



# SMART Personas Alcohol Drinkers

Prepared June 16, 2025

# PERSONAS IN THIS REPORT

As the alcoholic beverage landscape becomes increasingly competitive, understanding the distinct mindsets and motivations of consumers is essential.

Determining what motivates their choices—from taste to values—helps companies tailor positioning, product innovation, and messaging.

To draw greater contrast between the groups, they have been designed to be mutually exclusive – those who drink wine but not beer and vice versa.

## CONSUMPTION BASED PERSONAS

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*Wine drinkers in last 3 months who do not drink beer or ready-to drink alcoholic beverages and are 21+ years old.*

### Wine Drinkers

A mature category with strong rituals and clear demographic characteristics. Still offers premiumization opportunities and a need for health-conscious messaging (e.g., low sugar, lower alcohol, organic).



*Beer drinkers in last 3 months who do not drink wine or ready-to drink alcoholic beverages and are 21+ years old.*

### Beer Drinkers

Still dominant in volume, with strong emotional ties to tradition, socializing, and brand loyalty—plus room to innovate with craft, low-carb, or non-alcoholic options.

# THE POWER OF PERSONAS

Guide strategic decisions by helping teams anticipate customer needs, tailor communications and improve marketing effectiveness.

## What Are Personas?

- Detailed profiles of target audience segments
- Built by segmenting consumers in a proprietary database of over 250 million consumers
- Designed using variables such as demographics, attitudes, behaviors and preferences

## Why These Personas?

- Represent distinct alcohol usage and mindsets
- Preferences reflect broader cultural shifts in health and moderation (e.g., low-ABV, low-calorie)
- Highlight other patterns related to social identity, status signaling, inclusion, and ethics



# ORIGINS OF PERSONA DATA

Harvest has partnered with a cutting-edge AI-data infrastructure that powers human understanding with speed, precision & scale based on 4 sources of data.

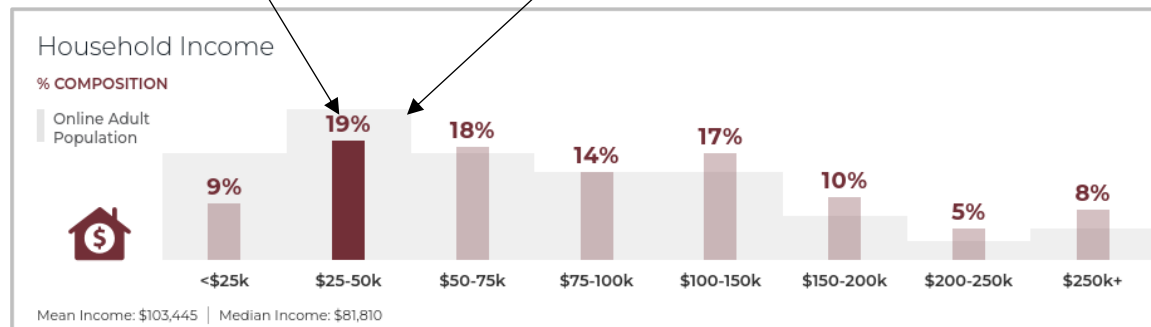


# HOW TO READ CHARTS

This report is a summarization of data that is meant to derive contrast between two groups. There is also a comparison to the online adult population to give greater context to the results.

Percentages represent the composition within the selected segment

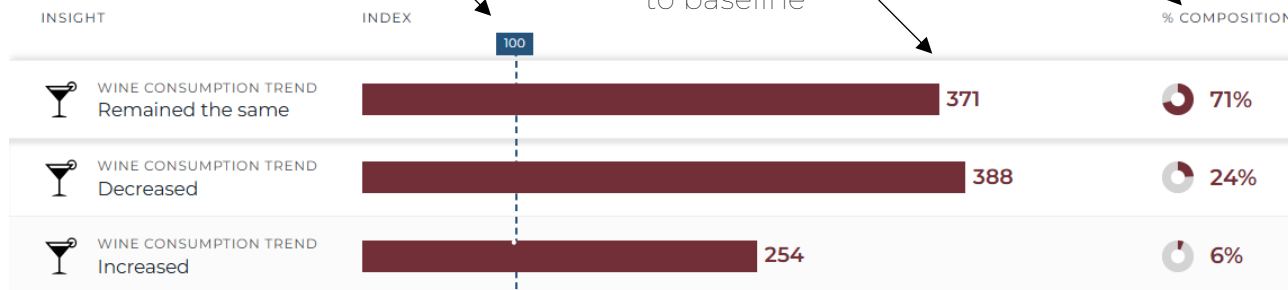
Shaded area serves as a baseline and represents the total online population



100 would be the index if the segment and the baseline are equal

Represents the extent to which the segment over or under indexes relative to baseline

Represents the composition of the selected segment



## Color Cues

For visual clarity, colors for each persona are consistent throughout the report.



Wine Drinkers



Beer Drinkers

BASELINE: Shaded grey behind colored bars represents the baseline number. In this case, the total for the online population.



