer wear, turning them into rags for cleaning or other household uses. They are not impulsive when it comes to updating their clothes; they prefer to keep wearing their clothes until they are in rough condition. However, this does not mean that they do not seek to update their clothes. Eventually, they update their wardrobe with a few key pieces, selected with care and purpose.

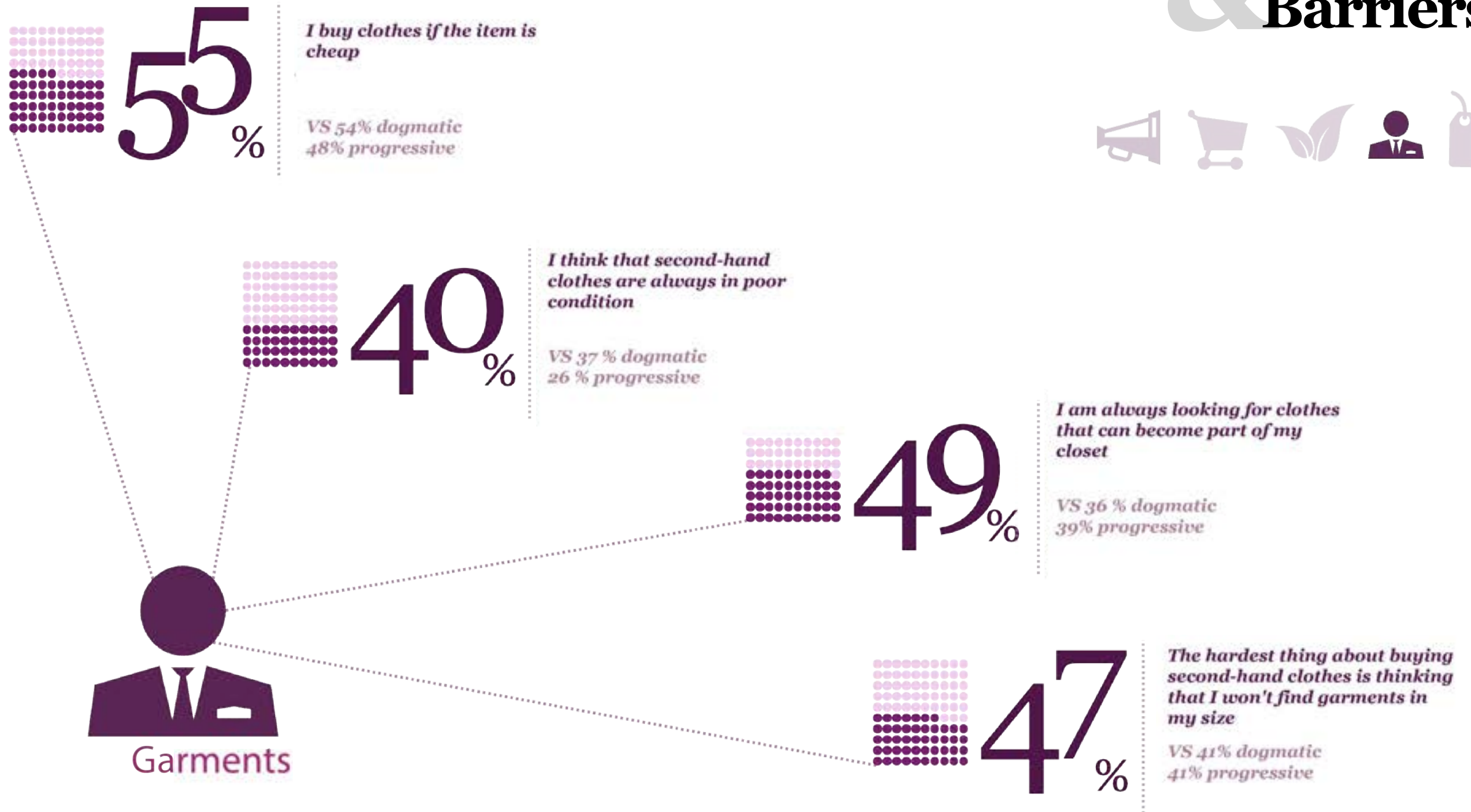
When thinking about second hand clothes, the biggest barrier to purchasing is the perception that second-hand garments have a high probability of being in poor condition.



