The Impact of Retail Chains on the Structure of Small Towns and Rural Areas in Poland

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Abstract. The retail trade and services are becoming the most dynamically developing sector of non-agricultural activity in Polish rural areas. State-owned and cooperative stores have been closed down and they were replaced mostly by private stores. There are more and more commercial outlets of various formats, including supermarket chains, discount stores and integrated chains. Despite the growing number of modern retail trade formats, traditional small-format, often referred to as the local market, is also really important. Retail chains in small towns and rural areas are mainly located in the zones of influence of larger cities. They affect many changes of spatial, social and economic character. Small towns and rural areas more and more frequently start to compete for further retail trade investments while noticing lots of benefits and costs of this process. The aim of the article is to show the scale of new retail investment in small towns and rural areas in Poland and to recognize the impact of locating discount chains and supermarkets in small towns and rural areas on the economic and social sphere of these places. In the territory of small towns transformations of the structure of trade can be observed, mainly as a result of changes in the consumer behaviour. In small towns, functional and spatial transformations related to the retail sector take mainly from the expansion of grocery supermarket chains. The future of small traditional stores in small towns and rural areas is uncertain. Despite the restrictions in terms of the diffusion of consumer behaviour trends from metropolises to their outer areas, transformations seem to be inevitable. This change process should, therefore, be studied systematically. Research devoted to this field is important from the point of view of choosing the location of new investments related to discount chains and of the strategy for the development of small towns and rural areas. Identification of consequences of the operation of discount chains in chosen rural areas and in small towns can impact the verification of the policy adopted by local authorities in relation to spatial planning and forming the functional structure.

1. Introduction
Retail chains in Poland have been subject to dynamic structural, quantitative and qualitative changes. New formats of large area retail stores are emerging, and the number of stores is continuously decreasing, which is proved by the declining number of mainly small-scale grocery stores (25% loss in the last five years) and stores with electronics and computers [1]. They are replaced by discount stores that apply a low price strategy, as well as by supermarkets and shopping centres. Small towns and rural areas in Poland, which still offer traditional trade - have become a lucrative business location space for retail investors. As a result of their expansion, discount stores and supermarkets of the largest commercial operators in Europe (Tesco, Carrefour, Biedronka, Lidl, Netto) are emerging in rural areas and small towns. The residents are willing to
use their offer and local entrepreneurs are struggling with growing competition. The situation is becoming similar to that experienced by Western European countries at the end of the 20th century, where several large operators concentrate the majority of market share. According to figures from market research group Kantar the share controlled by discounters in France is 10% and in Germany – home of Aldi and Lidl – it is 37%, in the UK, two-thirds of the market is controlled by four players, this is the same as in Germany, while in France 56% of the market is controlled by the top four and in Spain just under 50%.

Market and capital advantage primarily refer to discount chains, offering mainly food products as well as household chemicals and cosmetics. The growing investment dynamics of retail chains in Poland now does not only regard large and medium-sized cities, but more and more often also reaches small towns (up to 20,000 inhabitants) and rural areas. Thereby, as chains have specific requirements regarding location and conditions of accessibility (for example type of building, plot size), the spatial development of these areas, as well as the range of products for residents and competitive conditions for small, traditional shops and local social relationships are also changing [2]. The variety of the local retail offer in small towns and villages is more and more often replaced by the standard product range offered in the discount chain across the country. Regardless of the location, typical retail establishments are emerging in housing estates and along transit roads. They are surrounded by parking lots, which makes it possible to park a car conveniently and free of charge. A standard layout that is very quickly remembered by the customer, as well as several cash desks and self-service checkout counters are offered in return for direct contact with the retailer in a small store.

Small stores are not able to cope with the price competition of large retail chains, which causes a wave of bankruptcies or a change in their business profile. Along with the wave of the bankruptcy of small retail stores, local economic conditions as well as social and consumer behaviours change, and social ties are weakened.

The purpose of the paper is to recognize the impact of locating discount chains and supermarkets in small towns and rural areas, with a special focus on their influence on the economic and social sphere.

Research and observations of the functioning of retail chains in small towns and rural areas in Poland that have been conducted for many years, allow for the formulation of the following theses:
- The dynamics of development of discount chains in small towns and rural areas is diverse and the highest in the outer zone of large cities and agglomerations,
- Intensive development of discount chains and supermarkets have a degrading impact on the local economy and trading activity,
- Retail chains operating in small towns and rural areas in Poland cause changes in the functional and spatial structure of these areas as well as changes in consumption patterns and local social relationships.

