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Trends in Bulgarian Consumers' Behavior Regarding Bio Foods

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Abstract

Purpose: The present paper aims to identify if Bulgarian consumers (on the example of Ruse region) follow the world trend for increased bio foods consumption defining the changes in the attitudes and behavior towards the bio foods in Bulgaria and in the major factors influencing the different consumers' reactions (adoption and resistance), so that companies could use these results in their marketing decisions. Methodology: First, secondary data is gathered through different sources showing the trends in bio foods production and consumption. Second, empirical data have b.4 milleen collected through two researches conducted in 2017 and 2019 in Ruse region in Bulgaria. The "complex random sample" method is used for sample units selection. The population sizes in 2017 and 2019 are respectively 195 447 and 200 164. The minimum sample size for representativeness of the studies is 384 units. This number of respondents have been inquired. The questionnaire is exactly the same in the two researches for comparing the results. The methods of descriptive statistics and comparative analysis have been applied. Major findings: The level of awareness about bio foods increases but also does the distrust in the organic origin of these products on the Bulgarian market. This is one of the major reasons for resistance to bio foods. On the other hand, main factors influencing the adopters' decision to buy include the importance of healthy life style and the better health effects of bio foods compared to conventional. Conclusions: Consumers' profiles are formulated by analyzing the influence of different factors on their behavior towards bio foods and the various reactions to these factors resulting in adoption or some kind of a resistance. The results would be useful for bio foods producers, distributors and retailers. The paper offers some possible measures for overcoming the identified obstacles to the adoption of bio foods.

Keywords: consumer behavior, bio foods, factors for adoption or resistance.

JEL classification: M31, M39.

1. Introduction

Bio foods are a market that reports a steady growth trend, both globally and within Europe, and in particular in Bulgaria. Demand for organic food is steadily increasing while organic farming is expanding at a very fast pace (Golijan, Popović, 2016). The three main prerequisites linked to such positive changes are: 1. Consumers' intent to know in detail the risks endangering their health from the point of view of the consumption of conventional foods and the tools that would help to avoid them; 2. the desire of more and more people to join in one way or another to environmental protection activities; 3. an opportunity for development of rural areas in the countries.

Those identified changes in the consumption of organic (bio) foods correspond to *the goal of this elaboration*, namely to determine the trends in attitudes, consumer behavior and factors for adoption or resistance (postponement, rejection or opposition) to bio foods on the Bulgarian market on the basis of a secondary data survey as well as a comparative analysis of the primary data from two empirical studies conducted in 2017 and 2019 (Kleijnen, Lee, Wetzels, 2009). Profiles of the two groups of consumers - adopters and non-adopters to bio food are also developed.

2. Bio food market

Organic food production is a complete management system of the farms and the companies, processing these products. It combines best environmental practices, maintaining a high level of biodiversity, preserving natural resources and implementing high animal welfare standards. Organic production is part of a larger supply chain covering the processing, distribution and import of food (ECA Organic Food Audit, 2018). Since organic food products cannot be identified by a laboratory test or physical check, their biological status is verified by a certification system provided for in the EU legal regulation and controlled by the European Commission. The aim of this system is to provide consumers with confidence that when they buy an EU-labeled product as organic, the product they receive is truly organic. The system is implemented by Member States and inspections are made by public and private bodies (Council Regulation (EC) No 834/2007).

National authorities are a central element of the control system. They check the level of individual producers. Typical inspections include physical checks at the production or processing premises, document verifications and sampling of finished and raw products, leaves or soil to verify the use of unauthorized substances. On the other hand, national control bodies are controlled by the Directorate-General for Health and Food Safety, which assesses compliance with applicable EU standards. For non-EU countries, the Directorate also assesses private control bodies that provide recognized certificates for the export of organic products to the European Union. (The European Commission, 2017)

2.1. Trends in the organic food market in the world and Europe

Between 2000 and 2015, the organic market has increased fourfold. Organic food sales in the world in 2015 amounted to 72.9 Euro per capita, with the North American market boasting more than half of the organic food consumed. Organic food is produced by 2.4 million producers in 179 countries all over the world. About 90% of the sales are reported in Europe and North America. Concerning regional distribution, the largest market, with a value of 39.5 billion Euro, is North America, followed by Europe (29.8 billion Euro) and on third position - Asia (6.2 billion Euro). The forecast till 2022 shows that the Asia-Pacific region will have the fastest market growth, estimated at 22.9% (FiBL, 2017).

