

Pub Code Adjudicator Tied Tenants Survey 2022

Key findings

Overview

01

Methodology

The Process:

- Pubs invited to take part in the annual tenants survey were independently selected by Ipsos based on pub names and addresses supplied by pub companies.
- To ensure a representative sample, the number of pubs provided was compared to known estate figures to ensure they broadly matched and then Ipsos randomly selected pubs to take part in the survey on a 1 in 2 basis.
- Quotas were then placed on interviews achieved to ensure a representative sample of tenants were surveyed across the different pub companies and regionally within their respective estates.
- Note that due to base sizes, the confidence intervals for percentages for the whole sample are approx. +/- 4 percentage points and range from +/- 7 to 12 percentage points for results by individual pub companies.

Final number of interviews achieved:

Pub company	Interviews	Weighted
Admiral	78	61
Marston's	76	68
Punch Pubs	75	69
Star Pubs & Bars	123	134
Greene King	78	60
Stonegate	184	222
TOTAL	614	614

Findings at a glance

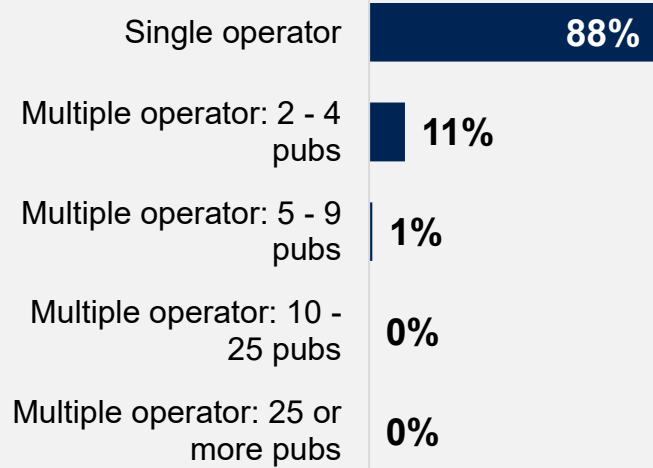
- Increased awareness of pubs code and PCA from 2019 survey. Tenants tend to get info on code from pub company but would most likely turn to google / internet if they needed info in future.
- Around 1 in 3 tenants claim to be unfamiliar with code rights – rights around insurance least understood.
- 6 in 10 satisfied with relationship with pub co. Admiral / Marstons tenants most satisfied, Punch least. 1 in 5 tenants dissatisfied.
- BDM relationship generally positive – biggest pain point repairs / dilapidations. Most don't know who CCO is.
- 8 in 10 find new tenant info useful. 6 in 10 say the same of sustainable business plan.
- Majority trust PCA to be independent. 1 in 3 do not.
- 1 in 3 claim to have used website in past 2 years – mainly for info on code. User experience positive. Claimed usership of enquiry line very low (~5%)

