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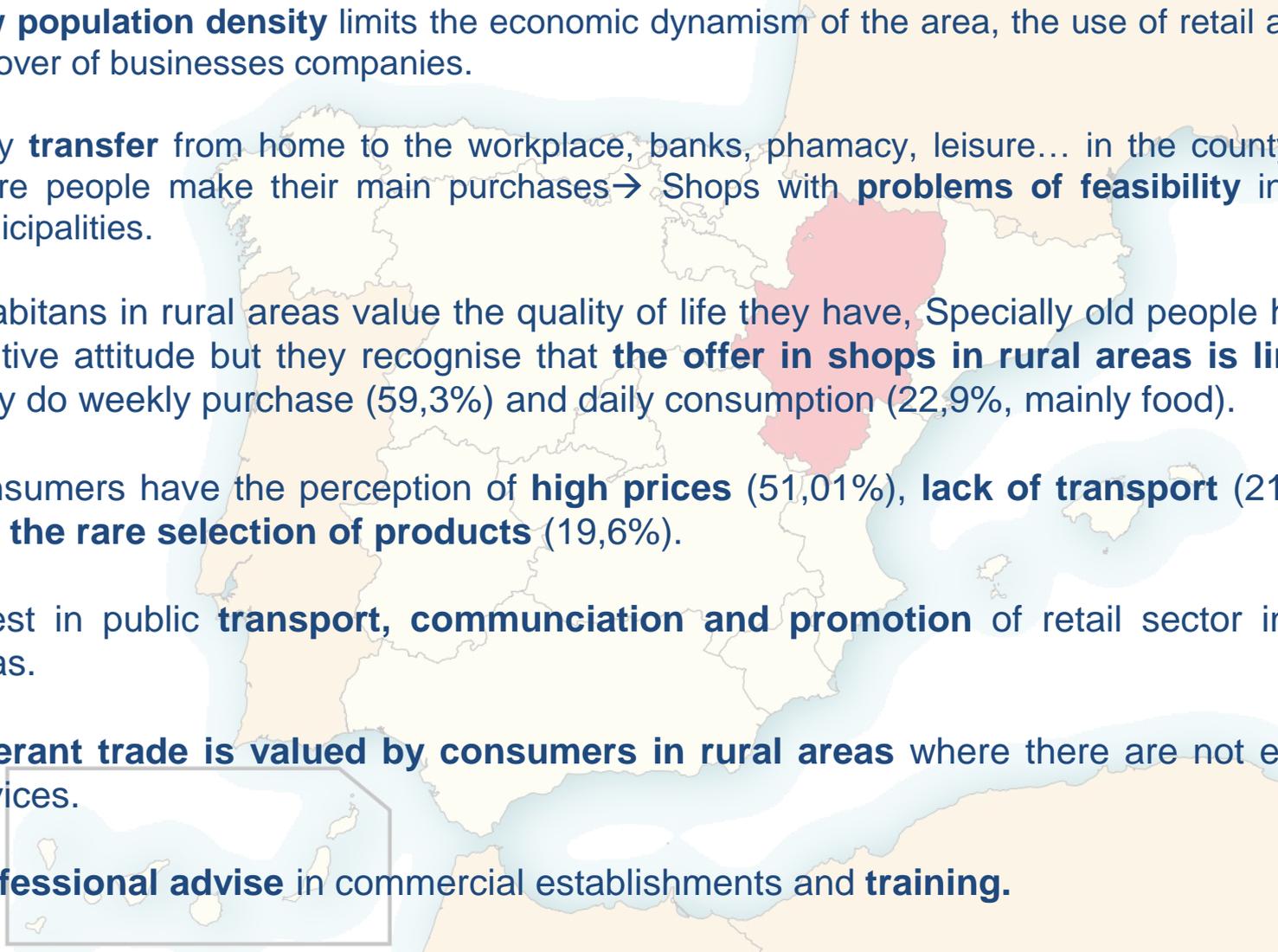
Conclusions of the Mapping Analysis in the partner regions

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Partners´meeting
in Söderhamn (Sweden)
25th & 26th September 2019

Rural retail in Aragón (Spain)

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- ▶ **Low population density** limits the economic dynamism of the area, the use of retail and the turnover of businesses companies.
 - ▶ Daily **transfer** from home to the workplace, banks, pharmacy, leisure... in the county seat, where people make their main purchases → Shops with **problems of feasibility** in small municipalities.
 - ▶ Inhabitants in rural areas value the quality of life they have, Specially old people have a positive attitude but they recognise that **the offer in shops in rural areas is limited**. They do weekly purchase (59,3%) and daily consumption (22,9%, mainly food).
 - ▶ Consumers have the perception of **high prices** (51,01%), **lack of transport** (21,36%) and **the rare selection of products** (19,6%).
 - ▶ Invest in public **transport, communication and promotion** of retail sector in rural areas.
 - ▶ **Itinerant trade is valued by consumers in rural areas** where there are not enough services.
 - ▶ **Professional advice** in commercial establishments and **training**.