The countries with the largest organic food market are the United States with a total of 35.8 billion Euro, followed by Germany - 8.6 billion Euro, France - 5.5 billion and China – with 4.7 billion (FiBL, 2017). The leading market segments of bio products on the world market are: fruits and vegetables, bread and cereals, beverages, milk and meat. (Golijan, Dimitrijević, 2018).

The highest consumption per capita in Europe is reported in 2015. Switzerland takes the leading position in this indicator as it is highest not only for Europe but also for the world (189 Euro - 2012, 262 Euro - 2015). The next position is for Denmark - 191 Euro in 2015 (showing a significant increase compared to 2012 - 159 Euro). Third is Sweden by 177 Euro (FiBL 2017; Willer and Lernoud, 2017).

In 2017, retail sales of organic food in Europe are now estimated at 37.3 billion Euro (34.3 billion Euro in the European Union). The European Union is the second largest single market for organic products in the world once again after the US (40 billion Euro). The largest market in the EU is Germany (10 billion Euro).

Many of the main organic food markets enjoy double-digit growth rates. Among the key markets in Europe with the largest total volume of consumption in 2017 are: Germany, followed by France with a 22% growth compared to the previous year, and third, Italy with an increase of 16% compared to 2016. (FreshPlaza, 2018) Typical for the Italian market is that families become a dominant consumer group with 26% of total sales. According to the Swiss Federal Office of Agriculture, from September 2017 to August 2018, in Swiss shops 7% more organic vegetables were sold and 13% more organic fruits compared to the same period of the previous year. (Leo Frühschütz, 2018; Karin Heinze, 2018)

For 2017, organic producers in Europe are 400 000, of which almost 310 000 are in the EU. The highest is their number in Turkey (over 75 000), followed by Italy (over 68 000) and Spain (34,673). Only in 2017 the number of these growers has grown by almost 7% in Europe (almost 4% in the European Union) (FiBL, 2019).

The global projections for changes in the organic food and beverages market by 2022 show significant growth thanks to the unique benefits of this type of products. These advantages include: the natural origin, the lack of pesticides, the higher environmental friendliness and healthfulness compared to conventional foods.

Driving factors that are expected to stimulate growth in the organic food market are: Raising consumer awareness of the benefits of consuming these foods; increasing consumer income levels; improving their standard of living; increasing environmental problems; increasing the risk of diseases due to the consumption of conventional foods. Additionally, introducing organic food production is also a form of a company product innovation, so increasing the innovational activeness of the producers and suppliers in the food sector is supposed also to increase the growth in that market (Stoycheva, B., D. Antonova, 2018).

In addition, it should be pointed out that investments in the world organic food sector are also on the increase both by private investors and by individual governments. It is not only because of the growing demand and eventual future profits, but also because of the wider application of the concept for sustainable business and social development, which integrates the long-term business goals with the social welfare (Antonova, 2017; Kunev, S., I. Kostadinova, B. Stoycheva, 2017).

Along with the factors leading to the expansion of the organic food market, there are also some constraints linked to the high cost of these products, a significantly shorter shelf life and distrust of their biological origin.

2.3. Production and consumption of organic food in Bulgaria

Until 2015, the processing sector for organic agricultural products in Bulgaria is underdeveloped. A change in this trend occurs in late 2015 and early 2016, when the number of processing companies increases sharply. This is mainly due to EU subsidies and increased consumer demand. (Alexiev et al., 2018). Recent data from the European Statistical Office, Eurostat, show that in Bulgaria the growth rate of organic production for 2016 is over 310%, with our country having the largest share of EU areas that are becoming completely organic land - 77.5%, followed by Croatia with 69% (Bio Verlag Gmbh, 2018). Over the last ten years, the number of operators in this sector has increased more than 35 times and the areas with biologically arable land have grown from just over 30 thousand acres to over 880 thousand acres.