02

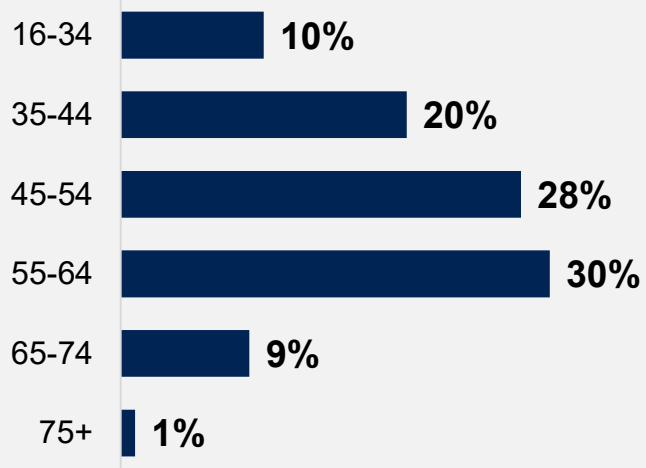
Profile of tied tenants

Profile of tied tenants in detail

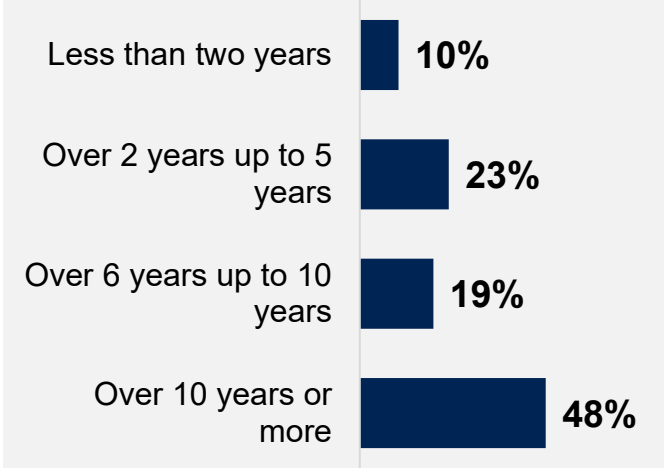
Number of pubs operated



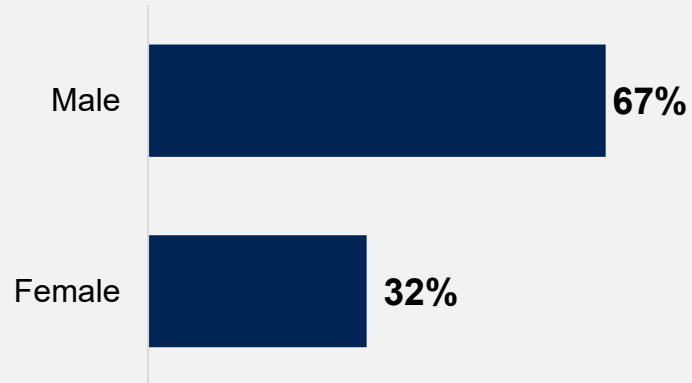
Age



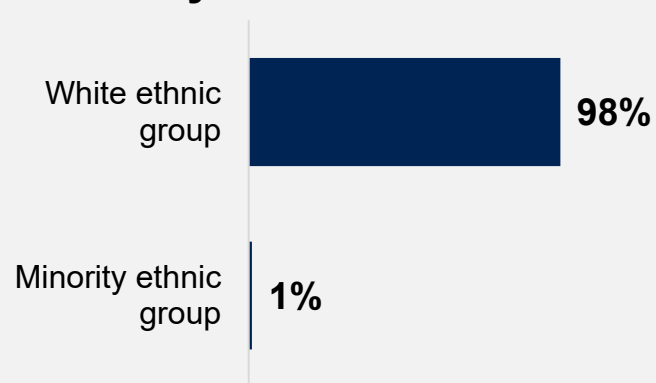
Years held pub tenancies



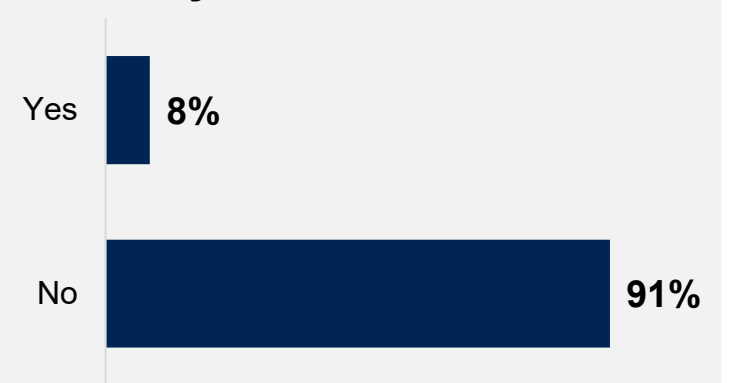
Gender



Ethnicity



Disability status



Base: All tied pub tenants (614)

Type of pub arrangement by pub company

S3. Is your arrangement for [PUB NAME]...

Type of arrangement	Among all	Admiral	Marston's	Punch Pubs	Star Pubs & Bars	Greene King	Stonegate (trading name of Ei Group)
A tied lease agreement	43%	35%	8%	50%	59%	38%	44%
A tied tenancy	43%	52%	22%	40%	31%	57%	51%
A franchise agreement	1%	0%	11%	1%	0%	0%	0%
A short agreement of less than 12 months or tenancy at will	4%	10%	10%	1%	5%	1%	2%
A retail agreement	3%	0%	27%	0%	2%	0%	0%
Something else (SPECIFY)	4%	3%	22%	5%	2%	4%	1%

Base: All tied pub tenants (614)

