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THE ART OF ADAPTATION: HOW TO ATTRACT CUSTOMERS AND INCREASE EFFECTIVENESS OF RETAIL STORES IN A VUCA WORLD

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In the study the author presented the adjustments implemented by various business entities operating within the retail industry and their impact on the competitiveness of reviewed discount stores. The companies analysed are considered as key players within the Polish retail market classified by the number of shops in each shop chain, number of customers attracted (also known as market penetration) and income from sales. Before the study, the author performed a literature search. In the first part of the article, the readers can find information presenting the operational background –a number of definitions, such as retailing and black swan, have been adduced to introduce the topic. Subsequently, the writer describes the scale of unexpected incidents affecting specific parts of society. Next paragraphs highlight the consumer trends of 2022 and their influence on customers. Furthermore, the author of the study presents the advantages of retail and market structure based on the size of outlets. In the last part, the readers can learn about the activities taken by several companies (Biedronka, Lidl, Netto, Aldi and Żabka) in recent years that created a difference in the results achieved by them.

1. INTRODUCTION

1.1. CHANGE A PARADIGM: A VUCA WORLD IS HERE

Each person living on Earth has their own life filled with activities, relations and values. Majority of us try to find our own rhythm and seek habits that allow us to feel calm and self-confident. Unfortunately, the world (whose pace is endlessly changing) does not allow us to do it. But has it ever been possible to control everything and follow the plans without any changes? People can prepare themselves (better or worse), but there is always a chance that something unexpected occurs. It is perfectly described by Vegetius, a writer of a Later Roman Empire, who claimed “Si Vis Pacem, Para Bellum” which means “If you want peace, prepare for war” [1].

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Those words are universal and apply both to the Middle Ages and contemporary times. Does that mean that we should not seek stabilisation? We should definitely try but with a changed paradigm: by taking the open-minded perspective – with the application of the consciousness that we live in a VUCA world that forces us to adapt to the unstoppable changes. Surrounded by the volatility, uncertainty, complexity and ambiguity each person or business entity can adjust their point of view and evolve – putting up with the fact that changes will be constant may redirect a person’s fixed mindset into growth mindset and, as a consequence, make it react better (in private and professional life) at the moment of the next change – no matter if the change was predicted or not.

2. BLACK SWANS

2.1. DEFINITION

During the last few years, we have all been affected by the evolving circumstances of the phenomena that have had a tangible impact on the world we are living in. Referring to Nassim Taleb’s masterpiece “The Black Swan. The Impact of the Highly Improbable” we classify such improbable phenomena as black swans. Such events are described by the following features:

- “it is an outlier, as it lies outside the realm of regular expectations”
- “it carries an extreme impact”
- “human nature makes us concoct explanations for its occurrence after the fact, making it explainable and predictable” [2]

2.2. EXAMPLES OF BLACK SWANS

Everyone has been affected by the black swans that appeared in their own lives. Each person could have their private black swans (for example financial problems or unexpected diseases) that might turn one’s world upside down. Beyond personal disasters affecting an individual or a small group of people, over the last year or so millions of people suffered from black swans that impacted society on a bigger scale. The things that made a real difference in our daily lives, decisions we took during lockdown periods and the choices taken nowadays afterwards could be divided. The factor that classifies the events into three groups could be the extent of impact: worldwide, continental and national. Their examples have been highlighted in table 1.

Tab. 1. Black swans: Scale of impact and examples of incidents [3]

Scale of impact	Examples of incidents
Worldwide	COVID-19 pandemic
	Military conflict between Russia and Ukraine causing the need for adjusting the energetic mix
	Suez Canal obstruction
	Recession and economic slowdown
Continental	Increasing pace of the technology development and its implementation into the businesses
	Political changes
	European Union regulations
National	Contamination of the second biggest river in Poland – the Oder