Motivators & Barriers



Motivators & Barriers



Chapter 6 Eclectic Mindsets

The idea of selling clothes only makes sense to the Eclectic mindset if it is a high-value item that can generate a significant financial return. They don't cling to objects for sentimental or status reasons; their approach is pragmatic and functional. As for environmental responsibility, they believe that this is an issue that mainly corresponds to the companies that cause the damage. Their view is that large entities should bear most of the burden and solution to environmental problems.

They are also characterized by their ability to adapt and find practical solutions in their daily life. Not anchored in rigid routines, their flexibility allows them to navigate different situations with ease.

They value authenticity and transparency. In a world where information is abundant and sometimes contradictory, they look for reliable sources and verifiable facts. This search for truth and evidence guides their decisions and allows them to maintain a clear and critical view of the world around him. Diversity in interests is another important facet. They have a wide range of interests and hobbies, exploring different cultures, disciplines and activities. This versatility makes them open-minded and adaptable to different contexts.



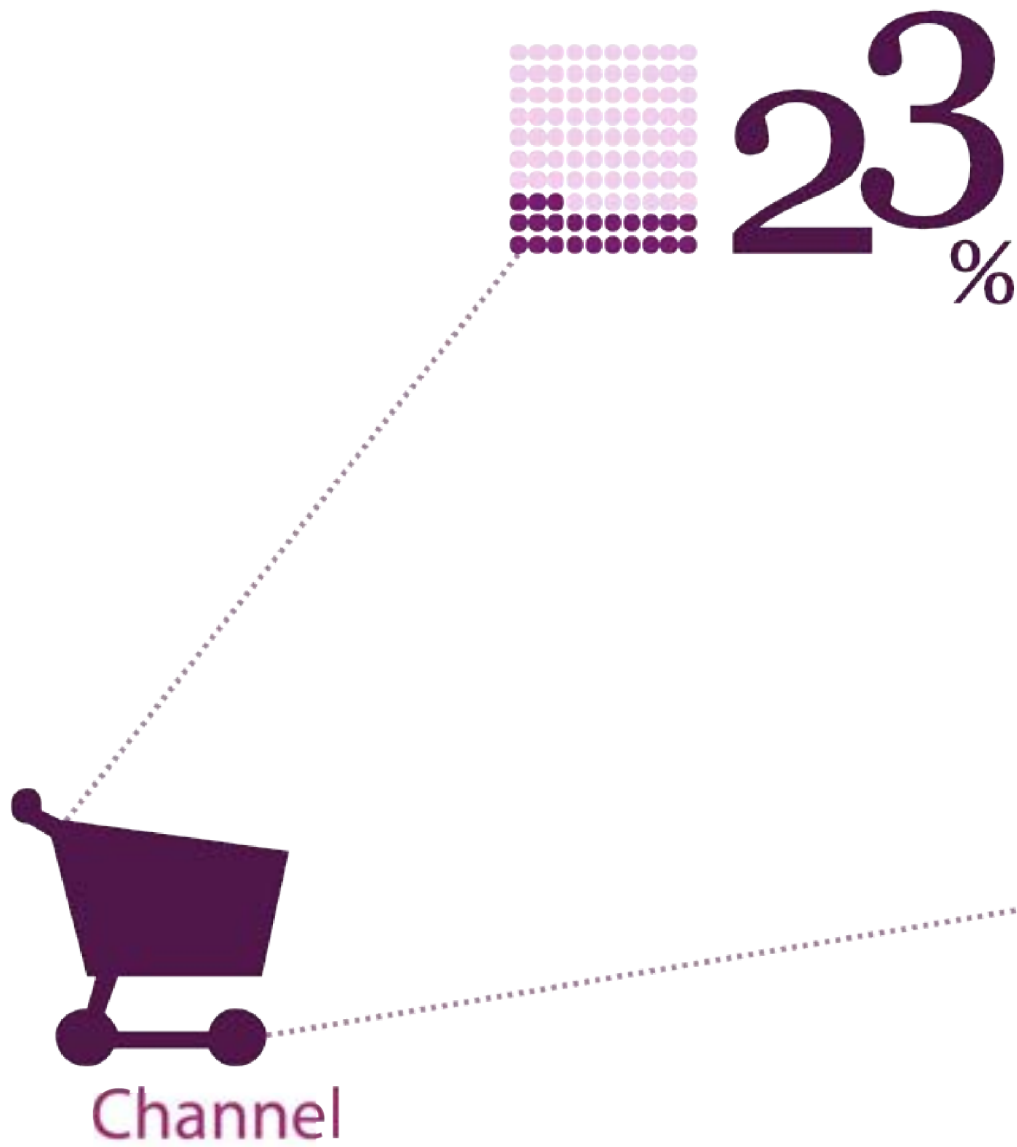
Motivators & Barriers



When I buy clothes it is important that it be a brand with unique garments, that are not found everywhere

*VS 58% dogmatic
57% progressive*

Motivators & Barriers



Second-hand clothing stores must collect, select, wash and prepare the garments for sale

*VS 16% dogmatic
21% progressive*



That the store offers discounts

*VS 74% dogmatic
71% progressive*

Chapter 6 Eclectic Mindsets

They are budget conscious and seek to maximize the value of their money. They prefer to make smart and strategic purchases, opting for quality products that offer durability and functionality. This financial awareness is combined with a preference for quality over quantity; they prefer to invest in fewer things with better quality, from a functional, not a discursive, point of view. This choice allows them to enjoy products that not only fulfill their purpose, but also have greater durability.

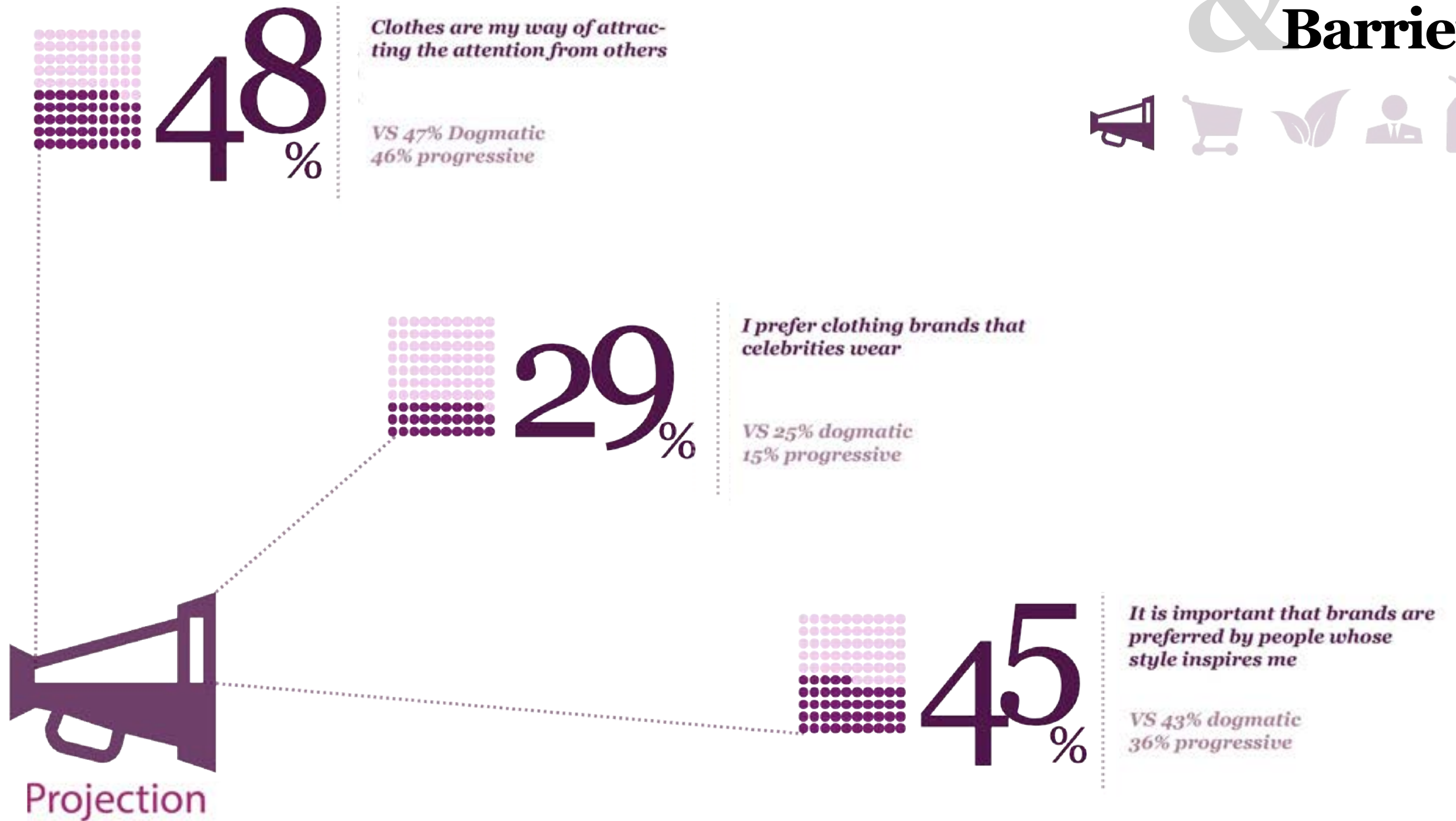
Autonomy is a fundamental pillar in their life. They prefer to make their own decisions based on their personal judgment rather than blindly following the recommendations of others. This independence is reflected in their lifestyle and purchasing choices.

