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# The Evolution of Click-n-Mortar E-tailing In Denmark

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## Abstract

The paper at hand presents an extension and application of Kotzab & Madlbergers (Kotzab & Madlberger, 2001) original clicks-and-mortar web-scan framework, which is here used to re-examine the click-and-mortar activities of the top 100 Danish retailers and compare with results from the identical study last year. The first part of the paper describes the development and rationale behind the model used, the second part describes the results obtained and describes the evolution by analysing data from 2001, 2002 and 2003. The empirical results show a shift toward selling in the internet channel, and a differentiation between the most sophisticated sites: they focus on either Marketing or Logistics processes!

*Key Words:* e-tailing, e-business, clicks-and-mortar retailing, web-scan model,  
Denmark

# **1. Introduction**

The extension of the portfolio of marketing channels with the internet channel by existing brick-and-mortar retailers is well documented (e.g. Doherty, Ellis, & Hart, 1999; Morganosky, 1997; O'Keefe, 2001b; Rowley, 1996). Various perspectives on e-commerce have been applied, eg e-supply chains (van Hoek, 2001) and intellectual capital (O'Keefe, 2001a).

Within e-tailing, different strategies have been employed. Companies without experience in retailing has come and gone, and the traditional retailers have extended their portfolio of marketing channels to include the e-channel.

A prominent example of a “clicks-and-mortar-retailer” is Tesco.com, which opened a portal in the Korean market in March 2002. The negative experiences of some pure e-tailers (e.g. the failure of WebVan in 2001) suggest that a click-and-mortar-strategy may be a more promising multi-channel alternative in the retail sector. In fact, the internet could be part of a solution to the channel-portfolio-dilemma, i.e. many existing retail channel formats (e.g. hyper-markets, category killers or supermarkets) are in the maturing or declining phase of a life-cycle.

This paper continues the work of Sørensen and Holst (Nielsen et al., 2001) Kotzab, Sørensen, & Holst, 2002; Sørensen & Kotzab, 2002 and presents a trend analysis of leading Danish retailers' use of electronic distribution channels. The web scan framework has been expanded to reflect the development of companies' web sites.

## **1.1. A framework for analyzing the content of clicks-and-mortar retail channels**

It is possible to analyze (r)etail activities in a number of ways. We chose to employ the functionality perspective, i.e. web site functionalities available to the customer. To evaluate the available web site functionalities we classify those functionalities according to traditional retail flows such as the physical, possession, promotion, negotiation, financing, risking, ordering and payment flows (Levy & Weitz, 1998).

Retailing defines the business of making a product or service available to private consumers. As such, retailing can be split up into a number of functions (all of which are not necessarily performed by the same business). Examples of functions are: carrying inventory, demand generation, physical distribution, after-sale service and extending credit to customers. These functions are performed so as to satisfy consumers' demand concerning spatial convenience, lot size, delivery time and product variety (Stern, El-Ansary, & Coughlan, 1996).

Additional specific functionalities are necessary in the web based retailing process. These are connectivity (the existence of a company web-site), interaction (web-based communication tools), and security (to reduce fraud and misuse of the technology) (e.g. Fog, Skov, & Jenster, 1999; Liebmann, Foscht, & Ulrich, 1999; Liu et al., 1997).

## **1.2. The Kotzab and Madlberger (2001) Web-scan Framework**

To observe and analyze web-based functionalities offered by Austrian clicks-and-mortar companies, Kotzab and Madlberger (Kotzab & Madlberger, 2001) developed a web-scan-model that included 13 observation items. The web-scan model allows a structured observation

of the state-of-the-art of clicks-and-mortar performance. The idea of Hart et al. (Hart, Doherty, & Ellis-Chadwick, 2000), who used the categories Registration, Information Provision, and Interactivity, to describe different stages of corporations' use of the Internet as a communication and distribution channel was pursued (see Appendix A).

The model was validated among the 48 largest retail companies in Austria representing 80% of the retailing business in the period 2-13 October 2000. The results showed that asset-based retailers used electronic distribution possibilities to generate rather than fulfil demand. The web sites observed had a predominant focus on marketing functionalities with only a marginal support of the physical flow of goods.