03

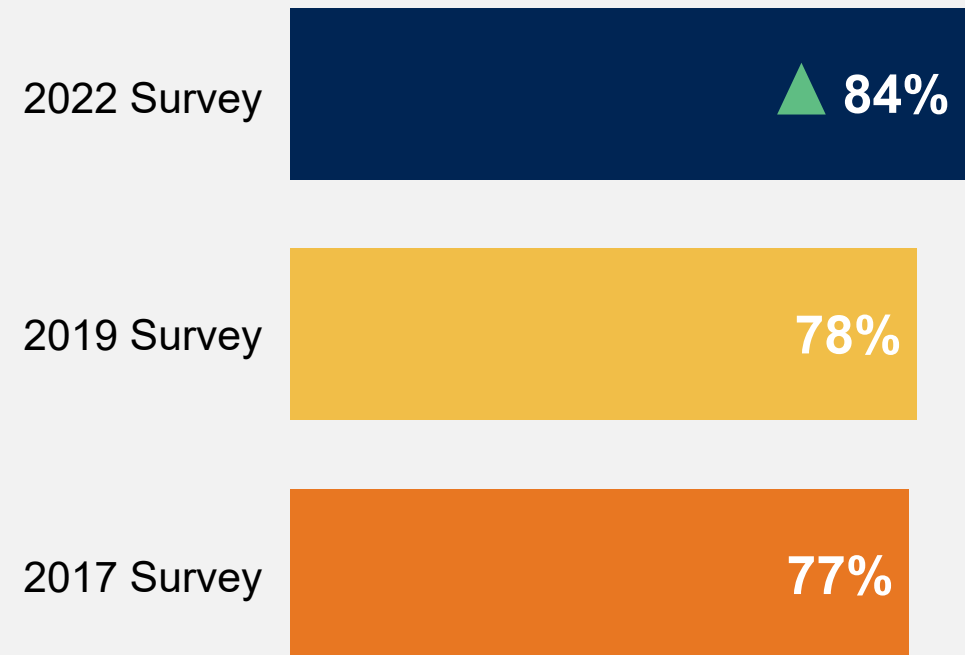
Awareness and experience of Pubs Code

Whether tenants have received information about the Pubs Code

C1. Have you ever read, seen or heard anything in relation to The Pubs Code?

- The proportion of tenants who have read, seen or heard anything in relation to the Pubs Code rose from 78% in 2019 to 84% in 2022, a statistically significant increase.
- Tenants with Admiral (92%) and Greene King (91%) were most likely to have read, seen or heard anything in relation to the Pubs Code, while those with Punch (72%) and Marston's (80%) were least likely to.