Minimalism is another important value for this mindset. They appreciate a lifestyle where less is more, preferring to get rid of the superfluous and focus on the essentials. This preference allows them to live in a more orderly and efficient manner.

In short, the Eclectic mindset is a pragmatic explorer in a complex world. Their ability to adapt, their focus on facts and their independent nature makes them a unique and dynamic mindset. While others get lost in discourses and appearances, they move forward, relying on their own perception and experience to navigate through life.



Motivators & Barriers

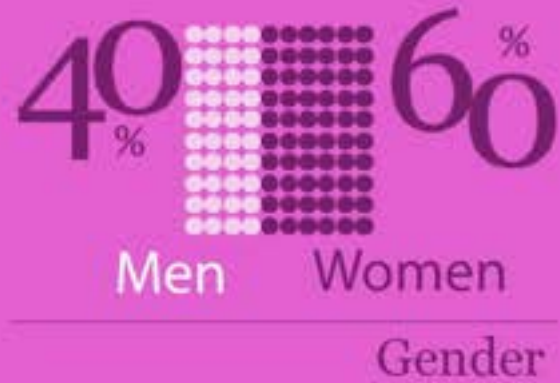




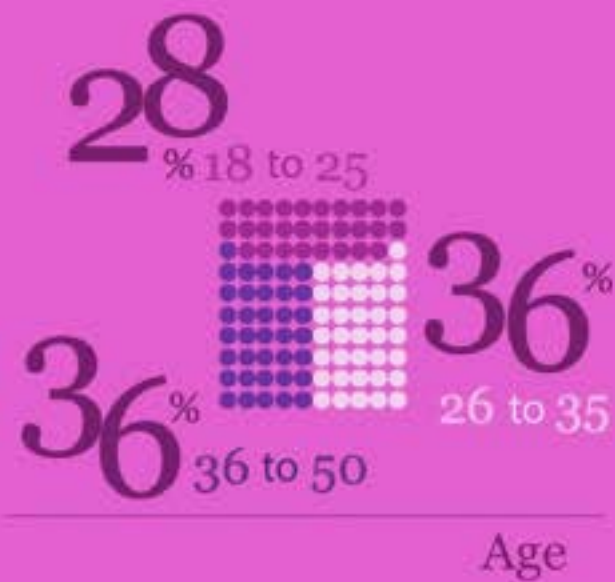
3. Progressive

"Change will not come if we wait for another person or another time. We are the ones we've been waiting for. We are the change we seek."

