

E-Bizz Øresund Report:

Barriers and Motivators of Online Grocery Shopping in Denmark

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1. INTRODUCTION

This report presents the results of the qualitative study that was conducted in the spring of 2002 in Copenhagen as part of the E-Bizz Øresund project¹. The purpose of this project is to develop and design distribution systems for BTC e-commerce related to food and grocery retailing. An important part of this is to know how consumers think of grocery e-commerce and what types of wishes and demands they might have in order to use such systems now and in the future.

On this background the qualitative study examined the consumers' perception of motivators and barriers for buying grocery on the Internet. The research process of this study was organized in a research group. Besides the authors of this report, the group consisted of Suzanne Beckmann, CBS and related to the Swedish part of the study²: Jenny Klevås, Magnus Karlberg and Annika Olsson, Department of Design Sciences, Packaging Logistics Division, Lunds University.

The research questions that guided the study and the analysis process were as follows:

- What are the advantages and disadvantages as experienced by consumers with off- and online shopping of FMCGs?
- What kinds of items are preferably purchased off- or online for what reasons?
- What aspects are important for consumers in relation to the delivery of goods purchased online?
- What happens after delivery? How are goods and packaging handled, stored and disposed of?

¹ For further information concerning the project look for the link: <http://ebizzoresund.teknologisk.dk>

² This study is published separately

2. METHODOLOGY

In order to answer these questions, 10 in-depth interviews were conducted with customers from an **online grocery service**³ and customers from an **online supermarket**¹. The main selection criterion for the respondents was that they had experience with online grocery shopping as either an Online grocery service's customer or as a customer of an Online supermarket. The total number of respondents was 11, as one interview was conducted with both husband and wife. The following table provides an overview of the respondent characteristics. A more detailed description is provided in the result section under consumer background.

Table 1: Respondent Characteristics

Online grocery service customers 2 women, age 40, 48 1 man, age 50 Children: School age children or grown up
Mixed experience (Online grocery service + Online supermarkets) 3 women, age 27, 41, 42 1 man, age 50 Children: No child, toddler, not living at home
Online supermarkets 3 women, age 29, 30, 51 1 man, age 47 Children: Baby, kindergarten, school age, grown-up

The interviews were conducted by 3 different interviewers using a semi-structured interview guide (see appendix A). The interviews lasted between 2 ½ to 4 hours, were tape recorded and transcribed verbatim.

³ The names have been changed to protect the identity of the two firms

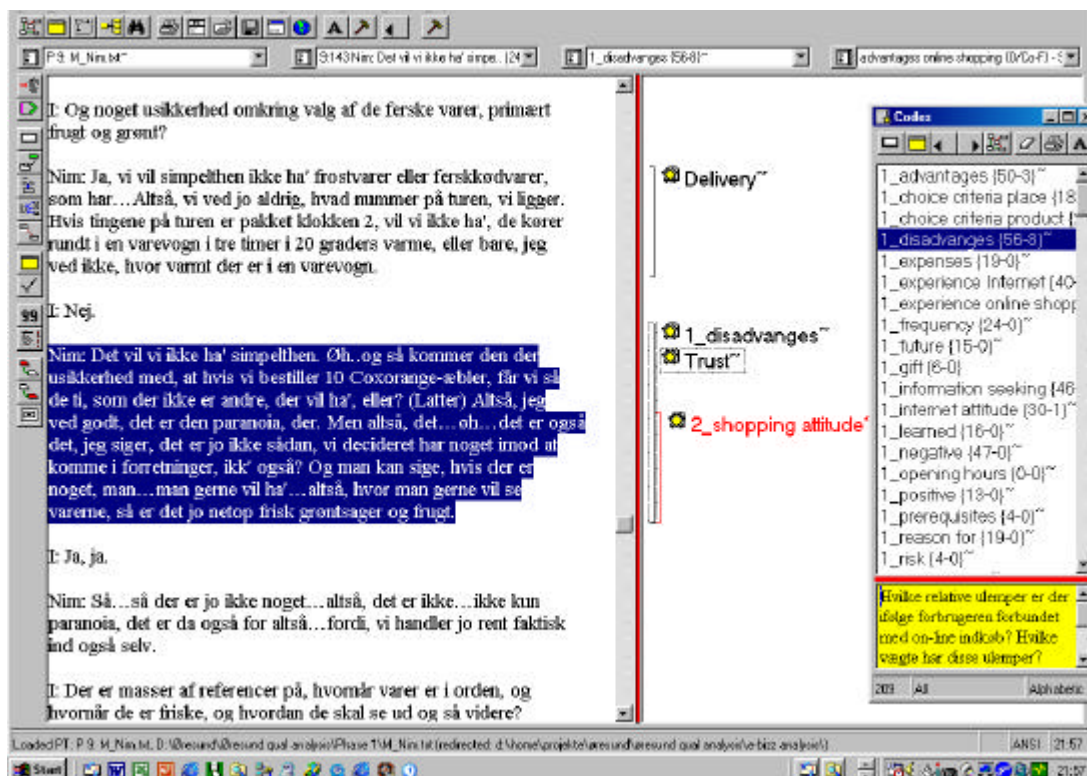
Data Analysis

The transcripts were analysed with the support of the software ATLAS.ti. ATLAS.ti (<http://www.atlasti.de/>) belongs to the genre of software that has been developed in recent years to support the analysis of qualitative data. The use of software has the advantage that it frees the researcher from those tasks that a machine can do much more efficiently like searching for words or strings in a text or retrieving coded text segments. With the support of the computer, it becomes much easier to analyse qualitative data systematically, and even large volumes of data can be structured quite quickly and clearly presented.

The basic steps of the analysis process when using such programs can be described as 'code-and-retrieve'. Text passages are marked and coded with one or more key words (= codes). These coded text passages can then be retrieved and reviewed. Thoughts about the data and the analytic process are written down in memos. Coded segments can be retrieved by either using single code words in a search or by combining multiple code words and data attributes using logical functions. The search process is the stage where questions are asked and results are obtained.

Figure 1 below shows the ATLAS.ti Interface with a coded interview. The actual interview is displayed on the left side of the screen, the applied codes on the right side in the margin area. Also visible is the code list with the highlighted code *1_disadvantage* (the 1 stands for online

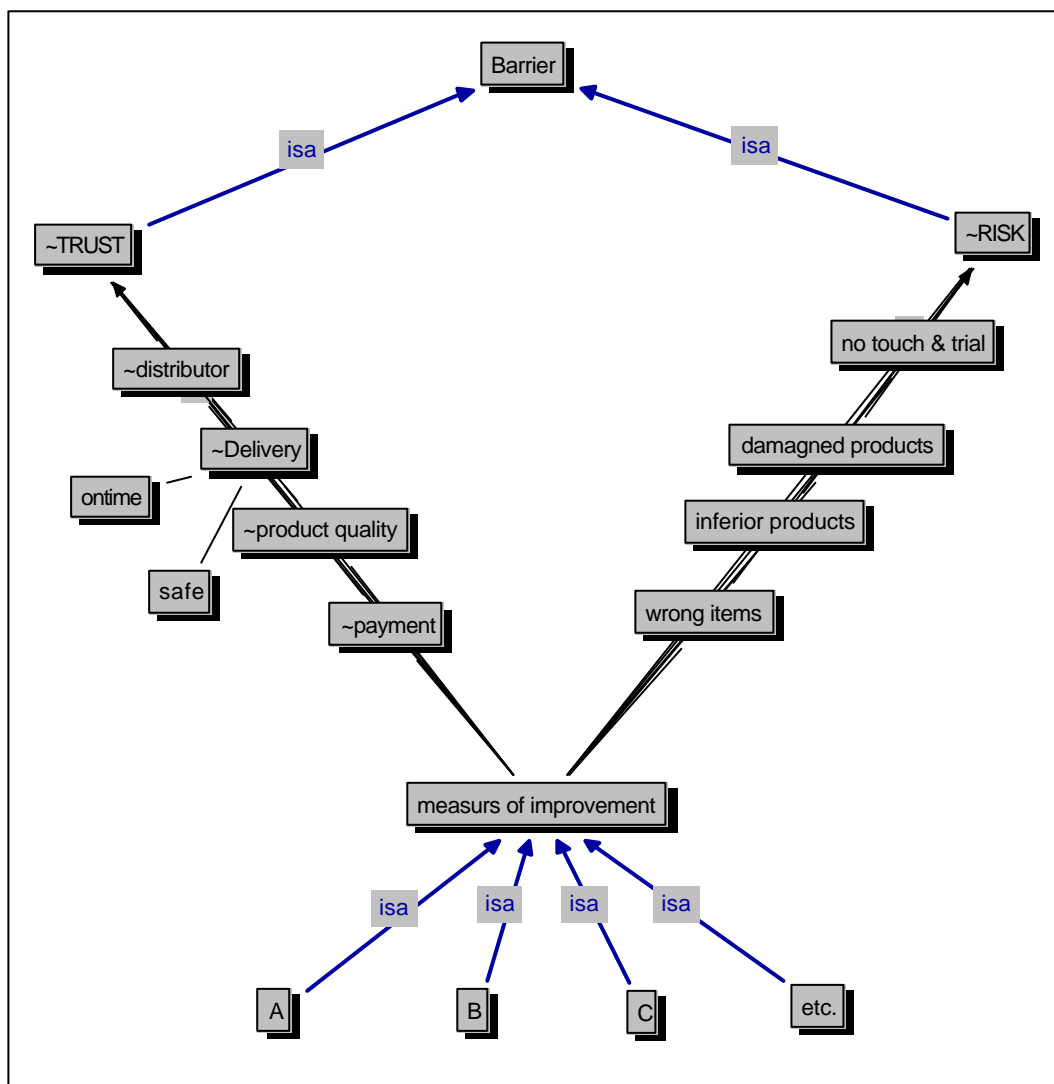
Figure 1: The ATLAS.ti Interface



as compared to 2 used for issues concerning offline shopping experiences). In the yellow text editor, the definition for that code is displayed. All in all 209 codes have been applied to the 10 interviews accounting for 2160 coded text segments.

An additional function that ATLAS.ti offers is the network view, which is a graphical presentation of linked objects (i.e., codes, quotations, memos). Below a graphical presentation of potential barriers to online shopping and their dimensions is depicted. Most codes listed in the network view are linked to text passages that illustrate their content and thus, it is possible to access the original interview material to inspect the details of what is behind those codes in their specific contexts.

Figure 2: Network view on the barriers trust and risk



The contents of this report

The result section is divided into the following parts. At first, the consumers who participated in the study are portrayed in detail. Then the type of goods that are frequently purchased online are described and listed. This is followed by a comparison of online shopping versus shopping in brick-and-mortar shops, and a discussion of the pros and cons as they particularly relate to online shopping. Further topics of interests were price, delivery fees, storage and packaging. From the analysis it can be seen that a number of issues are ambiguous containing both positive and negative aspects depending on consumer attitude, preferences, certain contexts and products. These two-sided issues are discussed under a separate heading. The analysis is completed by a comparison of Online grocery services vs. Online supermarket's customers, their experience, behaviours and attitudes.

Throughout the text a number of quotations from the interviews are used for illustration purposes. The quotations can be traced back to their original context in the interviews by the quotation number and the line number references indicated in parentheses at the end of each quotation.

3. CONSUMER BACKGROUND

Generally, it needs to be stated that all interviewed consumers had a positive attitude towards the Internet. Even though they do not embrace the new medium uncritically, they all believe that the Internet is here to stay. They regard the Internet as something that is practical but not necessarily entertaining or fun.

Online grocery service Customers

Kirsten⁴ (40) works in a day care centre and is pedagogue. Her husband (41) is a teacher. They have two children, a daughter, 14, and a son, 8 years old. Her husband writes children books in his leisure time, which they hope can generate sufficient income in the future so that he can give up his job as a teacher. Her son likes to play football and her daughter goes horse riding. Even though Kirsten works full time, she still takes care of the more typical (female) practical tasks in the household including shopping planning. The family lives in a good size 'andel' apartment of 132 square meters in Vesterbro since 12 years. It is a relatively inexpensive and well-renovated place.

Regarding her knowledge of the Internet, Kirsten describes herself as a bit backwards, but she finds her way around having been taught mainly by her husband. In addition to Online grocery service, they have purchased books, CDs and clothes of a specific brand (Bon A'Parte) online. Her most recent experience was an online fish order, as it sounded interesting to try. It turned out to be a positive experience.

Kirsten needs a specific purpose to go online and does not like to surf just for the sake of it. An example of a specific purpose would be checking out Netto offers every Sunday and if she likes something, she purchases it off-line the following day.

Fie (48) is a psychologist married to a 39-year-old biologist who works at a higher educational institution. Both work fulltime and have a combined income of about DKK 600.000. They currently live in a rental apartment and save up to buy a house. In their spare time, they spend time with her two grandchildren; they like to visit historic buildings and to go out for meals. A good deal of their leisure time on normal weekdays is spent in front of the TV. Fie likes to cook and spends a good deal of her free time in the kitchen. She describes

⁴ All names have been changed to protect the identity of the respondents.

herself to be more like the good-old days 'housewife' type with an ecological consciousness. This entails not spoiling or wasting anything, looking to use as little water, energy and packaging as possible and buying organic products.

Fie has no problems in using the Internet but says that she is not a nerd. If she has questions, she asks her husband. She uses the Internet as communication tool and for looking up information like travel routes. It also enables her to work at home. She and her husband purchase food from the Online grocery service. Other online shopping activities include most of their books purchases, technical equipment (husband), holidays, and magazine subscriptions.

Jens (50, an educational consultant, is married and a father of 4. Only the youngest daughter (15) is still living with them in their own house. His wife is a teacher. Throughout the years, they had an immigrant from Iran living with them and a girl, who has suffered incest. When turning 40, Jens decided to radically change his life by quitting smoking and alcohol. The family is financially well off and now as most of their children are out of the house; both parents enjoy spending a bit more on themselves. Jens recently purchased a new (fancy) car with lots of gadgets. His biggest hobby or leisure pass time is the family's caravan that sits in Hillerød and is used for the yearly holiday in Italy for about a month. Other leisure activities are reading and being together as a family.

Jens feels comfortable using a PC and the Internet. It is part of his job. He uses the Internet to seek information and to purchase a number of goods online, like food from the Online grocery service, extras for his car or music CDs. A few times, they also have been purchasing clothes over the Internet. He believes that in the future the Internet will be the primary means of communication. Jens describes himself as a political consumer.

Lisbeth (27) works as an employee statistician; her boyfriend, also 27, works in marketing research with a focus on the Internet. Their combined income is around DKK 500.000. They live in a freehold flat. Both still visit university courses, Lisbeth as part of a continuing education after work, her boyfriend to finish his Master degree. In her free time, Lisbeth goes to aerobic classes and jogs. She likes to go to art exhibitions and to draw pictures herself. Her boyfriend plays in a laymen-theatre. Both like to go out and spend time with friends and family.

Lisbeth is not a very experienced Internet user. Her boyfriend does most of their online shopping. The type of goods they purchase is food from the Online grocery service, books,

sometimes clothes, technical equipment like a PC or printer, foreign magazine subscriptions, and concert tickets. Lisbeth describes herself as a conscious consumer looking for quality and political correct purchases.

Maria (41) Swedish, works in the Norwegian ministry Embassy, is married to a 42-year-old programmer, also a Swede; they have a son of three and a half. Their combined income is a bit over DKK 1 million. They have two summerhouses in Sweden, which they use quite frequently and live in their own house. Gardening is one of their hobbies. If time permits, they enjoy reading and spending time outside in nature. Maria also likes photography and uses most of her spare time to be with her son.

More than three quarters of their daily goods (food, household goods) are purchased over the Internet. Sometimes they order clothes via catalogues. As she does not trust the online payment systems, they have not yet purchased any big-ticket items like computers. Maria has no problem using the Internet and has learned it by doing drawing at times on her husband's expertise. She uses the Internet as part of her job, for shopping, information search, communication (email) and chats within special interest groups.

As consumer, Maria is quality conscious, but she also compares prices. Political and ethical considerations enter her buying decisions.

Anne (51) a librarian is a single mom of a 13-year-old boy. They live in an apartment. Anne's full-time job has flex time and thus allows her a flexible work- as well as shopping schedule. She earns around DKK 300.000. She has a boyfriend, but they are not living together. Her leisure time is now dominated by a focus on health and healthy food due to some serious health problems. As a result she cooks regularly using fresh and varied ingredients. If she finds the time, she enjoys historic buildings and reading books.

Anne was introduced to the Internet via her work place a couple of years ago. She has been using it to chat, but currently mainly uses it for information seeking purposes and to update her Internet page written in English where she publishes reviews of books she reads. This also entails a worldwide correspondence with people interested in her reviews.

Her current online shopping experience is limited. She has ordered FMCGs online during a period where she could not walk well due to a broken leg and would consider doing it at present if a shop in her neighbourhood would deliver to her address. However, there is none.

Generally, she has a positive attitude towards the Internet, believing that it is there to stay. As a consumer, she describes herself to be price conscious looking for special offers. Anne would however not compromise quality in order to get something cheaply.

Online supermarket's Customers

Else (29) is a clerk married to Jan (33) and the mother of two children, age 4 and 7. Else lives with her family in a small terrace house in Ishøj, a Copenhagen suburb. Both Else and her husband grew up in the neighbourhood where their parents still live. Else is educated at a commercial school and works fulltime in the division of taxes for the local authority. She likes her job, but would prefer to work part time to be able to commit herself more to her two children and their upbringing. In her leisure time Else plays with the children and follows the oldest son to his leisure activity, karate. Before she had any children Else also attended karate lessons; actually that was where she met her husband. Besides attending to her children, in her spare time Else enjoys relaxing on the sofa and watching television, even if everything in the house is a mess. The family doesn't have a lot of money, because Jan is under education to become a teacher. But they are satisfied with what they've got: The house, the children and their leisure life. They prefer time over money, meaning they don't feel they need a lot of money to be happy. On the contrary, they hate to feel pressured for time.