### **1.3. Adapting the web-scan model to a Danish retail setting**

Based on these experiences, the authors have used the web-scan model twice earlier: first in an analysis of retail chains within six selected industries (Nielsen et al., 2001) and later in a study identical to the current (Kotzab, Sørensen, & Holst, 2002). A number of observation items were added and consolidated into three categories: 'Marketing', 'Logistics' and 'Communication'. The first use of the model introduced the Generations construct to describe the scope and stage of the web site development using the generation zero, one and two. The latter use added the generation three, see below:

- Generation zero: companies without a web site,
- Generation one: sites without sales function (= static site),
- Generation two: sites with sales related functions (= dynamic site),
- Generation three: sites which include interactive and customized value-adding functions (= sophisticated site).

The industry analysis performed in 2001 focused on the internet presence, and documented variance across the selected industries. The subsequent analysis performed the year later revealed an increase in internet presence and a shift from static (generation one) toward dynamic (generation two) sites. Additionally, the 2002 study documented more sophisticated functionality (generation three) on a portion of the sites. In order to further describe the evolution of the e-tailing sites in Denmark, we have chosen to perform the comparisons between the data set from last year and this year based on the existing constructs. The Static/Dynamic construct describes whether the internet is perceived as a suitable sales channel or not, the Generations construct further describes the development into integration and customization solutions for the consumers. The model is shown in Figure 1 below.

### **1.4. Research method**

The population for the analysis is the Top 100 Danish retailers as reported by the trade journal DetailBladet (DetailRapporten, 2002). The websites of the companies listed were searched for on the internet by the two researchers individually. These results were compared, creating a list of companies with an internet presence. Next, we tested the framework used the previous year in order to determine whether new observation items had to be added. A random sample of 20 web sites were analysed by the two researchers individually. This resulted in the extension of the framework by two observation items: 'Search' (M8) and 'Indirect marketing' (M9). With the extended framework defined (see Table 1), we performed the observation of the Top 100 Danish

retailers' websites. Two individual sets of observations were performed and compared February 15-17, 2003. The methods applied are identical to the methods applied last year.

*Table 1: Definition of the Danish web-scan model*

Marketing observation items			Gen.
M1	History	Indicates the presence of company history on the site.	1
M2	Locations	Indicates the presence of information on the chain's retail store addresses (store locator).	1
M3	Assortment	Indicates the presence of a web-catalogue of the chain's assortment.	1
M4	Promotions	Indicates the presence of promotion of special items in the assortment, e.g. "On Offer This Week" or as part of a competition.	1
M5	Investor Relations	Indicates the presence of information on the chain's economic performance, e.g. annual reports.	3
M6	"My Site" / Customization	Indicates the presence of user customization options.	3
M7	Surveys	Indicates the presence of web-based user surveys.	3
M8	Search	Indicates the presence of a search tool on the web site.	3
M9	Indirect marketing	Indicates the presence of articles related to the company's product(s) but which cannot be seen as directly demand generating.	3
Logistics observation items			Gen.
L1	Sales	Indicates a transaction possibility.	2
L2	Online Payment	Indicates an on-line payment possibility.	2
L3	Returns	Indicates whether the chain's policy on return of purchased goods is posted on the web site	2
L4	Differentiated Delivery	Indicates that the web customer has options in regards to delivery, e.g. no delivery, choice of transportation provider.	3
L5	Track & Trace	Indicates the possibility to locate a purchased good in the supply chain.	3
L6	Availability	Indicates the possibility to check whether a specific item is in stock.	3
Communications observation items			Gen.
C1	Email service	Indicates the presence of a corporate e-mail address.	1
C2	Recruitment	Indicates the presence of a recruitment forum: Job openings, possibility to send unsolicited applications etc.	1
C3	User Community	Indicates the presence of a user-to-user communication forum	3
C4	Newsletter	Indicates the presence of a newsletter service.	1

The functional category is represented through the grouping of observation items. The rightmost column in the table above shows the relationship between the observation items and the Generations construct. Classification of the individual site is done by determining the "highest" generation of the items observed. If a site has e.g. 'User Community' (C3) it is classified a generation three site. Sites without sophisticated items, but with items 'Sales' (L1), 'Online Payment' (L2) or 'Returns' (L3) are considered dynamic and belong to generation two. The remainders are the static sites, belonging to generation one.

Figure 1 below shows the relationship between observation items (in the bubbles), the category (marketing, logistics & communications) and the two constructs: Generations and Static/Dynamic<sup>1</sup>.