# DEMOGRAPHIC COMPARISON

## Demographic Highlights

### % COMPOSITION



**75%** are Female



**33%** are 65+ Years of Age

Mean Age: 52 | Median Age: 55



**19%** with Household Income of \$25-50k

Mean Income: \$103,445 | Median Income: \$81,810



**30%** with Some College



**60%** are Married



**65%** do not have Children Under Age 18

## Demographic Highlights

### % COMPOSITION



**74%** are Male



**21%** are 35-44 Years of Age

Mean Age: 49 | Median Age: 49



**25%** with Household Income of \$25-50k

Mean Income: \$78,178 | Median Income: \$60,184



**33%** with High School Degree



**53%** are Married



**58%** do not have Children Under Age 18



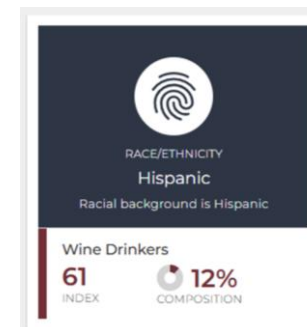
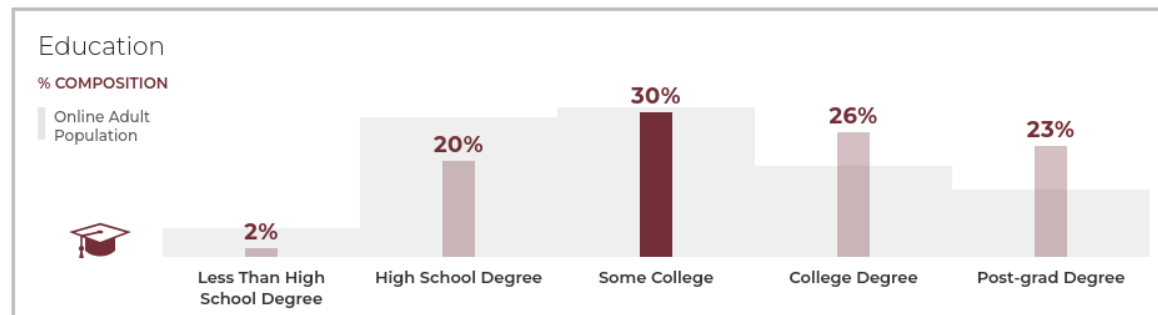
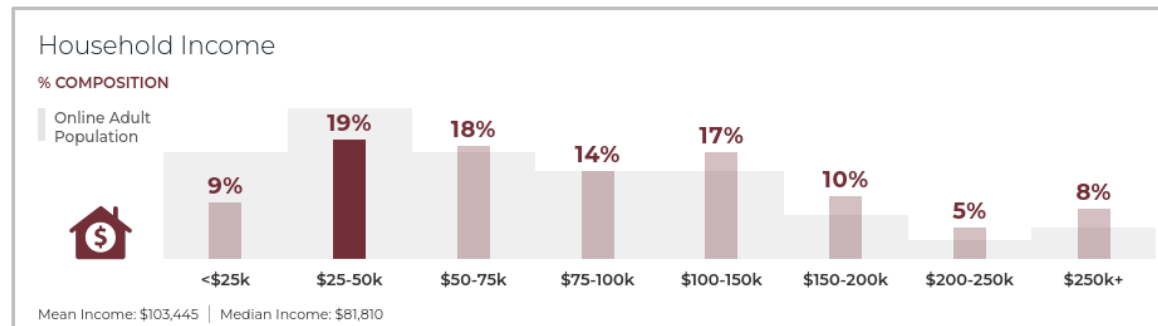
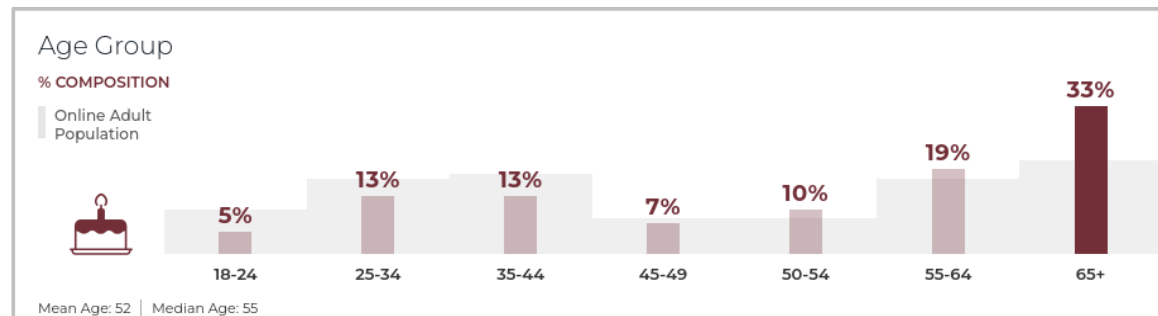
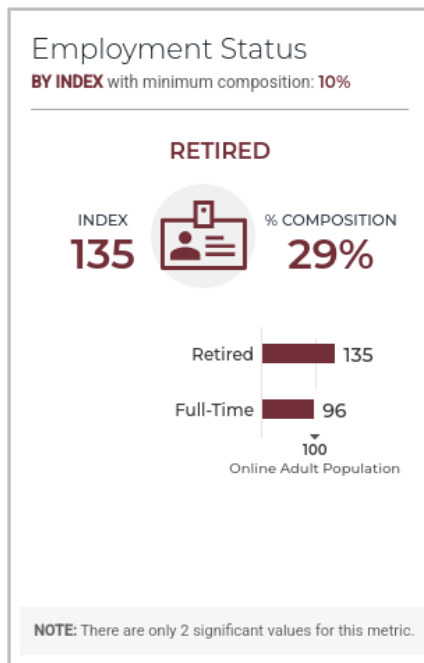
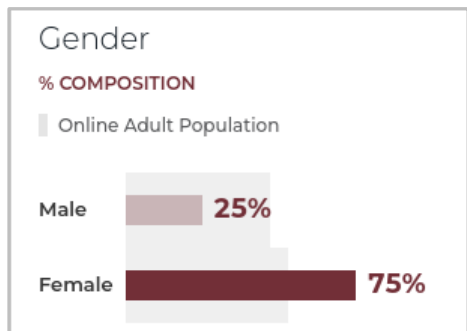
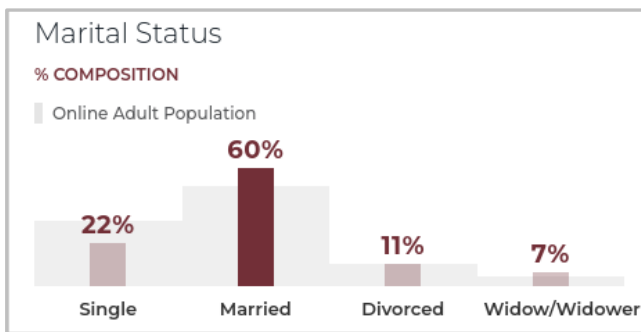
# Wine Drinkers

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# Demographics



- Wine drinkers skew older, with a significant portion aged 55+, suggesting messaging and channels that resonate with mature consumers and others to help engage younger consumers to bring them into the category.
- Women represent the majority of wine drinkers, offering opportunities for female-focused marketing and lifestyle positioning.
- Household incomes vary widely, but many wine drinkers are middle-income and well-educated, making them accessible through both premium and value-oriented offerings.
- Black wine drinkers over-index relative to the online adult population, while Hispanic wine drinkers under-index, suggesting nuanced opportunities to engage diverse audiences.