As you can see in the table, if we are taking into consideration all of the changes that happened – starting from the global ones that affected the majority of the world's population – we have to consider coronavirus and its consequences. It reflected in isolation, closed businesses (temporarily due to the restrictions and permanently – as a result of the bankruptcies of the companies which could no longer operate). Also the war in the eastern Europe had many crucial effects. To name just a couple of this conflict's consequences, several countries have taken actions related to adjusting their energy mixes (to increase their independence from gas that has been transported from Russia in the past). Global supply chains have also been afflicted by limitations such as economic sanctions and lowered commercial exchange. The examination should also include the evaluation of food supply chains – firstly it caused disruptions of production in Ukraine (which is among the biggest agricultural producers in the world – the country is leading among exporters of sunflower (responsible for 20,1%) and its derivative products – sunflower oil (36,3%) and sunflower meal (41,5%). Additionally, it is a significant exporter of such crops as rapeseed, corn, barley and wheat [4]). Apart from that, other nations, especially in Africa – for instance Egypt, which is the world's biggest wheat importer [5] – had problems with grain supplies. Such a situation was caused by problems with sea transportation. In March 2021, the ship known as Ever Given was stuck and blocked the Suez Canal stopping the transportation of goods for one week causing plenty of delays that lasted for months. One year later the Russian invasion stopped the deliveries from ports in Odessa, Chornomorsk and Yuzhne for the next 5 months. In the aftermath, the shortages caused enormous increases in the prices of baked goods. It emphasizes the last of the examples mentioned in the table above – global financial problems. In this case Egyptian authorities passed a resolution that set a fixed price of commercially sold bread to make it affordable to common people, as it is the basic product in their essential food product.

Furthermore, we had continental happenings. The occurrences that had an international impact across Europe were political changes (for instance related to the United Kingdom – leaving the European Union or death of Queen Elizabeth II) and decisions of the European Union (ban for new fossil-fuel cars from 2035 [6]). Simultaneously, we have all experienced accelerated implementation of remote technologies: online shopping or working and schooling from home.

Last but not least, in summer 2022 we had our internal problem of water contamination as Oder’s chemical pollution affected the ecosystem by killing thousands of animals. Even though the fish that are available in the most visited shops come from different sources, the devastating rumours linked with that subject might decrease the demand on fish and seafood. [7]

All of the above cases had a contribution to the shopping preferences – they compelled people to modify their consumer behaviours. Subconsciously the society tended to verify the judgements and decision-making processes in order to optimise them. Such reflections and actions taken have played an important role in the last months – this topic is described in more detail in the next chapter.

3. CONSUMER TRENDS

3.1. TOP 10 GLOBAL CONSUMER TRENDS 2022



Fig. 1. Top 10 Global Consumer Trends 2022 [8]

According to the research performed by Euromonitor, released in January 2022, entitled “Top 10 Global Consumer Trends 2022”, the consumers changed their minds and the values compared to the previous years (for example considering the year 2021). The factors described at the beginning of the essay turned the world

upside down, causing a huge part of society to increase their inner needs related to the most basic needs described in Abraham Maslow's hierarchy of needs – physiological, safety and belongingness [9]. The willingness to fulfil them shows up in several consumer behaviours:

- **backup planners** – being prepared for product shortages encourages the consumers to seek alternatives (both internal – within the same company and external – offered by competitors). Awareness of failure in purchasing the required products or services forced a lot of people to search for the desired articles in different shops. Additional opportunities allowed them to be more flexible and, despite of initial dissatisfaction, in the long run single-use substitutes could become first choice products for the customers,
- **digital seniors** – in the past computer illiteracy was one of the biggest threats at the point of new technology implementation, and for plenty of people it is still an unsolvable problem. The older the individual is, the more habits that person has. As a lower variety of stimuli occur the more stable life seems to be. The low probability of being shocked or disappointed let baby boomers and generation X representatives feel comfortable. It is reflected in inclination towards buying in person rather than through e-commerce channels. On the one hand, trying to keep a daily or weekly routine and keeping the habits creates an impression of stabilisation in the VUCA world. On the other hand, parents who did not have a possibility of working remotely or at least in hybrid mode were forced to leave their children with their retired, already unemployed grandparents. Such catalyst and youths expertise could support elderly people in becoming a new group that takes advantages of online shopping,
- **financial aficionados** – people have experienced price hikes due to the economic situation, which deteriorates with each new month. Accelerating inflation rate (which does not seem to slow down) pushes society into more conscious decisions and puts everyone in a position where all have to choose between accepting higher prices and looking for savings through other options, such as already described backup planners. Nonetheless, it is worth paying attention to the shoe-leather cost – this phenomenon is described as “the time and effort you spend to minimize the effect inflation has on your finances.” [10] There is no doubt that lowered expenses let an individual have more money for other spendings. However shoe-leather cost refers to such situations as browsing the advertising materials for hours for savings equal to small amounts not exceeding an hourly rate which could be spent on different, more-profitable activities,
- **the great life refresh** – after more than one year spent with plenty of governmental limitations and restrictions disallowing people to keep their bonds and relationships as strong as those were before the first outbreak of the pandemic in 2020, the society could enjoy liberty which was underestimated prior to coronavirus. Fear of losing a job, family member or travel restrictions to countries