<sup>1</sup> Using the Static/Dynamic construct means ignoring the sophisticated (generation three) items: M5-9, L4-6 and C3. Each site thereby has two classifications: one relating to the Static/Dynamic construct, and one relating to the Generations construct, the latter using all the identified observation items.

	Marketing	Logistics	Communica.	
Gen. Three Sophisticated	M5-9	L4-6	C3	<div>Generations</div> <div>Static/Dynamic</div>
Gen. Two Dynamic		L1-3		
Gen. One Static	M1-4		C1-2, 4	
Gen. Zero None				

Figure 1: Observation items, categories and constructs.

## 2. Selected results

This section describes and discusses the trends observed in the data. First, we compare the populations to assess the possibility of a comparison of the two data sets. Next we describe and compare presence on the internet and the observation items and their frequency. Finally we move on to analyze the development of the central constructs of the model: the Static/Dynamic and Generations constructs.

### 2.1. Comparable populations?

Comparing this year's population with the one used last year reveals a very static marketplace – only eight companies in this year's population are new, all in the very bottom of the list. 16 of the companies from the list have the same position as last year, among these top four. Of the 92 companies included in both populations, 72 have moved no more than five places, and the average shift is as low as 3,56 positions. Therefore we have concluded that the results of a trend analysis are trustworthy. See Appendix B for details on the population.

### 2.2. Internet presence

The first step in the analysis is to identify the websites of the retailers. This year a mere four companies did not have an internet presence, representing an improvement from last year's count of 14. Three (rank 13, 34 & 83) of the four companies are in the grocery segment, and were in the population last year as well (quite similar ranks). These companies have found that the e-channel is not well suited for their business models. The fourth company is a newcomer, - a

marketing unit for the meat processing industry. A web site may very well become relevant as the business grows.

### 2.3. Comparing the observation items

Depicting the observation items and their frequency reveals interesting insights, see Figure 2 below.

The most popular observation items this year is the same as last year. The new observation item 'Indirect marketing' (M9) is quite popular as well, ranking seventh with the value of 58 %. The first six are identical to the top six from last year, even though two sets of two items have changed places. The most striking observation, though, is the higher content of functionality on the sites. The average occurrence of an observation item across the sites last year was 33 %, this year it has increased to 46 %. The observations items increasing the most in popularity are all marketing items: 'Surveys' (M7), 'Assortment' (M3) and 'History' (M1).