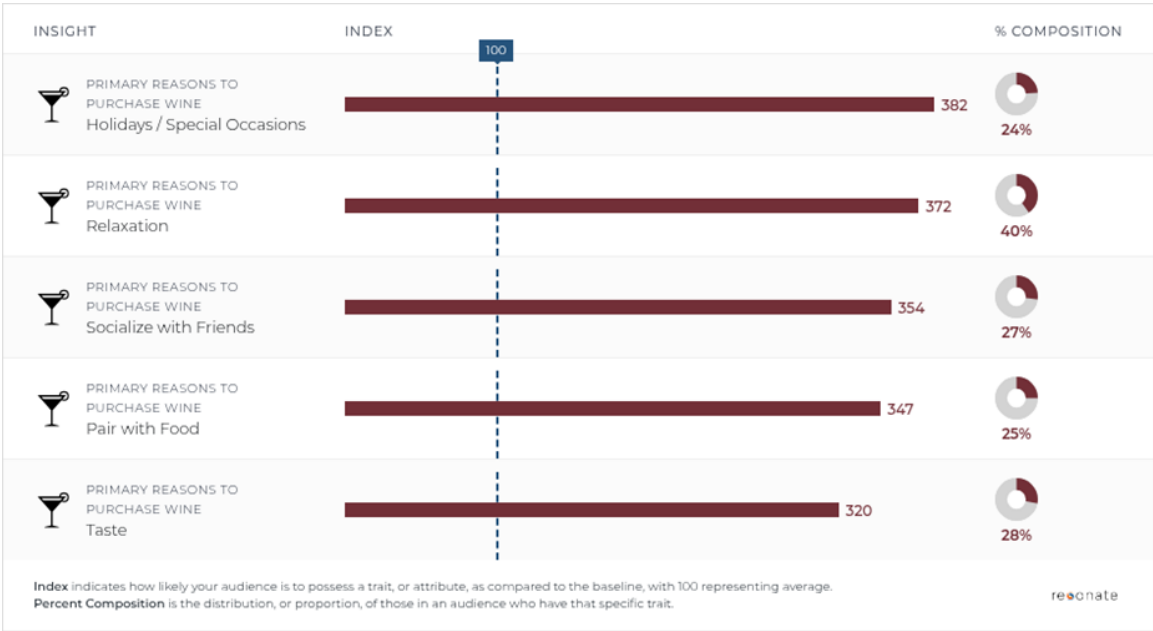
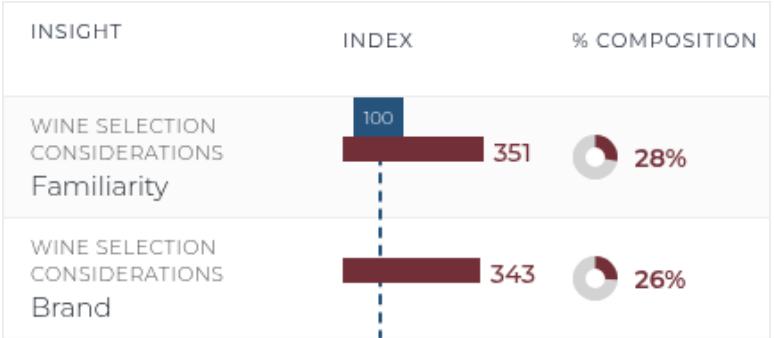
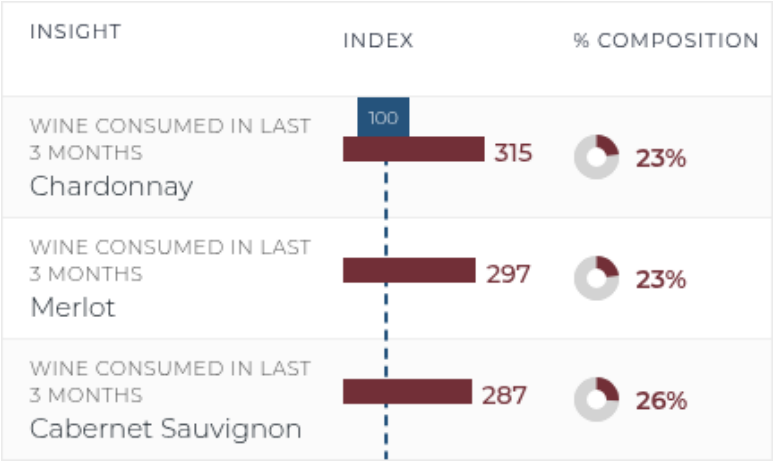




# Category Purchasing Behavior



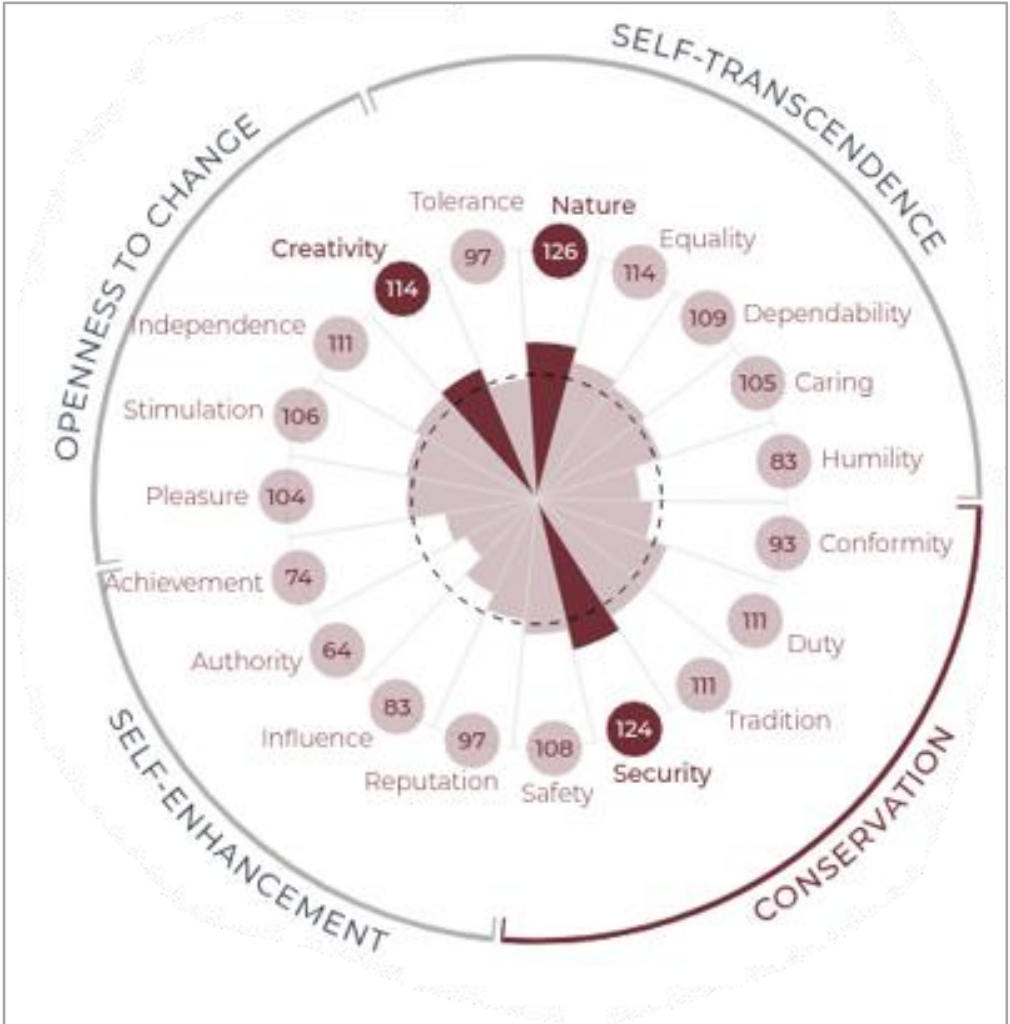
- Overall wine consumption is flat or declining, while most wine drinkers are maintaining current levels, a significant percent have decreased their consumption, findings way to engage with this segment are critical.
- Holidays, relaxation, and socializing are key motivators for wine purchases, suggesting opportunities to connect through these occasions.
- Chardonnay, Merlot, and Cabernet Sauvignon dominate varietal preferences, pointing to varietal-focused messaging potential.
- Familiarity and brand matter most when selecting wine, making reputation and recognition critical for engagement.



# Values & Drivers



## Top Personal Values



- Wine drinkers have a more optimistic outlook on life than the online adult population.

*Tip: Emphasize positivity and optimism in your messaging.*

- Preserving and protecting the environment is important to wine drinkers.

*Tip: Highlight themes of harmony with nature, conservation, and environmental stewardship in your creative execution and messaging.*

- Wine drinkers want to learn about new things and value opportunities for creativity, imagination, and individuality.