Else is the one in charge, she knows what all the family members need and want and therefore she prefers to do the grocery shopping. She regularly shops on the Internet. Once a month she orders groceries and other daily supplies over the Internet from the Online supermarket for about 2000 DKK. That means she only has to do a minimum of shopping in brick-and-mortar shops to supplement.

She describes herself as a consumer who buys the same things again and again. She doesn't think much about the price-cost relation; she buys what she thinks has the lowest price, but does not hunt for special bargains.

Jannie (30) is educated as a translator for German and Spanish. Currently she is on maternity leave. Her husband is 31 years old and works as an IT consultant. They have a 10 months old child. In her spare time, Jannie likes to swim or to go to aerobics. Her husband enjoys spending time in front of the computer, also as a leisure activity. They both like to read books and newspapers, hanging out with friends and family and to work on the house. Both grew up

southeast of Copenhagen and came to Copenhagen for their education. They now live in Greve. They own a house, which they currently are in the process of renovating.

As consumer, Jannie is quality and price conscious. The only goods she purchases online are food and household items from the Online supermarket. Her husband may have purchased software online, but she wasn't quite sure.

Jannie gathered her first Internet experience at home. Generally she feels quite comfortable using the Internet. E-mail activities take up about half an hour per day. When she looks for information, the starting point is often the search engine Yahoo. Her activities on the Internet are goal oriented. She does not like to surf or chat without a purpose.

Jørgen (47) and his wife (41) both are librarians. He works in Brøndby, where they live; she works in Copenhagen. Jørgen has an adult son who is no longer living with them. Jørgen and his wife are interested in Irish folk dance and music. He plays guitar and the Concertina, an Irish folk instrument. In addition to going to dances or concerts, they are members of an Irish club and involved in its organisation and management. Once a year they take a 14-days trip to Ireland. They both grew up in Copenhagen and their activities are concentrated on the city area. In addition to the interest in everything Irish, Jørgen likes football, going to games on Sundays and watching television. His wife enjoys gardening.

In terms of his role as a consumer, Jørgen describes himself as being trustful in general, but not if it comes to banks. At times, he thinks he is too trusting, e.g. when advice is given by sales personal. Instead of being critical, he tends to believe their advice, which recently also resulted in a negative post-purchase experience. Further, he describes himself as being quality but not price conscious. But he never buys consumer goods on credit.

Jørgen and his wife both are experienced Internet users as this is a necessity in their daily work life. They use the Internet for communication purposes, mail lists and information seeking. They check prices and compare different offers on the Internet before they purchase a bigger ticket item like a printer. Often they also look up information if there is an interesting question they have no answer for. Furthermore, it supports their hobby finding information on Ireland and Irish music. They purchase household items from the Online supermarket on a regular basis, but no fresh produce like vegetables, fruits or meat because of negative experience with the delivery of such items. Lene has purchased clothes online but found out that it is after all better to try on clothing in a shop first. Other items they have purchased online were books, CDs, music sheets and a printer.

Klaus (50) and his wife **Gurli** (42) live in the city. The interview was conducted with both of them. Klaus was previously self-employed as a consultant in the risk management and insurance business. As part of his job, he has been travelling a lot all over Europe and Africa. Gurli works in the hospital as a secretary. Both enjoy the city, e.g. visiting parks and both go to church, Gurli more actively than Klaus. Gurli and Klaus are newly wed. Gurli first husband died about a year ago. They both previously had summerhouses. Now they live in a condominium; Klaus has a second apartment in the city for his children. His father is over 80 years old and they visit him for a few hours every week. Klaus spends much time at auctions.

As consumers, both are price and quality conscious. If it is a good quality, they don't look so much at the price given a specific price range Ann has a pro-environmental attitude and is interested in organic food products. It was only now after she met Klaus, that a number of electrical appliances and a dishwasher became part of her (their) household. She describes herself as being more the traditional housewife type in terms of planning meals and shopping activities.

Both use the Internet quite frequently and have no problems in navigating. In addition to online shopping, they use the Internet for price comparisons or for finding information. Klaus and his wife have ordered a range of things online starting from food items at Prima, food for a birthday party including meat from a butcher, small furniture, clothes and accessories (shirts and belts with a well-known brand image) CDs, computer games, a computer, tickets (BilletNet), and gifts for friends. Currently, they plan to purchase a vacation online.

4. TYPES OF GOODS PURCHASED ONLINE

Online shopping seems to be preferred when looking for goods that are either

- Considered to be ‘standard goods’ or
- Speciality items that cannot be found (or not that easily) in an ordinary shop.

Standard goods are items like toilet paper, washing powder, milk, flour, rice, noodles and others household times needed on a regular basis (all FMCGs); Furthermore, CDs, books, printers, PCs, jeans of a particular brand, T-shirts, designer belt, scarves or tickets (entertainment, travel). Thus, the type of goods where it does not matter much where one purchases them. One knows what one gets and the quality is always the same, no matter which merchant sells the good.

A second potential group for online purchases appears to be goods on the other end of the spectrum, namely speciality goods. This, however, does not include all kinds of speciality goods and is dependent on consumer knowledge.

If consumers have a special interest in something, e.g. products related to a hobby or a vice, then the Internet might prove to be the best place to find what one is looking for with the added advantage of facing no geographic boundaries :

Nu ku' jeg enormt godt tænke mig nye forlygter til min bil. [...] Så fik jeg jo bestilt nogle nye forlygter. Det ku' jeg jo selvfølgelig køre op til automobilforhandleren og bestille. Nej, tænkte jeg, de skal nok tjene penge på det, så det fandt jeg nede i Tyskland på Internettet. Så jeg har bestilt forlygter over det. (2:32, 542-547)

Speciality items can also be FMCGs like fish, tea or wine. Other speciality items that were mentioned were gifts. Depending on the type of gift, online purchasing is also a vital option:

Der findes også en hjemmeside, der hedder guleroden.dk, hvor man kan købe gaver. Som man så får man dem så pakket ret flot ind. Jeg har gjort det et par gange. Jeg har også gjort det til Jacob, med en lillebitte flaske vodka. Og så skriver man en eller anden hilsen. Og så bliver det simpelthen leveret. Og det er jo genialt. Jeg ved ikke, jeg tror, det koster 40 kroner at få leveret, pakket flot ind. Designgarvet og lakstempel og...Det, synes jeg, er sjovt. (10:142, 2339-2346)

The above-mentioned advantage of not facing geographical boundaries is also relevant in a gift-purchasing context:

Sidste år, havde vi nogle venner, der boede ovre i San Diego. Så blev de så 30 år begge to det år. Og ...der gik vi så ind på sådan en gifts.dot.com og bestilte såd'n en kurv med chokolade, som så blev sendt direkte ud til dem. (8:62, 1183-1187)

However, a gift could also be something that consumers want to purchase in a speciality brick-and-mortar shop where they receive advice, especially if they lack knowledge about the product.

Fordi piberne...jeg har ikke så meget forstand på piber, så det ville jeg være nødt til at skulle ha' i hånden. (10:260, 4069-4070)

A consequence of having limited knowledge about a product is the desire to see or feel the good, wanting advice from a sales clerk and therefore wanting to purchase the good in a brick-and-mortar shop.

An online purchase requires that one knows what to look for. Search engines make it easy to find even bizarre items. But if one does not know which search term to enter, then finding what one is looking for can be difficult and the time required to do so would negatively off-set one of the advantages online purchasing offers, namely timesaving.

In particular, the types of goods purchased online by the respondents of this study were:

- Fast Moving Consumer Goods (FMCG) defined as:
 - Groceries (both food and household goods)
 - Food/household items excluding fresh product
 - Subscription from an Online grocery service like the basic vegetable case, fruits, cheese, bread and fish
 - Food and wine for birthday parties
 - Fish from online fish shops
 - Speciality teas
- Non-FMCG defined as:
 - Books, CDs, magazine subscriptions

- Computer and computer accessories, other technical gadgets
- Holidays, theatre or concert tickets
- Clothes (T-Shirts, jeans, trousers, belts, shirts)
- Flowers, gifts including gift wrapping and cards from speciality online gift shops, toys
- Jewellery, silver ware
- Small items of furniture like shelves
- Curtain fabric
- A cat (selection, but no delivery)

For a differentiation between the Online grocery service and the Online supermarket's customers, see appendix II.

The potential of non-FMCGs

Respondents had difficulties in imagining buying furniture and medicine over the Internet. Clothing was also critically. A few had at least already tried to purchase items of clothing online, however, with doubtful success. Big-ticket items like PCs pose a problem to those who don't trust credit card payments over the Internet.

Furniture

Only two of the respondents had experience with buying furniture online. And their experience was limited to small and inexpensive items like shelves or children's furniture. Generally over all respondents, half would at least consider buying furniture online; the other half responded with a definite 'no' attitude:

Nej, jeg tror simpelthen, altså, at da skal jeg sådan prøve stole og sofaer og senge og så videre. Altså man ku' jo for eksempel godt købe et bord på nettet, men alligevel, ikk'? Det er såd'n lidt med det visuelle, altså, hvor godt ... (1:56, 964-967)

The above quotation expresses hesitation and rather than presenting a well-formed attitude the respondent is 'thinking aloud' in providing an answer to the posted question. This shows that consumers are not yet very familiar with the idea of buying furniture online.

A German website reporting on trends in the furniture industry poses the question: Internet-shoppers, where are you? The hoped-for success in moving brick-and-mortar furniture shops online could not be realised.⁵ Nonetheless, a number of new online furniture shops are emerging. One example is the shop InVIDO.de. They offer an entire new way to sell furniture instead of simply trying to move a brick-and-mortar shop online. The InVIDO idea fits into the above described 'speciality' category. Consumers can individually design their own furniture supported by a software system, determine colour, shape and size down to a millimetre. The furniture is then custom made for them and delivered.

The shop furny-direct.de presents an example covering the other end of the spectrum for goods potentially purchased online, namely standard goods. They offer a limited product range consisting of three lines of shelf and cupboard combinations by minimising potential sources of consumer risk at the same time. The company assures a certified product quality, a money-return guarantee, off- and online payment options and delivery within 7 days.

Of main concern to the respondent of the current study was that they could not see, touch or try out pieces of furniture. Buying a PH-lamp, a well-known brand in Denmark, was on the other hand not seen to be problematic.

Med computere, der har jeg en fornemmelse af, hvis det er en Compaq eller en Dell, hvis det er et eller andet, man kender. For eksempel en Fujitsu. [...] Mens at en sofa, der tror jeg nok, at jeg lige ville prøve at sidde i den.[...] En PH-lampe, det ville ikke genere mig at købe via nettet. (9:88, 1561-1568; 9:90, 1573)

Brand knowledge thus reduces the perception of risk that appears to be quite high when considering online furniture purchases. Reducing this risk as shown in the furny-direct example or adding an experiential aspect to the online shopping experience may overcome this problem.

Another possibility is to combine a showroom presence and the possibility of ordering in the shop – a concept known in Danish furniture retailing. However this is very much like normal furniture retailing except for the ordering system.

Medicine

⁵ <http://www.moebel-tipps.de/archiv/mt2.html#2> (last accessed 3.12.02).

Buying medicine online was for all respondents a hypothetical purchase. None had experience with it. Those immediately in favour of the idea were the ones with a regular need for medicine, e.g. for treating asthma. Generally, seven out of the eleven respondents would consider purchasing medicine online, however, only if the following conditions were fulfilled:

- Non-subscription medicine
- Subscription medicine only if a system was in place that involved a doctor, preferably ones own regular general practitioner.

An online purchase would be favoured for reasons of convenience if

- a) A known medication was needed like headache pills or cough medicine and online purchase and delivery would result in time saving.
- b) Children were ill and/or one needs medication in the evening, on weekends or holidays. Especially in the later case, the added convenience of having the medication delivered would offset the added costs of having to pay delivery fees.

For those needing medication regularly, delivery fees are perceived as an additional cost that is not compensated by the added convenience. The reason for this difference in perception is that regular users have a built-in routine in their daily life where medication is picked up on the way home or when running other errands. Thus, delivery does not add much value. There would be some added value in being able to order the medication online so that it would be ready when picking it up at the pharmacy.

The service delivered by the expert in the pharmacy, however, is not a reason for *not* ordering online. More important is the feeling that one really gets the ‘right’ substances. Thus, being knowledgeable about a product (or in the case of medicine, not being very knowledgeable about it) makes the difference between a product having online potential or not.⁶ Medicine only seems to have a potential if expert knowledge is part of the deal.

Online medicine orders from abroad

⁶ This effect was previously also shown in the context of purchasing a gift.

The well-known fact that medicine is ordered online from other than one's home country because it would otherwise not be legally available can be explained by the specialty potential. The good is neither a standard good or regularly available in brick-and-mortar pharmacies. Here the boundary free nature of the Internet creates the potential for sales.

Potential, hypothetical and definite 'no' goods – a snap-shot view

Given the 10 households and their current level of online shopping experience, the following picture shown in **Figure 2** emerges with regard to goods that they currently purchase online, goods that they could potentially see themselves buying online in the future and goods that they definite won't buy. It was chosen to list the various products as often as they were mentioned, in order to give an immediate visual impression of what is and what is not purchased online and where there is future potential. Percentages or frequency counts would be misleading given the nature of the present study. The purpose here is to show trends. As not all respondents did list the same type of goods, the numbers across the columns do not all add up to 10.

Table 2: Snap-shot of products with current online potential

Goods currently purchased	Hypothetical goods	Definite 'no' goods
Furniture		
Furniture, small items Furniture, children's room	Furniture Furniture at online auctions Supplementary items like PH-lamps	Furniture Furniture Furniture, need to see it, try it out, service is not relevant Furniture, see them, try them Furniture, want to try them out Furniture, wants to try, see them
Medicine		
	Medicine Medicine Medicine Medicine Medicine Medicine Medicine	Medicine, no experiments Medicine, if postal delivery
Entertainment		
Travel Travel Travel Travel Tickets Tickets Tickets Books Books Books Books CDs CDs CDs CDs Toys Computer game	Travel Travel Tickets (entertainment) Tickets (entertainment) Gift: reservation in restaurant Gift: book Gift: CD Gift: toys	
Computer & Computer Accessories		
PC Printer Printer Other computer accessories	PC PC	PC, payment PC, wants to see it PC, not yet thought about it

Continued...

Goods currently purchased	Hypothetical goods	Definite 'no' goods
Speciality Goods		
Car accessories Antique silver Wine for birthday party Food for birthday party Tea Fish (e.g., sushi) Gifts	Wine at sales price /special offer Gift: stereo Gift: concern about on-time delivery	Art objects Gift: pipe (little knowledge)
Clothes		
Clothes (T-shirts) Clothes (jeans) Clothes (particular brand) Clothes Clothes (belts, shirts, branded products)		Clothes Clothes Gift: fur (wants to try it on)

Furniture seems to be a clear 'no' item. But it needs to be added that respondents here had a simple transfer of the traditional brick-and-mortar shop to an online platform in mind. As described above, new kinds of online furniture shop emerge that offer products that better fit the characteristics of potentially successful online products. They are either standard items like office furniture, shelves, chairs, etc., or they are speciality products where consumers for example are involved in the design or visit a showroom from where they order the goods.

Medicine purchases up until now are clearly only hypothetically in the mind of the consumer.

Products from the world of **entertainment** already seem to be established on the Internet. They are either already purchased or consumer have them into their consideration set for future online purchases.

Clothing appears to be a critical item. Of those consumers having tried to order clothes online, most were not satisfied. Those who as of today have not purchased clothes online, also did not consider to do so in the future – perhaps until better software tools are available that minimise consumer risk of getting items that don't fit or do not match in terms of colour.

Computer and computer accessories have a mixed online potential related to different consumer perceptions. Some consumers consider them to be standard goods and thus have no problem in ordering them online. Others express a concern about payment methods, as computers and computer accessories are big-ticket items. And for others, computers are not enough of a standard item that they would go without seeing them in a physical shop.

Speciality items also range across the entire spectrum from FMCGs to expensive durables.

5. OFF-LINE AS COMPARED TO ONLINE SHOPPING

Experiential aspects

One difficult to beat advantage of offline shopping is that it offers consumers the possibility of experiencing the goods with all their senses. Products can be tried out and tried on, smelled and touched. Quality can be inspected right there and then and it is not simply a matter of trust. Experiencing the products with more than just the visual sense can also be a source of inspiration, e.g. for deciding what to make for dinner.

Inspiration was, however, not only an aspect linked to offline shopping. Consumers for example also perceived the Online grocery service concept as stimulating (see page 27 below), or finding something of special interest on the Internet. This can be perceived as more inspiring than offline shopping:

Altså, jeg går ikke såd'n amok i dagligindkøb, ikk', og fylder indkøbskurven og ...eller vognen[.....],og [jeg] er svær at trække med i Bilka,[....] Altså jeg leder ikke efter indkøbsoplevelser og har dem sjældent. Jeg har derfor ingen 'aha' oplevelser af at gå ud. Det gør jeg ikke. Det kan vi så godt få lidt på nettet, ikk'? Fordi, det er det, der med, at vi pludselig opdager, at en speciel kunstner har udgivet en ny cd. "Nøj, den må vi ha'". [...] Men det er aldrig i forbindelse med dagligindkøb. Der mener jeg, der er det altså virkelig, at de åbner en ekstra kasse. (9:187, 2757-2772)

Generally though online shopping, especially online shopping for groceries, was not experienced as fun or exciting. But

- a) This was not perceived negatively and was not mentioned as a reason for not wanting to shop online, and
- b) Offline grocery shopping was often equally perceived as a tedious task. It is simply something that needs to be done.