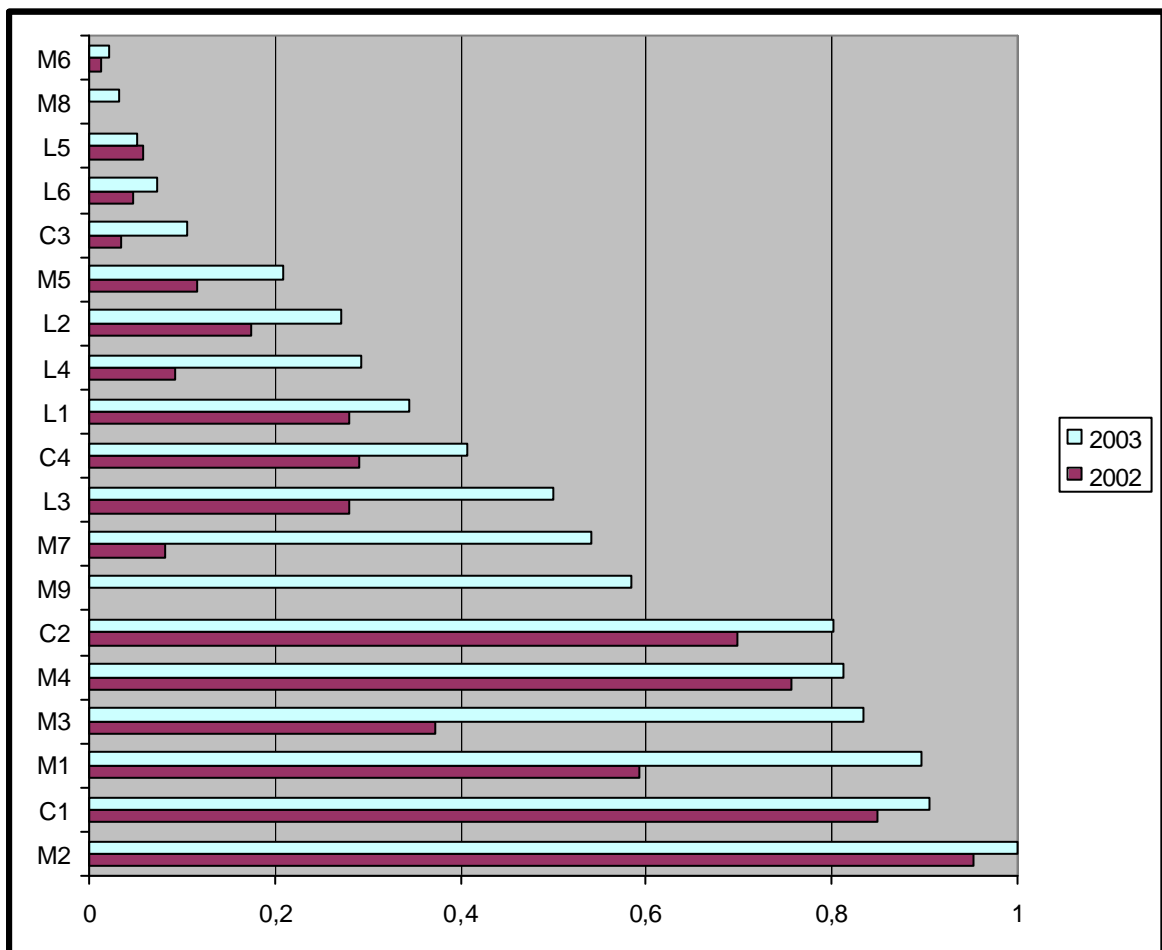


Figure 2: Observation items 2002 & 2003.

## 2.4. The Static/Dynamic construct

As described above, there has been a shift towards more presence on the internet. The proportion of companies with a web presence has increased to almost 100%. The number of static sites has decreased slightly, whereas the proportion of dynamic sites has increased markedly (see Table 2 below).

*Table 2: The Static/Dynamic construct*

Classification Year	No Site	Static	Dynamic	Total
2002	14	53	33	100
2003	4	47	49	100
Change	-10	-6	+16	0

From this table it is not possible to see the development of the individual web sites. As already argued, the high degree of stability in the populations from 2002 to 2003 enables a comparison across the two data sets, thereby creating the following table.

*Table 3: Shift in the Static/Dynamic construct*

2003	No Site	Static	Dynamic	Total
2002				
No Site	3	4	2	9
Static	0	35	15	50
Dynamic	0	5	28	33
No Entry	1	3	4	8
Total	4	47	49	100

The analysis reveals that none of the companies has gone off-line in the past year. And of those who have gone on-line, four have static and two have dynamic sites. 35 of the static sites were static last year as well, but five actually changed from dynamic to static. This intriguing development gives cause to further investigation. 28 of the dynamic sites were dynamic last year as well, but 15 have changed from static to dynamic.

Grouping the 92 sites with entries in both data sets according to their development in the Static/Dynamic constructs can be done by imaging a line going from the upper left cell (No Site – No Site) down to the Dynamic – Dynamic cell (marked with a light grey in the table above). The cells on this line represent stability, 66 of the 92 sites are thereby stable according to this measure. Below and to the left are the five sites mentioned above, “downgrading” the functionality on their site. The remaining 21 sites have either created a site or included some degree of sales functionality on their existing site. This indicates that retailers prefer to gather experience from a static site before venturing into a more dynamic model.



## 2.5. The Generations construct

The Generations construct partly overlaps the Static/Dynamic construct, as described in subsection 1.3. However, the extension of the Generations construct with generation three (Sophisticated) gives this construct explanatory power in itself. Generation three was introduced to describe advanced internet business models, in three functional areas: Marketing, Logistics and Communications (see Table 1 and Figure 1 for the link between observation item and generation / functional area). The analysis shows that the number of sites with at least one observation item belonging to generation three, thereby classifying the site as generation three, has increased from 25 last year to 49 this year.

