

South Korea On Premise Consumer Pulse Report

CGA by NIQ, March 2026



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CGA'S MONTHLY CONSUMER PULSE

- This monthly On Premise Consumer Pulse report is intended to be a fast-turnaround 'temperature check' of the channel and the consumers who visit bars and restaurants in Korea.
- This study looks into their On Premise behaviour over the *past month* and tests visit intention for the *month ahead*.
- In other countries, this monthly check-in has become a staple for beverage suppliers and other businesses interested in the channel.
- These monthly updates will help interested parties to stay close to the consumer's intentions and behaviours for our beloved On Premise channel.
- For this **March 2026** issue, we surveyed 750 consumers (aged 19+) between 6th and 13th March. These consumers were situated across all the Korea regions and must typically visit On Premise venues at least once within a 3-month period.

Overview

On Premise visitation continues to be strong

On Premise penetration remains stable, with drinks-led visitation remaining flat but food-led engagement showing steady, incremental growth since the start of the year.

South Korean consumers have engaged with the On Premise on weekly basis more (+4pp) and have also spent ₩266k on average in March in the On Premise, with the average spend bouncing back after February's dip.

Explore how to maintain or increase consumers' weekly visitation rates and average On Premise spend

The influence of international tourism on local consumption habits

East Asia remains the dominant overseas destination, with Southeast Asia, Europe and North America capturing smaller but notable shares of travellers.

Beer is the leading drink choice abroad, with soft drinks also widely consumed, especially in Southeast Asia, while wine stands out amongst those visiting Europe and North America.

Experiences abroad with beer especially shape the South Korean landscape as the top category consumers drank upon their return.

Consider how international beer, soft drinks, wine and highballs shape the South Korean On Premise landscape

Consumption and future consideration of East Asian spirits

A significant share of consumers have never tried East Asian spirits in the On Premise.

Amongst those who have, Sake is the clear favourite, followed by Kaoliang, with Japanese Shochu and Ergutou attracting smaller shares of the market.

Sake also leads future interest with Kaoliang next in line whilst other East Asian spirits drawing more limited appeal.

How can you capitalise on the appeal of sake in South Korea and expand the reach and popularity of other East Asian spirits?

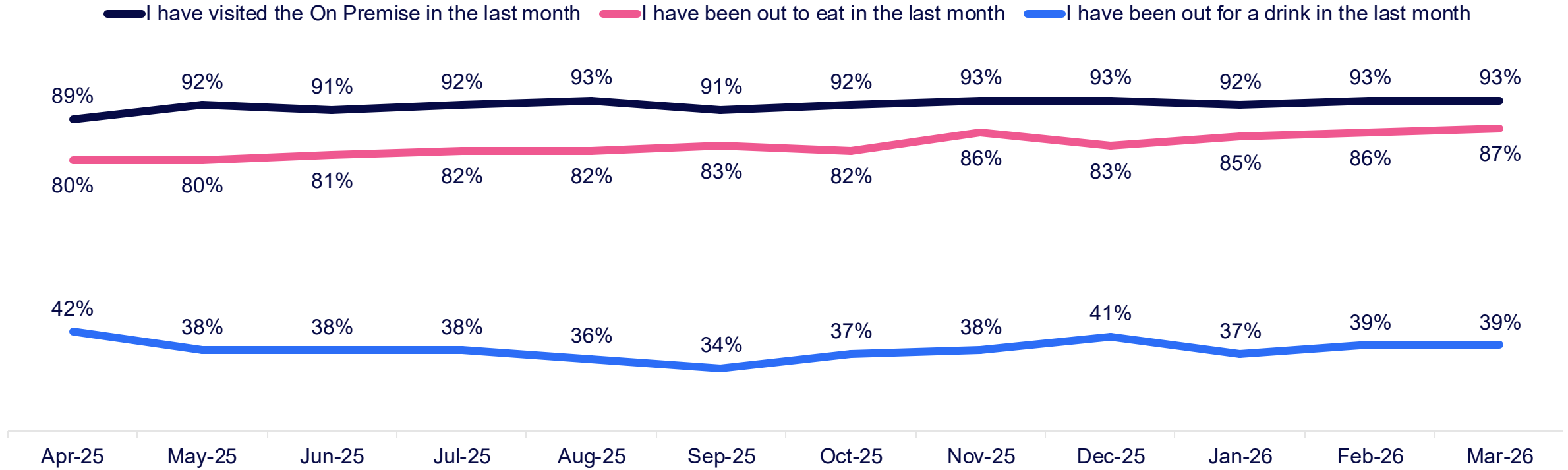
On Premise visitation

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WHICH OF THE FOLLOWING STATEMENTS APPLY TO YOU?

Proportion of consumers visiting the On Premise for food and/or drinks each month



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 750

91%
of consumers are
planning to go out to eat
or drink in the next month

AND DO YOU PLAN ON VISITING BARS AND RESTAURANTS TO EAT AND/OR DRINK IN THE NEXT MONTH?

Proportion of consumers planning to visit the On Premise in the next month

78%

of consumers are
planning to go out to
eat in the next month



39%

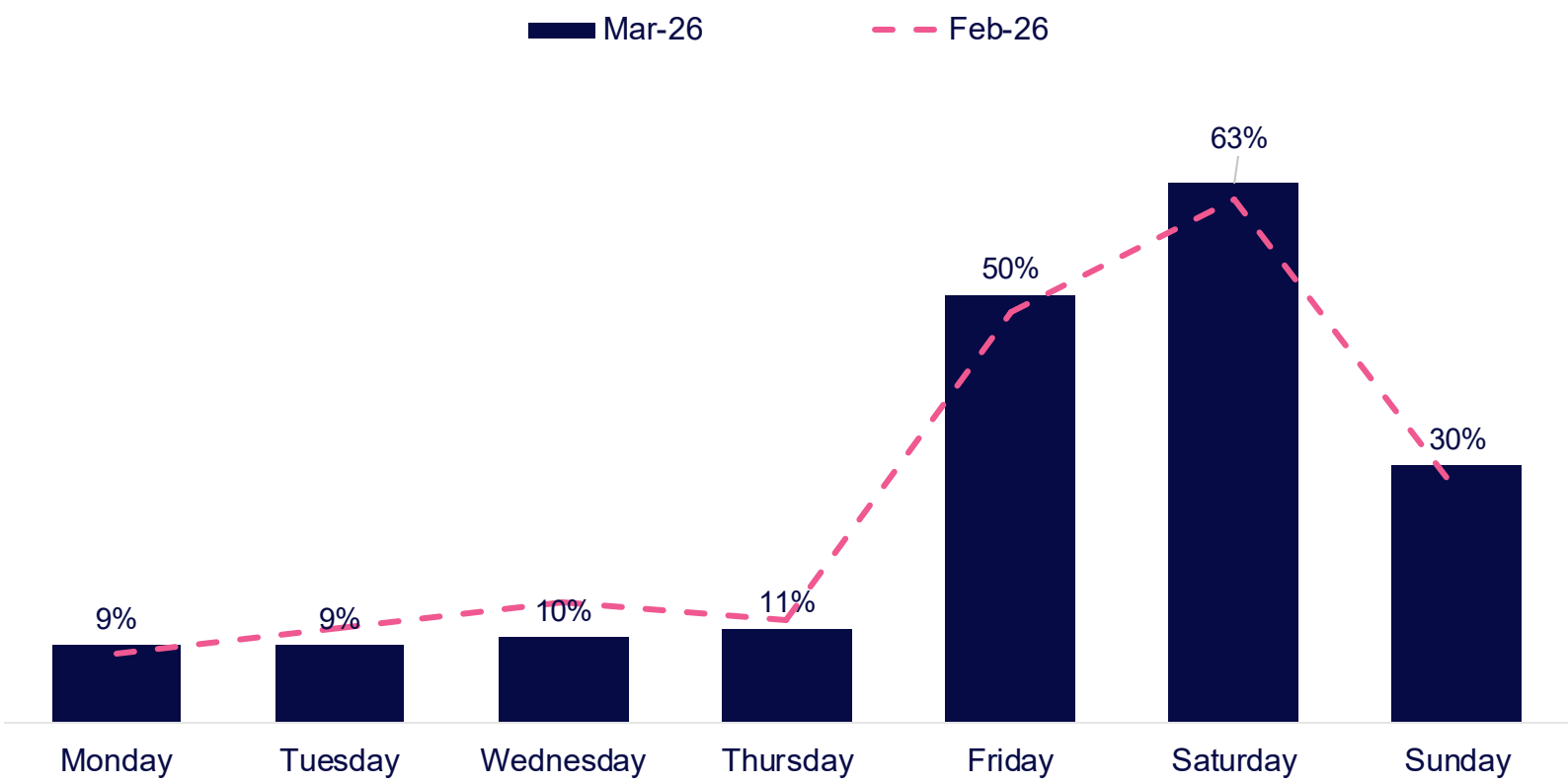
of consumers are
planning to go out to
drink in the next
month