One way to add a bit more excitement to the online shopping experience could be lists of special offers:

(Interviewer: Du er ikke sådan, at du sidder og glæder dig til det?)

Respondent: Nej, nej. Latter. (Interviewer: Og det er en oplevelse i sig selv?)

Respondent: Nej, det er det ikke. Ja, jeg syn's, den der

tilbudsliste er lidt spændende. Altså, man går ind og kigger på, hvis de har noget.... Og så er det så, hvis der er nogle ting, som man ikke rigtig kender, så kan man jo føle: "Nu har jeg gjort et rigtig godt indkøb". ...så kommer det ligesom frem, at man har sparet. Latter. (6:279, 2869 – 2894)

Thus, online shopping does not necessarily mean non-experiential shopping. The above-mentioned newly emerging online furniture shops that allow customers to design their own furniture on a computer screen are an example where the experiential factor is moved back into the world of online shopping.

Personal advice and service

Another hard to beat fact of offline shopping is the human contact possible in a brick-and-mortar environment. Personal advice from sales personnel is at times still appreciated, e.g. when clothes shopping. And the daily chitchat at the kiosk or the green grocers down the road is also hard to recreate online. The question however is whether consumers actually expect this when thinking about online shopping.

Based on the responses given across all interviews, service offline is not necessarily something the consumers in this study value very highly. Often the service quality they experienced was very poor, so they have learned to live without it and to find information about a product themselves. The quotes below exemplify some of the service experience consumers have made in brick-and-mortar stores:

Altså, jeg har, de gange vi har...jeg har været med ude at købe møbler, så jeg synes ikke generelt rådgivningen har været det,..., jeg har fået en særlig god rådgivning, uanset, om det har været i såd'n en "Byg selv", eller i en større én, for eksempel i Vor Sofa. Som var en dyr sofa. Men der synes jeg ikke, rådgivningen var særlig god. (4:66, 1177-1186)

Det er simpelthen noget, der virkelig kan gøre mig...øh...splintrende rasende. Øh. Sidste gang, jeg købte et...et nyt tv. Det er ikke så forfærdelig længe siden. Der var jeg heller ikke, det er umuligt at få een ekspedient i de der... radioforretninger. (5:66, 1132-1136)

Jeg kan ikke huske, jeg nogensinde har fået rådgivning i en møbelbutik. Ærlig talt. (Latter) Nej. (5:121, 2071-2072)

The level of service or lack of service was actually never mentioned as a perceived disadvantage of online shopping. A 1:1 translation of service understanding from offline to online shopping thus is not what is needed. More important is to gain an understanding of what service quality means to consumers in a virtual context and what consumer expectations are:

The results of the present study show that service quality online like offline is related to **information**. But it does not necessitate a human being providing the information. When buying groceries online, consumers for example would like a better description of the various items. Currently only the product names and brands are mentioned. If a product is not known, then this does not give the consumer much to go by. It also creates a barrier for ordering something new (=unknown) as there is a high risk.

*Det er jo et...kan man sige...et problem med Internetkøb, at man...[
...]når man så skal prøve noget nyt, så ved man ikke rigtig, hvad det
er. Og det syn's jeg også er noget, de kan gøre meget for at forbedre.
Altså, det skulle være sådan, at hvis du ligesom klikker på en vare, så
ville du få alt det, som er at vide om produktet. (6:38, 845-853)*

Thus, WebPages of online supermarkets should contain more, and more detailed information about the various products offered, possibly also accompanied by a picture. This is the standard in many other online shops selling books, music, toys, furniture, etc. and consumers have come to expect that they can see the product on the computer screen and read some additional information about it. However there is also a need for the pages to load faster and ordering to be faster, so more pictures and detailed information should be combined with i.e. a weekly list where the customer can just reorder or replace a few items.

Secondly, service means a generous **return and reimbursement policy** when a) the good was damaged during transport and b) when the product doesn't fit or is not liked. Products should not arrive damaged in the first place, but as this can happen, consumer goodwill is greatly increased when their complaints are taken seriously:

*Hvis...altså...Det, der er ved [Online dagligvare specialbutik], der har
de det, at de altid har den her høje kvalitet. Og det ved man, at de
har, ikke? Og skulle der være en smutter engang imellem, at man får
et vissent bundt radiser. Æh, så gi'r jeg dem en mail og brokker mig.
Og så trækker de det fra næste gang. (5:289, 842-844)*

[Online dagligvare specialbutikken] har kikset lidt en gang imellem med varer, der ikke har været i orden, simpelthen. Men det er meget, meget sjældent. Og så har du ringet og brokket dig, og så er det blevet krediteret. (10:283, 3661-3664).

As a result, the service of the Online grocery service is trusted and they have an image of delivering high quality products:

Altså, ISO havde jo de der leveringer, ..., det der med, at jeg er sur over, at jeg altid får de ældste varer, så vil jeg godt kigge på dem selv. Det er fordi, jeg har tillid til, at jeg får nogle gode varer fra [Online dagligvare specialbutikken], at jeg bruger dem. (3:235, 1594-1598)

Hvis...altså...Det, der er ved [Online dagligvare specialbutikken], der har de det, at de altid har den her høje kvalitet. Og det ved man, at de har, ikke? (5:289, 836-838)

Another positive spin-off is that it would be much more expensive to control the complaints from the customers, than just to pay what the customer claim damaged.

Thirdly, **delivery** is the service that differentiates online from offline shopping and it is one very important reason for consumers to shop online. All but one respondent mentioned it explicitly. Issues around delivery are discussed at greater length on pages 31 ff.

6. PROS AND CONS FOR PURCHASING ONLINE⁷

Advantages of online shopping⁸

Delivery

The fact that ordered goods are delivered to one's front door and that one does not have to be at home when they arrive (at least in the case of the Online grocery service) is generally perceived as positive and one reason to purchase online. Delivery is especially appreciated when goods are heavy (like bottles of water, beer, juice, wine, etc.) or if getting out of the house and/or to the shops means a greater effort (e.g. in case of small babies/children at home, illnesses, a busy work life). Consumers with sufficient time on their hand are a special case. For them placing the order online has the advantage of being able to do it whenever it suits them. But they may prefer to pick up the goods themselves as the time and effort involved in picking up the goods outweighs the added costs of delivery.

The x-mas effect (surprise effect)

The fact that the goods purchased online need to be sent/delivered has both advantages and disadvantages. Receiving a package or coming home and a case of food is standing in front of the door can be an exciting experience, a bit like Christmas, but a couple of times a year. Opening the package and seeing in reality what one has ordered, has the potential of arising positive feelings. The concept promoted by the Online grocery service is a good example how such responses can be evoked successfully:

...så blev det ligesom ny inspiration til... og lave mad og lave nogle nye ting. Og jeg syn's, det har forhøjet vores dagligdags kvalitet, faktisk, meget, det syn's jeg. (6:140, 2276-2282)

det er meget rart der at komme hjem om fredagen at se, hvad der...hvad monstro, der er i kassen og finde på, hvad man så skal lave. Det, synes jeg egentlig, er meget sjovt. (5:313, 777-780)

Off-line shopping has the disadvantage of needing to carry the purchased items. But one can be sure that the bag contains the items one wanted to buy and that they are of a desired

⁷ A graphical overview of the pros and cons of online shopping is provided in appendix III.

⁸ For a comparison of the Online grocery service and Online supermarket customers see appendix II.

quality. Coming home with the bags and unpacking them can also provide a feeling of excitement. Thus, the 'Christmas-effect' is not a unique advantage of on-line shopping. Nonetheless, it is an interesting issue worthy of further exploration.

Choices

A further aspect that was liked about online shopping is the fact that one can order something that cannot be purchased elsewhere. This can entail being able to search foreign websites and gaining access to a larger number of national and international distributors to compare products and prices, or special offers that are only available online:

De sælger hvad som helst på nettet, og så går man ned og henter det i sin lokale brugs, ikk'. Det syn's jeg lød rigtig smart, faktisk. De kan sælge alt muligt.12 flasker dyr rødvin eller et eller andet sted i Nordjylland. Det kan de så ikke købe der. Så på en eller anden måde så kan nternettet...det kan jo gi' én...øh...nogle ting, som man ikke kan få andre steder (3:227, 2133-2138)

As one respondent expressed it, the Internet with its online purchasing possibilities opens up an entire new world, thereby enriching life. Some feel that they can get everything they want online. Others were less satisfied with the range of goods available. This was especially true for those with experience in ordering groceries online. For them a more complete product range would be desirable (see also page 30 below).

Time and information (especially relevant for Non-FMCGs)

Having more time to decide, not feeling pressured and seeking information at ones own pace and time, especially during evening and night hours when offline shops are usually closed, are all reasons for buying online. Seeking information over the Internet also cuts waiting time in stores and in telephone cues; and it does not involve travelling. The information that is provided is often more extensive and it is easier to find. An example would be books offered by Amazon.com. Finding the kind of information that can be found online by simply typing in a few search terms would take much longer in an offline bookstore. This is, however, offset by home pages with bad search facilities or non-user friendly interfaces. Thus, the availability of large amounts of information is experienced as both positive and negative.

For many products (non-FMCGs), the Internet provides a better overview and the possibility to compare products and prices. This applies to big-ticket items like computer equipment or other appliances as well as ticket purchases (e.g. BilletNet). An added advantage with regard

to items like computers, printers, etc. is that it is easier than before to find the best priced offer due to the increased transparency.

Disadvantages of online shopping: FMCGs⁹

Above the positive aspects of online shopping were discussed and how online shopping compares with shopping at brick-and-mortar stores. In order to better understand how more consumers can be moved to purchase a larger variety of products online more often, it is also necessary to consider aspects that are currently evaluated as negative and weak.

Technical difficulties

Using the Internet for online shopping purposes requires basic computer knowledge and a certain willingness to try out various systems until a certain level is reached where one feels comfortable to use the Internet. All respondents in the present study had sufficient experience and computer knowledge to use the Internet. Thus, the negative perceptions reported below are not related to a lack of skills on their part.

Respondents expressed dissatisfaction with the design of home pages and the product ranges offered. Consumers find it irritating if the information on the page is not organised logically and if no clear instructions are provided (e.g. the Online supermarket).

In the start-phase of their online activities, the Online supermarket experienced some technical problems. These were solved over time and the page was redesigned and functionalities were added and deleted. The Online supermarket's customer was however not informed about the kind of changes that were made. A further minus is that no instruction for the first-time user are found on the Online supermarket's home page, at least not at an obvious place. Whatever is available can be found under FAQs, but this is not necessarily the first place one looks when wanting to try out the service.

Based on the tests and / or use of the Online supermarket by the respondents one can say, that this type of online shops have made all the mistakes known from other e-commerce beginners.

It appears that money was saved at the wrong places by for example using a provider that cannot handle larger volumes (quickly). Most of the respondents have ADSL access, and they

⁹ For a comparison of Online grocery service's and Online supermarket's customers see appendix II.

are spoiled by the more professional websites that they otherwise use. There were complaints about pages that build up very slowly, about contents that were deleted from shopping carts and orders that take 30 – 45 minutes to be completed online. All of this indicates that the current interfaces of online grocery shops are not very user-friendly.

Technical glitches that were mentioned were that names and addresses are not saved on a secure server. Instead repeat costumers had to enter their names and addresses every time they place an order. Customer communication could also be improved. If pages were reconstructed, customers were

- a) Not informed about it in advance
- b) They lost their previously entered shopping lists and could start all over again (the Online supermarket).

Despite these difficulties, some respondents still display a remarkable patience and have not yet given up. Others however have resigned and have stopped ordering groceries online.

Product range

An additional complaint was that at times it is difficult to find the kind of products one is looking for. Thus, the search facilities on the web page directly could be improved. This is also related to the expressed dissatisfactions with the offered product range. Some companies offer only a very small selection of their total product line online (e.g. Ikea, Imerco), and thus make it not interesting to even look further into the possibilities of ordering online. Others, like the Online supermarket, offer the possibility of adding items that are available in the physical shop to the list of those items that can be selected directly with a mouse click. The Online supermarket sells this as an advantage and explains at the same time why this is also the reason why one cannot pay online:

Hvorfor kan jeg ikke betale med Dankort?

Det kan du faktisk godt. Man skal først betale for varerne, når de bliver leveret. [Online supermarkeds] budet har altid en fluesmækker med, så du kan vælge enten at betale kontant, med check eller Dankort. Men elektronisk betaling via internettet er ikke muligt i [Online supermarkedets] NetButik. Det har vi fravalgt, og det giver dig som kunde en større handlefrihed i netbutikken. Hvis man bruger elektronisk betaling via internettet, vil den gode funktion i [Online supermarkedets] NetButik - at bruge kommentarfeltet til varer man ikke kunnne finde - være væk.

Consumers, however, find it difficult to order without having more detailed order information. So instead, they would prefer a complete assortment of the Online supermarket's matching the assortment available in the brick-and-mortar store.

Not being able to pay online was on the contrary not mentioned as a disadvantage. Consumers seem to be satisfied with the aspect of paying upon delivery and some even prefer it (see also the section on Trust).

Delivery: Problematic aspects

A big minus with online shopping is that goods cannot be handled, touched, smelt or tried. A computer screen can simply not replace these senses:

... hvis man såd'n skal sammenfatte det, så er det vel der, hvor kvaliteten...øh, har noget at gøre med smag og tekstur, på en eller anden måde, hvor.... som man ikke kan se på en flad skærm, endnu (5:142, 2387-2393).

Ordering something one cannot see or feel, involves a certain risk and also there is a time lag between ordering and delivery. If the ordered goods finally arrive and they don't meet expectations, one needs to go through the additional trouble of sending them back.

A further negative side of delivery is that deliveries can go wrong; products don't arrive when they are supposed to arrive, contain not all the goods one has ordered or the wrong items:

Jeg er holdt op med at købe ind hos Prima, hvor jeg bestiller tre flasker vin, to citroner, to agurker, fire dåser flåede tomater. Fordi, det kan de ikke finde ud af. Jeg bliver bonnet for dem, og så får jeg én dåse flåede tomater og én citron og én flaske hvidvin, og måske får jeg den ene flaske rødvin (10:60, 657-663)

Inconsistent handling of delivery or pick-up procedures also can put consumers off:

Der var såd'n noget med, at man kom op i butikken. Og så følte jeg mig slet ikke velkommen, så kiggede de fuldstændigt åndssvagt, når jeg kom for at afhente... Og, det, syn's jeg egentlig, var såd'n lidt ubehageligt, på en måde, altså. Man kom op der, og så nogle gange,

så ved jeg ikke, om det var nogle arbejdsdrenge, de havde fået til at samle varerne ind i butikken. [...]men det var såd'n forskelligt, hvordan de håndterede det, at jeg kom og bad om min e-handel-varer. Så..den første gang, da fik jeg en faktura. Det var fint nok, ikk'? Og en anden gang, da skulle alle varerne op på båndet, og ned i kurven igen, ikk'? Og så de der 25 kroner, jeg betaler for at få dem pakket, de var lige spildt så. Så det er forskelligt hver gang. De har simpelthen ikke vidst, hvordan de skulle håndtere det (8:76, 1457-1464).

Furthermore, the packaging especially of FMCGs is not consistent. It seems like that whatever packaging material is available like empty cases previously used for other products or plastic bags are used. Such a practice does not contribute to building up a consistent image, which as will be shown throughout this report is one of the major factors in establishing a successful online service.

Delivery via postal services was also a point of critique, as it requires being home when the post is delivered. Delivery options that do not necessitate for someone being at home are, however, also not optimal as it restricts consumers from ordering certain types of goods, namely those that need to be kept cold like meat, fish, cheese, etc. Suggestions like providing small refrigerators were received positively, even though the respondents had some difficulties in imagining its practical implementation, especially when living in apartment buildings. Another concern in this context was security. Having goods delivered to ones doorstep when not at home resembles an open invitation to thieves to serve themselves.

Suggestions for improvement

In order to increase customer satisfaction and the number of repeat customers, all of the above-mentioned problems need to be eliminated. The following standards should be strived for:

1. Goods should be delivered timely and within the promised delivery time
2. Goods should be of a high quality
3. Goods should arrive undamaged
4. There should be no discrepancy between actually delivered goods and originally ordered goods.
5. Goods should be packaged in containers that were especially developed for the online delivery service.

6. If problems occur regarding items 1. – 4., then a reimbursement policy should be in place.

Only if these criteria are fulfilled can further improvements be regarded as additional added value to consumers, possibly as a tool of differentiation from other online distributors. An example for additional added value is the recipes provided by the Online grocery service in combination with the food case. Other ideas that might find appreciation by consumers are packaging that can easily be recycled, used for multi purposes or folded to save storage space.

Trust

The issue of trust in online shopping has a number of dimensions. Trust or mistrust can simply entail how to pay for the goods. It can, however, also be related to trusting the quality of the products that are delivered, trusting that the order is fulfilled correctly, trusting that the delivery is on time and that goods are not spoiled during delivery, trusting that others won't steal the products delivered to one's doorstep. And last but not least, trust is also an issue when selecting a distributor. If the distributor is known as one that delivers quality goods, being reliable and dependable, then consumers perceive little problems in ordering. As not all online shops are off-line shops at the same time, such trust first needs to be built up (in other words brand building).

Og så håber man på, om ens øre, det plejer at være en god slagter eller noget andet. Man aner ikke, hvem det er, man køber hos, ikk'? Men man har hørt om ham, ikk'? Og så tilfældigt ta'r man så ham. Man går ikke ud til otte slagtere, som har levering af sådan noget, og si'r: "Hvordan, ser dit ud"? "Hvordan ser dit ud"? "Hvordan ser dit ud"? Ikke? (10:103, 1300-1305).