where the number of COVID-19 cases was growing showed us how valuable asset freedom is. As soon as the national and international authorities assured the public opinion that travelling (via public transport and abroad) would be allowed again the boom started. Plenty of tourists appeared in places that had not seen crowds for a long time. At the same time horeca channel could offer better services – the entities forming it tried to convince customers to eat out via guaranteeing sanitary conditions and products of the highest quality,

- **the socialisation paradox** – last but not least of the trends that could be considered as the most influential happenings in 2022. As the research says, “76% of consumers took health and safety precautions when leaving their homes in 2021”. Since the appearance of the coronavirus people had a wish to meet with their loved ones. If we sum it up with *the great life refresh*, described in the previous paragraph, people seemed to be more careful while they socialised and spend time in places filled with unknown people. In parallel, all kinds of shops – from small groceries through discount stores and supermarkets up to hypermarkets – could breathe a sigh of relief (literally and lyrically as the shoppers could enter stores without having to cover their mouth with masks). Cancellation of restrictions related to the possibility of being infected by COVID-19 had an enormous impact on customers, who were not so frightened anymore. This change has also been caused by the awareness of mental health – analyses of the data presented by the Lancet Public Health released in 2021 showed that the prevalence of depression symptoms applies to 5-10%, depending on the country. [11]

3.2. OPPORTUNITIES

Nevertheless, the existence of all of the trends that are presented above is undisputable – we have to take a look at new possibilities. In spite of all suffering and sadness brought by the black swans described earlier, the trends highlight that there is also a bright sight of the pandemic: the widely understood choice we have all been given. If we were to get into details, each of the trends mentioned could be given an example:

- backup planners allowed us to try different products and pick what we want based on most valued features – as personal priorities evolved, it resulted in focusing on private labels’ development in a few stores attracting the customers,
- digital seniors could learn how to navigate the internet or ask for help online,
- financial aficionados became noticeable at the point of purchasing and merchandising – lower prices of internal shop chains’ brands were convincing compared to more expensive external ones which were also available for their enthusiasts,

- the great life refresh is a little bit in opposite to financial aficionados, as it encouraged to invest in non-contact assets and services: rebranding and consequently change of the place of employment, providing possibility of working from home, boxed diet, allowing to save time and being tailored to the individual's needs [12], or increased willingness to travel with private transport e.g. car or zero-emission, pro-environmental electric vehicles, such as bicycles or scooters,
- the socialisation paradox allowed everyone to be in charge of their own “shopping style” – which could be done online or in person, with or without mask and hand disinfection, on their own or by pickers and couriers. It is a good justification for the cooperations started between shops and couriers.

The points mentioned repeatedly stress the importance of diversified forms used to generate the sale. The most outstanding dissonance is visible in the aspect of contact between the shopper and customer service. In the case of online businesses that aspect is more impersonal, while in real life shopping there are many variables affecting it – that is why we should take a deeper look at retailing and its strong points.

4. RETAIL

4.1. DEFINITION

All people have their own wants, needs and desires. Fulfilling them is only possible by finding the answers for the wishes of a person expressing them (loudly by sharing the information about it to others in one's surroundings, both verbally and non-verbally, or quietly in an individual's thoughts). Despite huge interest in e-commerce and its growth (reflected by constant rise of purchases done via this channel and amount of money spent there), still an enormous proportion of shopping is performed in brick and mortar retail shops. Addressing that word we should begin with describing it and specifying how broad that definition can be. According to Kotler, retailing can be described as “all the activities involved in selling goods or services directly to final consumers for their personal, non-business use.” [13] Taking this definition into consideration we are assured that business units focused on retailing are serving people by offering their service live by offering their best.

