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1. INTRODUCTION

Shoppers is a critical part of tourism. It brings in revenue and foreign exchange earnings, creates jobs, and gives travel destinations more variety. It can help spread economic development across the regions, particularly through out-of-town retail malls, parks and villages. It can also be a major factor for travellers when choosing their destination. Because of the strong impact it generates, governments and the private sector alike need to be aware of, and to sufficiently consider, the potential of retail tourism (purchasing retail-traded goods outside of one’s usual living environment) in their strategies.

The opportunities for retail tourism are great, particularly with the post-pandemic rebound of international tourism, which saw revenues from inbound visitors grow by 81.9% in 2022. Despite the significant contribution of retail tourism to destination economies, there has been a lack of an accurate estimate of retail tourism’s market size, as well as fragmented data and no well-accepted definition. A thorough understanding of this industry’s major challenges, studied from both the consumer and practitioner perspectives, should help to boost both economic recovery and the sustainable development of Travel & Tourism.

This report has three main objectives:

1. To capture retail tourism’s economic importance, current market landscape, external environment, and challenges.
2. To provide an in-depth analysis of retail tourism from the perspectives of both tourists and practitioners in order to uncover the factors that influence retail tourism demand and supply at the global and regional levels.
3. To share lessons for governments, destination management organisations (DMOs) and retail practitioners in managing the sustainable development of retail tourism.

Key questions that the report addresses:

• Why are people travelling, and how have habits changed since the onset of the pandemic?
• How can destinations and businesses enhance their retail offer?
• For destinations with strong retail demand, what has changed, and how should they be adapting for the future?
• For up-and-coming retail destinations (or those hoping to expand their retail offering, or even create one), what can be learned from other destinations?

The full report is available at ResearchHub.WTTC.org
2. REPORT APPROACH & METHODOLOGY

To address these issues, this report uses a mixed-method approach that includes both primary and secondary data to examine the market environment, global trends, and economic impact of retail tourism. The research includes:

- An overview of the current landscape of the retail tourism sector, using quantitative and qualitative analysis of secondary data to uncover global retail tourism trends. This includes an analysis of:
  - The economic impact of Travel & Tourism in general, and retail tourism in particular, primarily based on global and country level data from World Travel & Tourism Council (WTTC) / Oxford Economics.
  - The political, economic, social and technological factors that are currently shaping retail tourism globally, using secondary data.

- A global survey of travellers covering 24 source markets across all regions in August 2022 to provide insights into tourists’ shopping behaviour. This included:
  - Travellers’ retail experiences and preferences – mostly regarding expenditure and location – on their most recent foreign trip, and their intentions for a future trip.
  - Market segmentation and demand modelling analysis to identify demographic and other factors that influence travellers’ behaviour.
  - A ‘network analysis’ to show which were the most commonly chosen source-to-destination routes for likely upcoming trips.

- 13 in-depth interviews were undertaken with industry leaders, such as from tourism boards, major retailers, airports, credit card companies and travel portals, to help identify key themes, challenges and opportunities for the retail travel industry.

- We also highlight specific examples, based on research in collaboration with The Bicester Collection.

- We have also combined all these varied sources of data and insights to create deep-dive case studies for the United Kingdom (UK) and Hong Kong SAR.
3. RETAIL TOURISM MARKET ENVIRONMENT

This section provides an overall assessment of the environment in which retail tourism operates.

The Travel & Tourism economic landscape

According to data from WTTC / Oxford Economics:

- Some countries have bounced back fast since COVID-19 travel restrictions were lifted. Türkiye, Albania, Qatar, Dominican Republic and Colombia are among those that saw their international visitor spending exceed pre-pandemic levels in 2022.
- In 2022, despite economic and geopolitical challenges, the Travel & Tourism sector’s recovery accelerated, with its contribution to GDP increasing by 22% year-on-year to US$ 7.7 trillion.