% Ever read, seen or heard anything in relation to Pubs Code

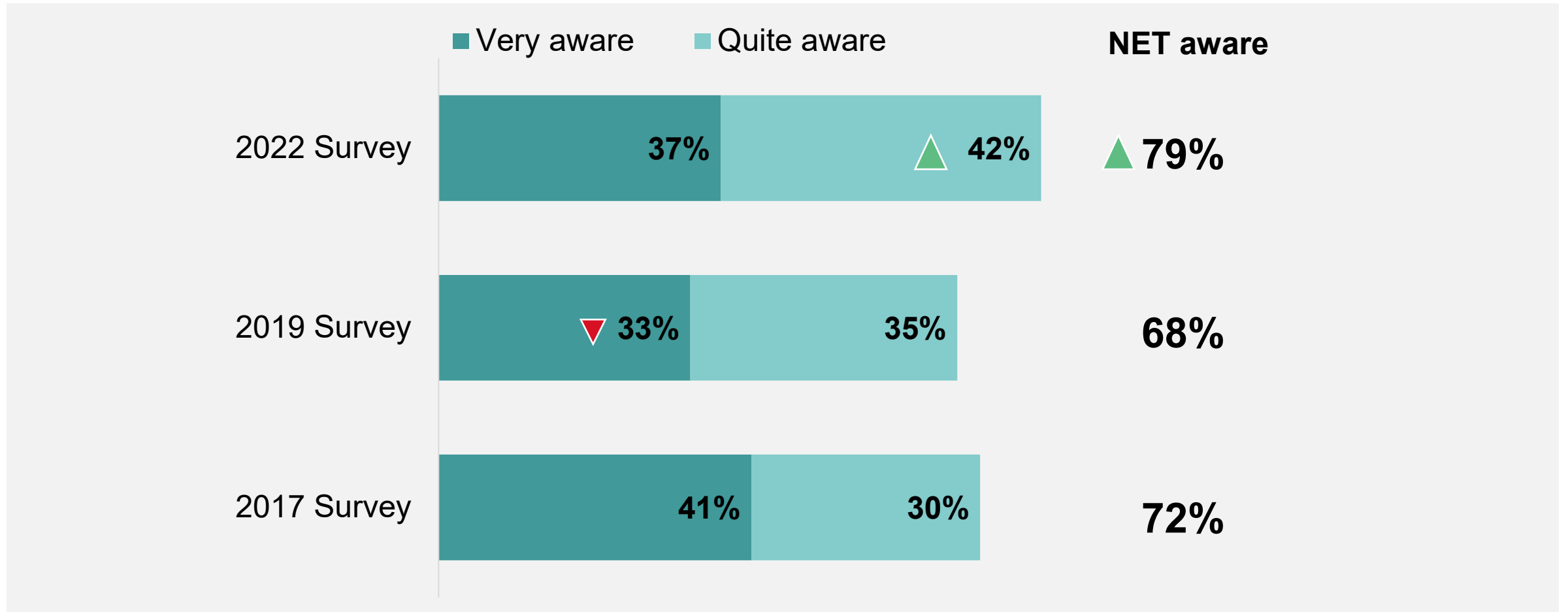


▲ Statistically significantly different from previous survey

Base: All tied pub tenants (614)

Awareness of the Pubs Code

C2. How aware, if at all, were you of The Pubs Code before today?

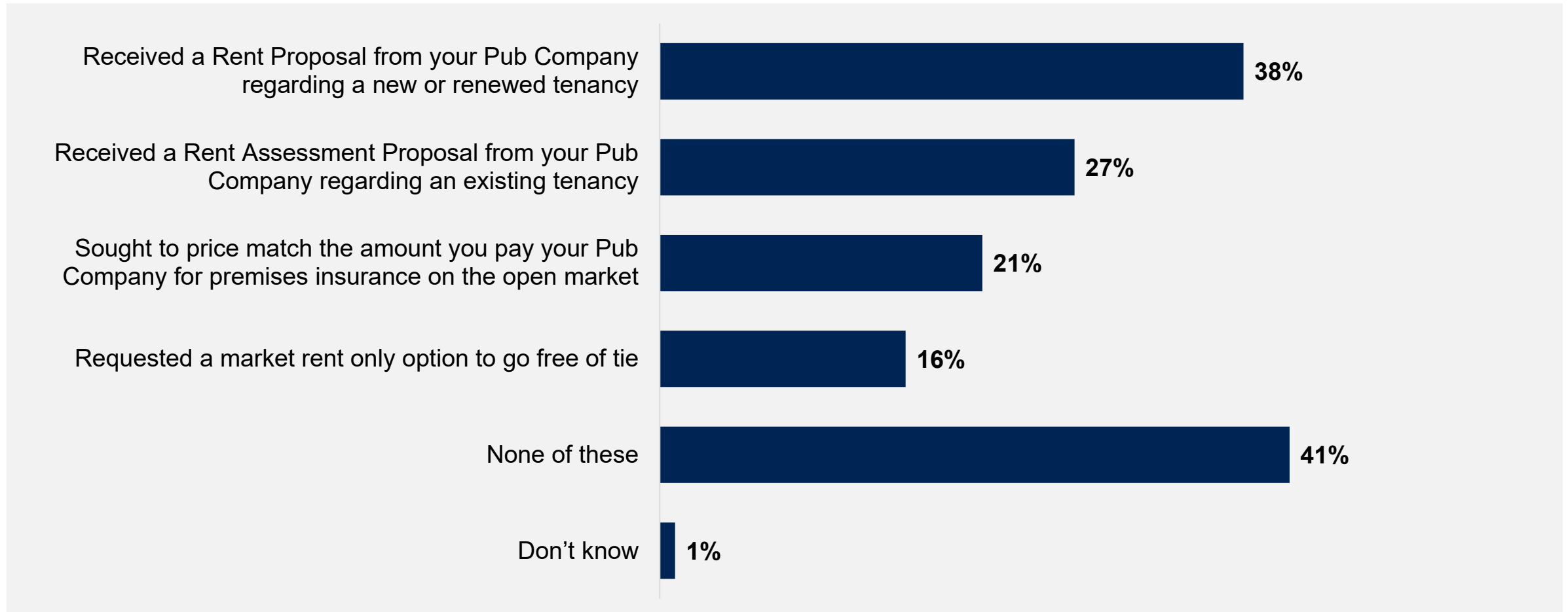


Base: All tied pub tenants (614)