4.2. ADVANTAGES OF RETAIL

Through his explanation of retailing Kotler also wanted to show the importance of this distribution channel, which has plenty of strong sides. Advantages of choosing this option are constantly the same for ages – possibility of verifying the goods wanted not only with one sense (sight is the only one available online) but with all senses. We can touch nearly every product, no matter if it is food, piece of furniture

or clothes, in order to check its surface or material it is made of but also smell it (especially important in case of perfumes or food that must be fresh). Additionally, in the case of buying something that we can eat or drink, there is an opportunity to try a sample of the product with taste – a piece of meal or a sip of beverage can convince us to purchase more. Rarely (but sometimes it happens) hearing can also be involved in the buying process – for instance where a customer is willing to invest in musical instruments, and the tones created by the equipment are the most crucial factor. Another benefit coming from buying in a brick and mortar store is support of customer service, who are usually well-experienced and know the assortment that can be found in their business entity. Receiving the product at the point of payment is also a bright side of retail shops as there is no need for waiting until its arrival via courier or parcel locker.

4.3. THE STRUCTURE OF STORES' MARKET

The sales structure is diversified and depends on the customer's preferences related to their demographic structure, psychographic profile and behavioural preferences. Nevertheless in each society there is a leading group of facilities. In 2021 Nielsen performed a webinar during which it presented the research that precisely specifies the structure of the market share in several European countries based on store size. The results have been shown on the diagram attached below.

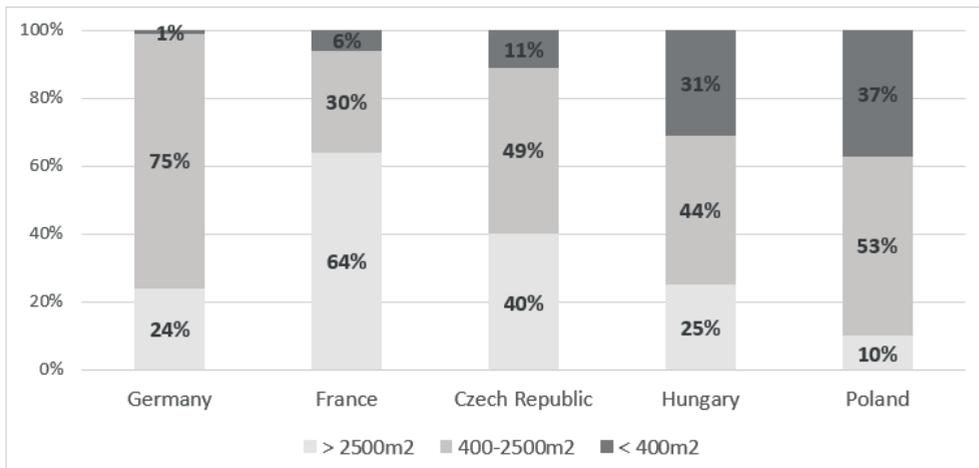


Fig. 2. Percentage of turnover in trade based on store format [14]

Based on the highlights presented on the diagram, there is a high tendency to choose shops that are middle-sized. After COVID-19 pandemic the society is less willing to visit enormous shopping centres or hypermarkets that are bigger than 2500 m². It could be caused by the fear of being infected by COVID-19 or going

shopping for a thoroughly defined purpose instead of walking and seeking bargains. The only exception in that case is France where over 60% of money were spent in malls and department stores. At the same time, the smallest shops did not have too big impact on the structure except for Hungary and Poland. That was triggered by high availability of small shops, allowing people to save time by going to the store located closer than discounts. In Poland it was mostly due to the tremendous expansion of Żabka, which has nearly 9000 shops all over the country, which are organised based on an efficient franchise model. [15] Its competitive advantage comes from the number of stores, innovative approach and technologies used. Through impersonal, autonomous nano stores, allowing the customers to meet their needs at any time, Żabka has more customers. [16] Another benefit of this chain is cashback given via application, which allows the shoppers to gain in-shop currency. The points collected there can be exchanged for products. Besides the promotions, the application also offers remote shopping with door to door deliveries thanks to the service named żappka jush. [17] Despite that, the dominant segment in middle Europe is between huge malls and tiny stores – it is filled by discount stores and convenience stores. These middle-sized shops have an area of over 400 m² but less than 2500m². According to Charles Lamb's "Essentials of Marketing" the characteristics describing these formats of shops are as follows: they are close to residential areas, offer standard or specialty merchandise, have a low-margin and try to keep a high availability and volumes of high-turnover goods. [18] These features encourage customers to visit such places focused on the most convincing factors for them. These factors are related to marketing mix tools: product, price, place and promotion. But how is it done in practice? Next paragraph will answer this question on the example of the Polish retail market presenting its key players.