Barack Obama



Demographic profile



Progressive

In a society in constant motion, the progressive mindset leads, with its adaptability, authenticity and commitment, causes that reflect an inclusive and sustainable future.

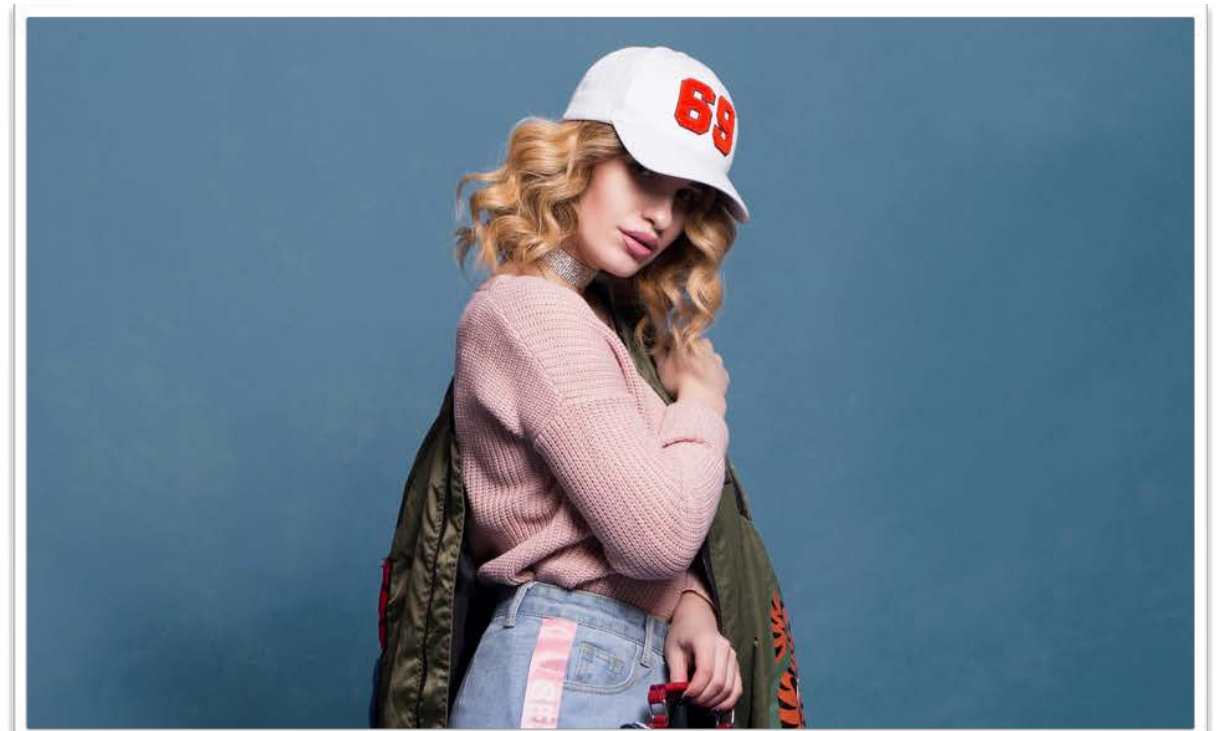
This mindset is defined by its extraordinary capacity for adaptability and its dynamic approach to trends.

Progressive is the mindset with the greatest capacity for adaptability. In a constantly changing world, they use clothing as a powerful tool to express their point of view on the reality that surrounds them. Fashion is not just about clothes; it is a statement of principles and a form of communication. They are passionate trend followers and a fervent lover of social media, where they find inspiration and a platform to show their identity.

This purchasing mindset is always open to new experiences and trends. They like to draw attention by making a statement with every action and discourse.

They don't just follow fashion; they live it and reinterpret it continuously. Every choice is an opportunity to stand out and express their individuality and creativity.