Rural retail in South Karelia (Finland)

- ▶ The challenges of South Karelia region are strongly related to **imbalanced population development and the loss of the population** → rural areas loose local services. Majority of retail and shops are located in the cities of **Lappeenranta and Imatra**.
- ▶ **Shops in the rural area** offer consumers mainly **food and daily consumption goods**.
- ▶ Regions located in the **Russian border** create business opportunities especially to local tourism and trade, that obtain a positive impact.
- ▶ The role of **leisure time residences** is significant to shops in rural areas in South Karelia. The **investment to accessibility** of shops in rural areas would support the rural retail.
- ▶ An **effective communication** is necessary: people visiting should be able to find information about the services available in the area.
- ▶ The retailers exploit only minimalistic the **possibilities of digital solutions and platforms** as a technical support to retail or in marketing.
- ▶ The opinion of consumers is clear: possibility to buy **food and daily consumption goods nearby home is preferred**. The survey addresses that **with other products and needs people are willing to travel or to buy online**.

Urban – Rural areas

Inner city-area

Outer city-area

Developing city area

Rural area local center

Rural retail in Burgenlandkreis (Germany)

- ▶ Constant and stable development
- ▶ **The incomes exceed the average of Sajonia-Anhalt.**
- ▶ Positive experiences of purchase, proximity and quality of products.
- ▶ Agriculture products
- ▶ Increase of supermarkets as the preferential commercial format.



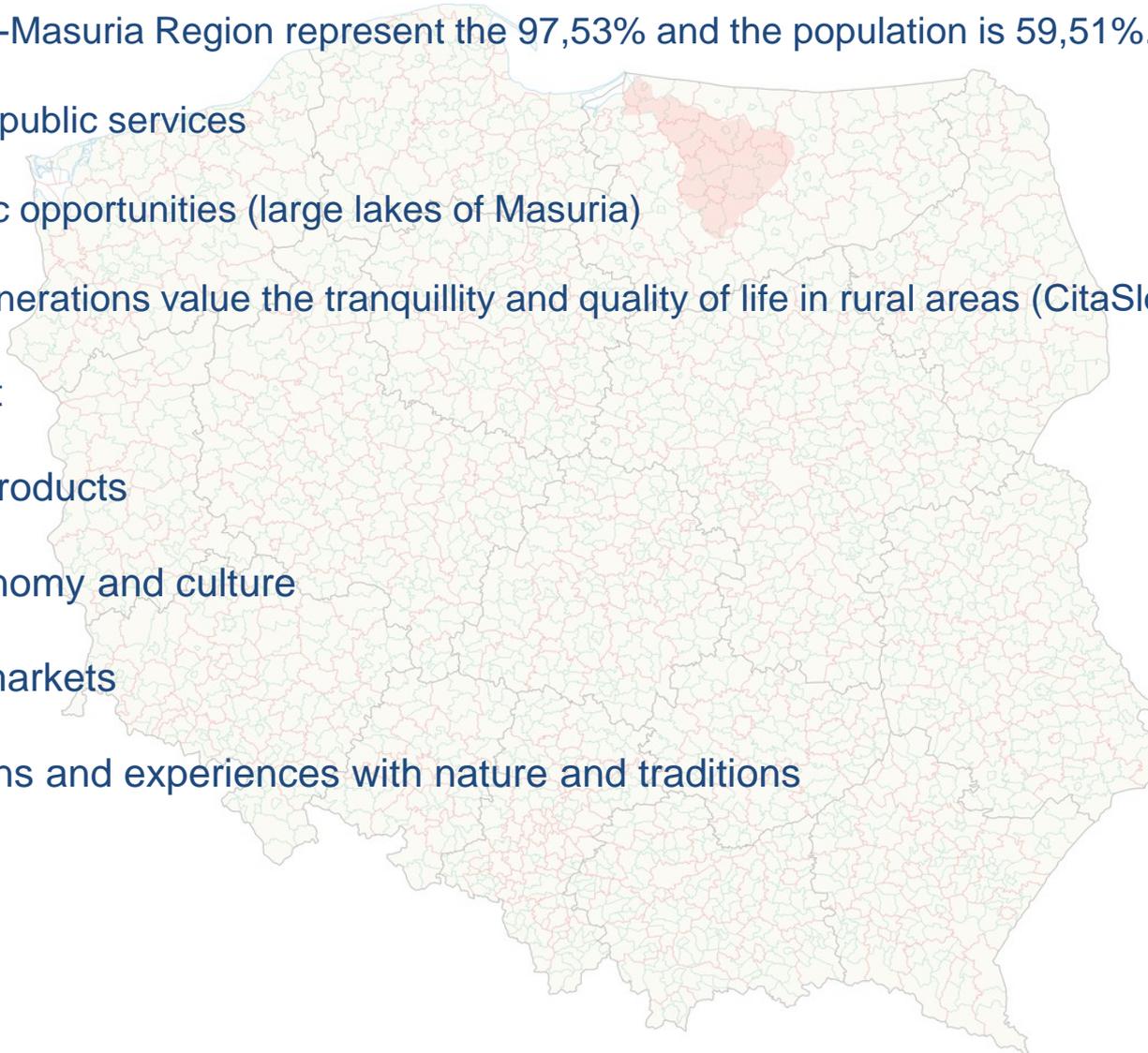
Rural retail in Sligo (Ireland)