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 750

ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE OVER THE PAST MONTH?

Proportion of consumers visiting the On Premise each day of the week over the past month



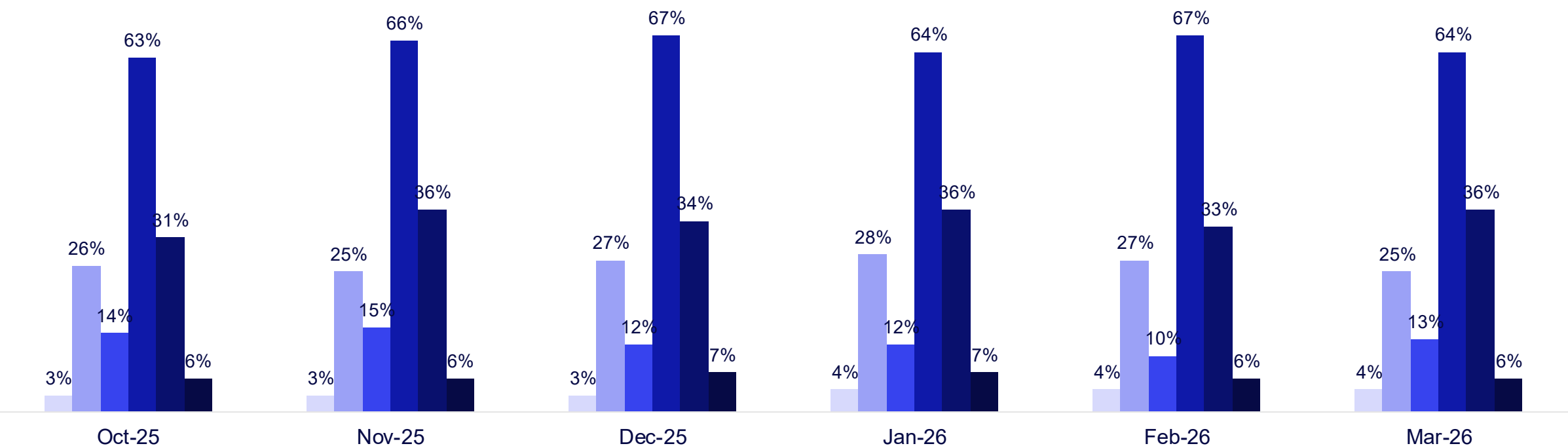
SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 697



WHAT TIMES OF DAY HAVE YOU BEEN VISITING BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

Proportion of consumers visiting the On Premise each daypart over the past six months

■ Brunch (before 12pm) ■ Lunch (12pm-2pm) ■ Mid-afternoon (2pm-5pm) ■ Early evening (5pm-8pm) ■ Late evening (8pm-10pm) ■ Late night (after 10pm)



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE:: 697

HOW MUCH HAVE YOU SPENT ON EATING AND DRINKING OUT OVER THE PAST MONTH?

