

## MARKET RESEARCH

## Rediscovering Barley



**HOLLIS ASHMAN**  
The U&I Group  
Powell, OH



**JACQUELINE BECKLEY**  
The U&I Group  
Denville, NJ

The concept of consumer understanding is based on the assumption that the consumer is the expert. People frame the world from their perspective, and their experiences and knowledge are the foundation upon which they judge products and services. As part of this issue on barley, we decided to write about consumer understanding, innovation, and barley. Renewed consumer interest in this ancient grain typifies the statement “what is old is new again.”

In preparation for this article, we surveyed a sample of 16 people. From a research point of view, one might think that 16 is too small a sample. However, research into qualitative validity suggests that as few as four individuals may provide a reasonably strong hypothesis. What people told us about barley was fascinating. When asked “What comes to mind when you think about barley?,” 13 people said soup, two said malt, as in alcohol and malted milk, and one said Barleygreen, alcohol, malt, and soup.

Why were these responses fascinating? This simple survey suggests that the “top-of-mind” thinking about barley is that it is good to eat and forms a component of soup, but, for most “people” (not cereal scientists), that is about it. This is where our knowledge base stops, and we don’t have much more to say other than to start telling stories about great soups we have had and the memories we associate with them. Ultimately, we get a very rich area on feelings about soup, but we really won’t get much more information about barley from the majority of people surveyed—except perhaps a few good recipes. What happens next with the largest group ( $n = 13$ ), however, is that they realize they don’t know much, and they begin to focus more on the product itself and begin to describe the product’s attributes in an attempt to make sense of their limited knowledge about barley. Using this, we can begin to learn about how barley looks, how it feels in the mouth in soup, and a little bit about its flavor.

Our second, smaller group ( $n = 2$ ) who knew about barley and the critical role it plays in brewing gave us a much fuller idea that there is more to barley than is indicated by the top-of-mind group. These were not ordinary consumers; they were more knowledgeable about the role barley plays in a product they enjoy. When we asked them why they thought malt, malted milks, and malted flavors were not as popular today as during their grandparents’ era, they did not know but speculated that there are a lot more flavors on the market today and that our palates may have become more sophisticated or been altered and that malts just do not appeal anymore to the general population.

The third group ( $n = 1$ ) provided us with a glimmer of what a trend tracker or innovation specialist is looking for—the odd observation, the quick head-turning discussion. The response, which included a variety of applications, suggests that barley is very popular with a group of people on the West Coast of the United States (i.e., as Barleygreen) and that those of us who think barley is just an ingredient in soup need to readjust our mindset. The response not only made us think that barley is worth a second look, it provided us with a great example of how simple application of the steps to consumer understanding can give us a glimpse at the process of innovation and innovative thinking inside the companies we work for.

Based on the results of our survey, we developed the following hypotheses:

- 1) Consumers have very little understanding about what role barley plays in their lives.
- 2) Consumers have a fond memory or two about barley. Barley is basically viewed as neutral to positive by U.S. consumers.
- 3) Barley may be unknown to most consumers because its biggest commercial value is as an ingredient in a process that is mysterious to them. Most consumers don’t know much about the brewing industry.
- 4) Barley and some secondary offshoots of it have cache in some niche groups.

What we see here is a potential ingredient that could be used to develop a whole area of innovation. It might be possible to expand the market for barley. But where, why, and who? We have observed that although most businesses today have many complex systems in place for understanding consumers and topics, most spend the bulk of their time working on top-of-mind projects, and much of their decision-making is based on their gut instincts and beliefs rather than on knowledge grounded in research, even when the company has a large amount of research to draw from. In short, one possible reason barley is not as widely used as it could be in the United States is related to the focus on top-of-mind projects.

Before we go further, let’s dig deeper and see if there is merit to the idea that barley may have a larger innovation potential in the United States. Researching the history of barley is fascinating. Barley, which has been cultivated by humans since 10,000 B.C., was grown at the same time as nonbrittle wheat in Jordan. Its potential as more than a cereal grain is explained by a Greek myth in which a goddess helps good people by allowing them to drink a beverage containing barley and mint. Roman gladiators were called *hordearii* (barley eaters) because barley was viewed as the special food that gave them their strength and stamina to fight and win battles in the

Coliseum. Some have suggested that barley may have been the first cereal domesticated in the grasslands of southwestern Asia. The distinctive nutritional properties of whole-grain barley are impressive: it contains large amounts of fiber (as much as 13.6 g/cup) and 5% (by grain weight) of two carbohydrates other than starch—pentosans (responsible for the stickiness of rye flour) and glucans (the gelatinous and cholesterol-lowering constituents of oats). When reading about many of these properties, one may begin to think that certain New School and New Age chefs should figure this ingredient out and that it should be found around the country on high-end trendsetting restaurant menus.