*Tip: Showcase innovation, originality, and self-expression.*

- Security and safety, including national security and social order is important to wine drinkers.

*Tip: Convey trust, reliability, and a sense of comfort and community stability.*

## Top Psychological Drivers

**BY INDEX** with minimum composition: 10%

Optimistic Outlook 114

Creativity 112

Expressing Individuality 108

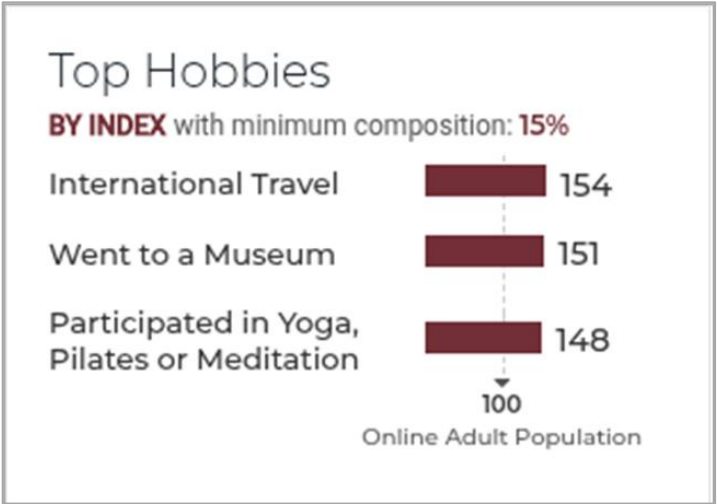
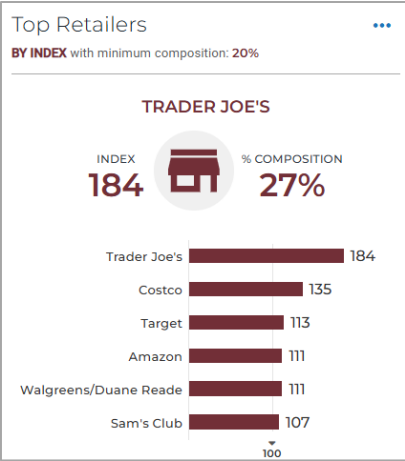
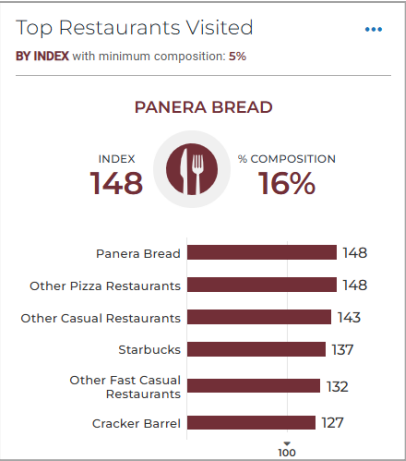
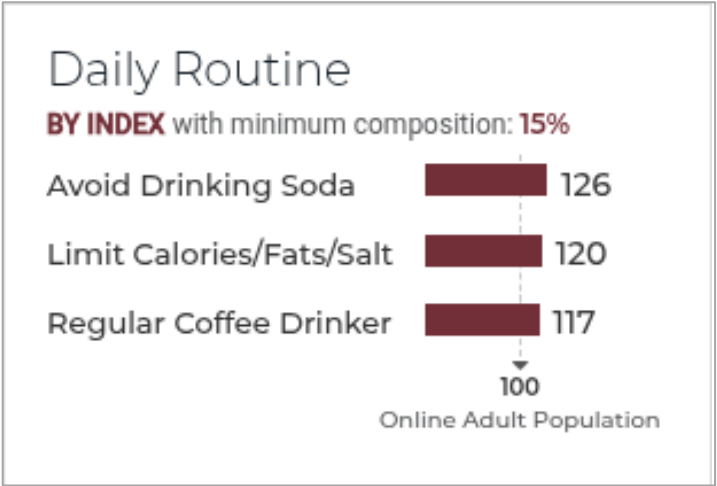
100  
Online Adult Population



# Attitudes & Behavior



- Wine drinkers embrace wellness-conscious habits, creating opportunities to position wine as a mindful indulgence that complements a healthy lifestyle.
- They frequent retailers and restaurants like Trader Joe's, Panera Bread, and Starbucks, suggesting strong alignment for partnerships or promotions in these environments.
- Their interest in cultural and experiential hobbies, such as international travel, museum visits, and mindfulness activities, makes lifestyle-based messaging a natural fit.
- Wine drinkers engage with digital content related to health, education, and travel, offering valuable opportunities for targeted outreach in these categories.



# Media Consumption



- Wine drinkers engage with traditional and streaming television, social media, and online videos making these strong channels to reach this audience.
- HGTV, Hallmark, PBS, Nextdoor, and Pinterest stand out as media environments where wine drinkers over-index.
- This audience actively subscribes to a range of streaming platforms, including both premium (ad-free) and ad-supported services, offering multiple ways to engage them with content and advertising.
- Trusted recommendations play a major role in influencing wine drinkers' purchase decisions.

## Top TV Networks

BY INDEX with minimum composition: 10%

168	Home & Garden Television (HGTV)
158	Hallmark
158	PBS
128	NBC
126	CBS

## Top Social Media Networks

BY INDEX with minimum composition: 10%

	Nextdoor	150
	LinkedIn	124
	Pinterest	121
	Facebook	104

## Top Paid Streaming Subscriptions

BY INDEX with minimum composition: 15%

### HBO MAX (WITHOUT ADS)

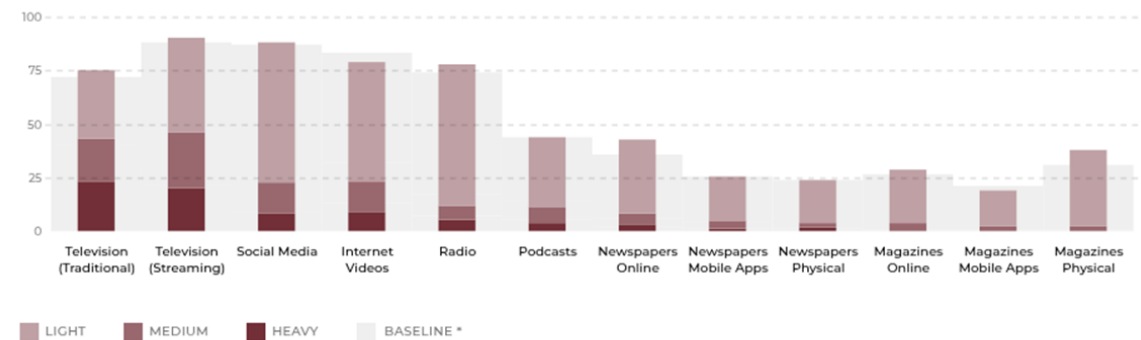
INDEX 122 % COMPOSITION 18%

HBO Max (Without Ads)	122
Amazon Prime Video	118
Hulu (With Ads)	111
Netflix (without ads)	111
Netflix (with ads)	107
Disney+ (with ads)	105

100  
Online Adult Population

## Overall Engagement

% COMPOSITION



\* The baseline represented here is the sum of Light, Medium, and Heavy.