▲ ▼ Statistically significantly different from previous survey

Whether tenants experienced Code events in the last two years

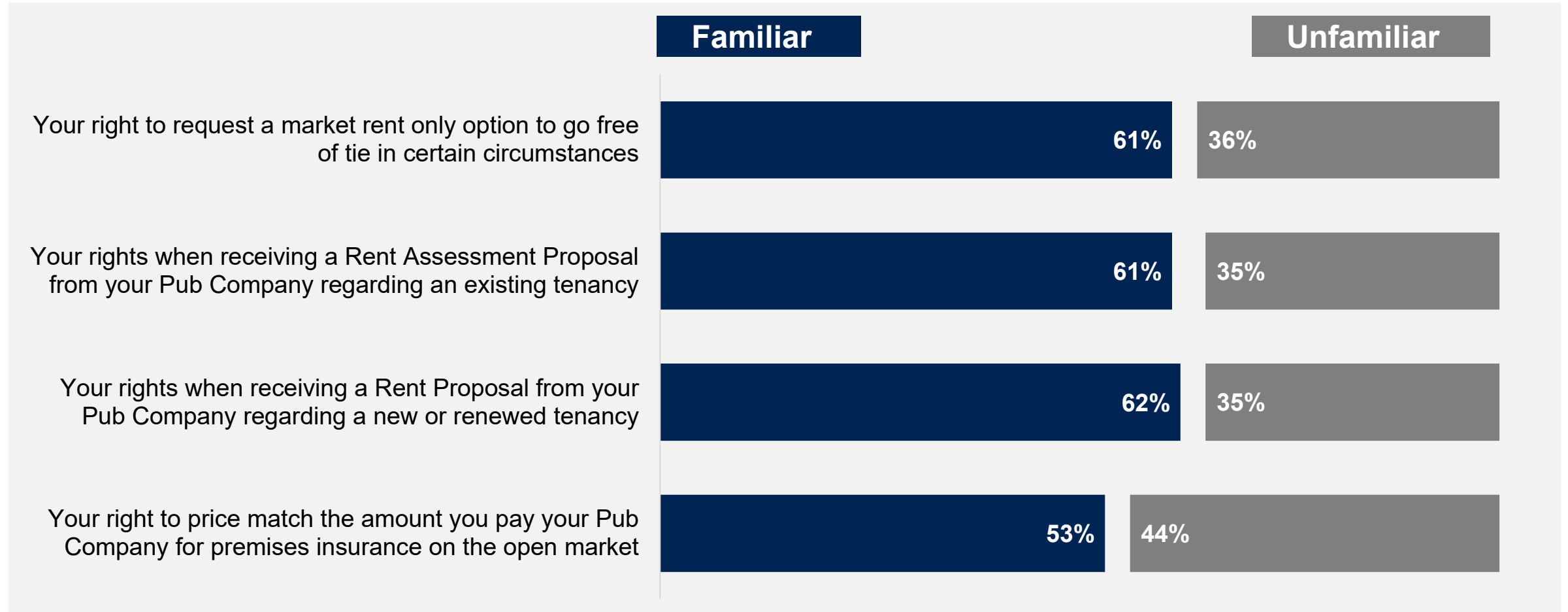
C5. Which, if any, of the following have you experienced with [PUB COMPANY] in the last two years?



Base: All tied pub tenants (614)