Exploring barley's place in history further, we find that in more recent times it was considered peasant food, while wheat was the grain eaten by the wealthy. Because barley was fairly easy to grow and was grown in a wide range of areas, it was not viewed as a particularly special food. Viewing something as routine and unimportant tends to marginalize it. In addition, breads made with barley lacked the smooth textures of those made with wheat due to the types of protein and carbohydrates found in barley. So, not only was this cereal widely available, when used in foods it created properties that were not considered appealing or desirable. Barley also is strongly associated with brewing and the creation of a variety of beverages. Considering all of these factors, we begin to see how this nutrient rich, high-fiber food ingredient has gotten lost in the shuffle.

Today, most commercial barley production in the United States is oriented toward developing high-yield varieties that are disease resistant and demonstrate exceptionally high malting and brewing qualities. Price premiums are paid in this business sector. We would speculate that breeding strategies for optimizing brewing qualities have created barley varieties that lack the qualities that would make it appealing and important as a food source.

To return to our earlier discussion, what about our top-of-mind thinking regarding barley and its common use in soup? Our collective wisdom that barley works well in soups or liquids is grounded in history. Soup is derived from the word "sop" or "sup," meaning the slice of bread on which broth is poured. In early Christianity, barley bread was considered the bread of choice for both religious penance and legal punishment, in which the bread formed the base a soup was poured over. This was the basis for the common meal throughout the Dark Ages. For more than 2,000 years in Europe, drinking barley water (water simmered with raw or roasted barley) was also popular as a source of quick energy, nourishment, and soother for stomach ailments. Those of us who lack this historical knowledge are familiar with the round, white berries of barley we find in reconstituted soups. Unfortunately, the pearl barley found in commercial soups is highly refined and lacks the higher nutrient and fiber components of less refined, flaked, or pot barley.

From an innovative ingredient perspective, Morocco, Japan, and West Coast trendsetters could help us envision the potential of barley. In Morocco, the largest per capita food user of barley, barley is frequently used in soups, porridge, and traditional breads. Japan also has several food uses for barley. One form familiar to consumers in the United States is miso, a paste that can be made from barley and used to flavor soups and other foods. Another form is barley tea, which is considered a healthful beverage that can be served hot or cold.

When looking for a potential innovation, it is important to have a story and a link to what is familiar to consumers. Barley is connected to a rich history of traditions and stories, and people clearly are familiar with it as a form of food. So what might innovations with barley look like? Sprouted barley could be used in salads and additives (like Barleygreen). What about healthy, crunchy toppings for both savory and sweet foods? Could barley be infused with flavors and used as a topping for cold and hot pasta dishes? What about beverage alternatives that might include barley? Since the current forms of beverages like *horchatas* and tisanes, which are now made with alternative grains, originated from barley, how might this ingredient be represented in the current palate of U.S. consumers? In addition, barley could help meet the demand for alternatives to rice, pasta, and cold cereals. The Alberta Barley Commission provides a good summary of the benefits of barley:

- 1) Satiety: Barley can be a comfort food that can fill you up and delay feelings of hunger. You get appetite control and nutrition.
- 2) Variety: Barley might be a good alternative to other common grains in our diet today.
- 3) Cholesterol lowering: Barley has components that can inhibit fat and cholesterol absorption.
- 4) Fiber: Barley is one of the richest sources of fiber and contains both soluble and insoluble forms.
- 5) Great taste.

When evaluating the consumer process, the first key is to understand the perspectives of the "top-of-mind" familiar, "expert," and "niche" groups. Next, these perspectives must be meshed with historical and benefits-based knowledge of the ingredient. This gives the product developer a starting place for creating innovative products that not only provide new benefits, but also can be linked back to what is familiar to consumers through history and stories. This link to the familiar is where global trend tracking of "organic," "natural," "nostalgic," and "functional" foods comes in. These steps help developers position the benefits delivered by the product and determine which stories should be used in telling a new story of barley innovation.

When you combine the inherent product benefits with a long history of use by humans, barley might just be one of those innovative ingredients that we have forgotten about for way too long. Maybe its time has come, again. Barley appears to be worth rediscovering.

#### Resources

1. Alberta Barley Commission ([www.albertabarley.com](http://www.albertabarley.com)).
2. George Mateljan Foundation ([www.whfoods.com](http://www.whfoods.com)).
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