And regarding the economic impact of retail tourism:

- Between 2010 and 2019, the direct contribution of retail tourism to GDP in 122 out of 185 countries analysed grew faster than the overall economy did. It grew fastest in Myanmar (by 21.1%) and Qatar (by 19.7%).
- In 2019, globally, retail tourism generated US$ 178.2 billion, which represents 6% of Travel & Tourism’s direct contribution to the world’s GDP and more than 15% in some countries.
- At a regional level, in 2019, retail tourism directly contributed US$ 65.9 billion in Asia-Pacific, US$ 55.1 billion in Europe, US$ 43.3 billion in the Americas, US$ 10.3 billion in the Middle East and US$ 3.6 billion in Africa.
- In 2019, the largest direct contributors of retail tourism to GDP were the United States (US) (US$ 34.71) and mainland China (US$ 20.45). Countries that relied most on retail tourism – with the highest relative contributions of retail tourism to Travel & Tourism – included Zambia (17.6%), Sweden (16.2%), Australia (15.6%), Pakistan (15.3%) and Jordan (13.9%).
- In 2019, retail tourism supported 5.24 million jobs in Asia-Pacific and 0.95 million jobs in Europe – the two regions with the highest contribution of retail tourism to employment.
- In 2021, the Americas saw the highest year on year increase in retail tourism direct contribution to GDP (+US$ 7.54 billion). This followed a sharp decline in 2020 due to COVID-19.
- The countries with the highest retail tourism direct contribution to GDP in 2021 were the US (US$ 23.88bn), mainland China (US$ 9.08bn), Germany (US$ 6.69bn), Japan (US$ 6.27bn), India (US$ 3.95bn), the UK (US$ 3.60bn) and France (US$ 3.27bn).
Macro-environmental outlook

A PEST analysis was conducted to present the macro-environmental factors that are currently shaping retail tourism globally.

**Political**
- Despite occasional regional conflicts that may cut tourist flows between some markets, such as the war in Ukraine, geopolitical stability provides a solid foundation for the development of retail tourism.

**Economic**
- Despite the prospect of slow economic growth post-COVID-19 in major economies such as the US and the European Union (EU) due to high inflation, and disruptions in supply chains related to tourism product provisions, demand for tourism in general – including retail tourism – remains strong.
- The luxury travel market has proved resilient, with a continuing demand for high-end hotels and premium flight cabins, but also for luxury shops and products.

**Social**
- The worldwide relaxation of COVID-19 travel restrictions, enhanced by China’s recent border opening, has released a previously dormant appetite for international travel, with a renewed eagerness for beach and city holidays.
- Consumers are increasingly seeking to reduce their carbon footprint, preserve local culture and support local economies.

**Technological**
- The desire to minimise physical interactions during the pandemic accelerated a transition to online shopping and contactless payments, although e-commerce growth has since slowed.
- Technical innovations now provide the opportunity for consumers to have a more immersive and personalised online shopping experience, for example using Artificial Intelligence and Virtual Reality.
4. WHO IS THE CURRENT SHOPPING TOURIST?

Nearly 4,600 travellers responded to our global retail tourism survey. Here are some of the key findings.

Tourism spending

- On average, travellers spent more on shopping than on culture, entertainment, sports and recreation, but less than on transportation and accommodation.
- Regionally, respondents from Latin America spent the most for their whole trip (including transport and accommodation). However, those from Asia-Pacific and the Middle East dedicated the highest proportion—a fifth—of their trip expenditure to shopping.

What are tourists’ retail spending patterns?

- Average retail spending by visitors from emerging markets and developing countries was US$ 794 per person, outpacing the US$ 502 per person spent by those from advanced economies.
- Travellers from Asia-Pacific, the Middle East and Latin America spent the most on shopping during their last trip. At a market level, those from mainland China spent the most: US$ 1,350 per person on average.
- Overall, spending was highest on ‘food, alcohol & tobacco’ and ‘garments, fabrics & shoes’, although Middle East travellers spent most on ‘jewellery & watches’, and ‘electricals, cameras & accessories’.

Where do tourists shop?

- The most-visited tourist shopping locations and specific sites are dominated by in-town/city areas (89% of respondents) and high street shopping centres (79% of respondents), respectively.
- However, a significant proportion (around a third) of the respondents in several source markets also visited out-of-town retail locations.
- When choosing a shopping site, product quality and a safe, hygienic and pleasant environment were considered the most important attributes, although priorities differ across source markets.
- Asia-Pacific respondents are keener than others to shop at airports or seaports, due to the presence of duty-free stores, whereas those in Switzerland and the UAE are more likely to prefer to visit an out of town/city location than other nationalities.

Shopping information source

- Retail tourists obtained the majority of their information from online sources (specifically websites, online search engines, social media, and mobile apps), followed by word-of-mouth from friends and family.
- Respondents in the Asia-Pacific region relied on online channels the most and those from Europe the least.

