



GROUND SIGNAL

OCTOBER 2026



CHARDONNAY WINE INSIGHTS

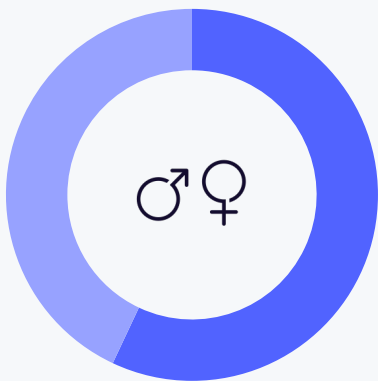
NATIONAL





Demographics

Gender

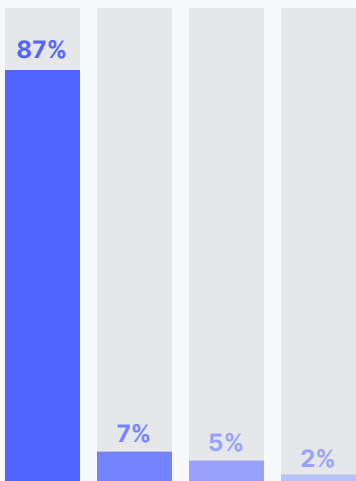


43% Male
57% Female

+0% +0%

Cultural Affinity

↑38%

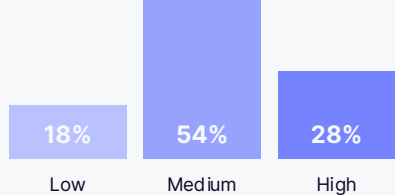


White 87%
Hispanic 7%
Black 5%
Asian 2%
LGBTQ+: 8%

Income

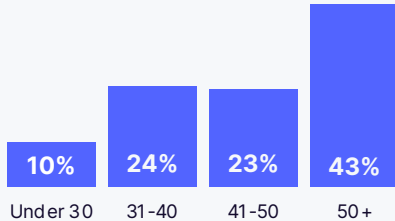
+6%

↑16%



Age

↑21%



Occasion Mentions



Top Chardonnay Occasions



Consumers are **288%** more likely to mention **Happy Hour** when drinking Chardonnay than On-Premise posts generally.

Occasion Ranked by Mention Share	Mention Share	Index
DINNER		↑265%
HAPPY HOUR		↑288%
DATE NIGHT		↑200%
GIRLS NIGHT		↑115%
VALENTINE'S DAY		↑155%
SPRING SEASON		↑90%
GALENTINE'S DAY		↑99%



Trending Chardonnay Occasions



The percentage of consumers who post about **Galentine's Day** and Chardonnay has increased by **160%** over the last two years.

Occasion Ranked by Growth	2-YR Growth
GALENTINE'S DAY	↑160%
SPORTS	↑82%
FOURTH OF JULY	↑59%
WEDDING	↑40%
SPRING SEASON	↑35%





Environment Mentions



Top Chardonnay Environments



Consumers are **40x** more likely to mention the **Sommelier** when they post about Chardonnay than when they post in the On-Premise generally.

Environment Ranked by Mention Share	Mention Share	Index
PATIO		↑ 281%
FINE DINING		↑ 946%
SOMMELIER		↑ 3.9K%
MOST REVIEWED		↑ 591%
PRIVATE EVENTS		↑ 199%
TOP RESTAURANTS		↑ 247%
KID FRIENDLY		↑ 194%



Trending Chardonnay Environments



The percentage of consumers who mention drinking Chardonnay in **Kid Friendly** environments has grown by **110%** over the last two years.

Environment Ranked by Growth	2-YR Growth
KID FRIENDLY	↑ 110%
RELAX	↑ 95%
CIGARS	↑ 91%
KARAOKE	↑ 81%
WATERFRONT	↗ 46%
JAZZ	↗ 17%
LIVE MUSIC	↗ 15%



Top Chardonnay Channels



16% of accounts with Chardonnay on menu are **American Restaurants** which is **91%** higher than its share of all On-Premise accounts.