In bio beekeeping, for example, Bulgaria is the first in the world. The Research Institute of Organic Agriculture said in its annual report that Bulgaria ranks first in the world by number of organically grown bee-keeping families (over 230,000 according to Ministry of agriculture and food's data for 2016), ahead of Italy and France. Bulgaria ranks first in the world in the export of bio-certified oilseed rose and lavender. Due to the increased interest in the production of organic wine in the last few years there has been an increase in the land areas, planted with grape varieties, grown organically. (Economedia, 2018) The improved economic situation in Bulgaria in 2014-2015 leads to an increase in the average income of the population and an increase in the interest in healthy eating. This leads to a breakthrough in the organic food market, which includes not only households with the highest incomes looking for high-quality products but also middle-income households. The fact is that the concept of healthy lifestyle and the purchase of organic food has passed the boundaries of big cities and is oriented to regional and local markets. The total number of different organic food stores in Bulgaria is about 2,000. Organic foods are available from all major retailers as well as many independent and smaller supermarkets. All types of retail channels registered growth in sales of organic products, with organic sales by retailers increasing from 44.5% in 2010 to 61.4% in 2015.

Organic food sales for 2015 are estimated at approximately 15 million Euro, which is with 7% more than 2014, with projected sales levels of these products by 2020 expected to be higher than 19.5 million Euro. This would represent a growth of 30% (2015-2020) (Aleksiev, Kostadinova, 2018).

Retail chains are the main channel for the sale of bio-packaged foods with 61.4% of organic products' turnover. Small independent retailers account for 20.9% of organic sales, and their share drops with 17.9%, compared to 2010. The third channel, representing 16.8% of bio-packaged food, is retailers (specialized stores). These stores offer the greatest variety and quality of the products, have a very good market penetration and are growing in popularity. Another popular channel is the farmers' markets, which are preferred by local organic farmers and small organic food producers. Their number increases several times, due to the fact that they are looking for more direct contact with consumers. This makes them a major competitor of specialized stores.

As for the categories of organic food products on the market for 2015, the largest share is for the baby foods - 36%. Secondly, the category of milk and dairy products is positioned by 18%. For the Bulgarian market, organic beverages are an emerging category of bio products whose price is high and often exceeds 300-500% that of their conventional equivalents. For this reason, experts believe that it is unlikely that sales of this product category will develop rapidly in the future without additional marketing efforts. Optimistic forecasts for higher sales are given for the category of processed organic products that are built on the already popular basic organic products (Balieva, Huliyan, 2015; Aleksiev, Kostadinova, 2018).

According to data from a survey of factors determining the local consumption of bio-products in the southeastern region of Bulgaria, conducted by a team working at the Thracian University in 2015 (Aleksiev et al., 2018) it is stated that 38.8% of the respondents do not consume organic products. The analysis shows that these are young people still studying and not working, i.e. they do not generate their own income but rely on family help. Among the main factors impeding the purchase and consumption of organic food products, these consumers point too high bio food prices, a lack of confidence in their characteristics and a lack of interest in them as a whole.

The remaining 61.2% of respondents consume bio products. They are aged between 18 and 35 years, with 75% of them being women. Their incomes are average for the country and they occasionally buy organic food from several times a year to several times a month. The factors, determining the chose for the purchase of bio-foods are: product quality, manufacturer's certificate, product price, recommendations from acquaintances already using the product. The most commonly bought types of organic products from these consumers are fresh fruits and vegetables, honey, bee products and spices.

3. Empirical study of Bulgarian consumers' behavior towards organic foods

3.1. Research methodology

As a research method an inquiry has been used as it gives the possibility for a quantitative analysis of data. All 22 questions in the questionnaire are divided in 3 parts – introducing, essential and demographic. The first two parts are formulated using Likert scales. The introducing questions aim to collect data about the consumer behavior regarding organic foods. The essential questions aim to identify key factors influencing the different consumer reactions and decisions – to adopt or to stay resistant towards organic foods. The last part of questions aims to collect information about consumers' demographic and socio-economic characteristics. They give an opportunity to describe consumer profiles depending on their behavior and adoption or resistance reactions to bio foods. (Todorova, Ruskova, Kunev, 2018)

The first study has been conducted in the period from 01.05.2017 to 15.07.2017 and the second one – two years later from 01.03.2019 to 30.04.2019. The respondents in the both inquiries are people living on the territory of Ruse and administrative district Ruse, Bulgaria.