Extensive literature studies, as well as statistical analyses and direct research performed in small towns and in rural areas in Poland, prove that the observed processes took place in Western Europe, where the structure of retail chains experienced this stage of transformation much earlier. Discount chains in Germany, France, Great Britain or Spain, dominated small towns and deprived them of local, traditional shops, which caused many adverse economic and social changes.

In Poland trade has been the subject of spatial studies that mainly concerned the analysis of the development of new retail trade format and distribution of commercial and service-providing chains in the structure of a given city [3-12]. As far as the spatial and socio-cultural structure of European countries is concerned, small towns and their rural hinterland constitute an important element of the landscape, economy and social life. After the entrance of Poland into the European structures, the ways of management and directions of socio-
economic links between rural areas are subject to change, it impacts also the development conditions of small towns. Little urban centres functioning in metropolitan areas, in which economic, social and cultural changes take place in an extraordinarily dynamic way, are in a particular situation in terms of development [13, 14].

Small towns [15, 16] and their rural hinterland are home to a significant part of European countries' population, especially in regions in which agriculture still plays an important role. The original role of small towns in the settlement system has come down to the function of local support of surrounding rural areas while a large part of their inhabitants earned their living from agriculture. As far as the development of small towns is concerned, the functional type of the rural hinterland is of key importance. From this perspective, it is possible to distinguish three main types of rural surroundings of towns:
- agricultural (of dominant agricultural function and agricultural services).
- tourism-oriented (of a significant share of tourist function in the local economy).
- urbanised, often also industrialised, within the scope of influence of a large urban agglomeration (of dominant non-agricultural functions and a high level of urbanisation of villages, ex. rural areas in the outer metropolitan zone in Silesia Region).

Due to the industrialisation of the 19th and the 20th century, in the scope of influence of large urban centres and their emerging agglomerations, rural areas entered into the phase of impetuous urbanisation, suburbanisation and semi-urbanisation, which resulted in their profound functional transformation. Small towns located in spheres of the strong influence of urban agglomerations are also subject to significant changes in municipal functions, which result mainly in an increasing role of the residential function related with the fact that the majority of their residents capable of work have been absorbed by external labour markets – in large urban and industrial centres.

Analogous transformations constitute a characteristic feature of the rural hinterland of small towns. They change current patterns of service and strengthen shifts of at least a part of central functions to main urban centres. In urbanised areas, towns and their rural surroundings resemble more and more the outlying residential areas located within urban agglomerations. However, most of them maintain – primarily due to the existing morphological systems of local malls – basic service functions [17].

Socio-economic processes, which were taking place in the second half of the 20th century throughout Europe, significantly changed the external conditions for the development of small towns, also in Poland and in Silesia Region. Spheres of economic connections and of the influence of all large urban areas, in particular of metropolitan ones, expanded. Service functions of extended range (specialist and basic), locating in mass in their external areas, caused another change of the conditions for the development of small towns. Local centres, located within the scope of links with the central labour market and regional market, have been gradually transferring their remaining service functions (often only basic ones) to new shopping formats located on the outskirts of urban agglomerations [18]. In the light of new socio-economic conditions which occurred after 1990, attempts were made in many small urban centres to strategically redefine the role and the place of those centres in shaped spatial structures of metropolises and their rural surroundings in particular in the expanding suburbanisation zones located around urban agglomerations. In small towns, attempts are made to find new boosts to development and to identify chances for the improvement of living conditions of local communities. Taking into account the competition for growth factors (residents, capitals, demand potential, renown of the place, etc.) with central areas of urban agglomeration, actions and activities focused on the use of the specific character of places, local advantages and opportunities probably constitute the best development strategy.

2. The retail chain in the functional and spatial development of small towns and rural areas in Poland

Today, trade is developing freely in conditions of the market economy. Along with the political transformation in Poland and the transition to the market economy, the effects of these transformations
were mainly revealing in retail trade [19]. Market supply was growing rapidly, and newer and newer
formats of retail outlets were emerging. This process, especially visible in large and medium-sized cities,
has been ongoing in both quantitative and qualitative terms. The commercial chains of smaller cities are
also slowly changing. The development of the city is the result of providing goods and services to the
city inhabitants and residents of the surrounding areas. Each city is striving for development and is
subject to the process of constant transformations. It is transforming as a whole, and its elements, as
well as the relationships between them, are changing.