The Online grocery service seems to have done a good job in achieving a high trust level. The high service level in crediting damaged or spoiled goods has very likely contributed a great deal to this perception.

In order for online shopping to flourish, consumers need to be able to trust **product quality**. Being delivered inferior goods or products with a sell by date that corresponds to the day of delivery will not contribute to customer loyalty and more online shopping activities:

Jeg fik leveret syv...det var nu denne uge...men...men sådan også generelt, jeg fik leveret... Og de var alle sammen den sidste brugsdag.

Det var den samme dag, som jeg fik dem leveret. Og dem havde vi jo tænkt at bruge til madpakker, ligesom i syv dage. (Interviewer: Det kan ikke rigtig lade sig gøre, så?) Øh. Nej, det bli'r ligesom svært. Og det syn's jeg nok, at den nye butik er lidt mindre påpasselig, altså varer, man kan sige gode varer. Altså, man bli'r lidt såd'n mistænksom, hvis de syn's, at det er praktisk at bli' af med det. (Interviewer: Tror du, det er noget, de gør med vilje, at de si'r okay....?) Egentlig ikke, egentlig ikke. Men ...[de] sku' tænke meget over det, syn's jeg (6:19, 443-459)

Altså, ISO havde jo de der leveringer [...] jeg er sur over, at jeg altid får de ældste varer, så vil jeg godt kigge på dem selv. Det er fordi, jeg har tillid til, at jeg får nogle gode varer fra [Online dagligvare specialbutikken], at jeg bruger dem. (Interviewer: Ja. Det er alfa...hvis de begyndte at slække på kvaliteten, hvad ville du så...?) Så ville jeg droppe dem (3:93, 1594-1607).

In terms of trust in online **payment systems**, consumers are divided. Some are not willing to provide credit card details; they rather forego an online shopping opportunity. Others express no or only little concern. If mistakes happen, e.g. that a payment is deducted twice, it is essential to react quickly admitting a mistake to re-establish consumer trust. This can then also be turned into positive associations:

(Interviewer: Har du haft nogen negative oplevelser på Internettet?) Jeg synes, det var lidt irriterende, at de trak mine penge to gange.. Men det var jo ikke specielt negativt, for vi ringede til firmaet. De var klar over det var en fejl og så noget. Så tilbageførte de det jo igen. (Interviewer: Men det er ikke noget, der gør, at du ville være mere, hvad må man sige, mere tilbageholdende en anden gang?) Nej, jeg synes, det var rigtig positivt. Og banken...og man bare kunne klage over, altså (3:89, 1546-1561).

Another payment option is to pay goods via banks transfer or PBS. While this is less of a problem within Denmark and preferred by those who do not trust the online payment system, it creates extra hassles and is a barrier for purchasing online products from a foreign distributor due to additional bank charges.

Flexibility

With regard to standing orders like goods from the Online grocery service, one problematic aspect is that the planning horizon needs to be at least one week. Orders cannot be adjusted on a shorter-term basis to fit changing customer schedules. Thus, at times goods are not used and need to be thrown out.

Men lige præcis, når der sker...når jeg har sådan en uge der, så er det faktisk svært at få brugt det, inden det bliver for gammelt. Det er lidt irriterende. [...] Ja, simpelthen, vi er bare ikke hjemme at spise. Og der var to dage, hvor vi ikke var....altså den ene dag, var (mandens navn) ude til noget. Og den anden dag, var jeg ude til noget møde. Det er svært at ta' sig sammen til at lave mad, når man er alene. Og så var der den tredje dag, hvor vi spiste hos mine forældre, ikke? [...] Og så ryger, der grøntsager ud. Og det irriterer sådan en gammel husmor som mig at smide grøntsager væk (5:17, 336-349).

This is also a barrier for some to subscribe to the Online grocery service.

...det er vi lidt skeptiske over for, fordi,...nu skal vi altså lige ha' spist, de der broccoli, inden vi må spise noget andet, altså. [...] man skal konsumere en vis mængde af et eller andet, [...] en fast mængde som vi ikke sammensætter, den er vi lidt skeptisk med, så derfor...Vi kunne godt tænke os ellers det der med [Online dagligvare specialbutikken], men vi er lidt skeptiske ved det der (9:190, 1706-1714).

Physiological, psychological and social aspects

Shopping at brick-and-mortar shops requires that one gets out of the house. It provides a chance to walk a few steps, to get some fresh air, to take one's mind off the regular daily activities, having a chat with the greengrocer in the corner shop. This is by some respondents perceived to be a non-defeating advantage of offline shopping that cannot be replaced by a virtual shopping trip. It however seem to apply somewhat more to non-FMCGs than to FMCGs. But it may just be a matter of available time. Also a trip to Netto can be experienced as fun, if one is not rushed.

... på mange måder, syn's jeg det er meget hyggeligt at købe ind. Jeg kan godt syn's, det er hyggeligt at gå ned i butikken. Men jeg kan også bare syn's, det er sjovt at komme ned i Netto, fordi de har fået nye

varer, så det er ikke såd'n en oplevelse for mig. (I: Der skal ikke så meget til i virkeligheden?) Lisbeth: Nej. Det kommer også an på, hvor meget tid man har og sådan noget. Og hvis vi så har travlt, så synes jeg ikke, det er fedt. Det kan jeg godt ku' nikke genkendende til. Det kommer an på, hvor meget tid, man har (3:54, 7:13-7:35).

Just looking what is on offer in the supermarket, whether they have specials, what kind of meat or vegetables are available can be inspiring and at times this also determines the dinner plan for the day.

Currently, online shopping does not establish a similar stimulating atmosphere. The question is whether this is necessary or desirable to think of online shopping as a direct substitute for the brick-and-mortar alternative. Or, whether online distributors should rather focus on the unique advantages that they could offer regarding their *product* to be more than just the offline version plus delivery.

Disadvantages of online shopping: Non-FMCGs

Shopping in brick-and-mortar shops can serve as a **family outing** or a relaxing **activity together with friends** (mostly when not shopping for groceries) – this is once again a benefit that online shopping cannot offer.

The above-mentioned problem that **off- and online offers do not match** has also been experienced in relation to non-FMCGs (e.g. clothes and fabric stores). Obstacles that consumers experienced were that product numbers in catalogues and on online pages for the same products were different; colours in a catalogue or on computer screen did not match the actual product colour. It goes without saying that this leads to dissatisfaction, product returns and the inconvenience related to that.

As with FMCGs, **technical glitches** on websites are equally perceived negatively.

A further problem, most often occurring when ordering non-FMCGs is that they are delivered via the **postal service**. And usually one is never home, when the post is delivered. This means part of the time saving effect is lost, as one has to pick up the parcel at the post office.

Trust in **payment system** is another minus for non-FMCGs. For non-FMCGs credit card payments are the most common form of payment. However, not all consumers trust online credit card payments and thus, this creates a barrier for ordering online.

Touch and trial: Ordering something one cannot see or feel, always involves a certain risk. Especially mentioned were goods like furniture and clothes. Second best after a real shopping trip is flipping through catalogues. This is preferred over looking at products like furniture or clothes on a computer screen. A possible reason for this could simply be habit. Furniture and clothes have a long history of being promoted via catalogues and consumers are used to flipping through catalogue pages to look at the products rather than to go online. The costs for being online and bandwidth are also barriers for doing so (unless one has a flat rate). It is not realistic to extensively look at pictures when connecting to the Internet via a slow line. Sitting on the sofa, having a cup of coffee or a glass of wine while looking through catalogues also adds a further dimension not matched by the online variation of it. Thus, the question here once again is whether it is not wiser to create a unique online product – a product to be understood as more than the physical object – rather than trying to substitute what is already available.

Criteria for choosing online distributors

Time, practical matters, trust in product quality, reliability of the distributor and the previously mentioned issues around web page design (accessibility, easy navigation and sufficient information) are all important for consumers when deciding to place an online order.

Practical matters can at times outweigh quality because lower quality is accepted in exchange for benefiting from having the goods delivered to one's doorstep. If a preferred distributor does not deliver to the area where one lives, the second best is chosen. However, if competition increases, distributors that deliver low quality goods, goods with a sell-by date that equals the delivery date, wrong or incompletely fulfilled orders will no longer be tolerated by consumers. Currently, they often don't have a choice. Either they order from the one shop that offers an online option, or they give up on it entirely and go back to shopping at the brick-and-mortar location.

Reactions to negative experience with online shopping and delivery were: giving up, subscribing to the Online grocery service, or only stopping to order fresh produce.

Dissatisfaction can, however, not be tied to a particular shop, at least not given the current landscape of online shopping possibilities. There are consumers that are unhappy with the quality of ISO goods at one location; others would wish their old ISO online shop back in exchange for the Online supermarket. Then there are also satisfied Online supermarket customers, but they purchase from a different location. The same applies to Prima-online locations. Thus, even if disregarding the differences between supermarkets, a first problem

seems to be a missing common policy and concept within a particular chain. Depending on where one lives, even if ordering from the same chain, service and delivered product quality does not seem to be same.

Price

FMCGs

Attitudes about price vary among respondents depending on the kinds of goods purchased. But generally speaking, none of the respondent could be classified as always going for the cheapest. Most considered quality in addition to price and were willing to pay a higher price for a higher quality product. This needs to be taken into account when evaluating respondent attitude towards price, especially for online purchases of non-FMCGs. Commonly, it was perceived that shopping FMCGs online was somewhat more expensive. This however was not perceived as a barrier since the motivation to buy online was not to save money. More important reasons were to save time and having the goods delivered to one's front door.

Non-FMCGs

For non-FMCGs, the variable price factors are evaluated to be more important when it comes to the decision where to buy. And here it is not only the decision about which online shop to choose, but also the decision whether to purchase off- or online. For non-FMCGs the Internet is often (only) used to find the best offer. The final purchase may take place in a brick-and-mortar shop. Therefore the delivery fee is frequently considered to be part of the price and products are compared on the basis of total prices (i.e., price for the product offline vs. price for the product online + delivery fee).

Jeg vil altid se på, hvor jeg får det...den, altså, jeg ser leveringsomkostningen som en del af den...af den samlede omkostning. Og det ville jeg lægge til og sige: "Okay, så koster det møbel så meget". Og, så ville jeg... sammenligne det også, som en del af prisen (5:122, 2078-2093).

However, the time saved in having the product delivered may at times be worthwhile the delivery charges:

(Interviewer: Hvis det nu koster 5.000, både offline og online, ville du så betale lidt ekstra for at få det leveret via nettet? Sådan, det

kommer op på 5.500 hundrede?) Fie: Hvis det sparer mig for noget tid i den anden ende. Så ku' det godt være, jeg ville gøre det. Men der skulle da være en besparelse ved det, for at jeg ville synes, det var sjovt. (I: Ja, så tiden kunne godt gøre, at du ville købe på Internettet?) Fie: Hvis jeg sparer tid, så vil jeg godt betale for det (5:123, 2095:2112).

Delivery fees

FMCGs

Delivery fees are acceptable in some circumstances but not in others, depending on consumer preferences. Some consumers value timesaving and practical matters so high that DKK 100–150 in delivery fees for household goods would not matter much. It needs to be added, that those consumers who were willing to pay up to DKK 150 were people with a high income, two full-time career jobs and a child. Thus, the opportunity costs for their time is fairly high.

On average a delivery fee of DKK 50 was perceived to be acceptable for groceries – but only if larger amounts adding up to DKK 800-1000 were ordered. The added convenience of not having to carry the items, thus, does not necessarily outweigh the extra costs of having them delivered if the fees make up a high percentage of the total amount. Therefore, there was a tendency among consumers ordering from online shops like Prima or the Online supermarket to order once or twice monthly in order to reach a critical amount making delivery worthwhile. The kind of products ordered were standard goods that are needed on a regular basis.

Vi ville ikke synes, det var sjovt at købe for 300 kroner på nettet og betale 55 kroner for ... levering. Men hvis det er 900 kroner, vi køber for, hvoraf de 55 kroner er...ja, okay, så betyder det ikke så meget (9:120, 2037-2044).

Non-FMCGs

For small items like a **mobile phone**, a fee of DKK 25 was thought to be suitable. For **furniture** DKK 300 was considered to be acceptable.

Yet, if time savings or convenience did not play a role in the purchasing decision, thus if it just was a matter of price and were to find the cheapest offer, delivery fees would go into the total overall price consideration (see also p. 38, price/non-FMCGs). If the delivery fee were to

bump up the price over and above what the same item would cost offline, the offline option would be chosen, especially when purchasing more expensive items.

In cases of **books** or **CDs**, consumers are willing to pay for the actual costs for postage but not for further add-on charges:

Jeg kan godt forstå, jeg skal betale et eller andet antal euro, fordi jeg skal have sendt en vare sendt fra udlandet og hertil, ikk'? Det kan jeg godt forstå. Det irriterer mig, at jeg skal betale et eller andet gebyr...for at få...et ret højt gebyr, for at få tilsendt en cd, som jeg nu har bestilt over nettet, ikk'? Det synes jeg er ingen grund til det. Men, hvor meget jeg betaler, det har jeg ingen anelse om. (Interviewer: Er der...et prisniveau, hvor du synes, det vil være rimeligt? Hvad vil være rimeligt for at få tilsendt en cd, for eksempel?) Det ved jeg ikke. 4 kroner og 50 øre, vel? Hvad... portoer koster. Men de kan bare ta' det...for de kan bare si', at det er det, den koster, ikk' altså? Jeg har jo ikke noget at bruge til, at... deres bogholderi, skal ha' at vide, hvor meget, at portoer er. Mit problem er, hvad skal jeg betale for varen? Og jeg kigger på den nederste linje (3:91, 1836-1852).

As stated in the above quotation, if goods need to be delivered **from abroad**, a delivery fee is more acceptable. This may be related to the previously mentioned aspect that the Internet offers the possibility **to order goods that are otherwise not available**. Thus, the added value of **getting something special** in addition to **timesaving** and **convenience** is also a reason for being more lenient with regard to delivery fees. This also applies to delivery fees for **medicine**. Consumers needing medicine on a regular basis and who had build-in routines to pick it up at the pharmacy were less willing to pay a delivery fee. Those who imagined a different situation and context like a child is ill and medication is needed in the evening or at weekends found a delivery fee acceptable because here the convenience of having the needed item(s) delivered outweighs the additional costs.

Summary

In summarising the above insights, it can be concluded that *no* generalisations can be made regarding delivery fees. Whether consumers are willing to accept a delivery fee and up to which amount depends on the context and the motivation for the purchase. Regarding the amount that is perceived as acceptable, consumers appear to think in percentage of the total amount ordered. For example, if the delivery fee for groceries is DKK 60, consumer prefer to

wait with their order until the accumulated need amounts to about DKK 800-1000. Another example is a respondent who stated that she would be willing to pay up to DKK 150–200 in delivery fees. Her order volume always added up to ca. DKK 2000. Hence, 5-10% of the total appears to be a good estimate what consumers are willing to pay for the delivery of groceries.

The accepted delivery fee for furniture was somewhat higher, but still falling within the 5-10% range (even if this of course cannot be applied *ad infinitum*).

This percentage rule, however, does not apply to big-ticket standard goods like PCs, printers, cameras, etc. For those goods, consumers are likely to compare prices offered by both brick-and-mortar and virtual shops. If the convenience of delivery is not an issue, what counts in the end is the total purchasing price.

Here we can once again observe the divide between standard and speciality goods. Consumers seem less willing to pay a delivery fee for standards products including FMCGs and are more forgiving when it comes to speciality items.

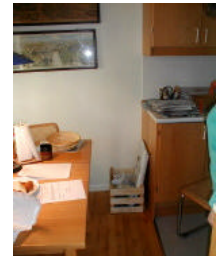
Important in all cases is to be open about delivery fees. Hidden delivery fees only annoy consumers and may prevent future purchases:

(Interviewer: Betaler du leveringsgebyr?) Nej, det er inkluderet i prisen. Eller, det ved jeg ikke, altså, der står jo, at det koster 167, men hvis du selv henter din kasse, så er det billigere. Så på en eller anden måde, er det bare skjult leveringsgebyr. (Interviewer: Nå, okay. Hvad synes du om det?) Jae, det skulle man jo læse lidt mere, så det var noget, man fandt ud af. Men jeg synes, det er fair nok, man skal betale i en eller forstand for at få leveret. Men der står bare, der er gratis levering, så der er sådan lidt uigennemsigtighed på en eller anden måde. (3:95, 1609-1631)

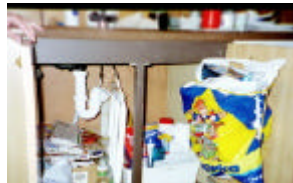
7. STORAGE OF FMCGs

As far as possible, goods are put away into the refrigerator, the freezer, cupboards and drawers. Food and household items are generally stored around the kitchen area, personal hygiene products in the bathroom, detergent, cleaning products and toilet paper in both kitchen and bathroom vicinity. Medicine can also be found in both kitchen and bathroom cupboards if all available space is filled up, food items like vegetables or fruits are put into bowls on kitchen surfaces. Balconies, terraces or washhouses are also used as storage places for fruit, vegetables and beverages, especially during the cooler months of the year.

Return packaging is stored at various places, wherever there is some room. For example, the Online grocery service's return boxes are often stored in the kitchen, the place where they are unpacked; or they are kept outside on balconies or terraces, either emptied out or still containing food items. Thus, until they are returned the following week, they serve as storage devices.