Average monthly spend in the On Premise per consumer



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 697

On average
consumers have
visited the
On Premise

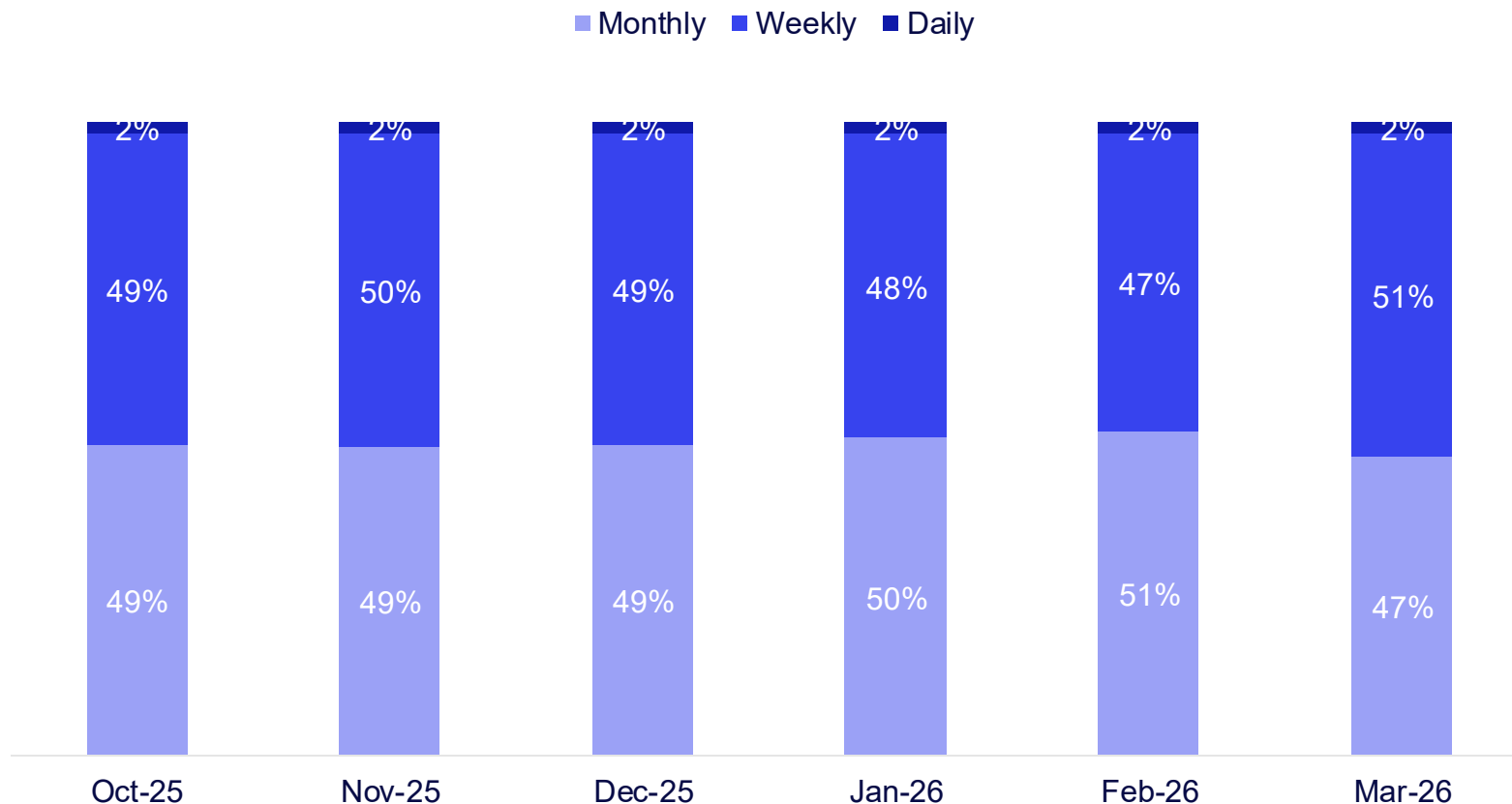
5.2

times in the
past month

=0pp vs February 2026

HOW OFTEN HAVE YOU VISITED BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

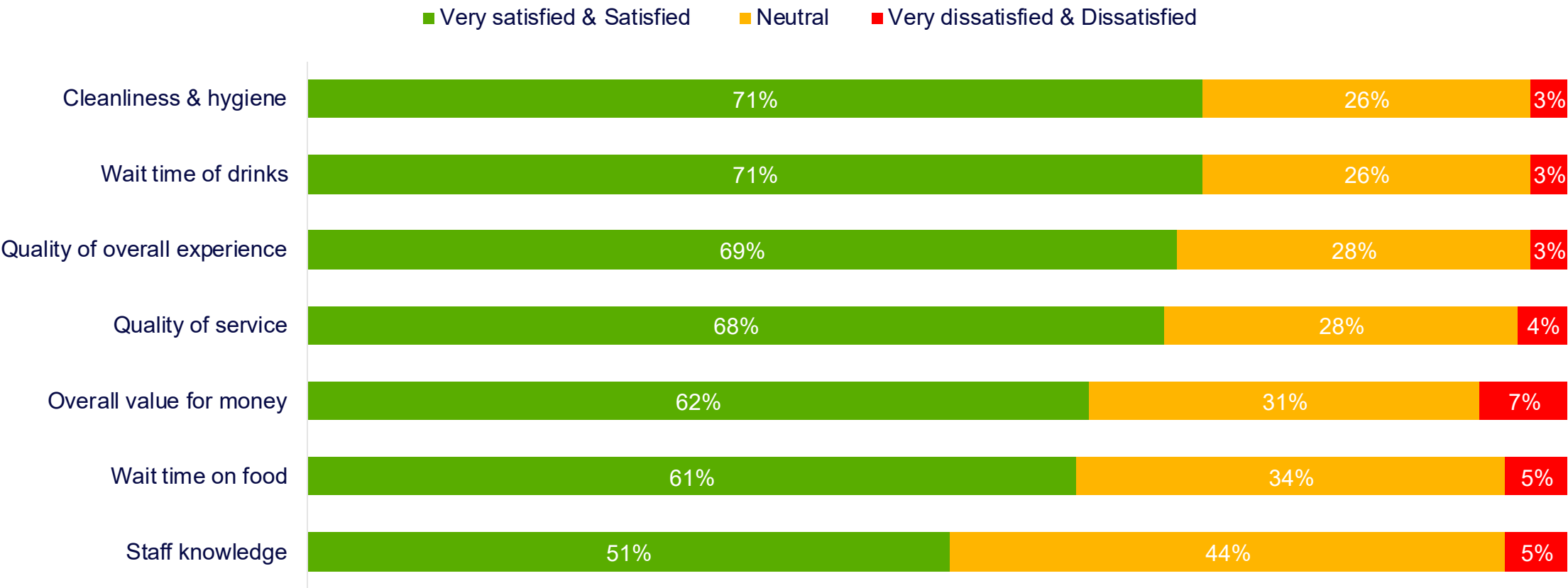
Proportion of consumers visiting the On Premise at each frequency



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 698

HOW SATISFIED WERE YOU WITH EACH OF THE FOLLOWING AREAS ON YOUR MOST RECENT VISIT TO A BAR, RESTAURANT OR SIMILAR VENUE ?

Consumer satisfaction with each of the following on their most recent On Premise visit