Trade is an important city-forming determinant and has an impact on the sustainable development of
the city and its surroundings [20]. The most important trade functions in the city development include:
consumer, employment, architectural and urban functions, as well as centralist, profit, cultural and other
functions related to the business environment (table 1).

| Table 1. Trade function in city development |
| Specification | description |
| -------------- | ----------- |
| Consumer function | - satisfying various residents’ needs (functional, cognitive, symbolic and social) associated with shopping; |
| – shaping the quality of residents’ life | - provides residents with access to shopping facilities (distribution, distance from residents’ places, adaptation to the number of inhabitants and frequency of use); |
| | - allows the formats to be adapted to the shopping preferences of various consumer segments; |
| | - has an impact on changes in the employment structure and creation of new workplaces; |
| | - is a traditional service sector with a high employee turnover with a great engagement of manpower, especially women; |
| Employment function | - is a very important employer offering jobs for people with different qualifications and skills; |
| | - has an impact on the city development plan and spatial order; |
| | - creates a diverse architectural and urban shape within individual trade formats; |
| | - together with the network of commercial and public services, it forms the “urban structure” of the city; |
| Architectural and urban planning function | - commercial buildings can contribute to the revitalization of buildings and urban spaces; |
| | - can contribute to raising the socio-economic status of the city; |
| | - determines the centrality of the housing estate, the district and the city, and their importance in the settlement hierarchy of the city and region; |
| | - has a diverse scope of impact (housing, local, supra-local, regional) depending on the type of product range and commercial potential (turnover, number of customers); |
| Centralist function | - taxes on business activities conducted by retail enterprises constitute income in the city budget; |
| | - income from the sale / lease of objects / land for commercial activities contribute to the city budget; |
| Profit function | - performs social integration functions related to satisfying the human need for contact with others; |
| | - meet the needs of residents related to the management of free; |
| | - contributes to the development of gastronomy, entertainment, cultural services, disappearance of the division between shopping and entertainment, shifts the purchase from the sphere of duties to the sphere of pleasure; |
| Cultural function | - is a co-organizer of social, educational and preventive actions; |
| Functions related to the business environment | - cooperation of commercial enterprises with other business entities providing services necessary for the opening and operation of commercial outlets; |

* [21-23]

The subsidiarity principle which is the basis for the organization of social and economic life in the
European Union provides the freedom to develop retail trade to individual countries. The decisions to

1 M. Adamowicz, M. Zaręba, Nowe formy handlu detalicznego w dużych i małych miastach Polski [New retail formats in big and small cities in Poland], „Economic and Regional Studies” 2015, Vol. 8, No. 4, pp. 5-21.
launch and locate retail establishment are delegated to the local level and remain the responsibility of local governments and local communities. The main task of the commercial network in the city is to provide residents with shopping conditions that are appropriate in terms of place, time and manner. The layout of the city commercial network should be largely dominated by the structure of the settlement network, which means that the strongest relationship in space should occur between the distribution of the settlement network and the distribution of the commercial network. Urban planning activities in the sphere of trade should harmonize with market mechanisms and social expectations of residents. Regulatory functions in the market economy are limited to the impact of planning instruments and related to local real estate management. The involvement of local government in the development of trade should consist in maintaining a balance between various formats of retail trade and ensuring appropriate conditions for using the commercial and service offer of trade outlets. Care for the proper use of the economic resources of a given area and maintaining the ecological and infrastructural balance of the city is especially important. To implement these tasks, it is necessary to provide local government with economic policy powers and instruments (administrative and legislative, financial, organizational and institutional, and information and educational instruments) to achieve the optimal state of trade development in the city. The policy of the local government towards trade can primarily have a spatial character (indicating areas for commercial and service activities and conditions of their use) and intervention character (using fiscal instruments through the use of a system of reliefs and taxes to control the spatial distribution and selection of desired functions) taking into account the needs and expectations of investors, entrepreneurs and traders and, above all, interested groups of residents.

For several years, sales have been moving from small local stores to discount chains, which account for almost half of the total retail space in Poland. Although there is still room for new investors, the market is slowly reaching saturation with modern trade formats and experts forecast that its development will now be associated primarily with consolidations and acquisitions. At the same time, e-stores are developing very dynamically, constituting serious competition for traditional trade in an increasing number of industries. However, the most important changes, concern not the number of outlets, but the broadly understood culture of trade. Small cities in Poland and their rural areas are experiencing changes in this respect. Nowadays, the previous canters of supply for the local community, where mainly local, often family-owned trading companies operated, become places of competition for international retail chains.