INSIGHT	INDEX	% COMPOSITION
SOURCES OF INFORMATION: ALL PURCHASES Independent Review Sites	130	27%
SOURCES OF INFORMATION: ALL PURCHASES Friend Recommendations or Personal Use	116	46%
SOURCES OF INFORMATION: ALL PURCHASES Brands' Websites	112	25%
SOURCES OF INFORMATION: ALL PURCHASES Family Recommendations or Personal Use	111	46%
SOURCES OF INFORMATION: ALL PURCHASES Customer Written Reviews	108	41%



AUDIENCE CORE



# SUMMARY AND TAKEAWAYS



## Wine Drinkers Summary

### Sophisticated Lifestyle & Cultural Engagement

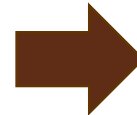
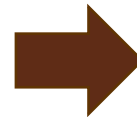
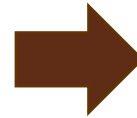
- Travel internationally, visit museums, and attend performing arts shows
- Embrace mindful indulgence that complements a healthy lifestyle
- Want to learn about new things and value opportunities for creativity, imagination, and individuality

### Values-Driven & Environmentally Conscious

- Preserving and protecting the environment is important; value harmony with nature and conservation
- Have a more positive perspective on life than the general online adult population

### Premium Quality & Occasion-Based Consumption

- Familiarity and brand matter most when selecting wine, making reputation and recognition critical
- Holidays, relaxation, and socializing are key motivators for wine purchases



## Wine Drinkers Takeaways

### Focus on Partnerships & Positioning

- Position wine consumption generally and your product specifically as a health-conscious choice that fits into a balanced lifestyle
- Partner with cultural venues and events like performing arts organizations, museums, and lifestyle media outlets
- Incorporate heritage storytelling and

### Incorporate Positivity & Harmony

- Highlight any organic or sustainability credentials on bottle or in advertising
- Ensure visuals and messaging is uplifting, life-affirming and celebratory in its nature

### Build Brand Recognition & Trust

- Prioritize consistent presence in premium retail & restaurants
- Ensure visuals and messaging is uplifting, life-affirming and celebratory in its nature



# Beer Drinkers

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# Demographics

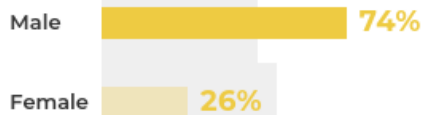


- Beer drinkers are more likely than the online adult population to be male, with a high school education, unemployed and aged 35 to 44.
- This audience has a higher-than-average rate of unemployment and over-indexes on having only a high school education, making value-driven messaging especially important.
- With a mean income of \$78K and half reporting being married, marketers may find success with messages that emphasize stability, everyday value, and down-to-earth appeal

## Gender

### % COMPOSITION

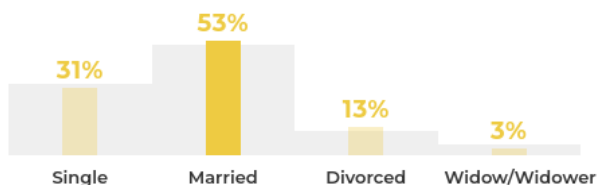
Online Adult Population



## Marital Status

### % COMPOSITION

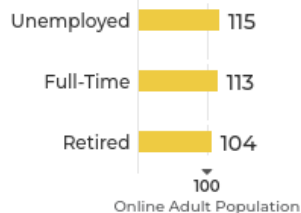
Online Adult Population



## Employment Status

BY INDEX with minimum composition: 10%

### UNEMPLOYED

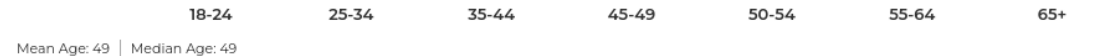


NOTE: There are only 3 significant values for this metric.

## Age Group

### % COMPOSITION

Online Adult Population



## Number of Children Under 18 Years

### % COMPOSITION

Online Adult Population



## Household Income

### % COMPOSITION

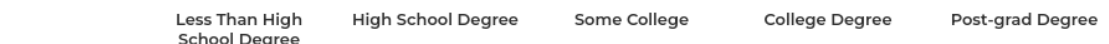
Online Adult Population



## Education

### % COMPOSITION

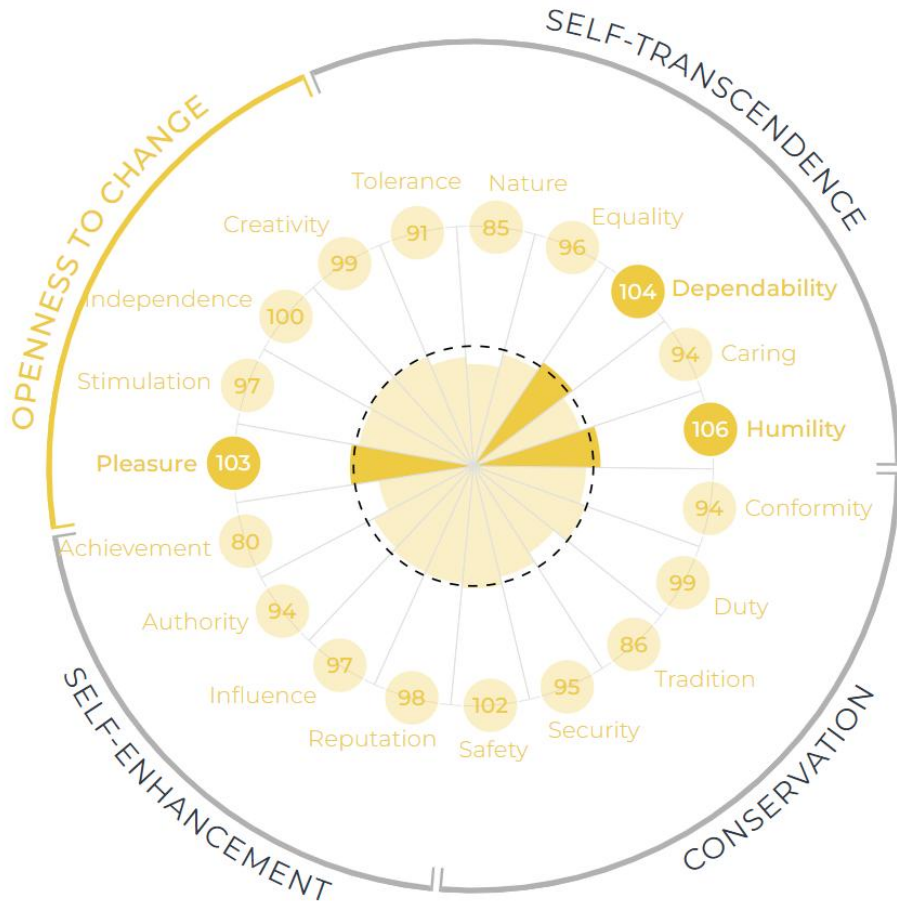
Online Adult Population



# Values & Drivers



## Top Personal Values



- They value humility and tend to keep accomplishments in perspective, often avoiding the spotlight and focusing on others' well-being.