*Table 4: The Generations construct*

Classification Year	Zero	One	Two	Three	Total
2002	14	44	17	25	100
2003	4	39	8	49	100
Change	-10	-5	-9	+24	0

The table above documents the development into more sophisticated sites. Overall, it seems that all types of sites have gotten more content, shifting from non-presence towards sophisticated sites. Albeit interesting, further analysis is needed to determine the shift between classifications.

*Table 5: Shift in the Generations construct*

2002 \ 2003	Zero	One	Two	Three	Total
Zero	3	4	0	2	9
One	0	27	4	11	42
Two	0	1	3	11	15
Three	0	5	1	20	26
No Entry	1	2	0	5	8
Total	4	39	8	49	100

Overall, this analysis results in the same conclusions concerning stability, with 53 of the 92 sites with representation in both data sets having the same classification in 2002 and 2003. More interestingly, six sites which had sophisticated functionality in 2002 have been downgraded, with five of the six sites now being generation one sites. Conversely, 24 sites have shifted to generations three, two of these from generation zero. Perhaps this is an indication of the increased speed of implementing sites with complex functionality? Of the remaining 22 sites currently having sophisticated functionality, half are previously generation one sites, the other half generation two.

## 2.6. Combining the constructs

Using the results already reported and grouping them according to Figure 1, the following table can be produced. The number represents the count of sites having any items belonging to that group (that is: combination of functional area and generation), the percentage in brackets represents the fraction of the population that year.

*Table 6: Comparison across functional area, generation and year*

Generation	Year	Marketing	Logistics	Communication
3	2003	24 (25%)	31 (32%)	10 (10%)
	2002	16 (19%)	11 (13%)	3 (3%)
2	2003		49 (51%)	
	2002		33 (38%)	
1	2003	96 (100%)		91 (95%)
	2002	85 (99%)		79 (92%)

As mentioned before both populations nearly have a 100 % representation in generation 1, with a slight increase in 2003. The proportion of sites with generation 2 logistics functionalities has increased markedly in 2003. It is interesting to note that although all of the functionality categories have increased in 2003, the relatively larger growth appears in the logistics category. This may indicate that companies are not only using the e-channel more intensively, but that they are in fact fully integrating this channel into their marketing channel portfolio.

Finally, it is be interesting to see how the development into generation 3 is distributed across the Static/Dynamic construct. Table 7 describes the distribution.

*Table 7: Comparison across functional area, generation and year*

Static/Dynamic	Year	Count	Marketing	Logistics	Communication
D	2003	49	18 (37%)	31 (63%)	8 (16%)
	2002	33	8 (24%)	10 (30%)	2 (6%)
S	2003	47	6 (13%)	0 (0%)	2 (4%)
	2002	53	8 (15%)	1 (2%)	1 (2%)

This final analysis reveals that the proportion of static, sophisticated sites is rather fixed. As is shown in the table above, the development towards more sophisticated sites is made up of dynamic sites alone. Between the functional areas, Logistics is the most popular one, indicating a trend towards more customization and information sharing through the functions ‘Differentiated Delivery’ (L4), ‘Track & Trace’ (L5) and ‘Availability’ (L6), L4 being by far the most popular observation item.

## 3. Conclusion and further research

Applying the extended web-scan framework to the one hundred largest retailers in Denmark has yielded results, which support the assumptions of prior research in the area (Nielsen et al., 2001) and adds to our understanding of retailers’ use of the internet as a distribution channel.

Clicks-and-mortar retailers have recognized the Internet as an important driver for their future channel-management (Kotzab, Sørensen, & Holst, 2002). Marketing and communication functionalities are still the most used and developed functionalities on retailers' web sites. However, an increasing number of web sites offer logistics functionalities.

Analyzing web sites through our Static/Dynamic construct we concluded that major retailers today have web sites. However, the total number of static web sites decreased as a significant movement towards dynamic sites was observed. An interesting observation, which calls for further investigation, was that five sites "downgraded" from dynamic to static.

Analyzing web sites through our Generations construct we found a significant shift towards second and third generation web sites. In both of these shifts the logistics functionalities were most prominent, indicating that companies now tend to perceive and use the internet as an integrated part of their marketing channel strategy.

Combining the two analytical constructs revealed that whereas the proportion of static, sophisticated sites remain stable, the dynamic web sites tend to increase their level of sophistication over time. This indicates that companies, which use the e-channel for sales, accumulate and apply knowledge of the e-channel potential relatively faster than companies with static web sites, regardless of the initial level of sophistication.