- ▶ The 63% of inhabitants live in rural areas in the Occidental part of Ireland. The South of Sligo is the most rural area and **Tubbercurry** is the second largest municipality of the county, with the most of the services; shops, home and personal equipment, pharmacy...
- ▶ 18,9% of the shops closed in 2018 in Sligo
21,2% of the shops closed in 2018 in Tubbercurry
- ▶ Festival, culture and tourism as a complement of rural retail.



Rural retail in South Warmia (Poland)

- ▶ Warmia-Masuria Region represent the 97,53% and the population is 59,51%.
- ▶ Lack of public services
- ▶ Touristic opportunities (large lakes of Masuria)
- ▶ New generations value the tranquillity and quality of life in rural areas (CitaSlow's)
- ▶ Internet
- ▶ Local products
- ▶ Gastronomy and culture
- ▶ Local markets
- ▶ Emotions and experiences with nature and traditions



Rural retail in Söderhamn (Sweden)

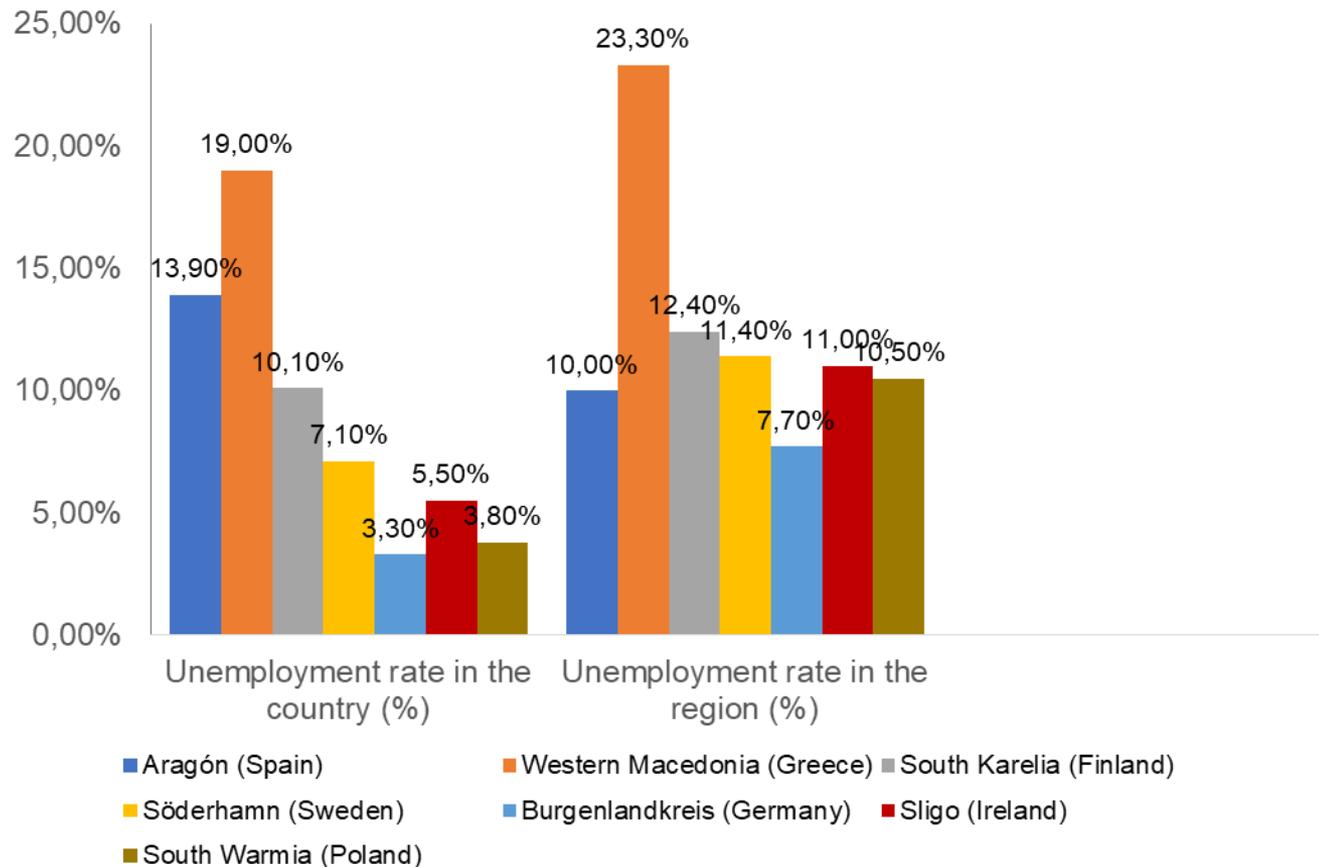
- ▶ 11 rural municipalities. Population has reduced 20%.
- ▶ **Young people** go out for studying and they **don't come back to rural areas**.
- ▶ Inhabitants in rural areas **prefer buying in local shops** but they travel too, looking for better **prices or selection of products**.
- ▶ People **buy online**.
- ▶ People in rural territories need **tools and advise** for SMEs survival
- ▶ Since 2018 in Söderhamn **6 points of rural service**.