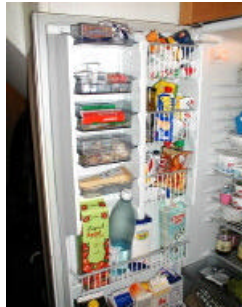
Plastic or paper bags can repeatedly be found under kitchen sinks or cupboards that are built around pipelines. Empty bottles are kept at a variety of places including kitchen floors, stored inside a cupboard or other doors, or in plastic bags hanging outside.



In some households there is a designated drawer for items like return bottles, packaging that can be recycled like glass and paper, or goods like batteries that need to be disposed of. In most of the respondents' households glass and paper is recycled and batteries are kept separately.



Most respondents did not follow a stringent order where to put items in the refrigerator. The vegetable drawers found in the bottom of every fridge are generally used for vegetable. Milk and juice and other opened bottles are put in the door of the refrigerator. Other than that no clear storage pattern emerged.



Packaging off- and online

Respondents were about split in half regarding their perception of whether products had too much or adequate packaging. If they were complaints regarding packaging it was always related to fresh produce like vegetables and fruits, especially organic products.

Those who ordered online generally perceived that the packaging for the delivered goods was adequate. If respondents complaint, it was actually with reference to too little packaging. They did not like if fruits were thrown in together with other goods without putting them in an extra bag, as this increases the risk of damaging the products in the process of delivery.

The Online grocery service was praised as their products were delivered without being damaged, but still without excess (or with too little) packaging:

Det er så det, der er fordelene ved... [Online dagligvare specialbutikken], ikk' også? Der kommer det nærmest uden emballage, eller det kommer måske ligefrem i en papirpose, som man kan smide ud bagefter.. Det er såd'n håndterbart, ikk' også.(2:198, 2453-2457)

Interestingly, if delivery cases needed to be stored until the next delivery, this was not seen as a problem – even if space concerns were expressed. The following quotes are two answers given by the same respondent:

(Interviewer: Hvad med flasker, for eksempel, tomme flasker?) Åh.

Det er et problem. De står der, indtil jeg kommer ned med dem. Det er faktisk...temmelig...det er ret irriterende. Jeg har ikke et sted at gøre af tomme flasker. Så de må bare komme hen, hvor de skal. (5:177, 3149-3158)

(Interviewer: Syn's du, at det er et problem med dig...med at være medlem, at du skal ha' de kasser stående til næste uge, efter dem hver fjortende dag?) Nej, det...det syn's jeg ikke. Den krog der, den ville ikke blive brugt til noget andet, alligevel. (Interviewer: Det er ikke sådan, du tænker, bare jeg dog ikke havde den kasse stående der?) Nej, det, syn's jeg ikke, er noget stort problem. (3:189, 3435-3445)

Thus, the added value of delivery seem to override space concerns so that the issue of finding a place for return packaging is perceived and evaluated differently depending on where the packaging material comes from. As a minimum, the returnable cases were tolerated if not avoidable. One method of trying to get around having to keep the case until the next delivery was to empty it out as quickly as possible so that the delivery person could take it back immediately.

As already mentioned on p. 32 under the heading Problematic aspects of delivery, online supermarket shops don't yet seem to have developed their own consistent packaging. This does not only apply to the 'order online, pick-up self' situation, but also to the delivery situation. Customers from the Online supermarket at times receive plastic cases that appear to be made especially for online orders & delivery; at other times goods are delivered in paper cartons.

There seems to be some confusion with regard to what needs to be returned. Paper cartons are generally thought of as non-returnable items and are discarded. The plastic cases are however also not always returned, e.g. if there is a long time between orders or if an order was picked-up personally. Having to go to the shop to return the cases is considered to be too much effort.

A further point of uncertainty is whether the freezer bags need to be returned or whether this is a special service included in the price when ordering online. In brick-and-mortar shops one need to pay for the same freezer bags. Online shoppers simply keep them, as they are unsure about what to do with them.

Thus, there seems to be room for improvement with regard to

- The packaging material used when delivering to customers' home

- The question of what should be packaged and how
- Information about the type of packaging used and what of it are returnable items and how the return is organised.

8. THERE ARE ALWAYS TWO SIDES TO THE COIN

... and this seems especially to be true for the topic at hand. Above a number of issues turned out to be two sided. Below these issues are taken up again to gain a better overview and to show that very likely there is no one best way forward to overcome possible barriers to moving more consumers to buy more online more often.

With regard to **product type**, the one side of the coin reflects the suitability of the online medium for *standard goods*; the other side the opportunity to find *speciality goods* and to be inspired by new things one can find on the Internet.

A similar two-sided picture emerges in terms of **price**. Price is not always the decisive criterion. Other reasons like *convenience* or *time saving* can swing consumers to make an online rather than an off-line purchase. In such cases, though, it seems important that customers can trust in being delivered a high quality product. Or, if dissatisfaction occurs, a return guarantee or a reimbursement policy is in place.

Grocery shopping was not only regarded as being a tedious task most respondents actually liked it (even if not always, especially if time was limited). Thus, one side of the coin is the *experiential atmosphere* of the brick-and-mortar supermarket, the ability to touch, smell, see and evaluate the goods based on the former. The other side is *time pressure*. This was especially apparent in dual-career families, in households with children or when exceptional situations arose like illness or birthday parties.

Time saving comes in part from **having the goods delivered**. But this positive aspect is not without its negative side, as delivery entails *risks*: the risk of a) receiving the wrong items, b) possibly an inferior product, and c) a damaged product. Online companies can try to and should minimise these risks. As described above, currently still many mistakes are made and this might create large barriers for risk adverse consumer, possibly with future long-term consequences.

The x-mas effect

is not a unique advantage that can be created by concepts as has been developed by the Online grocery service. Unpacking shopping bags containing purchased items from a brick-and-mortar shop can also create feelings of enjoyment. Nonetheless, this effect should not be underestimated. We know from the experience in the United States, that goods wrapped in special packaging especially created for deliveries of products ordered online can provide reasons for consumers to choose the online over the offline option. The *packaging* in addition

to *issues of convenience, time saving, opening hours*, hopefully a reliable delivery service, etc. creates a different product and image in the mind of the consumer – and it is that what they purchase.

Another **paradox of the Internet** is that on the one hand a *larger range of products* is available as for example geographic boundaries do no longer matter. But on the other hand, *consumers do not find what they are looking for* and the product ranges that they are used to, especially concerning FMCGs cannot be found online. In the later case, there is certainly room for improvement to correct this imbalance, however this is of course impeded by the severe economic problems this format has had. So there seem to be no economic space just to offer the total assortment, especially not when sales are only marginal.

Finding the kinds of products one is looking for is closely linked to the **amount and type of information** that online distributors decide to provide. On the one hand, consumers complain about *too much information* and that this information overload prevents them from being successful in their searches. On the other hand, once a product is found, often *too little product information* is provided so that it is difficult to make a final decision.

Distributors have little influence over who else is distributing information on the Internet and thus contributing to information overload. What they can do however is to improve the number of hits on their website and to provide more and better information on the product items they offer. For instance, the most intuitive way to see whether a certain supermarket offers an online service is to go to the company's website. Not all of the websites, however, provide a convenient and fast way from their main page to their online shop, e.g. on the Prima main page (<http://www.prima.dk>) it is not even mentioned that they also have an online shop. The online shop can be found under <http://www.prima-online.dk>. But no link is provided from their brick-and-mortar shop website to the online shop website.

Last but not least, **delivery fees** and consumers' perception about them is also of an ambiguous nature. For *routine* purchases like FMCGs only low or no delivery fees are accepted. For items that are purchased *less frequently* like computers or other technical equipment, consumers are more lenient when it comes to delivery fees. The same applies to *situational context*. If the purchase of an item is built into a daily routine, e.g. on the way home from work, consumers see less of a reason to replace this purchase by an online order that entails having to pay a delivery fee. In an exceptional, non-frequently occurring situation, however, delivery fees are more readily accepted as the price to pay for the added convenience. Such situations can be acute illnesses, a temporary handicap like a broken leg, or more happy events like a large upcoming party that needs to be organised.

The exceptional vs. routine product purchase or purchase situation is not to confuse with the differentiation between standard and speciality products. Both, computers (a non-frequently purchased item) and FMCGs (routinely purchased) are standard products. Likewise, the need for speciality items can occur in both routine and exceptional situations (e.g., a special medication purchased every other week, or a cradle of good wine, a gift for a birthday party).

Calculating delivery fees

In order to calculate an acceptable delivery fee, the percentage rule can be used as an indicator (i.e., the delivery fee should not be above a set percentage of the total amount purchased). In addition, purchasing frequency and situational contexts of where and when these goods are likely to be needed and purchased need to be taken into account.

9. COMPARING CONCEPTS AND PROFILES: - THE ONLINE GROCERY SERVICE AND THE ONLINE SUPERMARKET

The Online grocery service and the Online supermarket are examples of distributors selling either standard goods or specialized items. The Online supermarket sells everyday standard products like milk, juice, cheese, vegetables, toilet paper, shampoo, etc. The Online grocery service in a sense sells the same types of items like vegetables, cheese, bread, meat, fish, but the total product they sell is a specialty.

All of Online grocery service's goods are organic food products and instead of selling single items, they sell a concept. In other words, their product is more than just the vegetables or just the bread or the cheese. It is a box including a range of products of a particular product group selected by the Online grocery service and not by the customer, which is delivered in regular intervals weekly or every other week to the front door of the customer. The customer pays in advance for products to be delivered in the next 4-6 weeks by bank transfer. Changes of the standing order can be made latest 7 days before the next delivery. Payment is adjusted accordingly at the end of the invoice period.

The Online supermarket or other online supermarkets in contrast offer a large range of products comprising several thousand items. The customer is free to order any item from this assortment. Delivery can be expected the same day as the customer order within a specified number of hours. Payment generally is possible via Dankort.

Thus, the two cases the Online supermarket and the Online grocery service present two different scenarios. The supermarket on the one hand sells standard¹⁰ items in a very individualized context. The Online grocery service on the other hand sells a specialized product, but has standardized most everything else (i.e., ordering, handling, delivery and complaint procedures.)

Given the many positive comments by the respondents and the level of satisfaction regarding the Online grocery service and the long list of negative responses and complaints on the topic of online purchases from supermarkets, the Online grocery service obviously has done a better job. At a first glance, one could state that online supermarkets have a much more difficult task to handle given the larger range of products and larger flexibility with regard to delivery. In

¹⁰ Standard items in this context also include fresh produce, milk, vegetables and fresh fruit

order to better evaluate this, below a list of the strength and weaknesses for both the Online grocery service and online supermarkets has been put together.

Table 3: Strength and Weaknesses of a special concept vs. standard goods distributors

Online grocery service <i>Specialized goods, standardized procedure</i>	Online Supermarkets <i>standard goods, individualized procedure</i>
<p>Strength</p> <ul style="list-style-type: none"> • Convenience <ul style="list-style-type: none"> ✓ Time saving ✓ Not having to choose the products ✓ No need to carry • Not allowing for choices • Delivery (unmanned delivery, high customer satisfaction) • Packaging (high customer satisfaction, image of delivery case) • Trust in the Online grocery service as distributor (good image) • Minimal risk (customer side) as damaged or bad items are credited without questions asked 	<p>Strength</p> <ul style="list-style-type: none"> • Convenience <ul style="list-style-type: none"> ✓ Time savings ✓ Flexibility ✓ Accommodate individual needs ✓ No need to carry
<p>Weaknesses</p> <ul style="list-style-type: none"> • Not much flexibility • Case might be stolen • Insecurity about products that need to be kept cold like meat or fish • Several items of a package maybe discarded because they could not be integrated in a meal or because of time pressure 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Assortment not as wide and deep as the brick-and-mortar shop • Difficulties to choose, too little descriptions, no pictures of products • Delivery <ul style="list-style-type: none"> ✓ Risk of receiving the wrong items ✓ Damaged items ✓ Not within promised time window • Packaging <ul style="list-style-type: none"> ✓ At times too little, fruits not packed separately ✓ Breaking of cooling chain ✓ Inconsistent handling

The shared strength of both is the issue of convenience including time saving and not having to carry the purchased items. Apart from that, the two online shops differ widely in terms of where their strengths and weaknesses lie.

The positive image of the Online grocery service and high customer satisfaction seem to result from their strength regarding issues of delivery, risk and trust. For online supermarkets, these are the critical aspects that they don't yet seem to master well. It could be argued that the Online grocery service has an in-built advantage as their concept implies a sizable time window for delivery. If one however recalls the respondents' experiences regarding supermarket delivery, it can be seen that online supermarkets simply still make many mistakes that actually could be avoided.

Until now, online supermarkets have failed to standardize their packaging and delivery procedure. There do not seem to exist a common set of set of rules and measures, not even across supermarkets of a particular chain. What seems to be sold is the brick-and-mortar product (and not even that, as not all offline items are available online), just with the possibility of ordering it online and having the goods delivered. Supermarket managers seem to view the offer of online ordering and delivery as an additional service provided by the brick-and-mortar shop. They don't see in it the opportunity for creating an entire new product. Currently, online supermarkets seem to transfer their current product offering to an online environment. What is needed is a fresh look at what is actually sold here. It is not the items that are sold here but a service. The product offered by an online supermarket as compared to its physical counterpart should promise and fulfil the following: convenient ordering, convenient payment, adequate and consisting packaging, timely and save delivery.

Improving upon the weaknesses

Online Supermarkets

When comparing the strength of the online supermarket to their brick-and-mortar mother shops, it is obvious that convenience is their unique selling point (USP). To consumers convenience means saving time by placing orders online, flexibility in terms of when to order, and delivery. Here time saving and not having to carry the purchased items is of importance. As the data of the present study has shown, all of these aspects have not yet been solved

satisfactorily and therefore it does not come as a surprise that all of the Online supermarket online shops are closed now.

In order to become more successful, lessons can be learned from the Online grocery service's concept. Online supermarkets need to reconsider the *product* that they are actually selling emphasising the two USPs *packaging* and *delivery*. Furthermore they need to think about the image they want to build up. One reason for the Online grocery service being perceived much more positively by consumers is that they were successful in establishing a brand image as a distributor. Also their packaging case has achieved a certain status. Consumers willingly find a place for it in their home, use it as storage container and don't complain that they have to keep it for one or two weeks until the next delivery. In comparison, less tolerance exists for cases left by online supermarkets. They are perceived to be a nuisance:

(Interviewer: Såd'n noget som transportemballage, når I får varer leveret varer fra [Online supermarkedet] ?) Jørgen: Ja, vi håber, han ta'r det med tilbage. (Interviewer: På stedet?) Jørgen: Ja. Så vi skynder os meget at få det tømt, ikk'? Og håber, han tager det med (9:134, 2256-2264)

(Interviewer: Fint, fint. Hvis det nu viste sig, at den måde jeres dagligvarer ville blive leveret på, ..., det var i en returemballeringskasse, ...ville der være plads ude i jeres bryggerstil det?) Jannie: Nej, det ville der sådan set ikke. Det ville ikke være nogen hjælp for mig. (Interviewer: Nej, så det ville faktisk være et problem.) Jannie: Ja, det ville det faktisk. Jeg vil bare næsten hellere have det ned i en pose (8:108, 1972-1983)

The challenge online supermarkets are confronted with is to turn this around and to make customers to keep looking forward to the delivery case from THEIR online distributor. Questions to answer are:

- What is the product we actually want to sell?
- What is our core identity?
- How do we understand our extended identity?

It is unquestionable that the online branch of a supermarket remains closely linked to the brick-and-mortar 'mother' shop and the image it has. Thus, the values of both will largely overlap and also should do so, in order not to lose consistency. Additionally, the delivery service

including packaging and the image of the supermarket as an online distributor needs to be branded. And thus, a further question to raise is:

- What should be the essence of the brand we want to establish?

Implementing the answers to the above-posted questions is likely to remedy a lot of the glitches that currently still exists and will transform negative consumer perceptions and experiences. A clearly formulated identity and brand image will also help in positioning a given online supermarket in comparison to competitors.

Online grocery service

The greatest weakness of the Online grocery service is flexibility. Recent improvements to their website including the possibility for consumers to change their standing order on the website without having to contact a person via email, and the extension of their product range show that they are aware of this drawback. Flexibility, though, should not be the main focus of the Online grocery service. They will never reach the same level of flexibility that online supermarkets can offer, unless they kill their unique concept. Instead they should further strengthen their brand image to maintain their reputation and the current level of trust. In addition, they could improve their information policy.

Customers are hesitant to order products like fish or meat, as these are products that need to be kept cold. A reason for this was an absence of knowledge what kind of solutions the Online grocery service provide in order to ensure that the products are not spoiled during delivery and until finally they reach the consumer.

Noget af det, der afholder mig fra at bestille fisk igennem [Online dagligvare specialbutikken] , for eksempel, det er, at fiskekassen skulle stå herude, hvor der sommetider er meget varmt i vores gang her. Og hvis de leverer den klokken 9 om morgenen, og jeg kommer hjem klokken 6 om aftenen, så kan jeg få kogt fisk (2:291, 1223-1230).

Here more could be done to reduce consumers' risk perception. The perceived risk with regard to products other than vegetables, fruits, bread and cheese is currently quite high.

Summary

Once the weaknesses of both online supermarkets and speciality concept distributors have been turned into strengths, one may get the impression that the two online shops are no longer different. This is however not the case as the total product that is offered is not the same. And, as will be shown below, it appeals to different consumer groups.

In order not to water down this differentiation potential, the Online grocery service should not try to match the level of flexibility and individualisation that an online supermarket can offer losing their speciality concept in the process. A similar logic applies to online supermarkets. They should build on what they are good at (or could be good at) - the distribution of standard products.