*Tip: Consider themes of modesty, gratitude and respect in your messaging.*

- Dependability is a core value, with importance placed on being responsible, trustworthy, and loyal to those closest to them.

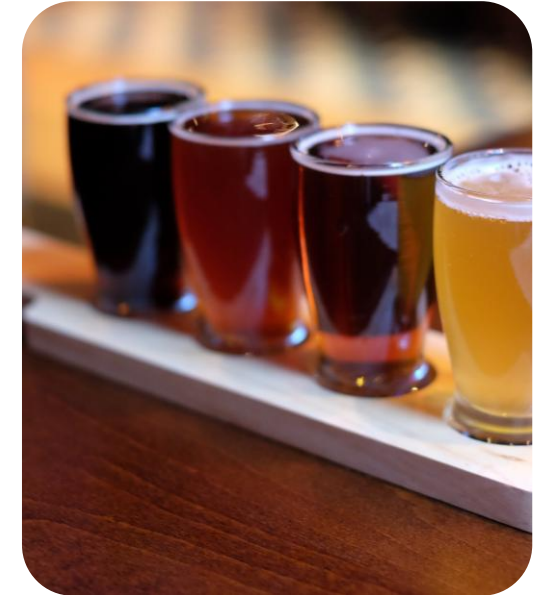
*Tip: Emphasize honesty, reliability, and loyalty in your brand story.*

- This group seeks pleasure and enjoyment in daily life, often driven by a desire for comfort, fun, and stress relief.

*Tip: Tap into themes of fun, indulgence and feel-good moments in your creative.*

- They are motivated by a desire to feel capable and earn the trust and respect of others through their actions.

*Tip: Reinforce feelings of competence and validation through messaging that reflects achievement and social value.*



## Top Psychological Drivers

**BY INDEX** with minimum composition: 10%

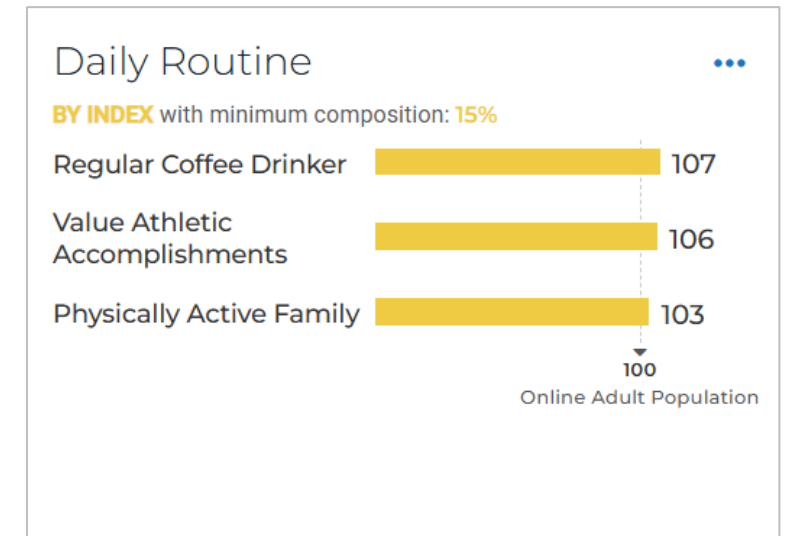
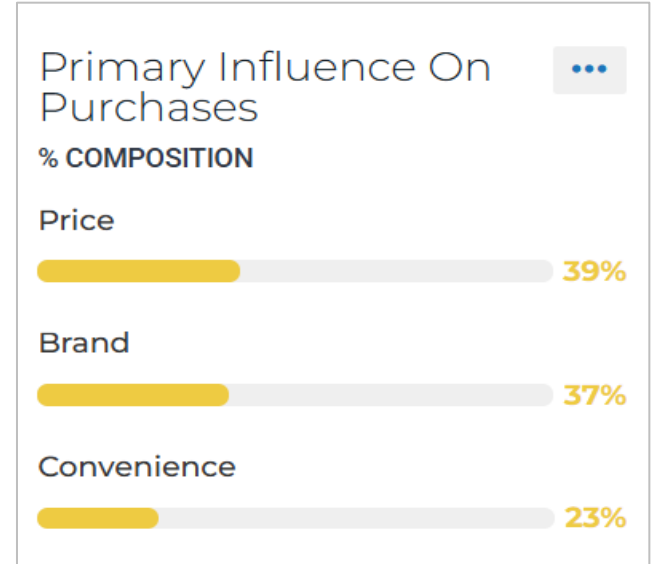
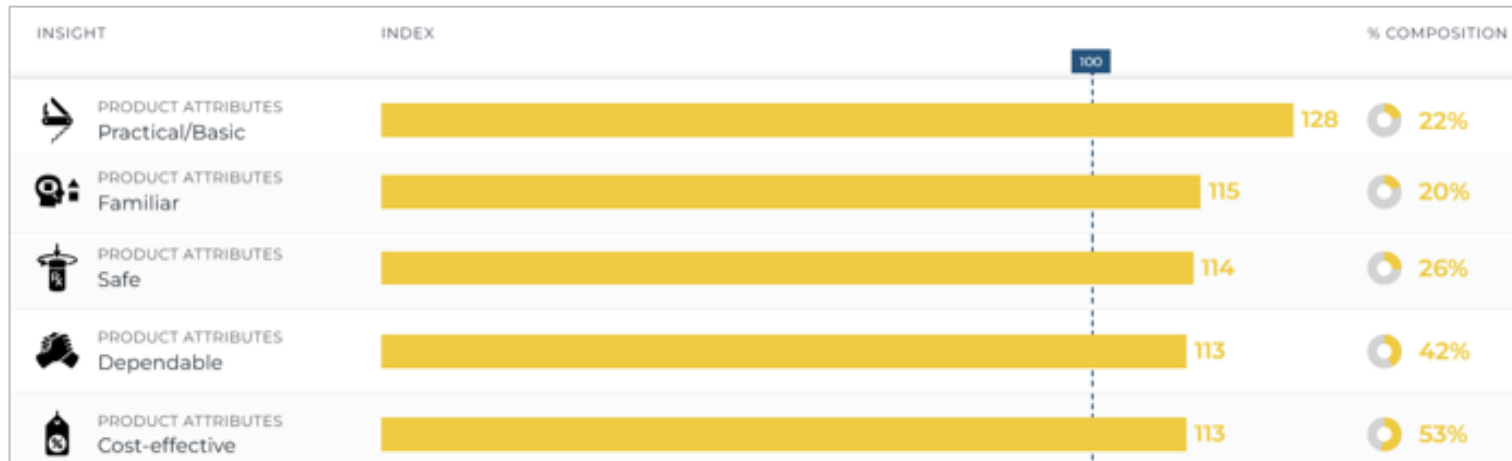