Rural retail in Western Macedonia (Greece)

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- ▶ **Disproportion** between young **population** and middle-aged or elderly population. Young people don't want to be self-employed.
 - ▶ Deep economic crises has created an **unfriendly environment for entrepreneurs**
 - ▶ **Tax reliefs, promotional campaigns and governmental aid** are some of the most important factors for the boosting of rural retail in Greek areas.
 - ▶ Lack of **diversity of activities** and businesses in rural areas (tourism not combined with agro food sector...)
 - ▶ It is necessary to invest in infrastructures and **create synergies with other initiatives** → cooperation.
 - ▶ **Technology** is not being used to its fullest potential for the enhancement of the retail sector.
 - ▶ **Consumers support the local economy** and try to **make use of all the available services nearby**. They want more access to services like technology, food supplies and clothes.
 - ▶ **Advise and training** addressed retailers.

Unemployment rate in our territories



Spain (2019)

Sweden (2015)

Greece, Germany, Finland, Ireland, Poland (2018)

Strenghts:

- ▶ Awareness of local products consumption and some Regional Administration.
- ▶ Potential customers from other tourism areas
- ▶ Active local groups are prepared for changing and modernizing. Strong mobilization of the citizens in collaboration.
- ▶ Quality of life in rural areas. Leisure time residence.
- ▶ Level of people's incomes above average.
- ▶ Positive values like proximity, treatment, quality and trust.
- ▶ Support and implication of the Administration
- ▶ Cooperation private&public
- ▶ Work together; associated trade.

Weaknesses:

- ▶ Lack of leisure and social services
- ▶ Rare training and low professionalization of retail sector
- ▶ Rare selection of products, concentrated on food (non-perishable goods)
- ▶ Low economic feasibility of retail sector in rural areas
- ▶ Low entrepreneur spirit and qualified labour limited
- ▶ Absence of knowledge, skills and experience in e-commerce
- ▶ Rural areas transportation network and connections are limited
- ▶ Impact of political decision making
- ▶ High fix cost to maintain shops in rural areas

Opportunities:

- ▶ Invest in promotion, communications and transport.
- ▶ Innovation and modernization of shops
- ▶ Agreed commercial urban planning actions
- ▶ Consolidation and growth of the tourism sector
- ▶ To increase cooperation and join initiatives (with Associations, University, Gastronomic sector...)
- ▶ Combination of natural, cultural and touristic values with local market activity.
- ▶ Development of 'Open Shopping Center' and Rural Multiservice.
- ▶ Arrival of new immigrants
- ▶ Local retail plans in small municipalities
- ▶ Favourable taxation rate and grants to entrepreneurs established in depopulated rural areas.
- ▶ Creation of new innovation services (ICT tools).
- ▶ Optic fibre (quick Internet)

Threats:

- ▶ High unemployment rate (see rates in graphic)
- ▶ Imbalanced population and depopulation of the territory
- ▶ Bigger cities around with other leisure's attractives
- ▶ Economic crises, low consumption
- ▶ Barriers to the development of the e-commerce
- ▶ Slow progress on improvements of transportation and logistics network
- ▶ Urban planning not adapted to the real needs of retail
- ▶ Reduction in rate of self-employment within retail sector
- ▶ Demographic dispersion of the territory
- ▶ Low purchasing power
- ▶ Digital competition (online shopping)



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Thank you!

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