Key Trade Channel	Channel Share (%)	Index vs. US
AMERICAN RESTAURANTS	16%	↑ 91%
ITALIAN RESTAURANTS	8.4%	↑ 127%
PUBS & TAVERNS	7.9%	↘ 17%
MEXICAN / TEX-MEX RESTAURANTS	7.4%	↘ 15%
ASIAN RESTAURANTS	5.7%	↗ 24%



jimmysbroadway

Pacific Northwest perfection—
Dungeness crab and a Chardonnay.





CHARDONNAY BY-THE-GLASS (BTG)

MENU INSIGHTS | NATIONAL

POWERED BY GROUND SIGNAL.AI

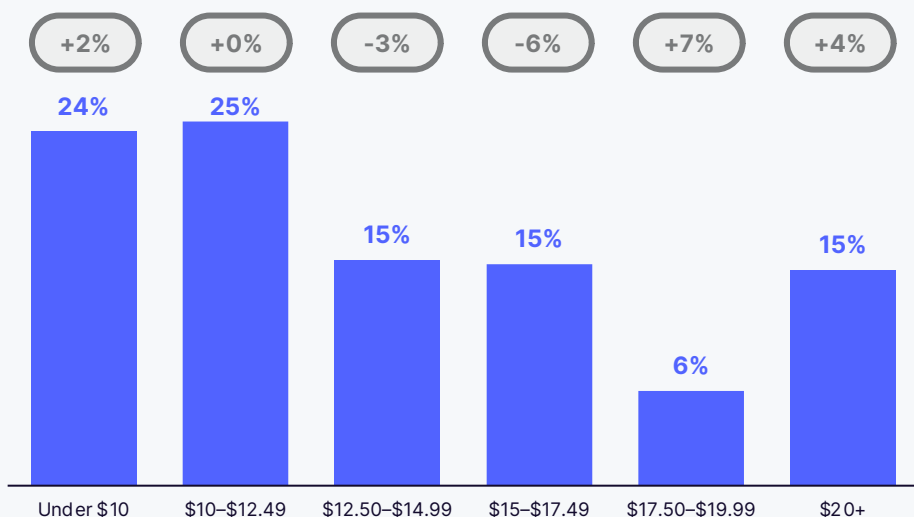


How are BTG prices distributed on Menu



24% of Chardonnay By-the-Glass listings are under \$10, which is 2% higher than the share of By-the-Glass listings across all varietals.

Index vs all BTG listings.



Valenza



tmkrya

I fell in love with Brie and Chardonnay. 🍷❤️



What Brands are Winning BTG Menus in Independent Accounts?



Kendall-Jackson has 11% of all Chardonnay By-the-Glass listings, which has increased 1% versus the prior year.

BRAND		BY-THE-GLASS MENU SHARE (YoY CHANGE)		BOTTLE + BTG MENU SHARE (YoY CHANGE)		AVERAGE BTG PRICE (YoY CHANGE)	
KENDALL-JACKSON	KENDALL-JACKSON	11%	▲ 1%	11%	▲ 1%	\$11.08	▲ 2%
SONOMA-CUTRER	SONOMA-CUTRER	6%	▼ 4%	9%	▼ 3%	\$15.10	▲ 2%
LA CREMA	LA CREMA	4%	▲ 0%	5%	▲ 0%	\$13.51	▲ 2%
ROMBAUER VINEYARDS	ROMBAUER VINEYARDS	3%	▲ 13%	8%	▲ 10%	\$21.50	▲ 2%
CHALK HILL	CHALK HILL	3%	▲ 0%	3%	▼ 2%	\$14.54	▲ 0%
LOUIS JADOT	LOUIS JADOT	2%	▲ 0%	4%	▲ 5%	\$16.11	▲ 2%
Cakebread Cellars	CAKEBREAD CELLARS	1%	▲ 5%	7%	▼ 1%	\$21.80	▲ 2%
FAR NIENTE	FAR NIENTE	1%	▲ 7%	5%	▲ 7%	\$25.63	▲ 2%
JORDAN	JORDAN	1%	▲ 0%	4%	▼ 1%	\$20.61	▼ 1%