Sample sizes are calculated by the statistical electronic calculator (Raosoft, 2004) with margin of error 5% and confidence level 95%. Population size in 2017 is 195 447 and in 2019 it is 200 164 (National Statistical Institute, 2019). The minimum sample size needed for a representative research based on these population sizes is 384.

The sample model used for the research is a complex random sample called a systematic sample. The sample step is calculated 521 and the Ruse region election lists are used for including each 521-st person in the sample. As the necessary and sufficient condition for representativeness of a sample is that it must be big enough in size and all its units must be selected in a random fashion, the samples for the studies in 2017 and 2019 could be defined as representative.

For the purpose of the concrete studies the research team chooses to use the methods of descriptive statistics – relative shares and cross tables. For data processing SPSS software is used. For the purpose of the present paper the method of comparative analysis is of great importance.

3.2. Changes and trends in Bulgarian consumers' behavior towards organic foods

The research found out that in 2019 half of the respondents 51% have a common idea about bio foods, while in 2017 this share has been much bigger (67%). In the same time the share of those who have just heard about this type of food is 17% and 27% know just some kinds of bio foods they have tried. Compared to the first study in 2017, the share of those who have deep knowledge about bio foods increased from 7 to 10% in 2019. The trend is obvious – more people have already tried some bio foods and the number of those who know their features is also bigger.

70% of the respondents in total buy bio foods and can be considered as adopters. In 2017 the results show the same share of adopters. Consumption frequency results show that 42% in 2019 (41% in 2017) buy bio foods each week or at least several times monthly. 28% are those who buy bio food products from time to time - once per several months which is not that often but means repeated purchases. In 2019 17% (13% in 2017) of the respondents have just tried once some type of bio food and 13% (17% in 2017) have never bought. 30% of the enquired Bulgarians have not adopted this type of product yet as one purchase is not considered as adoption of a product. (Mahajan, Muller and Wind, 2000) The share of those who have never tried, decreases although the total share of the non-adopters of bio foods keeps the same.

Regarding the preferred suppliers of bio foods by Bulgarian consumers the common trend keeps the same as producers and specialized bio shops are most often used, but the results show that people already feel more confident to buy this type of product from supermarkets and also online from specialized bio shops.

The most important reason to choose a certain supplier is to sell only products from certified producers (39%) as well as the sign for bio product on the packages (38%). Therefore, consumers' awareness about the ways for distinguishing bio foods from conventional ones has improved. Other reasons are recommendations from friends and specialists in healthy nutrition which corresponds to the sources of information they trust.

The information sources preferred by consumers are producers themselves (35%), specialists in healthy nutrition (36%) and consultants in specialized retail shops (38%). The respondents trust most these direct channels of communication as they can receive more detailed information and some personal approach.

The most significant increase of trust is for the specialized bio food retail shops - from 29 to 38% and it becomes the most influential channel for communicating the advantages and reasons to consume organic food to people who have interest in them. This corresponds to the secondary data analysis above showing that this channel is perceived by consumers as the most reliable.

Influence of specialists in healthy nutrition is on the second position (36%) but it is almost as strong as the influence of friends (35%) who have experience with bio foods and know about them and there is not a significant change in this aspect comparing the results from 2019 to those of 2017. There is an increase in the influence of social networks as an important source of information about bio foods (from 24 to 29 %) and specialized websites (from 28 to 31%). The reason is in the possibility for a fast direct communication and feedback that cannot be done in mass media communication (Fig. 1). That is why mass media like TV, radio and press is not that important for communicating bio foods.

In 2019 as was in 2017, most of the respondents prefer to buy bio vegetables and fruit (35%), followed by milk (31%) and meat products (30%) as well as spices and tea (29%).