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 647 - 749

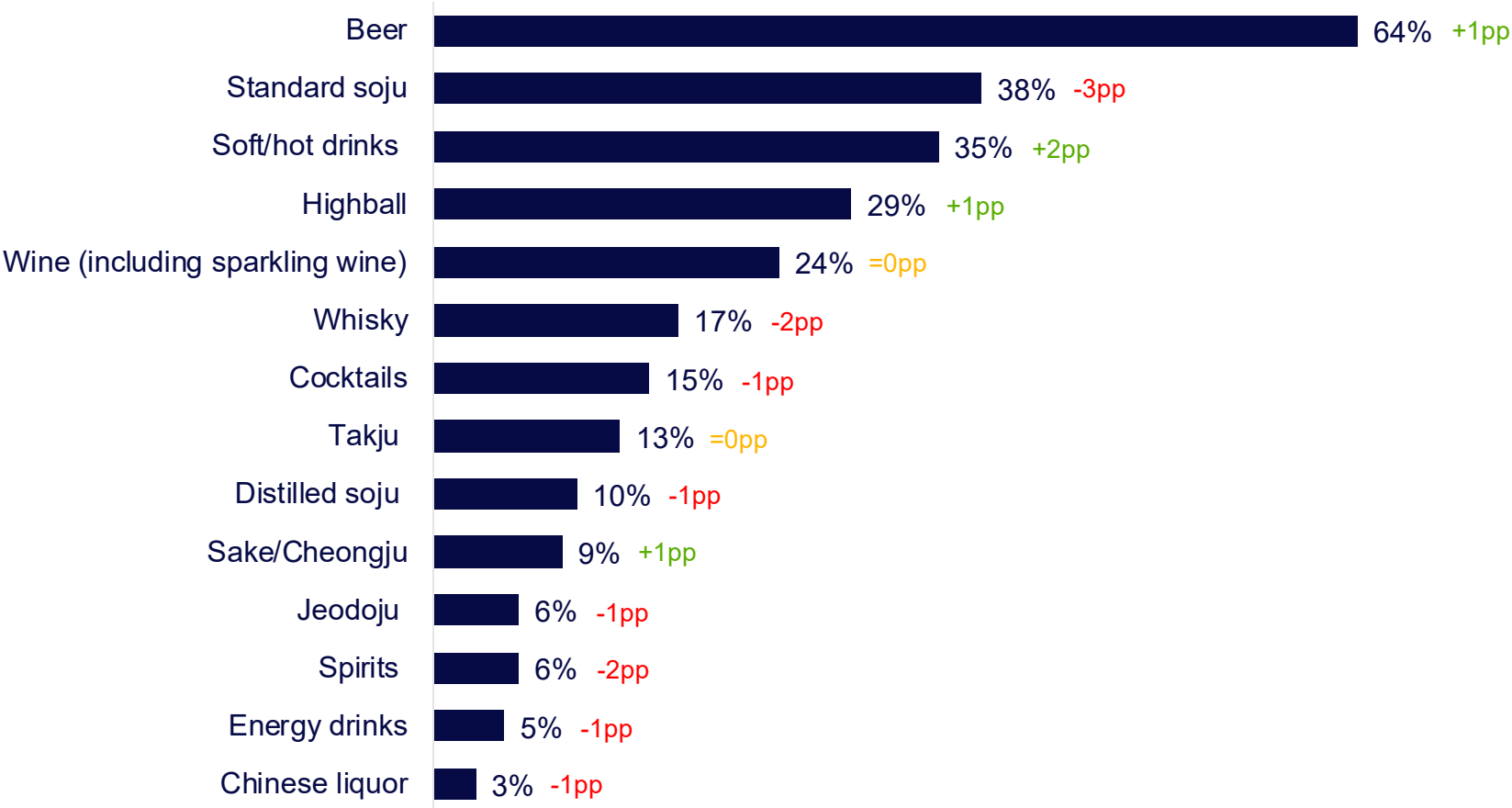
Category consumption

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WHICH OF THE FOLLOWING DRINKS HAVE YOU DRANK IN BARS AND/OR RESTAURANTS IN THE PAST MONTH?

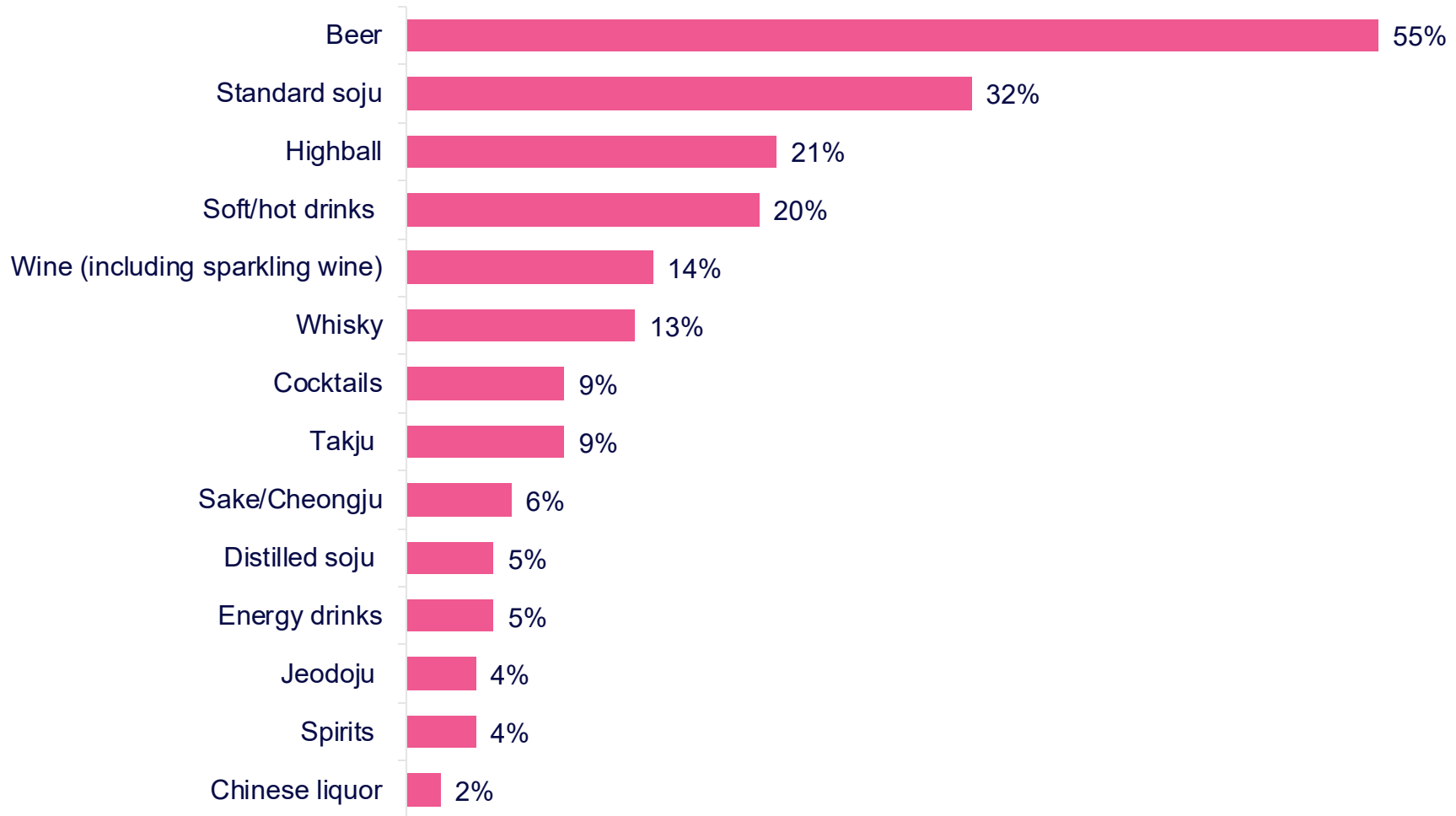
*Proportion of consumers drinking each category in the On Premise over the past month
Indexed vs 12-month average*



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 698

THINKING ABOUT YOUR MOST RECENT VISIT TO A BAR, RESTAURANT OR SIMILAR VENUE, WHICH OF THE FOLLOWING CATEGORIES DID YOU DRINK?

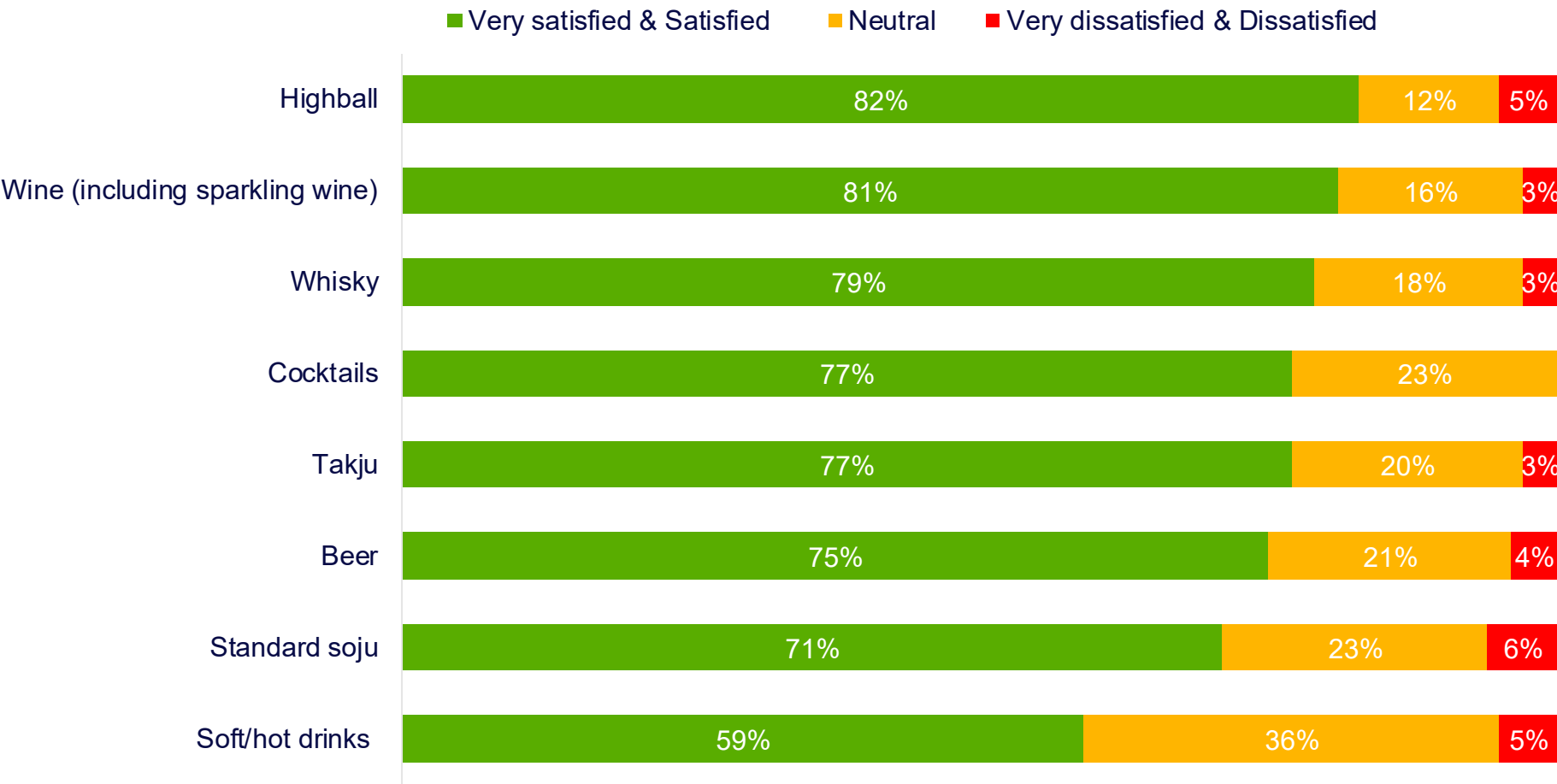
Proportion of consumers drinking each category on their most recent On Premise visit