If this is true, it might partly explain why some companies have chosen to go from dynamic to static web sites. However, this remains a subject for further research. Another area for further research is companies' last mile strategy. A frequently cited reason for not offering transaction possibilities on the internet has been the delivery problem. The documented movement towards an increased number of dynamic, sophisticated sites suggests that some click-and-mortar retailers have found a solution to this problem. A detailed analysis of the different last mile strategies and how these are distributed across industries is suggested for further research.

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## Appendix A – The Original Web-scan Model

Web-scan observation items			
Observation item	Purpose	Based on	Refers to the retail and/or web function of ...
On-line presence	<ul style="list-style-type: none"> <li>• Identification of a homepage in order to confirm the electronic distribution channel possibility</li> <li>• Characterization by category</li> </ul>	Rowley (1996); Morganosky (1997); Doherty et al. (1999); Liu et al. (1997); Liebmann et al. (1999)	Connectivity
Locations	<ul style="list-style-type: none"> <li>• Store-locator offered to identify the nearest available store</li> </ul>	Rowley (1996)	Advice
On-line assortment	<ul style="list-style-type: none"> <li>• Number of products presented on the web</li> <li>• Difference between virtual and store-based offer</li> </ul>	Rowley (1996); Doherty et al. (1999); Fog et al. (1999)	Assortment
On-line promotions	<ul style="list-style-type: none"> <li>• Brand and logo visible</li> <li>• Use of promotions</li> <li>• Special internet promotions</li> </ul>	Liu et Arnett (2000)	Advertising
On-line sales	<ul style="list-style-type: none"> <li>• On-line sales function available</li> </ul>	Morganosky (1997); Doherty et al. (1999)	Assortment
E-mail service	<ul style="list-style-type: none"> <li>• General interaction between visitor and company possible</li> <li>• Special interaction possibilities offered</li> </ul>	Liu et al. (1997); Liebmann et al. (1999)	Interactivity
Search engines	<ul style="list-style-type: none"> <li>• Internal and external search engines available</li> </ul>	Fog et al. (1999)	Advice
Chat rooms	<ul style="list-style-type: none"> <li>• Information exchange between customers and visitors</li> </ul>	Liu et al. (1997); Fog et al. (1999)	Interactivity
Recruitment possibilities	<ul style="list-style-type: none"> <li>• Employment activities (active and passive)</li> </ul>	Liu et al. (1997); Liebmann et al. (1999)	Interactivity
Security issues	<ul style="list-style-type: none"> <li>• Data privacy granted</li> <li>• Secure payment modes possible</li> </ul>	Rowley (1996), Fog et al. (1999)	Security
Additionally developed measures			
Measures	Purpose	Refers to the retail and/or web function of ...	
Minimum order quantity	<ul style="list-style-type: none"> <li>• Minimum sales or article quantity to generate EOQ-based orders</li> </ul>	Logistics	
Delivery fees	<ul style="list-style-type: none"> <li>• Delivery fee charged</li> <li>• Information whether the delivery is outsourced or not</li> </ul>	Logistics	
On-line payment	<ul style="list-style-type: none"> <li>• Payment possibilities offered (from traditional to internet related payment modes)</li> </ul>	Credit	