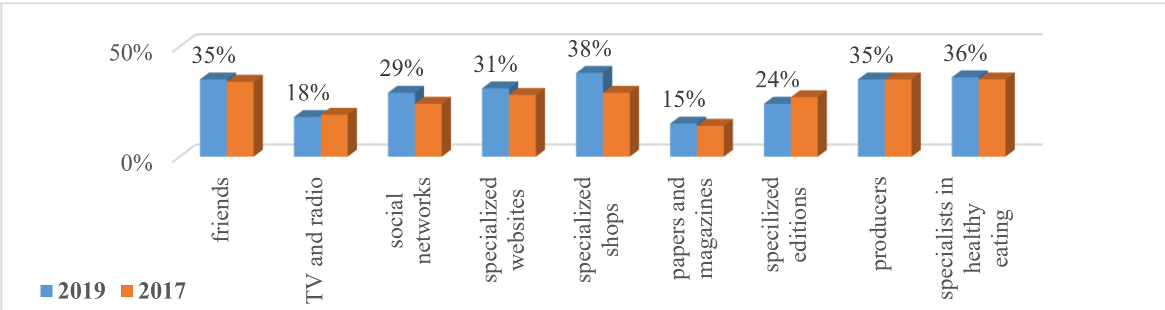

Figure 1. Preferred information sources about bio foods

[The respondents had the possibility to choose more than one answer and that is why the total is not 100%.]

Bulgarian consumers' beliefs about bio foods change in the following way: 43% compared to 53% two years earlier, believe that organic foods are produced without additional chemical substances or processing and 40% compared to 50% in 2017 are convinced that bio foods do not contain GMOs. The share of those who think that bio foods are equal as qualities to home-made foods or even do not reach their taste and quality decreases from 42% in 2017 to 37% in 2019. It could be due to more information and higher awareness. In the same time, in 2017 the respondents who claim to distrust the label "bio" or "organic" is 22% and it increases to 29% in 2019. Their ultimate answer is that on the Bulgarian market there are no original bio foods although they are offered like that. The main reason is the distrust in the proper functioning of the supervising and controlling institutions, therefore in the way producers are certified as bio. (Economedia, 2018)

3.3. Factors for adoption of and resistance to organic foods by Bulgarian consumers

Determining factors for adoption of organic foods by Bulgarian consumers are: the wish to have a healthy living (43%) and in this regard, the belief that bio foods are healthier than conventional (40%) as well as the higher nutrition value of bio foods (38%). Those who buy because of having a health problem keep 37%. (Fig. 2)

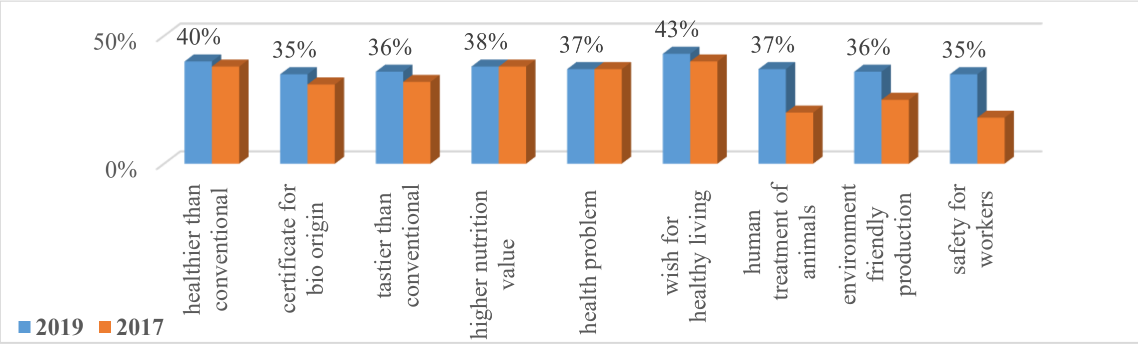

Figure 2. Determining factors for buying bio foods from Bulgarian consumers

Changes in the reasons for Bulgarians to buy organic foods include the higher percentage who need a certificate for bio origin (Fig. 2) which corresponds to the increased level of distrust and the need to have some kind of a proof. Another important trend is that Bulgarian consumers are more concerned about the social effects from bio foods production. These are getting more significant factors to buy bio foods.