It is demanding both in terms of functionality and discourse. They expect brands to not only offer compelling products, but also back up their offer with a clear, functional purpose. The progressive mindset is enthusiastic about purpose and seeks brands that align with their values and principles. Sustainability is an important part of their personal discourse, and although it may be more discursive than practical, it is an element that cannot be missing from their narrative. The biggest barrier to buying second hand clothes is the shopping experience. They expect spaces and sensations



Motivators & Barriers



I want to feel the same trust in brands from second-hand clothing stores as I do in new clothing stores

*VS 59% dogmatic
60% eclectic*



I could buy second-hand clothes that would allow me to access brands that I like

*VS 50% dogmatic
55% eclectic*



When I buy clothes, I look for brands that use high quality materials

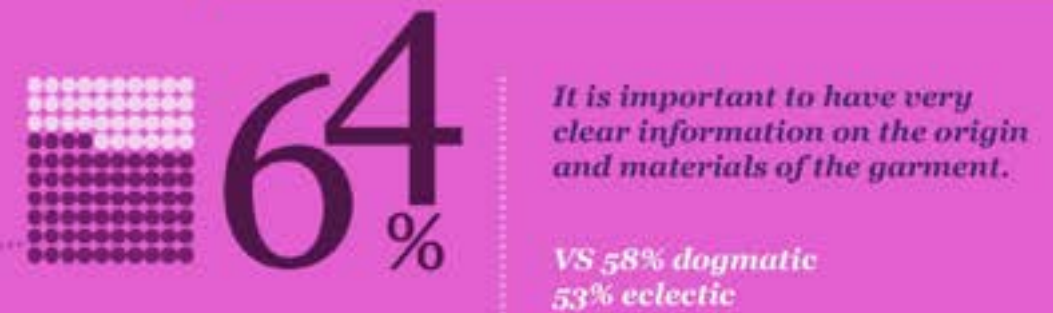
*VS 78% dogmatic
77% eclectic*



When I buy clothes, I look for brands with designs that are in fashion

*VS 54% dogmatic
52% eclectic*

Motivators & Barriers



Chapter 6 Progressive Mindsets

Their wardrobe evolves with fashion, reflecting their ability to change positions as quickly as the world does. Their adaptability is evident in their wardrobe, which is constantly updated to keep up with the latest trends. Each garment is an opportunity to make a statement, to show the world their vision and their commitment to evolution and change. They are also characterized by their ability to integrate technology into their daily life. Social media is not only a source of inspiration, but also a tool to influence and be influenced. This constant flow of information and trends allows them to stay ahead of the curve and always be early adopters of new trends.

Creativity and innovation are core values. They love experimenting with styles, combinations and concepts, constantly challenging norms and interpreting what it means to be fashionable. This approach allows them to not only follow trends, but also create and lead new ones. They also deeply value authenticity. Look for brands and products that not only look good, but also have a genuine story and purpose. This search for authenticity is reflected in their willingness to support brands that share their values and are committed to social and environmental causes.



Motivators & Barriers



I understand that products that are environmentally friendly have higher prices than those that are not.

*VS 62% dogmatic
69% eclectic*



I always choose brands that are committed to environmental or social sustainability, even if it means paying more for their products

*VS 47% dogmatic
42% eclectic*



I prefer brands made in Colombia

*VS 52% dogmatic
50% eclectic*



I want a garment with an environmentally friendly production

*VS 64% dogmatic
58% eclectic*



Motivators & Barriers



Chapter 6 Progressive Mindsets

They deeply value inclusion and diversity, seeking out brands and products that celebrate and represent a wide range of cultures, identities and perspectives. They are driven to follow not only fashion trends, but also social trends, supporting causes that promote positive change in society.

The Progressive mindset prefers experience over product, investing in activities and events that allow them to learn, grow and connect with others. Community is vital to them, actively participating both online and offline, sharing ideas and supporting common causes. They demand honesty from brands, wanting to know how products are made, what materials are used and how companies treat their employees. Authenticity and business ethics are valuable in gaining their loyalty.

They value brands that offer customization options, allowing them to create unique and custom items. While supporting global trends, it also values local trends, supporting small entrepreneurs and local businesses as a source of authenticity and creativity.