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 750

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT ACROSS EACH OF THE FOLLOWING MEASURES?

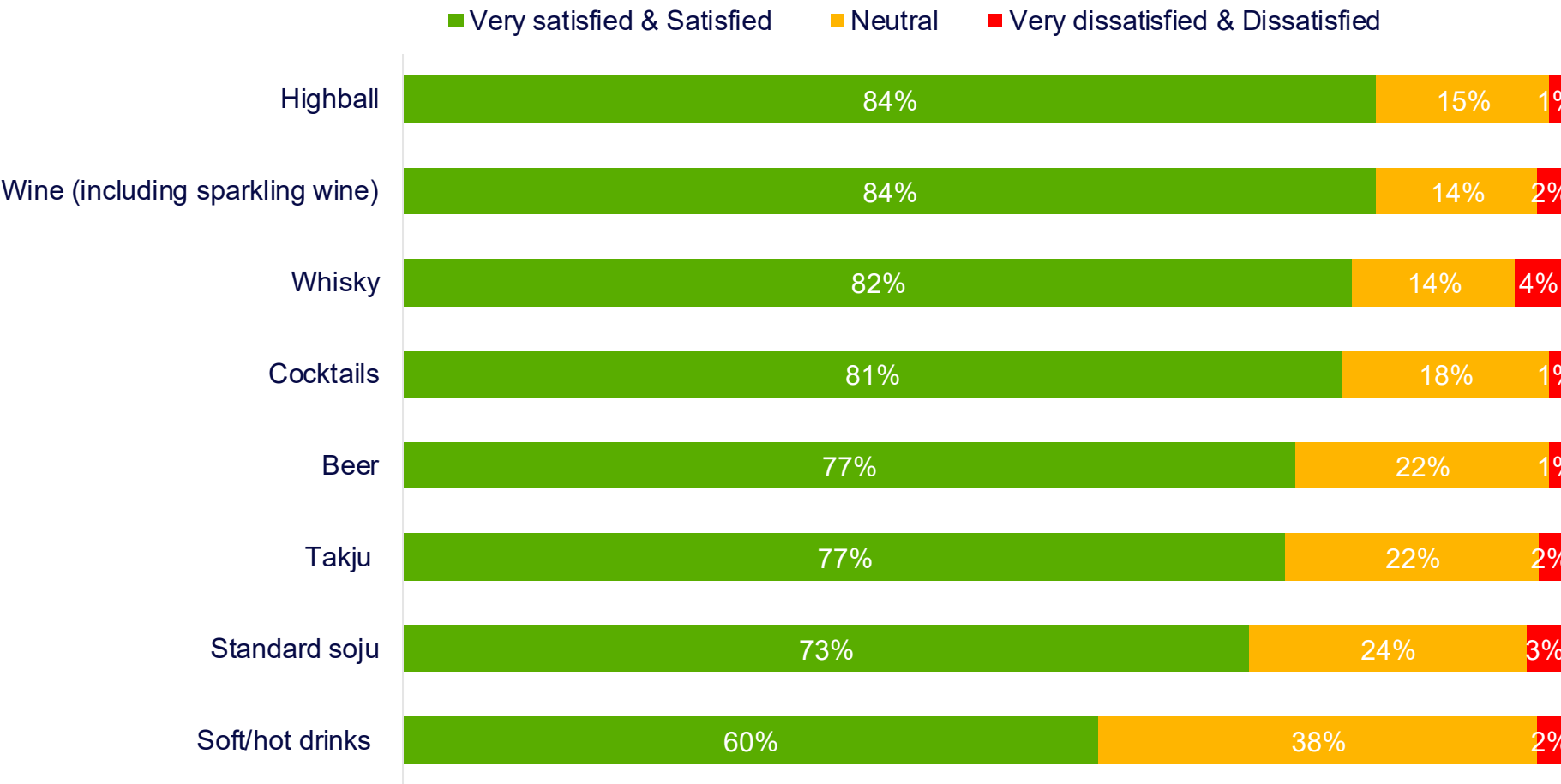
Value for money



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 65 - 416

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT ACROSS EACH OF THE FOLLOWING MEASURES?