5. POLISH DISCOUNT STORES

5.1. ANALYSIS OF THE NATIONAL RETAIL MARKET

Retail market in Poland is quite complex and competitive. It has its key players, runner-ups and plenty of smaller companies chasing their bigger competitors. Summing up, it is made up of over 20 enterprises. The biggest ones have been included in the report performed by Proxi.cloud in 2022. The research draws attention to market penetration, showing how a big part of the discount stores' customers visited the store of individual chains.

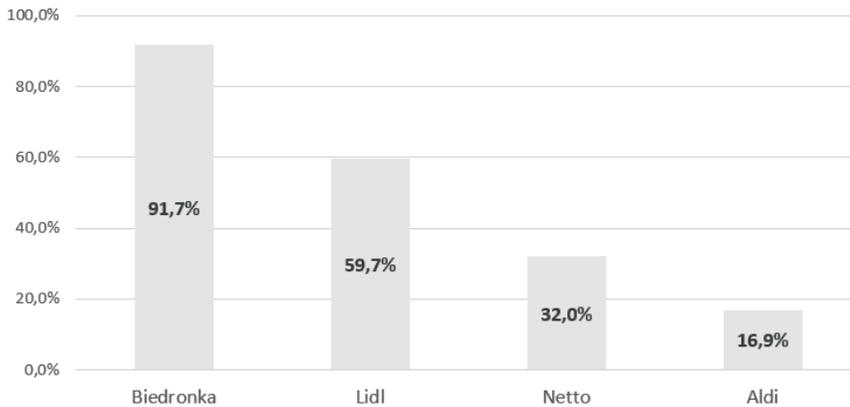


Fig. 3. Market penetration of discount stores in Poland [19]

As shown in the diagram presented above, Biedronka can boast the highest customer awareness level – nearly 92% of customers did the shopping in the leading discount store in Poland. Lidl ranks second with the score just below 60%. Netto, which has taken multiple activities in Poland during the last months, is third with a score of 32%. The last chain of stores taken into consideration at the survey is Aldi – one out of six consumers did their shopping there. What are the causes of these results?

5.2. BIEDRONKA

Jeronimo Martins is a Portugal-based international group operating in the food distribution and specialised retail sectors. [20] In Poland it is mostly known for its Biedronka chain, the leader in the local market of discount stores. What encourages customers to visit Biedronka? Definitely its accessibility caused by the number of its supermarkets (over 3200). Additionally the company supplies them with 17 distribution centres located across Poland, which is an efficient process for providing uninterrupted supply chain – in case of any problems with deliveries another logistic point may solve them. [21] In addition, Biedronka's wide offer and expertise resulting from many years of experience in the Polish market attracts the attention of many customers. As a consequence, the company may offer its products and services using higher prices than its competitors, who have fewer stores and need to convince the consumers to visit them in other ways. Despite the market advantage enjoyed by Biedronka, the company still makes an effort. Convincing promotions such as 2+1 (offering the third item of the same product for free) or new application's feature that gives a chance for a special discount attracts the society looking for savings in the tough times of economic crisis and inflation. In parallel, the company started the cooperation with Glovo that specialises in food deliveries. The concept is similar to

the one implemented by Żabka, but instead of creating a new solution the biggest chain of discount stores in Poland decided to use an already-existing, widely-known brand specialising in such services. This solution encourages people who prefer to do the shopping online to choose Biedronka among all players present in the market.