Source: Kotzab & Madlberger, 2001

## Appendix B – The population

Rank		Name	Web site	Rank		Name	Web site
2002	2001			2002	2001		
1	1	SuperBrugsen	www.fdb.dk	51	53	Sportmaster	www.sportmaster.dk
2	2	Netto	www.netto.dk	52	52	Brdr. Dreisler	www.dreisler.dk
3	3	Føtex	www.fotex.dk	53	49	expert	www.expert.dk
4	4	Kvickly	www.kvickly.dk	54	56	Salling	www.salling.dk
5	6	SuperBest	www.superbest.dk	55	57	Alta	www.altadiscount.dk
6	5	Bilka	www.bilka.dk	56	68	ServiceRing	www.servicingen.dk
7	7	Fakta	www.fakta.dk	57	59	Synoptik	www.synoptik.dk
8	8	Dagli'Brugsen	www.fdb.dk	58	63	Harald Nyborg	www.haraldnyborg.dk
9	9	Aldi	www.aldi.com	59	58	Din Tøjmand	www.dintojmand.dk
10	16	Prima	www.prima-online.dk	60	60	CBC-Computer	www.c-b-c.dk
11	10	Magasin du Nord	www.magasindnord.dk	61		El-Giganten	www.elgiganten.dk
12	11	Obs	www.obs.dk	62	78	GuldBageren	www.guldbageren.dk
13	12	Spar Grøn		63	64	BR Legetøj	www.br-leg.dk
14	25	Rema 1000	www.rema1000.dk	64	66	Ilva	www.ilva.dk
15	14	Råd & Dåd	www.raadogdaad.dk	65	75	Jem & Fix	www.jemogfix.dk
16	15	Matas	www.matas.dk	66	65	Dan-Bo Møbler	www.danbomoebler.dk
17	18	Silvan Kæden	www.silvan.dk	67	62	Løvbjerg Superm.	www.lovbjerg.dk
18	17	Jysk	www.jysk.com	68	82	Tele Danmark	www.teledanmark.dk
19	22	Statoil	www.statoil.dk	69	70	Inspiration	www.inspiration.dk
20	21	Irma	www.irma.dk	70	69	Focus	www.edeka.dk/focus
21	20	Shell	www.shell.dk	71	72	Skousen	www.skousen.dk
22	24	Q8	www.q8.dk	72	55	EuroSko	www.eurosko.dk
23	19	Fona	www.fona.dk	73	98	Kop&Kande	www.kop-kande.dk
24	23	Byggekrum	www.byggekrum.dk	74	73	KC Storkøb	www.kc-storkoeb.dk
25	27	Imerco	www.imerco.dk	75	67	Skoringen	www.skoringen.dk
26	31	Hennes & Mauritz	www.hm.com/dk	76	71	PS Prof. El-Samarb.	www.ps-el.dk
27	26	Nærkøb	www.naerkob.dk	77	90	7-Eleven	www.7-eleven.dk
28	33	HTH Køkkener	www.hth.dk	78	79	Kvik Køkkenet	www.kvik.dk
29	35	DK Benzin	www.dk-benzin.dk	79	84	Sonofon Partner	www.sonofon.dk
30	29	ISO Supermarked	www.iso.dk	80	80	Jensen Tæppeland	www.taepplend.dk
31	30	Edeka Merko	www.edeka.dk	81	83	Bøger & Papir	www.boegerogpapir.dk
32	41	Interflora	www.interflora.dk	82	74	El-Køb	www.elkoeb.dk
33	34	Idemøbler	www.idemoebler.dk	83	81	LetKøb	
34	36	De Friske		84	92	Sports Partner	www.sportspartner.dk
35	28	LokalBrugsen	www.fdb.dk	85	85	ABC Lavpris	www.abc-lavpris.dk
36	43	Merlin	www.merlin.dk	86	86	Garant	www.garant-gulve.dk
37	39	Super Spar	www.spar.dk	87	87	Smag & Behag	www.smagogbehag.dk
38	45	Bauhaus	www.bauhaus.dk	88	91	Profil Optik	www.profiloptik.dk
39	32	Fredgaard Radio	www.fredgaard.dk	89		Svane Køkkenet	www.svane.com
40	37	Ikea	www.ikea.dk	90	93	BogFan	www.bogfan.dk
41	47	Edeka Aktiv Super	www.edeka.dk/aktivsuper	91		TDC Mobil Center	www.tdcmobil.dk
42	42	Hydro Texaco	www.hydrotexaco.dk	92	94	Botex/Samatex	www.botex.dk
43	38	Tøjeksperten	www.tojeksperten.dk	93	95	Invita Køkkener	www.invita.dk
44	44	DSB kiosker	www.dsbrk.dk	94		Kød & Ide	
45	40	2tal	www.2tal.dk	95		Skjold Burne	www.skjold-burne.dk
46	46	Dendek	www.dendek.dk	96		Flügger Farver	www.flugger.dk
47	48	Mr.	www.mr-mister.dk	97	100	Sadolin Farveland	www.sadolinfarveland.dk
48	51	Bog & Ide	www.bog-ide.dk	98	89	Kontor & Ide	www.kontor-ide.dk
49	50	Kwik Spar	www.spar.dk	99		Panasonic/Technics	www.panasonic.dk
50	54	Intersport	www.intersport.dk	100		DER	www.der.dk