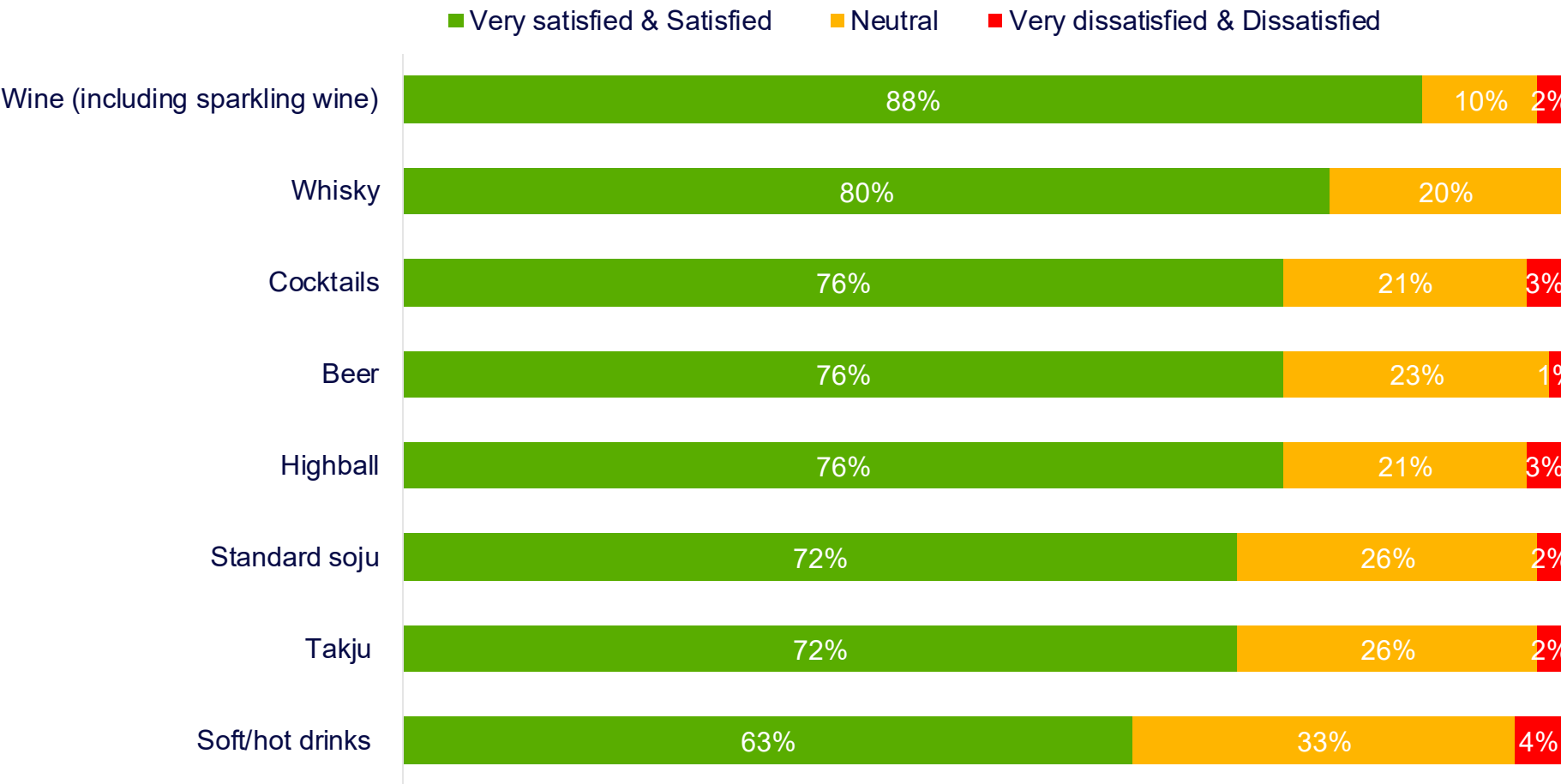
How exciting the drink was



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 65 - 407

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT ACROSS EACH OF THE FOLLOWING MEASURES?

The overall quality of the serve (e.g., glassware and service)



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 65 - 414

HAVE YOU TRIED A NEW DRINK WHEN EATING OR DRINKING OUT OVER THE PAST MONTH?

Trying new drinks in the On Premise

'New drink' covers any of the following: New brand, new category and new format



43%

Yes



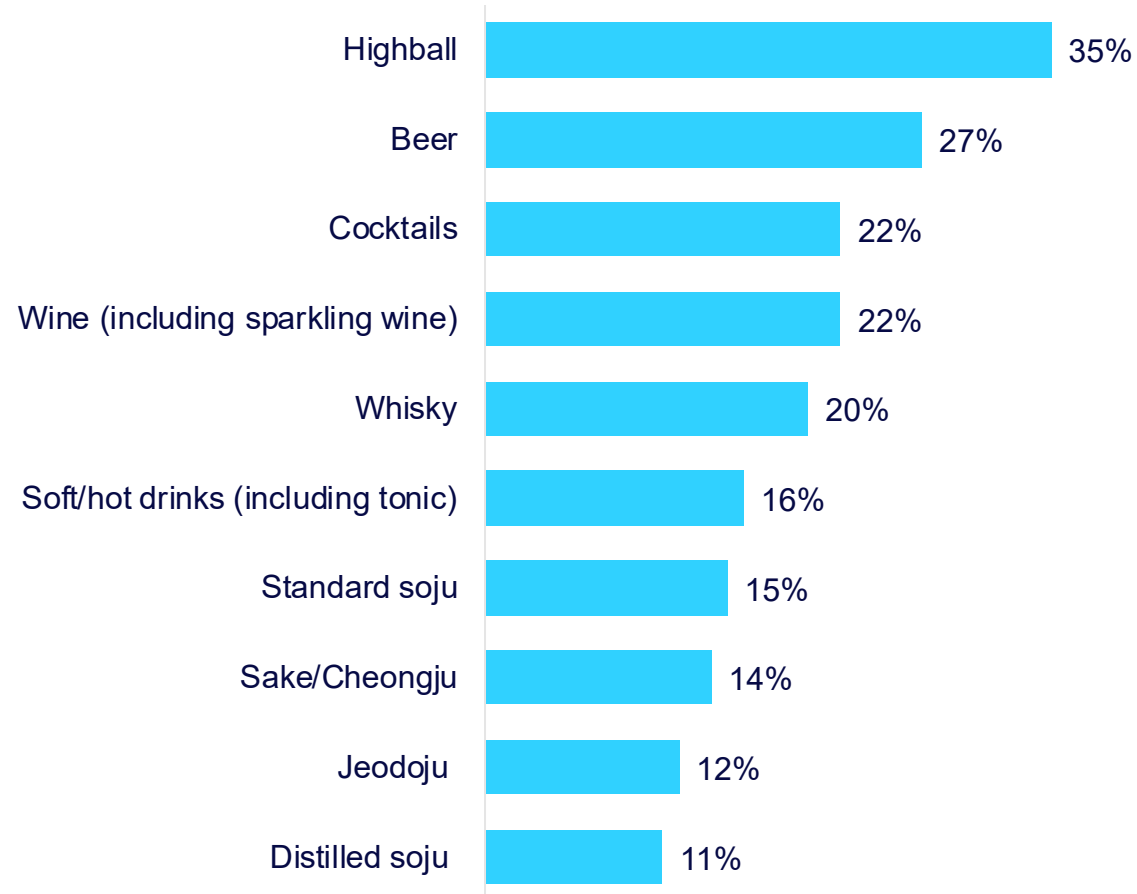
57%

No

SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 698

WHICH OF THE FOLLOWING CATEGORIES WAS THE NEW DRINK THAT YOU TRIED?