Tenant awareness of Pubs Code rights

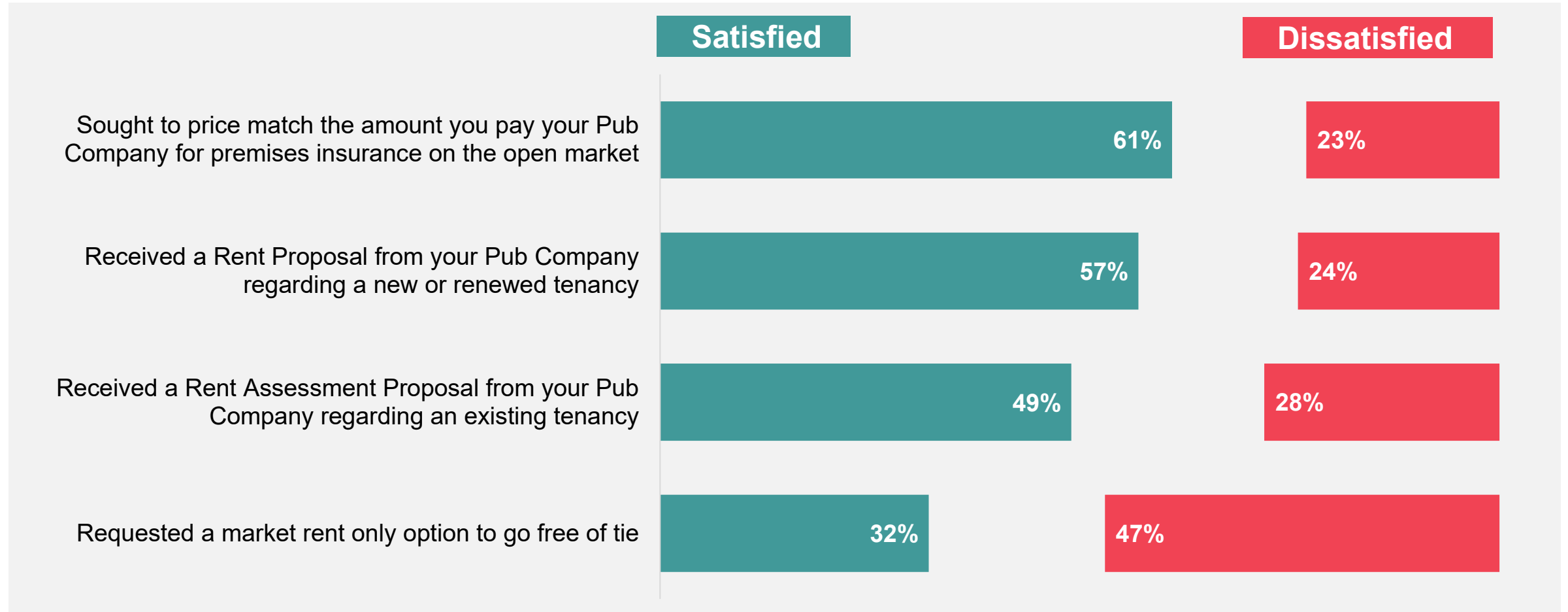
C6. Before today, how familiar, or not, would you say you were with your rights as a tenant in the following areas of The Pubs Code?



Base: All tied pub tenants (614)

Satisfaction with pub company handling of Pubs Code events

C7. Overall, how satisfied or dissatisfied were you with how [PUB COMPANY] dealt with you when you did the following?



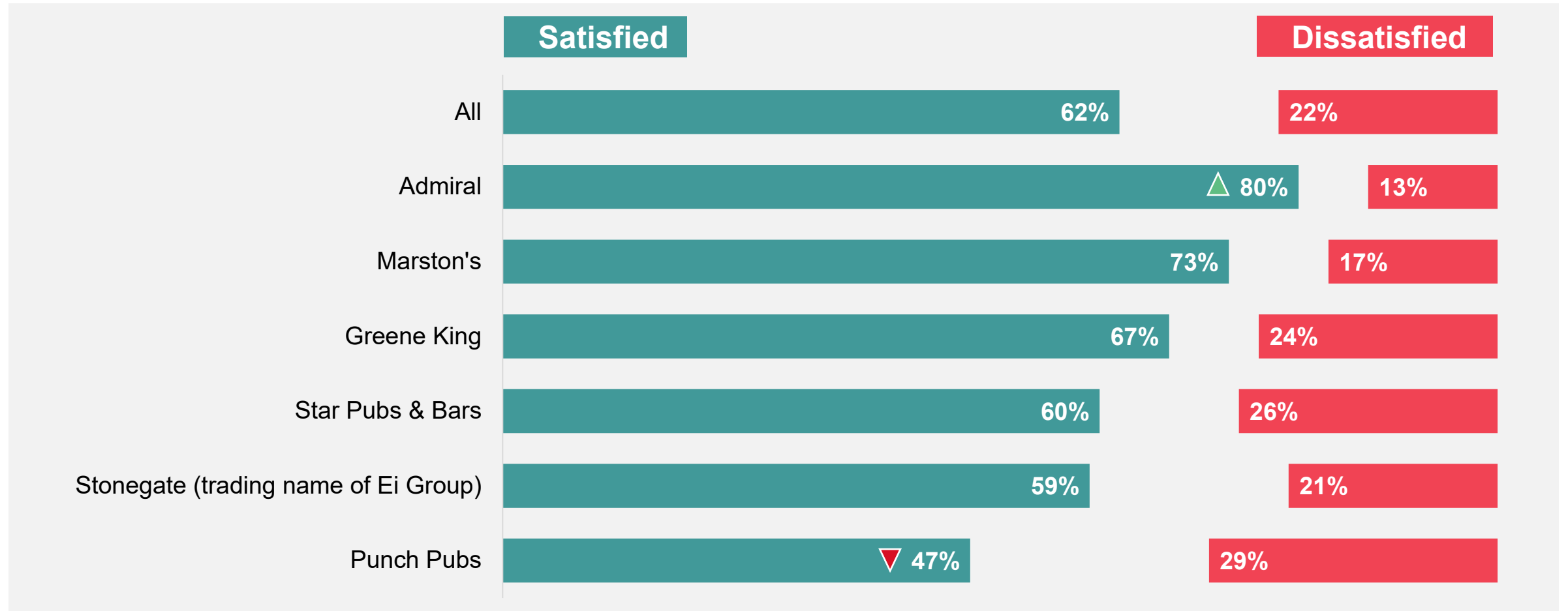
Base: All tied tenants who requested a market rent only option to go free of tie (96), received a Rent Assessment Proposal from your Pub Company regarding an existing tenancy (164), received a Rent Proposal from your Pub Company regarding a new or renewed tenancy (235), and sought to price match the amount you pay your Pub Company for premises insurance on the open market (127)