# Attitudes & Behaviors



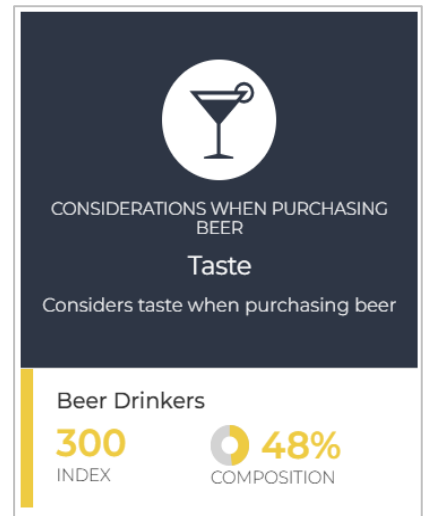
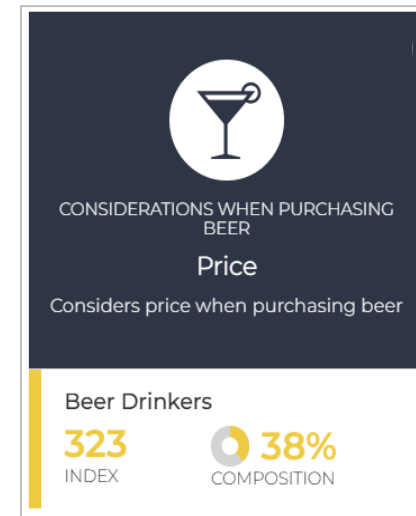
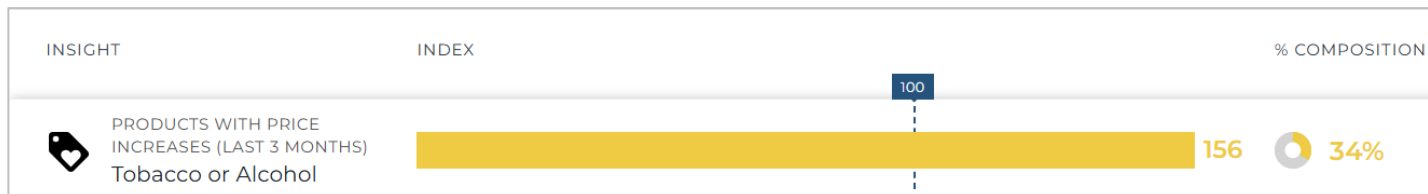
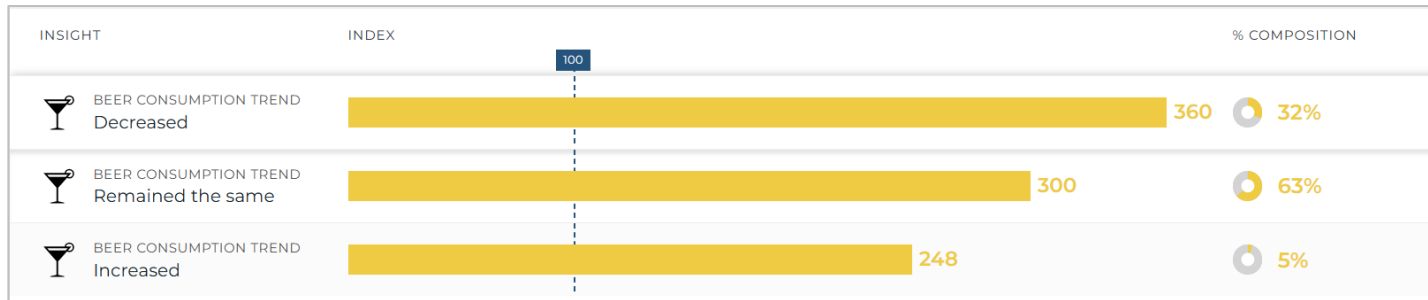
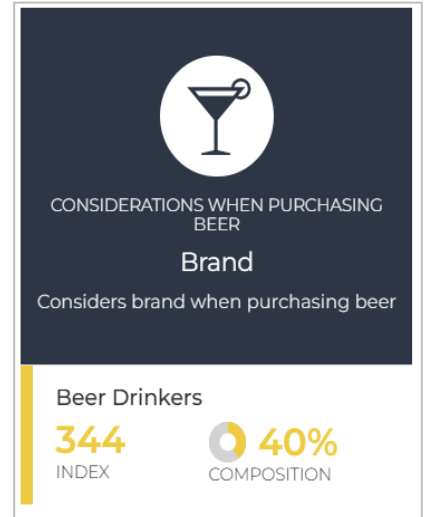
- This audience shows a preference for **practical, familiar, and reliable products**, favoring those that feel safe, cost-effective, and aligned with their everyday routines.
- They tend to be **price-sensitive**, with cost being a top driver of purchase decisions, though brand recognition and convenience still carry meaningful influence.
- While grounded in practicality, they also **value uniqueness**, showing interest in products that feel personal or expressive, especially in social settings.
- They tend to lead **active, energetic lives**, over-indexing as regular coffee drinkers, sports fans, and fitness participants, often within physically active families.
- These behaviors suggest opportunities for marketers to **balance functional messaging with personality-driven branding**, particularly when connecting through lifestyle, health, or social identity cues.