In the last 10 years, the total number of stores has decreased by 25% and it is expected that in the next years the number of small, traditional outlets will be decreasing by about 3% per year [24] [25]. In turn, discount chains effectively conduct competitive activities as a result of which they take over local markets and lead to standardization of the supply offer. The situation in Poland has been intensifying in the recent few years as evidenced by conducted research and statistical analyses.

3. Development of discount chains in small towns and rural areas in Poland in 2014-2019

Today, Small town is a place of small stores and sidewalks, a place where public and private space overlaps and a place where we buy goods and services from businesses owned by our neighbours. Such places are increasingly rare. Small-scale, pedestrian streets are giving way to massive, impersonal discount and supermarkets chains. Street life has suffered, as our daily errands revolve increasingly around stores accessible only by car. Locally owned businesses are disappearing, displaced by national chains that have limited ties and no long-term commitment to the community. The loss of locally owned stores and the pace of retail consolidation are staggering.

In small cities in Poland and in their rural areas, large retail chains, mainly discount ones, are gaining a dominant position. Since 2012, they have been growing at a rate of several per cents of the market value annually. In 2013, 432 discount outlets were established in Poland, in 2014 - 275 outlets, and in 2015 only 135 outlets; in subsequent years of 2016-18, the increase in discount outlets fluctuated around
160 per year. Biedronka, Lidl and Aldi are the leading discount chains operating in Poland. In the second quarter of 2019, Biedronka chain in Poland had 2,932 stores, Lidl - 702 stores and Aldi - 134 stores.

Discount chains, that are the main shopping place for the urban and rural population in Poland, are currently conducting very similar marketing activities, which make them more and more alike in terms of price level, product range, promotional materials and store environment. To attract customers, discount stores are changing, while tailoring the offer to the needs of consumers. First of all, they are working on changing their perception - in the past, the dynamic growth of discount stores was the result of positioning them as the cheapest shops, for the poorest consumers. At present, discount stores undertake several activities to be perceived as those "for everyone". Increasing the scope of assortment, particularly by adding popular brand products, and thus reducing the share of own brands in the assortment is an example of such actions.

Along with the expansion of discount chains on the Polish market, a change in the location of new investments is observed, with fewer and fewer outlets being opened in large and medium-sized cities saturated with commercial space. They are increasingly more often located in small towns and even in rural areas (Figure 1, 2).

![Figure 1. Discount stores in small towns in Poland (2012-2018)]
Figure 2. Discount stores in rural areas in Poland (2012-2018)

The development process of discount stores in Poland is systematic. Discount stores located in small towns and rural areas may change the functional structure of the area. Over time, the number of small retail trade establishments may be reduced due to the loss of a significant part of the customers what confirms the hypothesis that modern retail chain eliminates the activities of traditional forms of retail trade in small towns and rural areas in Poland. Among positive boosts to the development related to the construction of discount stores, the respondents enumerated the creation of new jobs in both retail and service sectors. In the areas of small towns and rural communes, progressive and diversified transformations of the structure of retail trade can be observed, as a result of changes in the consumer behaviour. The intensity of modifications depends on the size of a given commune and the number of discount stores in the retail trade chain. In rural communes, functional and spatial transformations related to the retail sector take place at a slower pace (much more considerable changes concern residential areas), while in small and medium-sized towns they result mainly from the expansion of grocery supermarket chains. Traditional stores do not have the economic potential to compete with modern retail chains.

Even if chain stores do save us a few dollars now and again, it comes at a great cost. Chain stores contribute far less to the local economy than independent businesses. Developers often present new chain store developments as major additions to the local economy. They note the growth in retail sales and shopping options. They tally up the number of new jobs and the added tax revenue that the development will bring. What is often overlooked is the other side of the balance sheet. Unlike new manufacturing facilities, which do create real economic growth, new retail stores simply shift consumer spending from one area of town to another. A new big box store can only be successful at the expense of existing businesses.

Local stores keep profits circulating within the local economy. They also support a variety of other local businesses. They create opportunities for service providers, like accountants and printers. They do business with the community bank. They advertise through independent radio stations and other local media outlets. They purchase goods from local or regional distributors. In this way, money spent at locally owned businesses sends a ripple of economic benefits through the community. By contrast, chain stores typically centralize these functions at their head offices. They keep local investment and spending
to a minimum. They bank with big national banks. They bypass local radio stations in favour of national advertising. In this way, much of the money spent at a chain store leaves the community immediately.