Target Markets¹¹

Obvious targets for the Online grocery service are consumers with a preference for organic food products. This is supported by the data. All of the Online grocery service's customers expressed a clear preference for organic foods. This was often combined with an environmental friendly attitude and the desire for politically correct shopping behaviours. Online supermarket's customers either did not find it important to look for organic products, or they had never seriously thought about such a choice, or they only purchased organic milk and/or eggs. Those of the Online supermarket customers with a pro-organic foods attitude had either previously ordered from the Online grocery service or were currently considering it.

Online supermarkets have a more diffused client base with regard to product preferences. But there can also be an overlap of those consumers ordering from an online supermarket and those subscribing to the Online grocery service. One of the interviewed persons at the time of the interview ordered from both the Online grocery service and the Online supermarket. One further interviewee was considering supplementing his online supermarket order with a subscription by the Online grocery service as a) he presently already purchases organic products if they are available and b) due to negative experiences with the delivery of fresh produce from an online supermarket, he stopped ordering fresh produce. The vegetables case from the Online grocery service could close this gap.

With regard to respondent characteristics, the Online grocery service customers appear to be of a higher income group, are more likely to own a car, and are less prone to planning meals

¹¹ All presented results have to be considered with caution as inferences are drawn from only a small group of consumers. Nonetheless, some trends can be observed.

or writing shopping lists. They also tend to be more impulsive. Or stated the other way around: None of the online supermarket customers stated they were impulsive. Only one said that he was somewhat impulsive and he was the one considering starting a subscription by the Online grocery service (see appendix II for more detail).

Regarding the online and Internet experiences of the two customer groups, the following differences became apparent: the Online grocery service's customer mentioned a larger variety of disadvantages of the Internet in general and talked about it more often (25 as compared to 13 quotations from the Online supermarket's customers). Both customer groups mentioned slow websites, bad web page design and the problem of information overload as disadvantages. Other disadvantages mostly mentioned by the Online supermarket's customers were experienced-based: Generally they were more concerned with issues of trust; trust in delivery, trust in the distributor and trust in product quality. Clients from the Online grocery service expressed some concerns regarding issues around delivery as well, but their statements were of a more broad-ranging nature also including macro level disadvantages like the dangers of losing personal contact and the possible disappearance of neighbourhood shops.

The Online supermarket's customers simply had made so many negative experiences when ordering online that when asked about the advantages or disadvantages of the Internet, they immediately thought about more practical problems. This is also obvious in the number of statements where respondents talk about their negative online shopping experience (mostly with regard to FMCGs). The Online supermarket's customers made 44 such comments as compared to 11 from the subscribers of the Online grocery service.

This raises the question why the Online grocery service's customers mentioned more disadvantages of the Internet on a general level, even though they obviously had encountered fewer negative experiences when shopping online. One answer could be that the Online grocery service's customers are only subscribers and there is little need for them to be online once the order is placed. Thus, there are less experienced online shoppers. The data show a different picture. Contrary to what one might expect, the Online grocery service's customers have a more extended experience with purchasing products online. As a whole, they order a larger variety of goods, mainly non-FMCGs (see appendix II). Some of the Online supermarket's customers only have experience in ordering groceries online being exposed to all of the negative aspects this currently still entails. Purchasing non-FMCGs like books, CDs, technical equipment, or vacation trips over the Internet is obviously less problematic, and thus the negative list of the Online grocery service's customers is shorter. Due to their more

extensive online shopping experience, though, they may be more sceptical and therefore list a larger variety of disadvantages as pertain to the Internet in general.

The target group characteristics can be summarised as follows:

Table 4: Description and comparison of target groups

Description of Target Groups	
Online grocery service	Online supermarket
<ul style="list-style-type: none"> • Higher income • More likely to have a car • Preference for organic food products • Preference for politically correct behaviour /pro-environmental attitude • Prone to impulsive purchases • Emphasis on hedonic values (surprise effect, more adventurous, try out more) • Experience in ordering a variety of products online (non-FMCGs) 	<ul style="list-style-type: none"> • Low to middle income • Emphasise more often as an advantage the aspect of delivery/no need to carry bags of groceries • Do not make much of a difference between conventionally produced products and organic foods • Emphasis on planning • Fewer experience with online shopping, some only restricted to FMCGs • More negative experience with online purchases of especially FMCGs. Thus, an added task is to turn around negative perceptions into positive attitudes.

From the table above it can be seen that there are clear differences between the two target groups. It can however not be assumed that the two groups are exclusive. As also shown by the present data, consumers are spread along a continuum with regard to characteristics like impulsiveness, planning need or a desire for hedonic experiences. Therefore, some order from an online supermarket *and* have a subscription for the Online grocery service.

10. CONCLUSIONS AND RECOMMENDATIONS: WHAT COULD MOVE CONSUMER TO BUY MORE ONLINE?

Type of goods

The goods with the largest online potential are standard goods, speciality goods, and more generally speaking, goods consumers have some knowledge about. If knowledge about either standard or speciality goods is lacking, consumers still prefer personal advice and personal service.

Product characteristics

Products should be of the highest quality in order to avoid complaints and to increase consumer trust in the online delivery service.

If a brick-and mortar shop exists in addition to the online shop, product ranges offered online and offline should match. This entails product range, as well as order numbers and product features.

Web and interface design

Web and interface design should be improved. This is especially important for online supermarkets. Ordering procedures should be simplified and the time to place an order needs to be reduced. Pages should build up quickly, even if users log on using a 56k modem.

A better product description including pictures should be provided, however there is a trade-off between the number of pictures and how quick the homepage builds up.

If both off- and online shops exist, the brick-and-mortar shop and the online homepage should be linked.

Packaging

It should go without saying that consumers receive the goods they have ordered. But as shown, this is not always the case. A likely reason for that is that no common procedures to handle online orders have yet been established. It might be a cheap solution to let temporary workers like school kids handle the online orders. But unless a detailed process description is

in place and sufficient training is provided, this will not lead to the needed consistency in building up a high reputation online service.

The detailed procedural description should include issues like what kind of packaging material to use for which goods, what types of goods to put together in one bag, how orders should be handled when picked up personally, and how and when payment occurs. In addition, the procedures should be the same across all online locations of one supermarket. Consumers move and should be able to expect the same service and procedures when ordering from an online supermarket in Aarhus or when ordering from the same chain in Odense or in København.

For the online delivery service, special packaging material and containers should be developed to build up a consistent image. The packaging material should be *branded* in the original sense of the word with the logo of the online supermarket or shop. Even for brick-and-mortar shops with an existing logo, it might be a good idea to develop a logo particularly for the delivery service in order to give it its own identity.

Delivery

In addition to handling online orders consistently and using branded packaging, a reliable delivery service is also necessary to build up a positive image and a strong brand. Delivery is one of the USPs that differentiates offline from online shopping and often the major reason for consumers to choose the online alternative. Therefore, high emphasis should be given to making it as smooth and foolproof as possible. This includes:

- Delivery within the promised time window
- Avoiding product damage during delivery. This necessitates optimal packaging and packaging material that secures products as best as possible.
- Cooling chains should not be broken
- Ensuring that products cannot be stolen when receivers are absent at the time of delivery, however this can be replaced or supported by a lenient reimbursement policy

Branding

The **online delivery service** should not be treated as an add-on to the brick-and-mortar shop. Instead, the delivery service should be looked at as a stand-alone product. The product here is not the single items that are ordered, but the convenience 'packaged' around the goods: the convenient ordering at ones own pace, time and location, the physical packaging done by someone else, the delivery and the payment options. The above provided suggestions under the headings web page design; packaging and delivery can be used to support the development of such a brand.

A second matter to consider when talking about branding is the branding of the items themselves. A barrier for consumers for ordering online is lack of knowledge about a particular product. If a product or the total service is known, consumers are less hesitant to order it online as this means fewer risks. Therefore, they will accept **branded products** more readily. If no-name products or new products are offered, additional information, application examples and/or incentives for a first-time trial need to be provided.

Increasing consumer trust, reducing risks

The above suggestions once implemented are likely to contribute to an increase in consumer trust and a reduction of perceived risks. The kind of risks consumers encounter when ordering online as compared to shopping in a brick-and-mortar shop are the lack of being able to touch, see, feel, smell and try the product, the risk of ordering something they actually don't want if they don't know the product, the risk of product damage during delivery caused by a third person, the risk of not receiving the products on time or when needed, the risk of losing money either incurred by any of the above-mentioned risks above or when using an online payment system.

Building up consumer trust is therefore very important, especially when it comes to the following areas:

- Trust in the distributor to provide a high quality service
- Trust in product quality
- Trust in the delivery service (reliable and save)
- Trust in payment systems

As something still can go wrong, even if all procedures are carefully planned and implemented, an additional point of emphasis should be a **superb customer service**. In case of delivery

delays, product damage, customer complaints about product quality, the delivery of incorrect items, etc. a lenient reimbursement policy should be in place in order not to violate trust. As a likely consequence customers are more likely to become loyal customers and continuing users of the offered online service.¹²

¹² This is also a well-known but often not practiced effect for products or services purchased in a brick-and-mortar context. If complaints are resolved to the satisfaction of the consumers, they become even more satisfied consumers. Unfortunately only a small percentage of dissatisfied consumers complain. Therefore, it should be made as easy as possible for consumers to voice their complaints, followed up by a quick reaction and satisfactory solution to their problem.

APPENDIX I: INTERVIEW GUIDE

Ebizz Øresund forbrugerundersøgelse I

- ✓ semistrukturerede personlige interviews med forbrugere, der har erfaring med køb af dagligvarer bestilt via Internettet

Vejledning for interviewere:

- I. Den endelige udgave af spørgerammen printes ud i farver.
- II. Overordnede temaer er markeret med grå ramme, underordnede med lysegul ramme
- III. De overordnede spørgsmål der **skal** belyses er markeret med en ramme og et fortløbende nummer, der starter ved tallet 50. Der kan være underpunkter indenfor rammer og så **skal** de også besvares. Opfølgende spørgsmål er placeret udenfor rammen og skal opfattes som eksempler til inspiration for interviewer. Det er vigtigt, at respondenter selv får lov at svare med sine egne ord. Husk at sige spørgsmåls nummeret i forbindelse med interviewet, så er det lettere at finde rundt i interviewet på båndet og afskriften bagefter.

- IV. For ikke at få for mange overlappende spørgsmål, er de spørgsmål, der både omhandler indkøb i butik og på nettet markeret på følgende måde hvilket indebærer, at for dette spørgsmål skal der både spørges til forhold vedr. butiksindkøb og indkøb bestil via nettet. **Husk hele tiden at have øje for at spørge både til butiksindkøb og køb via Internettet hvor det er relevant!**

B	I
X	X

- V. Kommentarer til interviewer er markeret med: [tekst]

- VI. Spørgerammen er omfattende og interviewet vil nok vare ca. 3 timer. Det overordnede forløb er

Spg 50 – 71 fra 0 – 80 min

Spg 72 – 74 fra 80 – 100 min

Spg 74 – 91 fra 100 – 180 min

Det er vigtigt at holde øje med tiden undervejs. Derfor er der indsat markører, der angiver, hvor langt man ca. bør være nået med spørgsmålene indenfor en given tidsramme. Markørerne angiver det antal min. der max. bør være gået ved et spørgsmål og dette er markeret

med en grønfarvet tyk streg med hvid skrift

Indhold i spørgeskemaet

1. Generelle forhold og informationer

2. Indkøb i butikker og på Internettet

2.1 Indkøb i dagbogsperioden

2.2 Indkøbsaktiviteter

- Dagligvareindkøb
- Indkøb af øvrige varer (udvalgsvarer og varige forbrugsgoder)

2.3 Holdninger til indkøb

2.4 Udvikling måden at købe ind på og i holdningen til indkøbet

2.5 Dagligvareindkøb og de fysiske rammer i hjemmet

3. Værdier og livsstil

3.1 Værdier, livsstil og indkøb

- Holdninger til indkøb - i social belysning
- Normer for det gode liv – med fokus på indkøb

3.2 Værdier & livsstil relateret til husstandens samlede aktiviteter

- Prioriteringer i dagligdagen
- Prioriteringer i fritiden
- Hvordan oplever du tidspres og tiden som en del af livet
- Mobilitet – tilgængelighed

3.3 Udvikling over tid af værdier & livsstil relateret til husstandens samlede aktiviteter og til indkøbsvaner

1. Generelle forhold og informationer

[Interviewpersonen er udvalgt som den indkøbsansvarlige i husstanden og dagbogen vedrører alle dennes aktiviteter i den udvalgte uge og kun de øvrige medlemmer af husstanden hvis der er tale om indkøb.

I dagbogen er altså en del af disse forhold belyst og det er interviewerens ansvar, at der ikke spørges om forhold, der allerede findes data for i dagbog.]

50. Kunne vi indledningsvist tale om familien som helhed, især de som ikke har lavet dagbog ?

- Alder, køn ?
- Beskæftigelses-, uddannelses- og indkomstforhold ?
- Arbejdstid eller tid på uddannelsesinstitution ?
- Fritidsaktiviteter (herunder art og ca. timeforbrug pr. uge) ?
- Boligform ?
- Transportform og transporttid?

2. Indkøb i butikker og på Internettet

2.1 Indkøb i dagbogsperioden

51. Når du tænker tilbage på ugen med dagbogsskrivning, hvad er det så du kommer til at tænke på først?

33.1.1.1.1.1

Eksempler på uddybende spørgsmål / temaer:

- Har jeg nået det jeg ønskede på arbejde, hjemme og i fritiden?
- Hvad er det mest positive og det mest negative, der er skete i løbet af ugen?
- Hvad var godt og mindre godt ved de indkøb i butikker og på nettet som jeg foretog i dag ?

	B	I
52. De indkøb du skrev ned i dagbogen er de typiske eller adskiller de sig fra andre uger ? Hvorfor, hvorfor ikke, er der afvigelser ?	X	X

[Her skal blot registreres respondentens umiddelbare reaktion, mens hukommelsen søges støttet af de konkrete spørgsmål i afsnit 2.2 om indkøbsaktiviteter]

2.2 Indkøbsaktiviteter

Dagligvareindkøb

	B	I
53. Kan du fortælle om dine indkøbsvaner når du køber dagligvarer. Hvad sker der typisk i løbet af en uge f.eks. hvor køber du oftest ind, hvad lægger du vægt på når du køber ind og hvor tit køber du ind, osv, osv. ?	X	X

Eksempler på uddybende spørgsmål / temaer:

- | | | |
|---|---|-----|
| a. Hvor tit køber du stort ind. (Stort vil sige over 300 kr. pr. indkøb)? | X | X |
| b. Hvor tit køber du dagligvarer (Alle dagligvarekøb)? | | |
| c. Skriver du / I huskeseddel og bliver den fulgt? Hvorfor, hvorfor ikke? | X | (X) |

- | | | |
|---|---|---|
| d. Har læsning af tilbudsaviser og reklamer (aviser, radio, TV og Internettet) betydning for indkøbet og valg af varer ? | X | X |
| e. Er indkøbsstedet valgt på forhånd og hvorfor? | X | X |
| f. Er varerne valgt på forhånd? og hvorfor ? | X | X |
| g. Er bestemte mærker (Coca_Cola, Toms chokolade, etc.) valgt på forhånd eller vælges lige så gerne erstatninger? | X | X |
| h. Hvilke butikker handles i og hvor tit og hvorfor ?? | X | |
| i. Hvilke dagligvare Internetbutikker handles i og hvor hyppigt og hvorfor ?? | | X |

	B		I	
54. Når du vælger et indkøbssted til dagligvarer, hvad er det så ved selve butikken og dets personale du lægger vægt på og sætter pris på? F.eks. i form af pris, service, placering, åbningstider?	X		X	

	B	Vurdering	I	Vurdering
55. Kunne du på denne liste skrive din vurdering af hvilken vægt du lægger på de enkelte faktorer [Skemaet udleveres. Målt på en 7 punkts skala gående fra ”Ingen betydning” til ”Meget stor betydning”. Husk både at vurdere den fysiske butik og Internet butikken]				
a. Godt vareudvalg (sortimentets bredde, dybde & kvalitet)	X		X	
b. Butikkens priser generelt – discount ?	X		X	
c. Gode tilbud	X		X	
d. God atmosfære	X		X	
e. Lavt prisniveau	X		X	
f. Annoncer i aviser og ugeblade	X		X	
g. Sjældent i kø ved kassen / slipper for kø ved kassen	X		X	
h. Lange åbningstider	X		X	
i. Ofte nye varer	X		X	
j. Højt kvalitetsniveau	X		X	
k. Ofte smagsprøver	X		(X)	
l. Højt serviceniveau	X		X	
m. God butiksindretning / god hjemmeside	X		X	
n. Rent i butikken	X		-	
o. Husstandsomdelte reklamer / tilbudsaviser	X		X	
p. Hjælpsomt personale	X		X	
q. Altid friske varer	X		X	
r. Gode parkeringsmuligheder / slipper for vanskelige parkeringsforhold	X		(X)	
s. Stort udbud af økologiske varer	X		X	
t. Gode specialafdelinger (f.eks. delikatesser, etnisk) / gode specialvarer	X		(X)	
u. Gode adgangsforhold til butikken / internettet	X		(X)	
v. Stort udbud af færdigretter	X		(X)	

w. Medlemskort, dividende, andre rabatter	X		X	
x. Afstand til butik fra jobbet	X		X	
y. Afstand til butik fra hjemmet	X		X	

	B	I
56. I de to foregående spørgsmål (54 & 55) har du været ind på, hvad det er du lægger vægt på, når du vælger butik, både den fysiske og den på nettet. Men hvis vi ser det i sammenhæng, er der så noget du prioriterer frem for noget andet, f.eks. kvalitet frem for pris eller pris frem for kvalitet?	X	X

Eksempler på mulige kombinationer:

X X

- Pris ctr. kvalitet, friskhed; hvorfor?
- Gode indkøbsoplevelser ctr. lav pris; hvorfor?
- Sortiment ctr. lav pris; hvorfor?
- Afstand, tid ctr. lav pris; hvorfor?
- Tid, afstand, pris ctr. kvalitet, friskhed; hvorfor?