Categories in which consumers have trialed new drinks in the past month (Top 10)



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 302

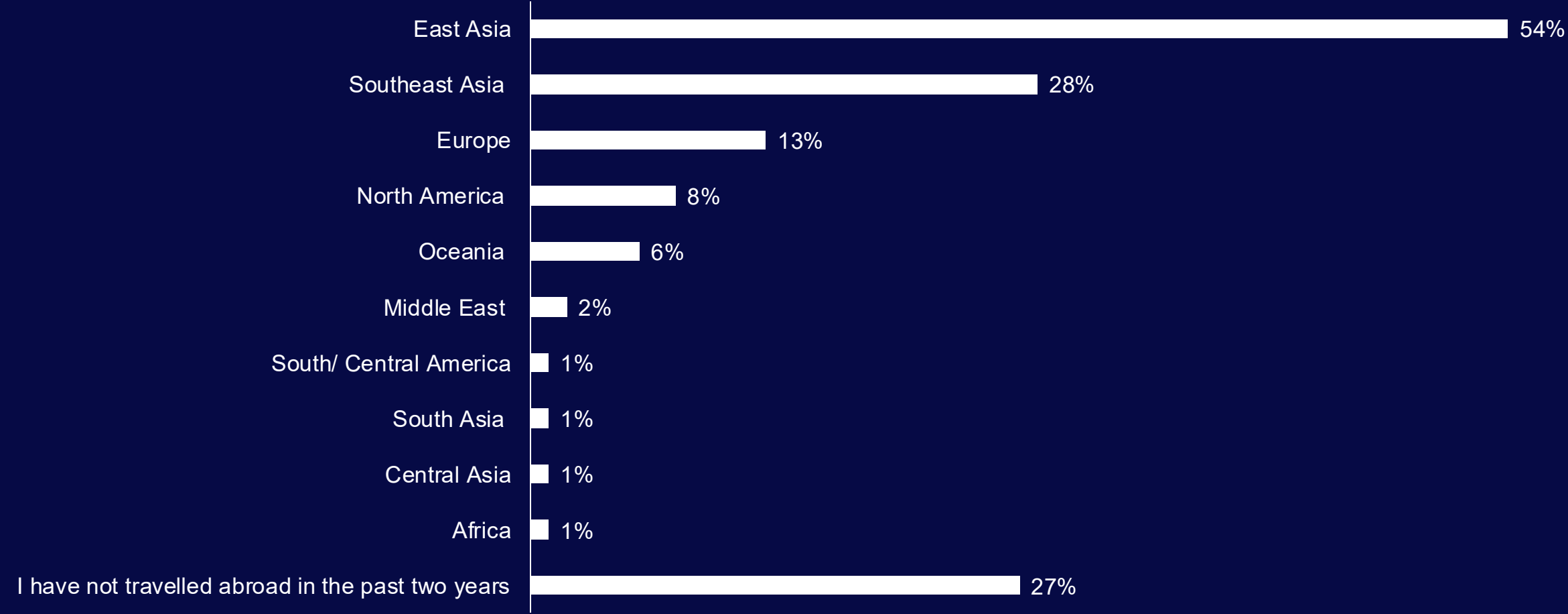
Hot Topic: The influence of international tourism on local consumption habits

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WHICH OF THE FOLLOWING OVERSEAS REGIONS HAVE YOU TRAVELLED TO IN THE PAST TWO YEARS?

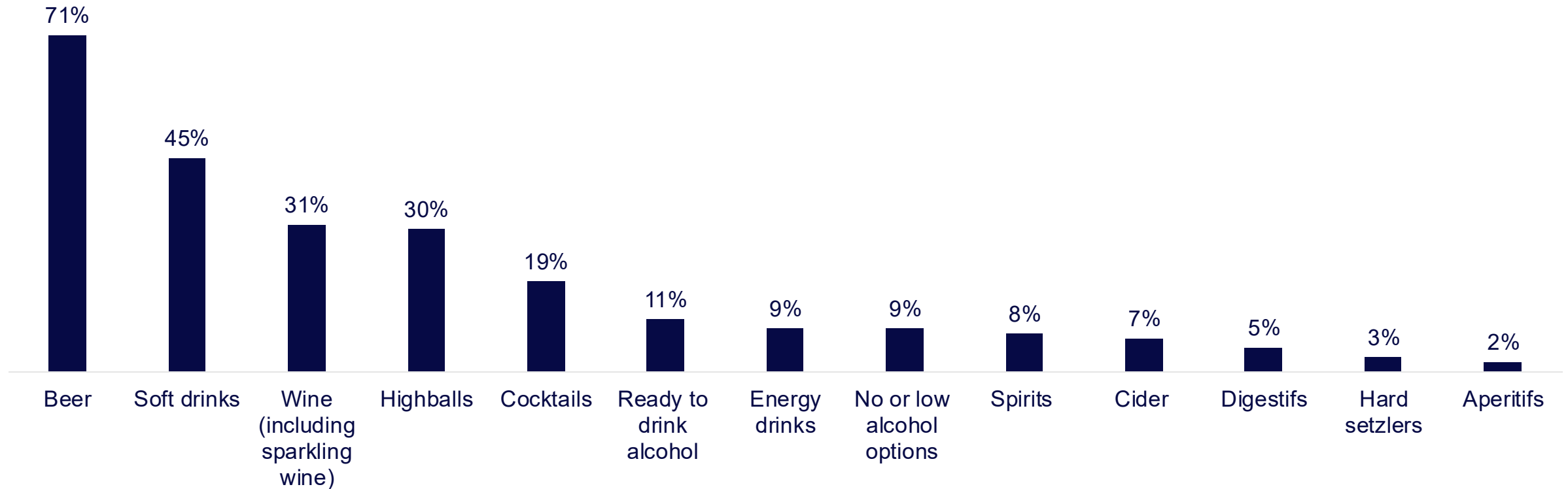
Proportion of consumers visiting the following regions in the past two years



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 750

WHICH OF THE FOLLOWING DRINKS HAVE YOU CONSUMED WHILE ABROAD IN THE PAST TWO YEARS ACROSS ALL THE REGIONS YOU HAVE VISITED?

Top categories consumers have consumed abroad in the past two years across all regions



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 550

WHICH OF THE FOLLOWING DRINKS, IF ANY, HAVE YOU CONSUMED WHILE ABROAD IN THE PAST TWO YEARS ACROSS THE REGIONS YOU HAVE VISITED?

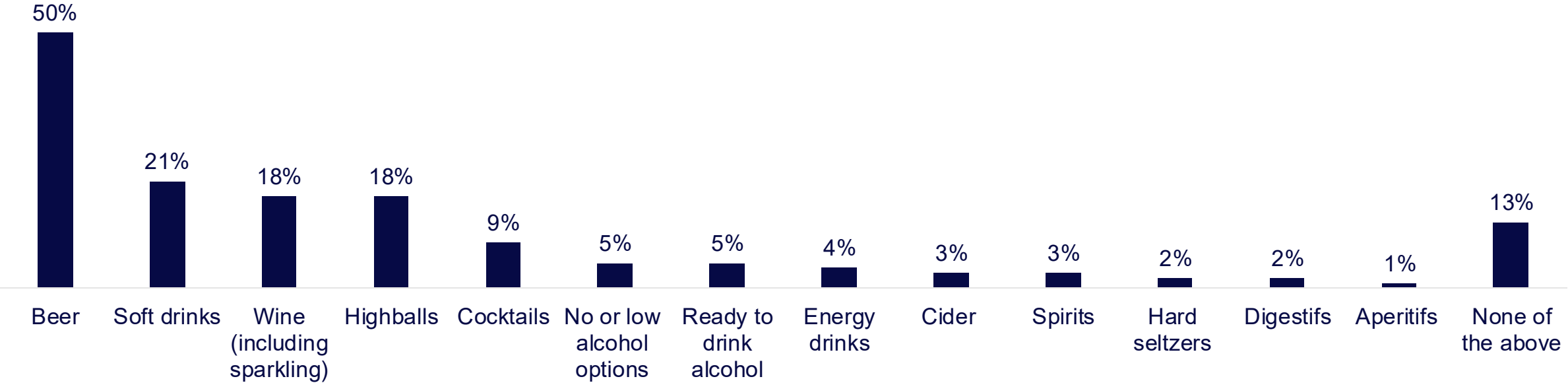
*Top 5 over-indexing categories consumers drank when visiting the below overseas regions in the past two years
Indexed against the average across all regions*

	Southeast Asia	Europe	North America
#1	Cocktails +11pp	Wine (including sparkling) +33pp	Wine (including sparkling) +24pp
#2	Beer +6pp	Cocktails +9pp	Cocktails +21pp
#3	Soft drinks +6pp	Spirits +7pp	Spirits +11pp
#4	Wine (including sparkling) +6pp	Beer +6pp	Highballs +10pp
#5	Energy drinks +5pp	Highballs +6pp	Beer +9pp

SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 60 - 207

YOU SAID YOU CONSUMED THE FOLLOWING CATEGORIES ON YOUR TRAVELS ABROAD.
WHICH OF THE FOLLOWING, IF ANY, HAVE YOU DRINK UPON YOUR RETURN TO SOUTH
KOREA AS A RESULT OF YOUR EXPERIENCES ABROAD?