11% (compared to 10% in 2017) of the respondents who consume bio foods claim that nothing can make them stop buying them in future. These are actually the consumers who have adopted permanently bio foods. 53% of the inquired consumers are very sensitive to prices of bio foods and their increase could make them stop buying. 30% would give up organic foods only in case of buying imitation products more than once.

Determining factors for resistance to bio foods include at first position consumers' suspicion and distrust in the bio origin of those foods (36%) which increases in a two years period (Fig. 3). It is followed by the too high price (35%) as more people find them too expensive than in 2017 (22%). This is connected with the relation between price and benefits and the perceived discrepancy between price and health effect (33%) and between price and taste (32%). The part of the respondents who do not feel need to buy bio food is lower than in 2017 (24%/ 26%) which means that more people realize the benefit of organic food but in the same time the financial limitations in spite of the desire to buy are very important burden to the adoption of this type of products. There is an increasing part of the respondents who claim that they do not buy bio foods because of this reason - 30% (compared to 22% in 2017). All these results show that the economic risk for the Bulgarian consumers, connected with the bio foods as an innovative product, is very high and even getting higher. It leads to the weakest form of resistance – *postponement*, because in a situation of higher income or lower prices those people are willing to buy and consume bio foods.

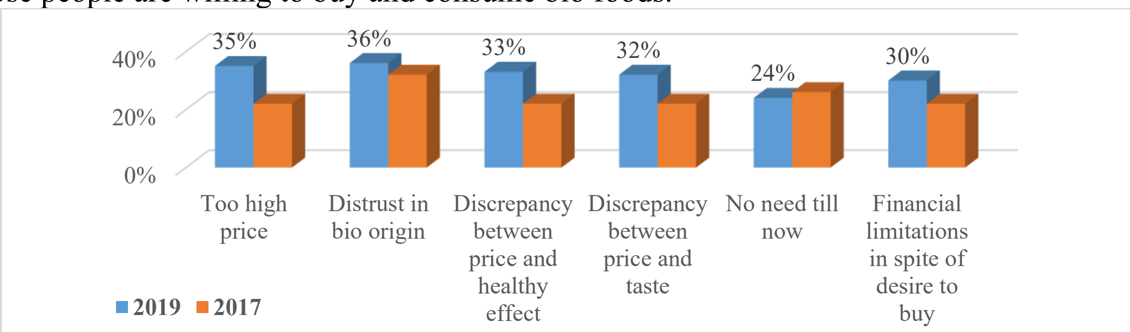

Figure 3. Determining factors for not buying bio foods by Bulgarians

The increasing distrust to bio foods is confirmed by the following result: 84% compared to 70% in 2017 estimate the possibility to purchase a false product of this type very high. It is connected also with functional risk – they will pay a high price for a product that will not have the expected quality and will not gain the desired health benefits by purchasing it.

Regarding the most probable effects of purchasing an imitation product, 36% believe that health problems for them and their families could follow. This relates to the physical risk that causes the strongest form of resistance – opposition. 11% of the respondents share that in case they buy a false “bio” product, they would react by trying to prevent other people through social networks and 17% say they would warn only their referent groups. The trend in this direction could be estimated as positive because two years ago the share of the consumers that would react by opposition has been bigger – 41%. The reason is in the higher level of awareness about bio foods offered on the market. 31% (26% in 2017) expect from an imitation product no health damages but only the lack of positive effects which means the functional risk prevails. The economic risk is most significant for 21% of the respondents (27% in 2017). That shows a change in the dominant factors while in 2017 economic and functional risks are equal in its importance, in 2019 the functional risk influences more people in the decision making process regarding bio foods consumption. Only 9% of the respondents will cease buying bio foods in case of imitation product purchase. The same part was in 2017. Most people will try to be better acquainted how to distinguish original bio foods from imitations (34%) or just will change the supplier after a short research (23%).

3.4. Consumer profiles of adopters and non-adopters of bio foods on Bulgarian market

Profile of Bulgarian adopters of bio foods (on the example of Ruse region) has been formed as these are mostly women who work, in the age scope 26 - 45, mostly with higher education and medium income. This group of consumers search for information directly from the producer or from a healthy eating specialist as well as trusts friends’ opinion and recommendations. Main factors that influence their decision to buy bio foods include the willingness to have a healthy life style, the better qualities and health effects of bio foods compared to conventional. Most of them buy bio foods not only for themselves but or their family too. For them the presence of certificate is as important as the positive social effects of bio production on workers and environment. They buy mostly fruit and vegetables, milk and meat products.