Small, independent stores also create economic diversity and stability. Because they are locally owned, these stores are firmly rooted in the community. They are unlikely to move and will do their best to weather economic hard times. Chain stores, by contrast, tend to be fair-weather friends. They are highly mobile and will abandon a location if profit margins do not meet their expectations. The worst case scenario is when a big box store builds on the edge of town, destroys the central business district, and then, a few years later, decides that it too will close its doors. The town is left with a death of the main street and nothing to show for it. A community that loses its local businesses to national chains also risks losing other economic development opportunities. New technologies have enabled many companies to operate virtually anywhere.

In 2018, research\(^2\) (interviews) was conducted with trade sector entrepreneurs in 84 small cities in Poland. They assessed market conditions for the functioning of companies and competition with retail chains. Entrepreneurs admit that they were forced to reduce prices of offered goods and services (68%), enrich or change the offered assortment or modify opening hours of their enterprises (66%). As far as severe changes in the company are concerned, they mention the necessity to dismiss employees (54%). It is, therefore, possible to state that discount stores in small towns and rural areas have a negative impact on the development of regions, they constitute a destimulant in relation to the development of small towns and rural areas influenced by them and they cause the bankruptcy of small enterprises, their financial drain and loss of customers. Competition of discount stores is one of the main factors making it difficult to conduct the business activity, especially for entrepreneurs with a trade profile.

Supporters of statutory limitations of competition in trade are prevailing over opponents. However, the highest number of people neither agrees, nor disagrees if such solutions are indifferent about it. Discount stores located in small towns and rural areas may change the functional structure of the area. Over time, the number of small trade establishments may be reduced due to the loss of a significant part of the customers. Among positive boosts to the development related to the construction of discount stores, the respondents enumerated the creation of new jobs in both retail and service sectors (39%).

Locally owned businesses build strong communities. They provide a foundation for the web of connections so essential to a healthy neighbourhood. The independent stores tend to be located in humanly-scaled, pedestrian-oriented shopping districts, as opposed to the sprawling, isolated experience of a chain store parking lot. The second reason is that local stores create a sense of place and community identity. They reflect the local culture. They give neighbourhoods their distinct flavour. They are often a source of community pride and an attraction to visitors. Chain stores, by contrast, are sapping communities of their character and individuality. Local merchants are more than providers of goods and services. They often take a leadership role in community affairs. Many chair neighbourhood organizations host cultural events or organize local festivals. Do we want in Poland the market place is filled with a few big discount chains? Or do we want a market where there are thousands upon thousands of small entrepreneurs, independent businessmen, and landholders who can stand on their own feet and talk back to their local government or to anyone else?

4. Conclusions
The research makes it possible to formulate some general conclusions regarding the impact of retail chains, especially the discounters on the structure, economy and social condition in small towns and in rural areas in Poland.

\(^2\) The study was conducted in 2018 in 1248 local retailers operating in 84 small cities in Poland
Firstly, in the territory of small towns and rural communes, progressive and diversified transformations of the structure of trade can be observed, as a result of changes in the consumer behaviour. The intensity of modifications depends on the size of a given commune and its proximity to a metropolitan area. In the rural communes, functional and spatial transformations related to the retail sector take place at a slower pace (much more considerable changes concern residential areas) while in small and medium-sized towns, they result mainly from the expansion of grocery supermarket chains. Despite the restrictions in terms of the diffusion of consumer behaviour trends from metropolises to their outer areas, the transformations seem to be inevitable. Modern commerce techniques, such as online sales and group purchases, eliminate barriers associated with distance or economies of scale and make it possible also for residents of the outer metropolitan area to participate in the entire commercial and service offer.

Negative changes, consisting mainly in the liquidation of small shops, are considered to be a natural consequence of market gambling.

Thirdly, the sector of the trade and services is the main factor in the development. While trying to attract external investors, local governments focused mainly on manufacturing companies (small and medium-sized towns) or on the entrepreneurs forming the sector of tourism and recreation, as well as on housing investors (rural communes). As a consequence, there are also no instruments aimed at protecting local retailers. The public policy in Poland has undermined local retailers by giving large retail corporations unfair advantages.

Chain store proliferation has weakened local economies, eroded community character, and impoverished civic and cultural life. Moreover, the consolidation has reduced competition and may harm consumers over the long-term. On the contrary to conventional wisdom, the decline of independent businesses is not inevitable, nor is it simply the result of free market forces. Rather, public policy has played a major role, particularly through tax incentives and other development subsidies that give retail chains a significant advantage. At the city and state level, the tax incentives and other kinds of subsidies are routinely made available to chain stores.

The future of small traditional stores in small towns and rural areas is uncertain. This change process should, therefore, be studied systematically.

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