Top categories consumers have drunk in South Korea as a result of their experiences abroad



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 539

YOU SAID YOU CONSUMED THE FOLLOWING CATEGORIES ON YOUR TRAVELS ABROAD.
WHICH OF THE FOLLOWING, IF ANY, HAVE YOU DRINK UPON YOUR RETURN TO SOUTH
KOREA AS A RESULT OF YOUR EXPERIENCES ABROAD?

Top over-indexing categories consumers have drunk in South Korea as a result of their experiences in the below regions
Indexed against the average across all regions

	Europe	North America
#1	Wine (including sparkling) +21pp	Cocktails +13pp
#2	Cocktails +5pp	Wine (including sparkling) +10pp
#3	Digestifs +5pp	Highballs +6pp

SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 60 - 205

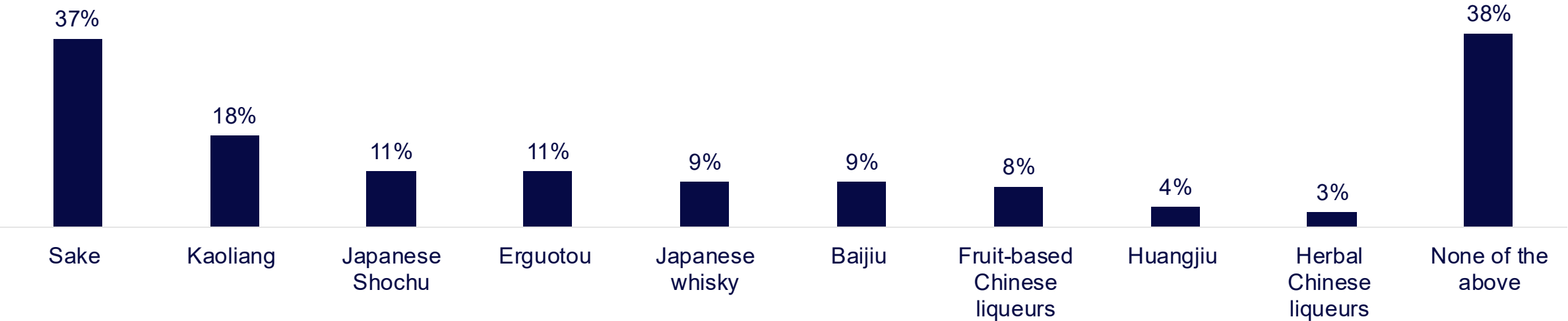
Hot topic: Chinese & Japanese spirits

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WHEN VISITING BARS, RESTAURANTS OR OTHER SIMILAR VENUES, WHICH OF THE FOLLOWING TYPES OF CHINESE AND/OR JAPANESE SPIRITS, IF ANY, HAVE YOU CONSUMED IN THE PAST YEAR?

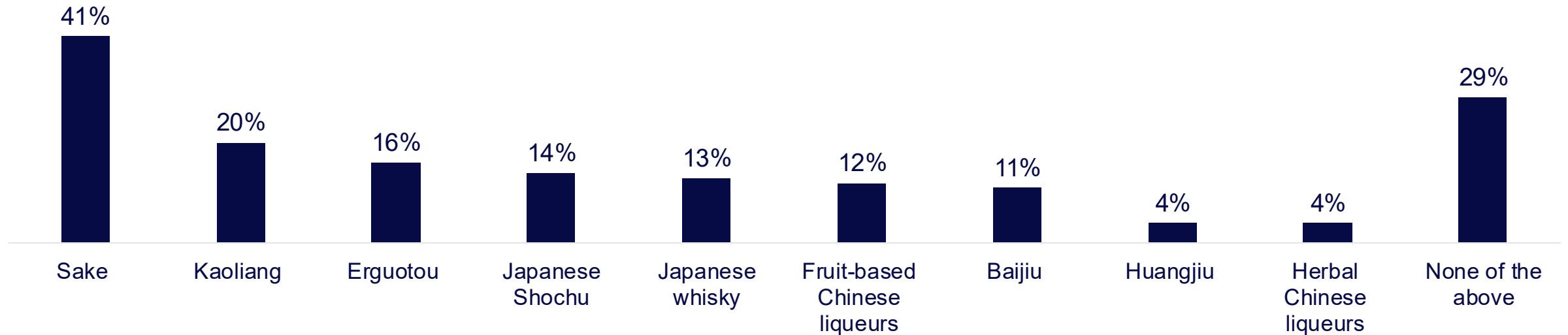
Top Chinese and/or Japanese sprits consumers have consumed in the On Premise in the past year



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 750

AND WHICH OF THE FOLLOWING TYPES OF CHINESE AND/OR JAPANESE SPIRITS, IF ANY, WOULD YOU CONSUME IN THE FUTURE WHEN VISITING BARS, RESTAURANTS AND OTHER SIMILAR VENUES?

Top Chinese and/or Japanese sprits consumers would drink in the future in the On Premise



SOURCE: CGA MONTHLY SOUTH KOREA ON PREMISE CONSUMER PULSE REPORT March 2026 – SAMPLE: 750

CGA by NIQ ON PREMISE SOLUTIONS

Essential Services to support your On Premise strategies



OPUS

Consumer Insights

- + Robust insights tracking behaviour, habits, and preferences of consumers in the On Premise
- + Understand brand and category consumption to build selling stories for your portfolio
- + Highlight channel visitation and national account engagement to support your key account teams and conversations with retailers

LIVE NOW



Outlet Index

On Premise Segmentation

- + Understand the size and shape of the South Korean On Premise
- + Build strategies catering to the ever-changing outlet dynamics shaping the channel
- + Determine which channels are in growth or decline
- + Integrate Outlet Index to better your conversations with distributors and retailers

LIVE NOW



OPM

On Premise Measurement

- + Statistically robust model providing volumetric measurement of alcohol sales in bars and restaurants
- + Use as a barometer for Brand and Category performance in any market
- + Track KPIs such as brand and category share, competitive benchmarking, volume and value velocity (Rate of Sale), total distribution points and price

LIVE NOW

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We'd love to hear from you!

The Consumer Pulse Report brings you key trends on On Premise visitation, consumer satisfaction, and drink category consumption—*but what else would help you stay ahead in the market?*

Could you spare 1–2 minutes to share what's most valuable to you and what other insights you'd love to see?



Scan the QR code
or *click here*

Find out how to build a successful On Premise strategy

For more information on
how CGA by NIQ can
help your business grow
in the South Korean On
Premise, get in touch:



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