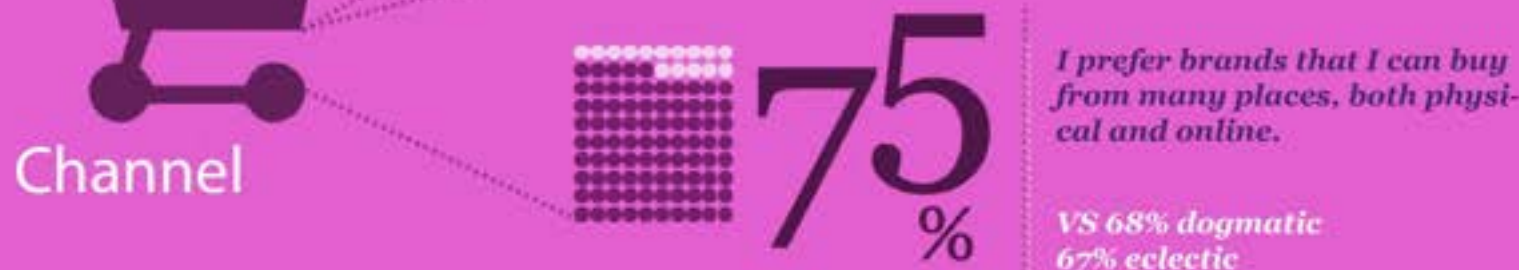
They are interested in brands that they can interact with across multiple channels, including social media, local stores, mobile apps, and physical world activities.

They seek authentic and meaningful relationships, connect with people and brands that share their values and offer genuine interactions.

In short, the Progressive mindset is a true adapter in a constantly changing world. Their wardrobe is an extension of their identity, a tool to express their vision and a reflection of their ability to evolve over time. While others cling to what is familiar to them, they embrace change, trusting in their ability to navigate trends and continuously finding themselves in what's trendy.

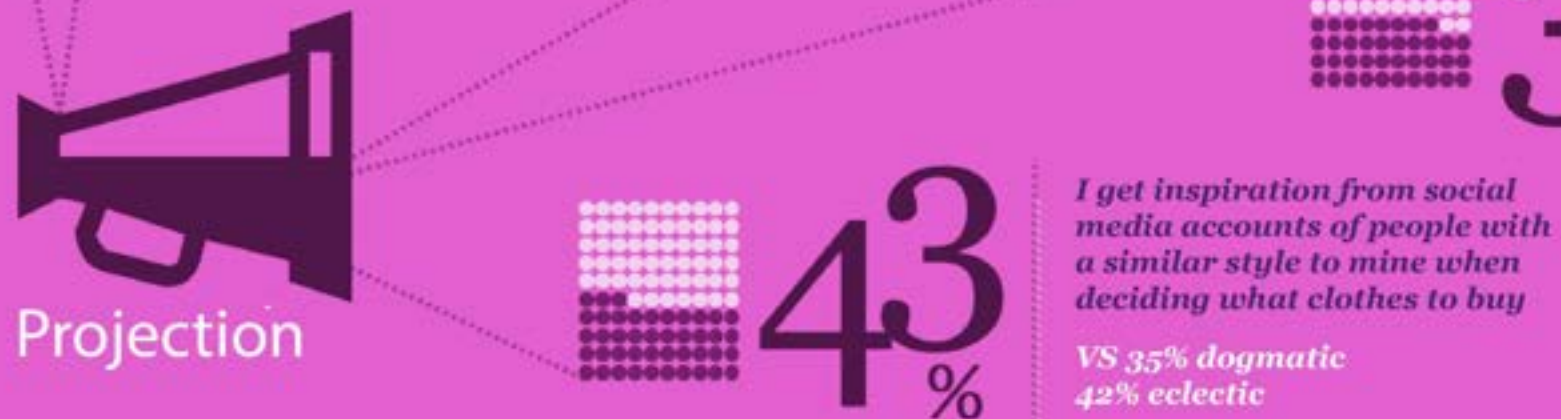


Motivators & Barriers



Channel

Motivators & Barriers



Projection

Study Fact Sheet

Qualitative and quantitative field

17 in-depth interviews

1311 surveys in an online panel

Total margin of error of 2.7%

People from 18 to 50 years of age

Strata 1 to 6

Bogotá, Medellín, Cali, Barranquilla y

Bucaramanga

Developed between March and June 2024



Annex 2

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