	B	I
57. Er der er fast kreds af butikker du / I vælger at handle i eller er det snarere sådant, at ture til de enkelte er koblet på andre ture til jobbet, fritidssysler, familiebesøg, etc. Eller sker det på en helt tredje måde?	X	-

Indkøb af øvrige varer (udvalgsvarer og varige forbrugsgoder)

58. Indkøb af udvalgsvarer og varige forbrugsgoder generelt ?	B	I
a. Hvor stor en del af rådighedsbeløbet bruges til henholdsvis dagligvarer, tøj/fodtøj, boligudstyr (møbler, mv.), transport, rejser & medicin (ca. kr. gnsn. måned)? [Der noteres på medbragte lister]	X	X
b. Hvilke slags varige forbrugsgoder har husstanden ? Tørretumbler, vaskemaskine, opvaskemaskine, mikrobølgeovn, videobåndoptager, videokamera, Cd-afspiller, DVD – afspiller, mobiltelefon, telefonsvarer, fax, pc, CD rom, DVD drev, Internet (modem, ISDN, ADSL, andet) [Der noteres på medbragte lister]	X	X

c. Hvilke butikker købes udvalgsvarer i og hvordan er den procentvise fordeling af købene på produkter, herunder Internet køb ? [Der noteres på medbragte lister]	X	X
d. Hvilke butikker købes varige forbrugsgoder i og hvordan er den procentvise fordeling af købene på produkter, herunder Internet køb ? [Der noteres på medbragte lister]	X	X

Der er nu gået max. 40 min af interviewet ??

59. Indkøb af Pcere og pc udstyr - kunne det også ske på nettet ?	B	I
a. Hvilke(t) mærke(r) af pc er indkøbt? Hvornår? Hvor? Hvorfor?	X	X
b. Hvilken betydning har den fysiske butiks rådgivning ?	X	-
c. På hvilken måde støtter Internettet køb af pc?	-	X
d. Hvilken type udstyr til pc købes (f.eks. blækpatroner) ? Hvor? Hvorfor? Hvor hyppigt?	X	X
e. På hvilken måde støtter Internettet køb af pc udstyr?	-	X
f. Hvilken betydning har priser og leveringsgebyrer for parathed til at købe pc og udstyr over Internettet?	X	X

60. Indkøb af møbler - kunne det også ske på nettet ?	B	I
a. Hvilke(t) mærke(r) af møbler er indkøbt? Hvor? Hvorfor? Hvornår ?	X	X
b. Hvilken betydning har den fysiske butiks rådgivning ?	X	-
c. På hvilken måde støtter Internettet køb af møbler?	-	X
d. Hvilken betydning har priser og leveringsgebyrer for parathed til at købe møbler over Internettet?	X	X
e. Hvilken betydning har det at kunne købe tilbehør som lamper, billedrammer, sengetøj, etc. samme sted som møbel købet?	X	X

61. Indkøb af medicin – kunne det også ske på nettet?	B	I
a. Hvilke(n) type(r) af medicin indkøbes? Hvor? Hvor hyppigt ?	X	X
b. Hvilken betydning har lægen og den fysiske butiks rådgivning ?	X	-
c. På hvilken måde støtter Internettet køb af medicin?	-	X

d. Hvilken betydning har priser og leveringsgebyrer for parathed til at købe medicin over Internettet?	X	X
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2.3 Holdninger til indkøb

	B	I
62. Er indkøb via Internettet foreneligt med husstandens nuværende indkøbsmønster Er der f.eks. bestemte produkter eller situationer, der passer eller ikke passer?	-	X

	B	I
63. Hvad synes du om Internettet og hvad er dine erfaringer med at bruge nettet til informationssøgning og handel?		
a. Adgangsforhold, on-line frekvens [vigtigt at huske at spørge]	-	X
b. Søgning af information (hvornår, hvad søges mv.)..	-	X
c. Handlet på internettet? (hvornår, hvad, hvor ofte, for hvilke beløb mv.)..	-	X
d. Syn på internettet generelt (positivt/negativt, generelle begrundelser herfor)..	-	X

	B	I
64. Hvilke fordele/ulemper ser du ved at anvende Internettet til informationssøgning?		
a. For hvilke produkter (herunder navnlig dagligvarer), i hvilke situationer	-	X
b. Levering, transportform og betaling(betalingsforhold)..	-	X
c. Hidtidige positive/negative oplevelser	-	X
d. Andre forhold	-	X

	B	I
65. Hvilke fordele/ulemper ser du ved at anvende Internettet til indkøb ?		
a. For hvilke produkter (herunder navnlig dagligvarer), i hvilke situationer	-	X
b. Levering, transportform	-	X
c. Betaler du et leveringsgebyr ved levering af dagligvarer og hvor meget? Hvis ja, synes du så det er rimeligt ? Hvorfor / hvorfor ikke? Hvis nej		

hvad er så et rimeligt prisniveau ? Hvis, ja er der økonomiske forhold, der bevirker at du selv synes du sparer penge ? VIGTIGT AT FÅ SVAR PÅ DETTE SPØRGSMÅL !		
d. Hittidige positive/negative oplevelser	-	X
e. Andre forhold	-	X

66. Er handel via Internettet gennemskueligt? Er det let at få et overblik?	B	I
a. Hvorfor, hvorfor ikke?	-	X
b. Hvad kan gøre e-handel mere gennemskueligt?	-	X
c. Er nogle aspekter mere gennemskuelige end andre? Hvilke, hvorfor?	-	X
d. Hvordan har du det personligt med at bruge nettet. Har du måttet øve dig meget for at kunne bruge det? Hvordan synes du dine egne <i>kompetencer</i> er? (generelt og i forhold til dagligvarer?) (hvorfor, hvorfor ikke?)	-	X
e. Hvorfra har du din nuværende viden om internettet og om e-handel? F,eks, a. venner, bekendte, kolleger b. familie c. medier (trykte, hvilke?; elektroniske, hvilke?) d. andet (f.eks. kurser el.lign.)	-	X
f. Andre forhold	-	X

67. Hvordan opleves det at være på Internettet ??	B	I
a. Er det en positiv oplevelse, hvorfor / hvorfor ikke ?	-	X
b. Hvad kan fremme online oplevelsen?	-	X
c. Skal det være sjovt/en oplevelse at indkøbe dagligvarer?	-	X
d. Skal indkøbet af dagligvarer blot overstås?	-	X

68. Hvad mener du karakteriserer den typiske Internet bruger ?	B	I
a. Job/uddannelse/alder/indkomst/bopæl (storby versus land)	-	X
b. Livsstilsforhold (karriereminded, travl, aktiv, innovativ, etc.)	-	X
c. Interesser (generelt, fritid, jobmæssigt)	-	X
d. Politisk observans (højre, venstre, midt)	-	X
e. Andre forhold	-	X

2.4 Udvikling måden at købe ind på og i holdningen til indkøbet

	B	I
69. Er der sket en udvikling fra 2- 3 år siden og til nu i den måde de/ I køber ind på f.eks. på grund af ændringer i familieforhold, arbejde, m.v. og også ændringer i holdningen til indkøb?	X	X
70. Hvordan tror du dit fremtidige forhold til Internettet vil udvikle sig ?	B	I
a. Mere, mindre..?	(X)	X
b. Udviklingsretning (fortsætte som hidtil, intensivering af hidtidig adfærd, nye aspekter mv.)..hvorfor?	(X)	X
c. Hvad taler for denne udvikling, hvad taler imod..?	(X)	X
d. Hvad kan forøge denne udvikling, hvad kan bremse denne..	(X)	X
71. Hvad kan få dig til at handle mere på Internettet ?	B	I
a. Er der nogle forhold den traditionelle butik kan tilbyde dig, som efter din opfattelse ikke kan opnås i online?	X	X
b. Hvad skal der til for, at du vil give afkald på disse (herunder mulige 'trade-offs')	X	X

Der er nu gået max. 1 time og 20 min af interviewet og der er afsat ca. 20 min. til de "fysiske rammer i hjemmet" !!

2.5 Dagligvareindkøb og de fysiske rammer i hjemmet?

	B	I
72. Hvor placeres de indkøbte varer indtil de er forbrugt og er der pladsproblemer og andre ting der irriterer med (retur-)emballage ? [Dette spg. vil have stor støtte af billeder taget i hjemmet]		
a. Er der indimellem problemer med at få plads til de indkøbte varer f.eks. ved storkøb?	X	X
b. Visse typer af frugt og grønt som også er kølevarer, bliver de altid opbevaret i køleskab eller findes der alternative placeringer (f.eks. en kølig kælder)?	X	X
c. Købes der stort ind f.eks. af kød, så der er behov for selvstændig fryser eller er frostboks i køleskab tilstrækkeligt?	X	X

d. Hvorledes er varerne organiseret i køleskabet f.eks. er nogle af produkterne til morgenmad eller madpakke samlet i særlig kasse ?	X	X
e. Er der for lidt eller for meget emballage omkring varerne i forhold til hvad der nødvendigt for opbevaringen i hjemmet ? Hvad burde gøres anderledes ?	X	X
f. Har det nogen betydning for valg af varen og den senere brug i hjemmet at varen tydeligt kommer fra et bestemt firma f.eks. Kellog's Cornflakes? Eller er det mest vigtige hvordan de fungerer ? Eller betyder udseende også noget ?	X	X

73. Hvordan placerer og håndterer i returemballage i hjemmet f.eks. flasker og kasser? [Dette spg. vil have stor støtte af billeder taget i hjemmet]	B	I
a. Hvor placeres returflasker med pant fra de er tømt og til de tilbageleveres (f.eks. øl / sodavandkasse, egen kasse, skab uden kasse)? Returneres sammen med dagligvarekøb ?	X	(X)
b. Hvor placeres returflasker uden pant? Hvilken genbrugsordning er der og har den betydning for evt. pladsmangel pga. for lav hyppighed ?	X	X
c. Modtager I anden form for returemballage? Hvordan håndterer I den?	X	X

74. Hvordan modtages og håndteres Internetbestilte dagligvarer i hjemmet og hvilke gode sider og hvilke problemer har I oplevet? [Dette spg. vil have stor støtte af billeder taget i hjemmet]	B	I
a. Er varerne kommet uskadt frem	-	X
b. Er køle og frostvarer stadig nedkølede / frosne	-	X
c. Er der plads til returkasser og lignende	-	X
d. Er der problemer med at bortskaffe ikke genanvendelig emballage som er modtaget ved hjemmelevering	-	X
e. Hvordan passer leveringsformen i øvrigt ind hjemmets fysiske rammer	-	X

Der er nu gået ca. 1 time og 40 min af interviewet og altså 1 time og 20 tilbage !

3. Værdier og livsstil

3.1 Værdier, livsstil og indkøb

Holdninger til indkøb - i social belysning

	B	I
75. Hvordan vil du beskrive dig selv som forbruger?	X	X

Eksempler:

- Tillidsfuld/ikke tillidsfuld
- kvalitetsbevidst/afslappet omk. kvaliteten
- prisbevidst/ser stort på prisen
- eksklusiv/storforbruger
- ”husmoderlig”/her-og-nu-forbruger

X X

	B	I
76. Køber du også ind, som den forbruger du beskrev, eller må du tage hensyn til bestemte omstændigheder (fx økonomien), eller andre personer (fx familien). Hvad vil du helst bruge dine penge på, hvis du ikke var økonomisk begrænset? Hvad sparer du på, hvis du ikke har så mange penge? Hvad forbinder du med luksus i dit valg af varer? Hvad kunne gøre dine indkøb, som de er nu, nemmere?	X	X
	B	I
77. Hvad ville du købe, hvis du skulle finde en gave: a) Til dig selv? b) Til en eventuel ægtefælle/kæreste? c) Til eventuelle børn? d) Andre - Kunne du finde på at købe en gave over nettet? -Mener du kvaliteten af varerne købt på nettet er anderledes end i butikkerne?	X	X

	B	I
78. Køber du ting, som (næsten) ingen andre gør? - Hvad? - Hvorhenne?	X	X

	B	I
79. Er du tryk ved at overlade ansvaret for indkøb til andre? - Er der noget andre ikke kan købe for dig? - Hvad?	X	X

	B	I
80. Er det interessant at se/høre om hvad andre har købt? - Og omvendt, synes andre at det er interessant hvad du køber ind? - Møder du mange du kender, når du køber ind? - Er det rart/ligegyldigt?	X	X

Normer for det gode liv – med fokus på indkøb

	B	I
81. Hvad bruger du mest tid på, når du har fri? - Hvad vil du helst bruge tid på, når du har fri? - Hvornår har du sidst haft ”en god dag”? - Beskriv hvad der var særlig godt ved den?	X	X

	B	I
82. Kan du huske en situation hvor du blev glad ved at købe ind/handle? - Beskriv situationen? - Køber du dagligvarer ind alene, eller sammen med andre? - Shopper/oser du (som regel) alene eller sammen med andre? - Evt. hvem? - Hvad ser du/I på for det meste?	X	X

	B	I
83. Har du som regel travlt når du køber ind? - Er du stresset når du handler? (god/dårlig følelse af stress?) - Nyder du at finde specielle ting når du køber ind? - Har du tid til at blive inspireret når du køber ind i dagligdagen?	X	X

3.2 Værdier & livsstil relateret til husstandens samlede aktiviteter

Prioriteringer i dagligdagen

	B	I
84. Hvad prioriterer du i dit daglige liv ? Hvor vigtigt er dit job, din familie og hvordan balancerer du dette med din fritid ? Hvordan får du / I tingene til at nå sammen?	X	X

Eksempler på uddybende spørgsmål / temaer:

- Hvor meget fylder dit job i almindelighed?
- Synes du der er balance mellem job, fritid og familie?
- Er der noget du gerne ville have mere tid til? Hvad /hvem?
- Er du impulsiv i dagligdagen?
- Hvornår planlægger du dine indkøb?
- Hvornår planlægger du dine/Jeres måltider?
- Har du nemt/svært ved at overskue hvad du mangler i husholdningen?
- Er dine daglige indkøb varierende i mængde og/eller indhold?
- Har du/I systematiseret dine/Jeres indkøb (hvem køber hvad hvornår)
- Bruger du/I meget tid på at overveje/diskutere indkøb (hvem køber hvad hvornår)?
- Hvad ville du helst have: Hjælp til rengøring eller hjælp til indkøb?

Prioriteringer i fritiden

	B	I
85. Hvad interesserer du dig for i fritiden? /har du nogen hobbies? Og hvor vigtige er disse hobbies for dig?	X	X

Eksempler på uddybende spørgsmål / temaer:

- Hvordan foretrækker du at holde fri?
- Evt. hvad laver man med familien/vennerne i fritiden?
- Synes du at du har fri, når du ikke er på arbejde?
- Ville du gerne have mere fri?

- Hvad ville du gerne slippe for at skulle købe ind?
- Er der noget som er sjovere at købe ind, end andet? Hvad? Og Hvorfor?

Der er nu gået 2 timer og 20 min af interviewet og kun min. igen !!

	B	I
86. Hvordan oplever du tidspres og tiden som en del af livet f.eks. er tidspres noget du tit oplever, hvor tit laver du dine planer om og tænker du nogle gange på at ændre eller omprioritere tidsforbruget på arbejde, familie, fritid? Betyder tidspres noget for din måde at købe ind?	X	X

Eksempler på uddybende spørgsmål / temaer:

- Hvor tit kigger du på uret i løbet af dagen
- Er tid og travlhed noget du tænker meget over til dagligt
- Synes du, at du har for travlt
- Er der forskel på oplevelsen af travlhed på arbejde, i hjemmet og i fritiden
- Laver du ofte om på dine daglige tidsplaner og hvad er årsagen hertil
- Tænker du nogen gange på at ændre dit daglige tidsforbrug på bestemte aktiviteter og bruge mere tid på nogle ting og mindre på andre
- Har du på bestemte tidspunkter i dit liv ændret daglige rutiner og hvad var begrundelsen
- Er der bestemte tidspunkter, hvor du synes tiden går langsomt eller for hurtigt og har du en mening om hvorfor det sker
- Har din oplevelse af travlhed eller ikke travlhed betydning for den måde du vælger at købe ind både i butikker og på nettet
- Har din oplevelse af travlhed eller ikke travlhed betydning for de produkter du vælger eller hvor grundigt du er i din udvælgelse

	B	I
87. Har det bestemte sted du bor, stedet du jobber eller nyder dine hobbies; - har det valg af sted indflydelse på den måde du / I får dagligdagen til at virke på og har det indflydelse på jeres indkøb og	X	X

hvad i køber?		
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Eksempler på uddybende spørgsmål / temaer:

- Er der forskel på den måde du vælger produkter på nettet og i en butik og har det noget med tid og sted at gøre
- De butikker du normalt vælger at købe ind i – har det nogen betydning hvor de er placeret i forhold til hjem, arbejde eller fritidsaktiviteter
- Hvilken betydning har den indbyrdes placering af aktiviteter mellem hjem, arbejde eller fritidsaktiviteter for tidsforbruget til dagligt
- Når jeg siger ”HJEM” hvilke tanker og følelser kommer så frem? Er der nogle af dine følelser for dit hjem som sted du også har for nogle af de andre steder, hvor de aktiviteter du deltager i foregår og hvorfor?