Retail tourism demand analysis

- The main factor determining how much a traveller spends on shopping is their length of stay. A trip lasting more than seven nights can induce 2.71 times more retail expenditure than a day trip.
- Married tourists with one or more children spent significantly more on retail products than others.
5. WHO IS THE FUTURE RETAIL TOURIST?

This chapter focuses on an analysis of retail tourists’ future shopping intentions and behaviours based on the survey responses.

Retail tourist intentions

Although travellers are now keen to visit international destinations again, roughly half of these respondents would be at least somewhat likely to substitute this with a domestic destination. More than half of respondents are interested in experiencing a virtual environment, such as a virtual reality space, and in shopping online; a trend that became more popular during the COVID-19 pandemic.

Future retail tourism demand

- Married parents are likely to spend 49% more on shopping than single tourists.
- Risk-takers, the self-employed, and those aged 18-30 are also more likely to be higher spenders.

Willingness to pay for sustainable products

- Around 35% of respondents say they are ‘likely’ or ‘very likely’ to consider sustainability when making purchases on their next trip, and around 86% of those people say they are willing to pay a premium of at least 5% for sustainable products.
- Respondents in India are the most likely to pay a premium of at least 5% and those from the UAE, the US, India and Saudi Arabia are most likely to pay a premium of more than 20%.
- Those who are women, married with children, under 60 years old, employed and attended higher education are more likely to pay a higher premium for sustainable items.

Future desired destinations

- The US, followed by Japan and Italy – which were the three most visited places on respondents’ previous trip – remain the destinations most likely to be visited on their next trip, although France, Spain, the UK, Canada and Australia are not far behind.
- In comparison to the destinations they most recently visited, Australia and New Zealand saw a marked increase in desirability. Italy, France, and Greece were also more popular.
- While demand is returning for long-haul travel, network analysis of the survey responses shows preferences for intra-regional trips. Japan holds strong appeal for Hong Kong and Taiwan respondents, while Saudi Arabia is the primary source market within the Middle East for neighbouring countries such as the UAE, Egypt and Turkey.

Chinese Retail Tourism in Asia-Pacific: Forecast

In anticipation of an increase in outbound Chinese travel and its impact on retail sales over the next three years, we have projected the total retail revenue due to be generated by Chinese tourists within the Asia-Pacific (APAC) region, based on three scenarios corresponding to varying rates of recovery:

- Total retail spending by Chinese tourists in the Asia-Pacific region could reach up to US$53.45 billion in 2023 and could reach US$84.13 billion by 2025.
- Chinese retail tourists are expected to spend the most in Northeast Asia, with total tourism retail revenue reaching US$73.96 billion, US$57.60 billion, and US$45.62 billion by 2025 under the mild, medium, and severe scenarios, respectively.
6. THE INDUSTRY PERSPECTIVES

To understand how retail businesses and other Travel & Tourism stakeholders see the future challenges and opportunities for retail expenditure, 13 in-depth interviews were undertaken with industry leaders in 2022 and 2023. Quotes from them are included in the report. Four main themes emerged from the interviews as core areas for strategic development:

1. Retailtainment

Combining the terms “retail” and “entertainment”, this marketing concept has emerged as a significant factor in incentivising shopping at tourism destinations. DMOs and retailers can attract more footfall by transforming a shopping centre, for example, or an individual store into a place of entertainment, leisure activities and experiences, or by holding retail-related events.

2. Sustainable and ethical retail

As consumers become more conscious of their impact on the environment and society, retail tourism is shifting towards more sustainable and ethical practices, whether it is in the design of stores or in products that are ethically-produced or have plastic-free packaging.

3. Local products, local culture and local experiences

The local touch, with the focus on exclusive, local brands and crafts that cannot be found elsewhere, is an area of growth and importance in destinations. As tourists seek more uniquely local experiences when they travel, there are opportunities for sales of local products through family-run businesses, and to experience more of the culture through artisans and their work.

4. The growth of digitalisation

Industry experts emphasised the continued and growing relevance of digitalisation since the arrival of COVID-19 – in particular the importance of, and demand for, e-commerce and digital payment platforms. Retailers will increasingly use technology such as AI and data analytics to offer personalised experiences and recommendations to shoppers, both online and in-store. However, shopping in a physical store will endure as it provides an experience and memories that cannot be replicated online.