# Category Purchasing



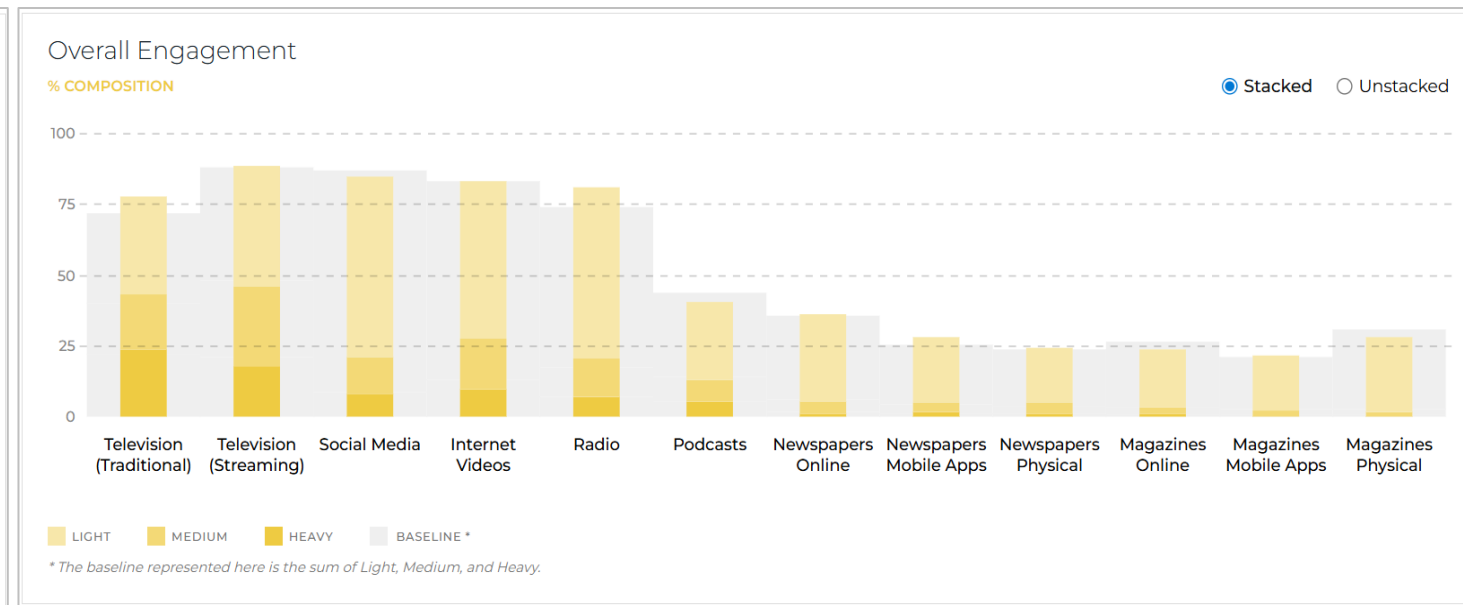
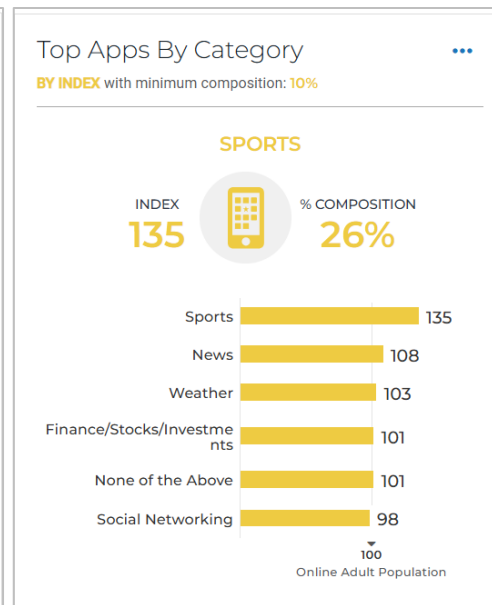
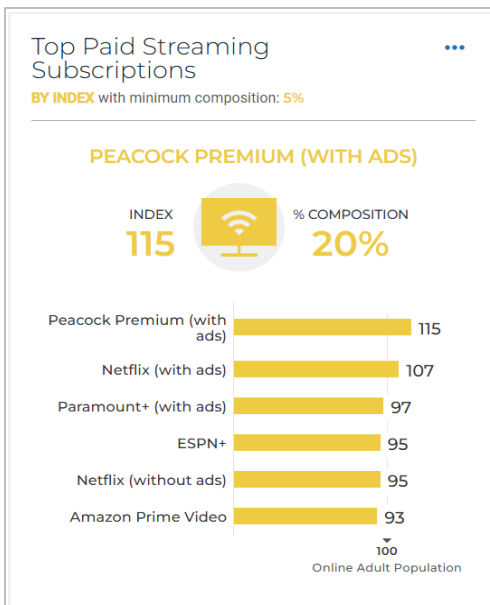
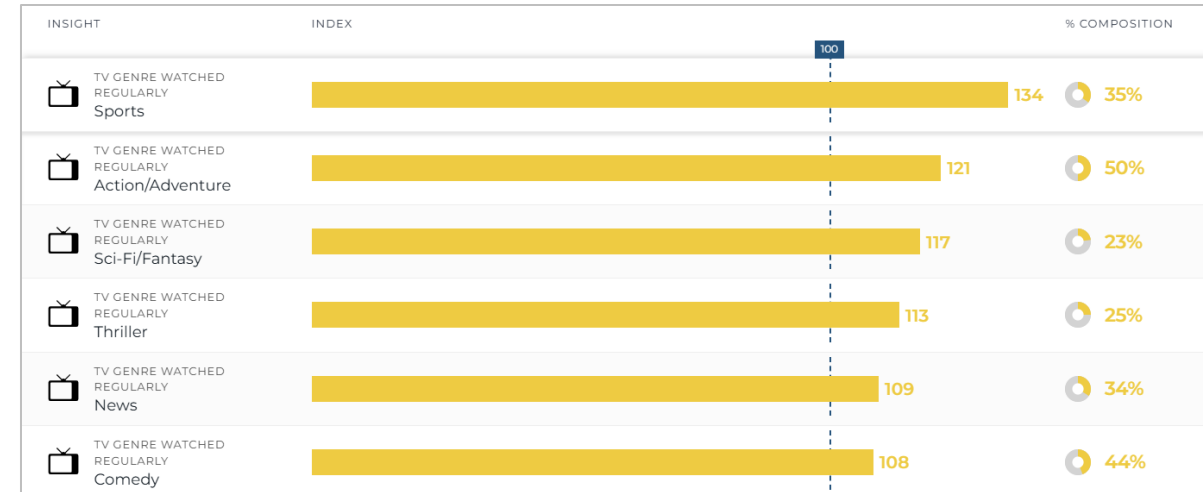
- **Brand, taste and price are among the top considerations**, with cost sensitivity playing a key role in shaping preferences and limiting experimentation.
- Familiarity plays a major role, suggesting that **known and trusted products have an advantage in driving purchase decisions**.
- While most beer drinkers report their consumption has remained steady, this audience over-indexes on those who have decreased consumption, **possibly due to rising costs or shifting lifestyle priorities**.
- This group is particularly aware of recent price increases in alcohol and tobacco, signaling a **heightened sensitivity to value and the risk of pricing-related drop-off**.



# Media Consumption



- This audience shows **strong engagement with television streaming services**, particularly for sports and entertainment, making these platforms effective for targeted messaging.
- They have **notable interest in live sports**, regularly watching events like NFL, MLB, college football, UFC, and NASCAR, creating natural opportunities for brand alignment.
- As **tech-savvy consumers**, they engage frequently with sports and new apps, pointing to mobile and in-app channels as effective ways to reach them.



# OVERVIEW AND TAKEAWAYS



## Beer Drinkers Summary

### Practical & Value-Oriented Mindset

- Price-sensitive with cost being a top driver of purchase decisions, heightened sensitivity to recent price increases
- Favor products that feel safe, cost-effective, and aligned with everyday routines
- While price-focused, brand recognition and convenience still carry meaningful influence

### Active & Social Lifestyle

- Strong engagement with live sports (NFL, MLB, college football, UFC, NASCAR) and fitness participation
- Value uniqueness and products that feel personal or expressive, especially in social settings

### Humble & Dependable Character

- Value humility, keep accomplishments in perspective, avoid spotlight and focus on others' well-being
- Dependability is core value - importance on being responsible, trustworthy, and loyal to those closest to them



## Beer Drinkers Takeaways

### Lead with Value

- Create bulk purchase options, loyalty programs, and sales
- Focus on practical benefits like 'great taste, great value'
- Lean into the routine and habitual nature of having a beer in certain circumstances
- Position brand as the essential companion for events

### Lean into Sports and Activities

- Invest in sports sponsorships even at the local level
- Create campaigns around 'sharing the moment' or 'celebrating the wins'

### Be Authentic

- Se modest, relatable messaging that avoids flashy language
- Emphasize relatability, trustworthiness, & beer you can count on



**For more information on  
SMART Personas, contact us at**

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