5.3. LIDL

Lidl is a part of the Schwarz Group that is seen as one of the top retailers in the world. [22] It has more than 700 stores in Poland, which gives the company the second place in terms of number of shops in the country. [23] The company stands out with high-quality products and attractive special offers that can be found in the application "Lidl Plus" – at the first glance they seem to be similar to the ones offered by Biedronka; however, they differ from them because of possibilities of mixing different tastes or types of products under the same private label (for example Pikok or Pilos). Moreover, special attention should be paid to the latest campaigns. The first one known as "Masz wybór" presented the combination of products belonging to private labels and brands. The customers can buy the well-known goods, but in case they want to save money, they are being given a choice between classic products and cheaper alternatives. Simultaneously Lidl fixed the prices for some products – for instance meat – in order to let the shoppers buy the expected products at attractive prices. In addition, the large family card allows people who have more children to receive special discounts. [24] Such activities show how the company cares about their customers. [25] Finally, the contract signed with Robert Lewandowski and advertising focused cooperation with schools entitled "Szkoły pełne talentów" was noticeable everywhere. [26] This combination of support given to the students and use of a football star as an influencer affecting plenty of people who are his fans and admire him catches publicity attention.

5.4. NETTO

In spite of the fact that Netto comes third in the ranking of discount stores in Poland, it has a bright future ahead. It has been considered an important player in the market, as it has overtaken about 300 stores from Tesco that decided to leave Poland. As for now, Netto has over 650 shops in the Polish market, but treating Poland as a priority market can cause further increase in the future. [27] Additionally, the company could become cheaper than its competitors through hard discount strategy which is realised via limitation of assortment to the required minimum (especially packed products) and reduction in store staff. This strategy is also reflected in the appearance of the store – as the objective of such shops is to have lower prices, hard discounts require reductions in the amount of equipment. As a consequence, the goods lay on pallets instead of classical shelves. [28] Another advantage of the company's recent activities has been the possibility of making online purchases – thanks

to the Everli application the customers can order online and receive their shopping to the indicated address. [29]

5.5. ALDI

The lowest position in the ranking has been occupied by Aldi. The reasons for the unpopularity of this store chain are related to the area of activity – this German-based group has about 230 shops in Poland which, compared to the three competitors named earlier, hinders market penetration. Notwithstanding the number of stores, the company has lately opened its second distribution centre in Lisi Ogon near Bydgoszcz. [30] This action may be seen as a sign of further expansion and increase in the number of shops in the upcoming years. Another benefit coming from choosing Aldi is the possibility of buying products in calm atmosphere – the campaign of quiet hours aimed at people with autism and other customers who prefer silence allows them to do the shopping without any distractions. [31]

6. SUMMARY

The world is still evolving, and the society becomes more and more aware of it. People tend to seek comfortable lives and try to stay calm despite the global and national struggles that appear regularly. In parallel to that, the retail businesses are trying to meet customer needs with a variety of activities. Discount stores are focused on answering the needs and expectations of low-income and medium-income customers. [32] Depending on the target market segment customers may be attracted thanks to appearing on the internet (which seems to be more convincing for younger generations that feel comfortable with online shopping), while lower prices and the reduction of stimulus on the verge of walking through the shop physically should attract older buyers. Everyone wishes to receive high-quality customer service but on different levels. On the one hand, self-contained buyers prefer to have a non-person possibility guaranteed via self-service checkout or remote purchases. On the other hand, there are the people who value relationships and want to be able to ask a question to the cashier or customer service worker. Unfortunately, the factor that has a negative impact on the emotions of the buyers is a mixture of the appearance and quantity of equipment the store chain uses – even though the shops offer the latest technologies, when there is only one till opened customers will be nervous and impatient due to the queue they have to wait in. At the same time, increasing the number of tills requires more space, which equals hiring more staff (in case of cashier-operated tills) or spending the money on technologically-advanced devices (if the shop launched self-service checkouts). The queues could become shorter if customers changed their values and their time became more valuable than money [33] – in

this scenario the prices could be higher, but it would result in a decrease in the number of customers too. [34] Regardless of their preferences, the companies have to remember that the trust is built over years but can be lost by one inappropriate decision taken – it may be the reason why the discount stores implement environmentally-oriented solutions such as energy supply from renewable energy sources or reusable bags.

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