Profile of non-adopters of bio foods on the Bulgarian market is made in two variations. Half of them are young people from 18 to 25 years old with average income or lower. Most of them do not feel the need to buy bio food. For them healthy way of living is still not a priority. They are mobile and do not take much care about what they eat, even more – for them it is more important to have tasty food than if it is healthy. It is shown by their answers that prices of bio food do not correspond to the taste. These consumer behavior is related to the rejection as a form of resistance. Other people who also reject bio foods have tried some once but have not appreciated the relation between price and benefits as worthy.

There is another big part of the non-adopters who are people from different age groups and different family status. What is common is that they do not buy bio foods mostly because of economic reasons although they are willing to do it and are convinced in the positive health effects. They are related to the slightest form of resistance – postponement. In case their income increases they are going to adopt this products. Most of them have tried some kind of bio food but do not have the financial possibility to purchase regularly.

4. Conclusions

The comparative analysis of the results of the two studies of the consumer behavior regarding bio foods and the reasons for it among Bulgarian consumers show the following trends and results:

- ✓ The level of awareness about bio foods increases but also does the distrust in the bio origin of these products on the Bulgarian market. The reason is that people doubt in the proper functioning of the supervising and controlling institutions and therefore in the way producers are certified.
- ✓ Most trusted suppliers are producers and specialized retail bio shops as the preference to the latter increases considerably. Supermarkets and inline shops of bio foods also are used more frequently compared to 2017 but still are on third position.
- ✓ The influence of specialized shops increases also as an information source about bio foods and it has a leading role followed by specialists in healthy nutrition, producers and friends with equal position.
- ✓ The structure of purchased bio foods keep the same as follows: fruit and vegetables, milk and meat products, spices and tea.
- ✓ The significance of social effects of bio production increases considerably as a factor influencing the decision for bio foods purchase. The reason for this is the increased social status and life style change of Bulgarians.
- ✓ People are getting more sensitive to prices of bio foods – more people would stop buying bio foods in case of price increase than in case of a false product. Financial limitations are getting more and more important obstacle to the consumption of bio foods.
- ✓ There are no people who react by opposition to bio foods as the most active negative reaction of resistance, but in case of purchase of false products one third of the respondents claim that they would feel risk for their health and will try to prevent other people. An increasing share of people estimate the possibility to buy false bio food on Bulgarian market as high or very high.

Based on these conclusions some measures could be offered as follows.

One possible activity for increasing the level of trust by convincing consumers in the bio origin and clarifying the health benefits of bio foods is if the specialized bio shops organize together with specialists in healthy nutrition and bio producers common information campaigns offering possibility to taste and answering all questions of consumers.

Bio producers and retailers should use more actively the social networks in order to share positive consumers' feedback and the ways they care about people's health, to explain bio technology of production. This will help consumers overcome some of their prejudices and worries about the origin of bio foods.

Another channel that should be used more is YouTube influencers. At first companies should attract them and convince them in bio foods advantages by giving samples and interesting information so making them opinion leaders about their products. By showing bio foods and talking about them in their videos, influencers can have a very strong positive impact over a large number of people of different ages and with various interests. This could increase awareness and interest, as well as decrease the distrust especially among the younger people who trust this media and follow their favorite vloggers.

More researches should be done in order to find those consumers who are dissatisfied by their purchases of bio foods and to understand the reasons for their negative reaction. Thus, these consumers could become more loyal to bio foods and some producers even than the satisfied ones, due to the appreciation of their opinion. They could be a source of improvement ideas as the most critical buyers.

In order to overcome the distrust in the bio foods, producers should realize that it is good for them if those consumers who are most active and interested in healthy way of living have the opportunity observe the process of control on the system of certifying and production of bio foods.

In order to decrease the share of those who estimate the possibility to buy food with false "bio" labels, it would be very useful if a software product or an application is available that will help distinguishing the credibility of the label information as well as the validity of the certificates of different suppliers.

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