Mobilitet – tilgængelighed

	B	I
88. Hvilken rolle spiller transporten for at binde jeres daglige aktiviteter sammen f.eks. er bilen nødvendig for at det hele hænger sammen og er den også vigtig ved indkøb og hvorfor?	X	X

Eksempler på uddybende spørgsmål / temaer:

- Hastighed og fart har det betydning
- Når jeg siger bil, hvad tænker du så på? Hvad er en bil egentlig for en størrelse i dagligdagen og hvad betyder den for dig og din familie?
- Giver bilen frihed , i givet fald hvordan
- Sætter den også nogle begrænsninger, i givet fald hvilke

	B	I
89. Hvilken betydning har transport og biler for miljøet og hvad forstår du / I ved miljø i øvrigt og hvad gør i selv og hvad bør andre f.eks. myndighederne gøre?	X	X

Eksempler på uddybende spørgsmål / temaer:

- Har bilismen betydning for miljøet
- Ville du køre mindre i bil hvis det kunne gavne miljøet
- Hvem skal løse miljøproblemerne
- Miljø i øvrigt: sorterer du dit affald, sparer du på energien & sparer du på vandet

	B	I
90. Når I får leveret varer hjemme (bestilt over nettet) vil det så betyde, at I kører mere eller mindre i privatbil og hvorfor? Og tror du hjemmel levering kan være med til at løse miljøproblemer på transportområdet?	X	X

3. 3 Udvikling over tid af værdier & livsstil relateret til husstandens samlede aktiviteter og til indkøbsvaner

	B	I
91. Er der inden for de seneste 5 – 7 år sket grundlæggende ændringer i den måde du tænker, de holdninger du har til livet i bred forstand, etc. f.eks. på grund af at børn er kommet til, ændrede familieforhold, nyt arbejde eller andet haft betydning for ændringen? Og påvirker det familiens aktiviteter og måde du køber ind på og de produkter du / I vælger?	X	X

APPENDIX II: RESPONDENT CHARACTERISTICS

Table 5: Respondent Characteristics

Name & Age	Profession	No. of Children	Marital status	Income	Hobbies	Consumer attitude
ONLINE GROCERY SERVICE'S CUSTOMER						
Kirsten, 40	Pedagogue	8 & 14	Married, 41, teacher	??	Man write books, children: football / Horseback riding	Netto offers, freshness and quality
Fie, 48	Psychologist	Grown-up	Married, 39, biologist	600.000	Grandchildren, cooking, TV	Ecological conscious, political correct, non-wasting
Jens, 50	Educational consultant	4 children, one still at home	married	Good income	Caravan, reading, family, cars	Political consumer, like to spend on themselves
Lisbeth, 27 previous negative experience with ISO	DK statistic		Boyfriend, 27, university	500.000	Sports, drawing, theatre, exhibitions	Quality, politically correct
Maria, 41	ministry	3 years	Married, 42,	1 million	Photography, summer	Quality conscious, compares prices,

current Online supermarket 's customer			programmer		houses, gardening, reading, nature	political correct
ONLINE SUPERMARKET'S CUSTOMER						
Anne, 51	librarian	Son, 13 years	Boyfriend	300.000	Write book reviews, publish online	Price conscious / quality special offers
Jannie, 30	Translator, currently on maternity leave	10 months	Married, 31, IT consultant	??	Sports, read books, friends, family, work on the house	Quality and price conscious, but price is not that important
Else, 29	clerk	4 & 7	Married, 33, teacher training	Not very high income	Attending to family, relax on sofa	Time over money Buys same things again Lowest price but not bargain hunting
Klaus, 50 Gurli, 42 previous experience with Online grocery service	Vicar	Grown-up	Married, 42, hospital secretary	??	City life, parks, church	Price and quality conscious

Jørgen, 47 considering subscription from Online grocery service	librarian	Grown-up	Married, 41, librarian		Irish dance and music, football (passive), TV, gardening	Trusting in service advice, quality but not price conscious, no purchase on credit
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Table 6: Shopping Behaviour and Time perception

Name & Age	Shopping planning	Impulse	Like to shop	Outsourcing	Car	Perception of time
ONLINE GROCERY SERVICE'S CUSTOMER						
Kirsten, 40	Huske liste, supplement	no	It is nice to shop		no	
Fie, 48	Vague planning, more influenced by the moment, special offers	YES	Fun if time allows, not experiential	Yes, for standard products, but she does not plan much	Yes	Busy during the week (work related), not on weekends, if stressed: sleeping problem, feels busy, but not stressed Time can pass too slowly but also too fast
Jens, 50	Huske liste, go shopping everyday, no meal plan	YES	Likes it, negotiating	Happy leaving it to others	YES	Works towards deadlines, time to sit down to talk, cannot be stressed so easily, would like to have a bit more time for leisure activities
Lisbeth, 27 previous negative experience with ISO	The Online grocery service long-term, shop every day, huske liste, never know what happens	no	Likes to go to shop depending on time, see things, not experiential	Not really, only if products is known	no	Uses a lot of time for studying, if stressed, own responsibility, not stressed when shopping, doesn't feel stressed although her lifestyle is filled with activities

Maria, 41 current Online supermarket's customer	Huske liste, overview of what is needed, not all is planned	no	Daily shopping = no, specialities more fun	No, likes to have control	YES	Handles stress well, good inert time perception, feeling more busy when at home, is annoyed about lines in supermarkets Time never passes slowly Time = money, prefers to buy service to have more time for family and leisure
ONLINE SUPERMARKET'S CUSTOMER						
Anne, 51	Shopping list in the evening, when on sale purchases in advance of routinely used items	no	Likes shopping, doesn't like carrying		no	Feels more stressed at home (kid), stress at work to be expected and accepted
Jannie, 30	One-week meal plan, shopping list	no	Likes to go to shops	Likes to control shopping, it would be boring if someone else did it	yes	Time passes too slowly at times Currently no time pressure
Else, 29	Precise list of things that are used as basics, used for online shopping, supplemented by daily offline shopping (milk, fruit, etc.)	no	Likes to shop, look at things		no	Not time pressure, has sufficient time, but still likes to save time by shopping online to have more time for her family Time more important than money

Klaus, 50 Gurli previous experience with Online grocery service	Meal plan, shopping list followed strictly by wife, Klaus at times also purchase extra items when on sale.	no	He = yes She = less	Yes, but difficult with personal things	no	Filling all time holes with activities, Gurli can never sit still (as compared to Klaus, he can relax), for her time never goes too slow
Jørgen, 47 considering subscription from Online grocery service	Huske liste, no meal plans, often shop on way home	somewhat	Has nothing against it	Can imagine others to do the shopping	no	Time can pass too slowly and too quickly

Table 7: Advantages/Disadvantages of online shopping & types of goods actually purchased

Respondents	Advantages online shopping	Disadvantages online shopping	Goods purchased online
ONLINE GROCERY SERVICE'S CUSTOMER			
Kirsten, 40	No need to carry	<p>damage during delivery (not experienced)</p> <p>not less expensive</p> <p>delivery of wrong items (experienced)</p> <p>missing social aspect, loosing contacts to others</p>	<ul style="list-style-type: none"> • Fish • The Online grocery service • Books, CDs • Clothes (branded products)
Fie, 48	<p>The Online grocery service: fun, surprise, even if higher price, good quality, good service</p> <p>subscription: no need to remember to buy magazine</p> <p>better availability of information</p> <p>finding what you want</p> <p>product/price comparisons</p> <p>delivery of books makes it easy</p> <p>if one is very busy, one does not have time to shop properly and ends up having to buy whatever is needed</p>	<p>The Online grocery service: don't eat up everything, need to throw out, no adaptation to changing schedules</p> <p>in order for it to be worthwhile, one needs to order larger amounts. This leads to storage problems.</p> <p>no price information on the Net (for a modem)</p> <p>one does not always find what one wants, searching can be time intensive</p> <p>feel/hear/touch, texture, important to evaluate quality</p> <p>delivery problems if one lives in an apartment: possibility of goods being stolen, no cooling facility</p> <p>likes to go shopping</p>	<ul style="list-style-type: none"> • The Online grocery service • Books • Computer + accessories • Flowers • Magazine subscriptions • Travel

	at the expensive kiosk		
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Jens, 50	<p>being able to shop on one's own time, all day</p> <p>good information seeking, goal oriented searches</p> <p>no need to carry</p> <p>practical</p>	<p>The Net is not the real world</p> <p>bank charges, no information about it</p>	<ul style="list-style-type: none"> • Car accessories (to save money) • Entertainment (BilletNet, cinemas) • The Online grocery service
Lisbeth, 27 previous negative experience with ISO	<p>to find cheapest offer (for standard goods like PCs, printers, etc.)</p> <p>being able to compare prices</p> <p>to purchase special goods, e.g. from abroad</p> <p>books that are otherwise difficult to get</p> <p>convenience, delivery, especially if one does not have a car</p>	<p>postal delivery, opening hours to pick up package</p> <p>clothing: feel/see aspect missing, need to return if they don't fit</p> <p>The Online grocery service: choice of products not always optimal</p> <p>overall skeptical due to little experience</p> <p>is not aware of delivery fees, possibly disguised delivery fees</p> <p>home pages are not clear</p> <p>as compared to offline shopping, little experience where to find what. This leads to a feelings of disorientation</p>	<ul style="list-style-type: none"> • The Online grocery service • Previously tried ISO • Standard products (household purchase by boyfriend): • Clothes • Books (for school), CDs • Printer, other technical equipment • Subscription of foreign magazines, foreign books • Travel
Maria, 41 current Online	<p>being able to find specialities or goods that you don't get other</p>	<p>delivery of products with a current sell-by-date</p> <p>no information about products (groceries), makes it</p>	<ul style="list-style-type: none"> • 85-90% groceries online • Online supermarket's &

supermarket's customer	<p>places (e.g. like teas, special fish)</p> <p>time independence</p> <p>no waiting on the telephone</p> <p>The Online grocery service: no need to choose, surprise element</p> <p>delivery</p> <p>easy during time when it is difficult to get out of the house, eg with small babies</p> <p>finding information quickly</p> <p>increases life quality due to finding new, inspirational things on the Net.</p>	<p>difficult to try out something new and thus, one stays with what one knows to minimize risk</p> <p>missing search engine on home pages</p> <p>technical problems regarding web pages</p> <ul style="list-style-type: none"> • need to type in address every time • no information when page was redesigned • no information if side is down • saved data (shopping list) disappeared <p>--> lack of convenient ordering</p> <p>payment systems (no use of Credit cards online)</p> <p>delivery: keeping products cool (i.e. meet)</p>	<p>The Online grocery service</p> <ul style="list-style-type: none"> • Antique silver, other speciality items
ONLINE SUPERMARKET'S CUSTOMER			
Anne, 51	Not need to carry	<p>bad home pages: too slow, doesn't find what one is looking for, too small a product range (e.g. Ikea, Imerco), no user-friendly interfaces</p> <p>time intensive searching</p> <p>no precise hits</p> <p>time to order (30-45 minutes)</p> <p>cannot feel/see</p> <p>no online supermarket in the area, thus no</p>	<ul style="list-style-type: none"> • Toys • Groceries (previously when she had a broken leg)

		opportunity	
Jannie, 30	daily goods: easy, you purchase only what is needed, keep overview of expenses	Online supermarket: looked funny when picking up bags, no systematic process, every time different procedure, no one seem to know precisely what to do, how to handle the order, packaging not consistent, don't have all goods/brands one wants, no price on missing items, even if one can add them by hand, technical glitches: carts was suddenly emptied out --> very time intensive likes to touch/feel, i.e. fruits and vegetables	<ul style="list-style-type: none"> • Online supermarket's
Else, 29	saves time time independence no need to carry big, heavy items	interface/home page design: possibility to save shopping lists not always able to find the information one wants one does not necessarily receive the best quality often inferior quality because one has not previously seen it doesn't always receive what one orders because items were sold out feel/trial (relevant for clothes)	<ul style="list-style-type: none"> • Online supermarket • Inexpensive furniture like shelves, cupboards for kids
Klaus, 50 Gurli, 42 previous experience with Online grocery service	easy good quality even if price is higher get what one wants, find specialities (food items) delivery, convenience no need to carry	few choices, only one online supermarket (Prima) unreliable delivery: one does not receive what one has ordered non daily goods: delivery time too long, some items never arrive The Online grocery service: delivery wrong place, wrong time	<ul style="list-style-type: none"> • Prima & The Online grocery service • Curtain fabric • Wine for birthday party • Meat for birthday party • Tea (shows shop)

	<p>good service in case of dissatisfaction</p> <p>Ticket sales: saves time, avoid lines, good overview of what is happening where, when, available seats</p>	<p>wrong time</p> <p>doesn't know distributor</p> <p>ADSL cable across the room (Gurli)</p> <p>product ranges are not the same in off- and online brochures</p>	<ul style="list-style-type: none"> • CDs, computer game • Clothes (belts, shirts, branded products) • Travel • Small furniture • PC (ordered online, picked up self) • Tickets • Gifts • Cat
<p>Jørgen, 47</p> <p>considering subscription from Online grocery service</p>	<p>Practical</p> <p>Delivery, limited amounts one can carry without a car</p> <p>Finding new CDs, discovery element</p>	<p>missing feel/touch</p> <p>insecure whether one really gets what one orders, especially fresh produce</p> <p>enjoys shopping experience</p> <p>Websites are too slow</p> <p>Technical problems: orders are deleted</p> <p>time intensive ordering: 45 minutes per order</p> <p>trust in delivery, i.e. goods that need to be kept cold (negative experience with fish)</p> <p>The Online grocery service: need to eat what they bring (no current customer)</p>	<ul style="list-style-type: none"> • Groceries, but no fresh produce (Online supermarket) • Clothes • Printer • Books, CDs

APPENDIX III: ADVANTAGES AND DISADVANTAGES OF ONLINE SHOPPING

Figure 3: Advantages of online shopping

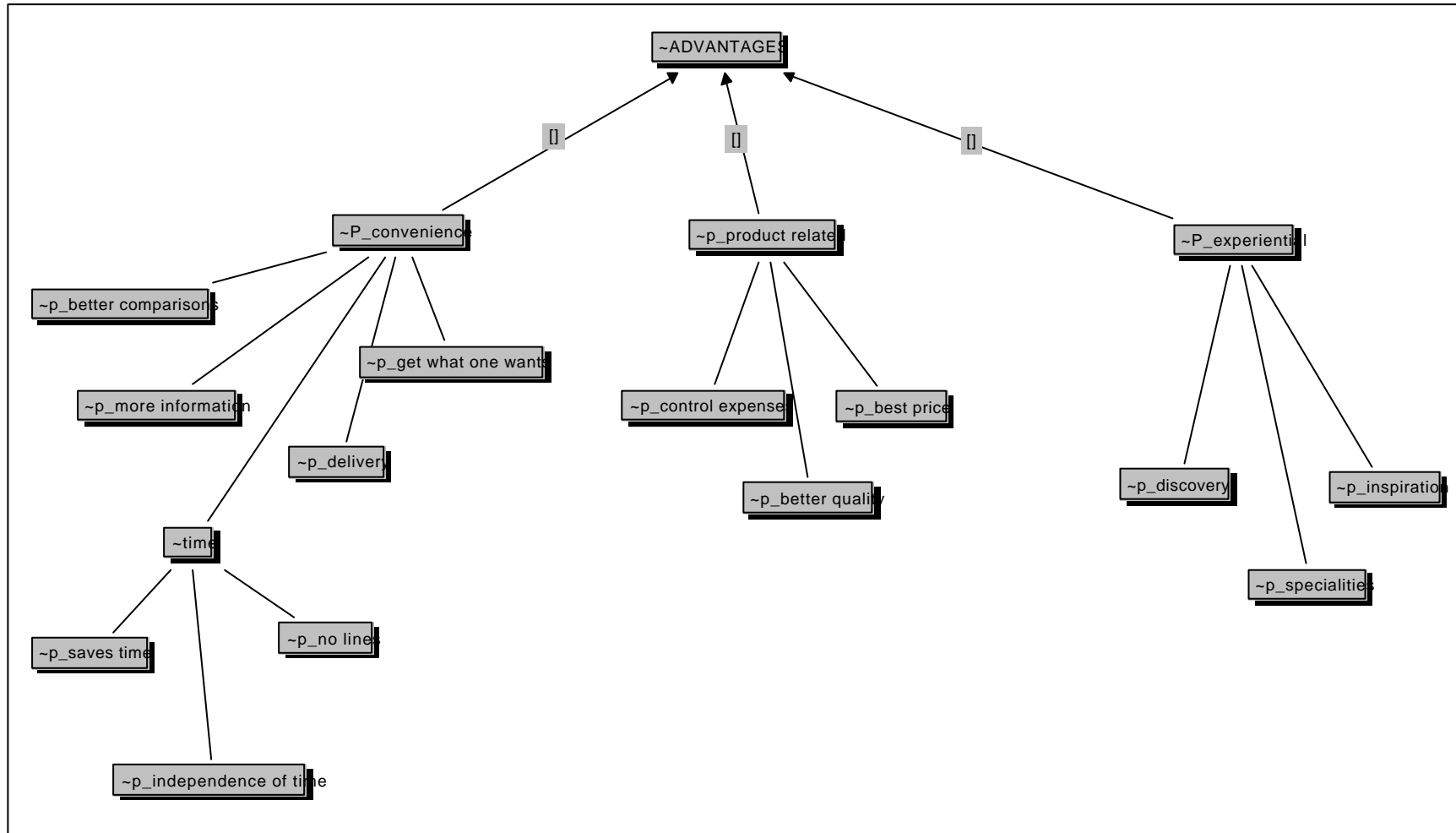


Figure 4: Current disadvantages of online shopping