Additional emerging trends for retail tourism

- International retail tourism has been recovering well since COVID-19 border restrictions were lifted, with a rise in the proportion of Gen Z and Millennial shoppers.
- Interviewees also highlighted the ongoing strength of the luxury retail market, with social media being a notable factor in the increasing demand for high-end and exclusive goods and experiences.
- Retailers have benefited in countries such as France where international visitors can claim tax refunds on product purchases. Technological advances are needed to quicken the tax reclaim process.
- COVID-19 has led to travellers being more interested in products and services that promote health and wellness.
7. CHALLENGES & OPPORTUNITIES

Challenges

• **A lack of government support** means crucial opportunities to enact policies that will incentivise retail tourists to travel and spend, and so boost the economy, are missed. In particular:
  - **Tax-free shopping**: Countries such as the UK that have no tax-refund scheme for international visitors, or that set an overly high minimum purchase threshold for a rebate, as in Italy, are losing out on retail tourists who will travel and shop elsewhere.
  - **Restrictive labour laws**: Regulations in some countries, such as restrictions on Sunday trading, as occurs in Germany, hampers retailers’ ability to tap into the labour force at times when customer demand is strong.
• Governments, DMOs and retailers **lack robust, incisive data** about visitor expenditure and spending habits that would help them plan more effectively and strategically.
• Retailers continue to face **economic obstacles** such as disruption to the shipment of parts, and high inflation and energy costs that have led to higher retail prices amid lower consumer confidence.
• **International tourists** currently remain fewer in number than pre-COVID-19 and they are needed most as they spend more per person than domestic visitors.
• **E-commerce** has increased but it is unable to completely compensate for the current loss of in-store international tourists in some destinations due to additional online costs, such as taxes, duties, and delivery charges.
• **Implementing sustainable practices** in retail tourism may require significant investments in infrastructure, technology, and training, which can be challenging for small and medium-sized businesses, or for destinations with limited resources.

Opportunities

• **With the international return of Chinese consumers**, who, according to our survey, are among the world’s largest retail tourism spenders, retail operators and DMOs should benefit. They can tap into this market especially if they use Chinese social media platforms for marketing, customise content to highlight the elements of the destination that resonate with Chinese travellers, and hire staff who can speak their language.
• **Newly evolving destinations** such as Saudi Arabia can enhance their attraction by including retail tourism in their strategies.
• As almost half of all luxury goods are purchased while on a trip, retailers and DMOs should **consider the luxury segment** which remains a stable and lucrative source of income, particularly from source markets such as Asia-Pacific and the Middle East.
• Retailers that **open stores outside of urban centres** can help to mitigate the threat of overcrowding in tourism hotspots by encouraging visitors to experience another area. Out-of-town retail malls, parks and villages, such as those operated by The Bicester Collection, can help to regenerate previously neglected areas by stimulating local businesses which in turn revitalise local communities.
• There is a growing preference for **tourism ‘experiences’**, so stakeholders can capitalise on this by investing in sites that link entertainment or activities with a retail product offer.
• Retailers that embrace **technological advances**, such as data analytics and mobile payment systems, will be better at targeting customers, personalising the retail offer and creating a more convenient and engaging shopping environment for the visitor.
8. RECOMMENDATIONS

Recommendations for retail businesses and other destination stakeholders

To pursue recovery in the short-run and sustainable growth in the long-run, retailers and associated stakeholders such as DMOs should consider the following recommendations:

- Be agile to respond rapidly to the market’s shifting dynamics and latest trends by obtaining real-time insights:
  - Use technology reviews to gather instant insights, such as by monitoring online searches and reviews and engaging in multi-channel communications.
  - Gather the latest market research data from governments and tourism organisations and track stories in the media.
- Identify and target the highest value visitors by doing a segmentation analysis.
- Tailor the retail offer to create value and generate demand, based on the target source market’s preferences regarding the types of products, retail location and site.
- Enhance long-term, sustainable competitiveness and resilience against shocks by:
  - Diversifying international source markets, both within and outside the region
  - Including in the retail strategy a wide variety of attractions, activities and events to encourage repeat visits and longer stays

Recommendations for governments

Governments and local government agencies should implement enabling policies to help incentivise retail tourists to visit and spend more, such as:

- Allow international visitors (and perhaps even domestic visitors, as is the case on Hainan Island, China) to reclaim the tax on their purchases – ideally digitally. And ensure that any tax-free minimum purchase amount threshold is set at a level that can compete with nearby destinations.
- Ensure flexibility in employment regulations; for example permitting Sunday trading.
- Enable more connectivity to other countries by incentivising additional air routes through an enabling regulatory framework and lowering aviation taxes, fees, and charges.
- Remove visa obstacles. Offering visa-free entry options, or a visa-on-arrival makes a destination far more enticing for potential high-spending shoppers.
- Invest in retail location development in collaboration with all stakeholders, including local residents, to plan safe, accessible, and appealing environments with diverse attractions that best incentivise visitors to shop whilst benefitting the local community.
- Share officially collected data on international and domestic shopping visitors with retail tourism stakeholders.
- Improve transport connectivity within the country to encourage businesses to open out-of-town retail sites and so stimulate tourism and prosperity in new areas.
9. CASE STUDIES

This section explores in more detail the retail landscape in the UK and Hong Kong SAR, China. For each of these case study destinations, it describes the economic impact of retail tourism, the situation regarding international arrivals and source markets, and (based on the survey) the demographics of visitors, their average shopping expenditure, choice of shopping site and future travelling intentions. It also sets out specific challenges and opportunities, along with examples of innovation, investment, incentives and marketing campaigns carried out by private companies and governments.

In the UK:

- Retail tourism contributed US$8.9 billion to the UK economy in 2019, accounting for 9.4% of the wider Travel & Tourism’s direct contribution to UK GDP.
- The retail tourism sector faces regional competition from other European destinations that have a tax-free policy. The UK has been at a disadvantage since the government ended its VAT-refund scheme after 2019.
- London’s renowned retail hub Oxford Street will be revamped from 2023, with investment by the local council and private sector to improve the street’s environment and the council’s incentive scheme for new cutting-edge businesses.

In Hong Kong SAR:

- Retail tourism contributed US$1.7 billion – 12.7% of Travel & Tourism’s direct contribution to GDP – in 2019.
- However, the city has faced severe challenges due to a lack of visitors from mainland China and beyond since COVID-19 arrived, as well as social unrest in 2019. Retailers who rely heavily on tourists, particularly those selling luxury goods, suffered the most as a result of the restrictions imposed on travellers from mainland China.
- Chinese and Western retailers have taken advantage of low rents to open flagship stores in previous shopping hotspots, while retail hub Times Square became the city’s first mall to enter the metaverse, encouraging consumers to shop virtually.
- In 2023, the Hong Kong Tourism Board’s campaign to incentivise the return of visitors included the distribution of HK$100 cash vouchers that can be used in shops.
10. CONCLUSION

Retail tourism is here to stay. Travellers collectively spend billions of dollars every year when they shop. They create jobs, providing income for local artists, craftsmen, farmers and designers. Retail is one of the world’s most diverse industries, shaping every part of the travel experience. Despite all the challenges of the pandemic, retail tourism remains strong. Out-of-town shopping is a particular opportunity. Retail villages are a celebration of everything tourism has to offer — with their wide range of goods and bespoke local designs, they are a blueprint for the future of retail tourism.

Retail tourism providers should capitalise on the big trends in the sector: offering sustainable products, embracing local customs, creating leisure experiences and focusing on digital. They should push for the best data they can get their hands on and use it to create tailored marketing campaigns and shopping experiences. Governments can help with retail-friendly policies, such as tax-free shopping havens and flexible labour laws. And all stakeholders — whether politicians, retailers or destinations — can take the opportunity that retail tourism offers to spark strong, sustainable growth for generations to come.
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The Bicester Collection

The Bicester Collection is a family of 11 distinctive shopping destinations in Europe and China defined by extraordinary experiences while offering remarkable value. The Collection, created and operated by Value Retail, brings together the world’s most discerning guests and the world’s most renowned brands – often for the first time – on a journey of discovery. The Villages are located close to some of Europe’s and China’s most celebrated cities: London, Paris, Milan, Barcelona, Madrid, Dublin, Brussels, Munich, Frankfurt, Shanghai and Suzhou. Collectively home to more than 1,300 boutiques, The Bicester Collection offers guests an ever-evolving curation of fashion and lifestyle brands, world-famous restaurants, exciting pop-ups, and imaginative art installations throughout the year.

For more than a quarter of a century since its founding, The Bicester Collection’s mission has been to make the lives of others better – from the communities it serves to its guests, brand partners and its people. Through its DO GOOD programme, The Bicester Collection aims to drive sustainable social change in support of the United Nations’ Sustainable Development Goals, with a focus on unlocking futures for women and children, wherever they’re born.

Discover more at: TheBicesterCollection.com