04

Relationship with pub company

Overall satisfaction with pub company

D3. Overall, taking everything into account, how satisfied or dissatisfied are you with your relationship with [PUB COMPANY] today?



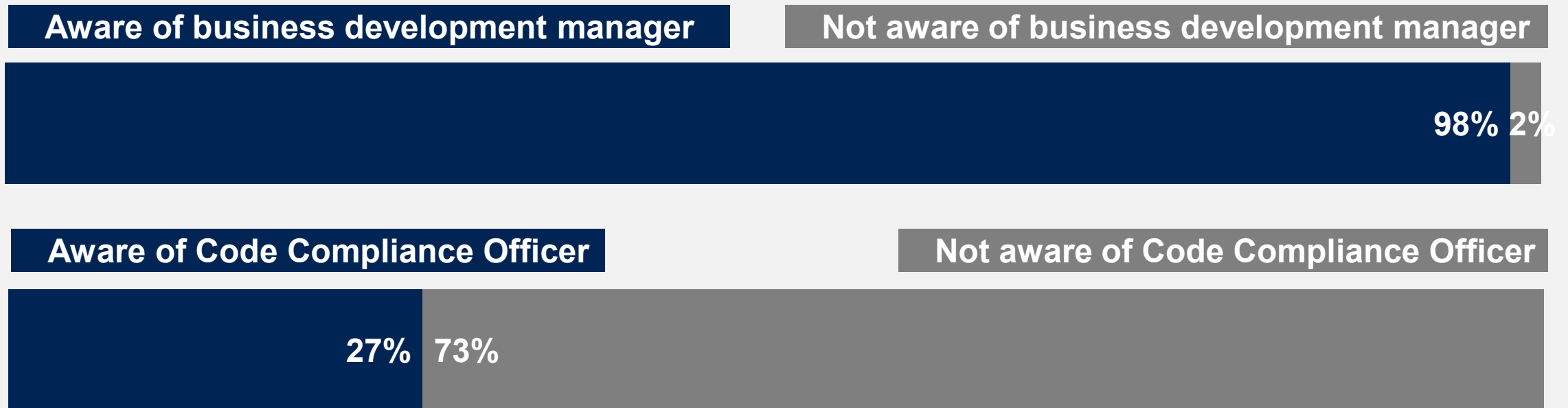
Base: All tied pub tenants (614) with Admiral (78), Marston's (76), Punch Pubs (75), Star Pubs and Bars (123), Greene King (78), and Stonegate (184)

▼▲ Statistically significantly different compared to the average

Awareness of business development manager and code compliance officer

D1/D2. To what extent, if at all, do you agree or disagree with the following statements about your business development manager/Code Compliance officer?

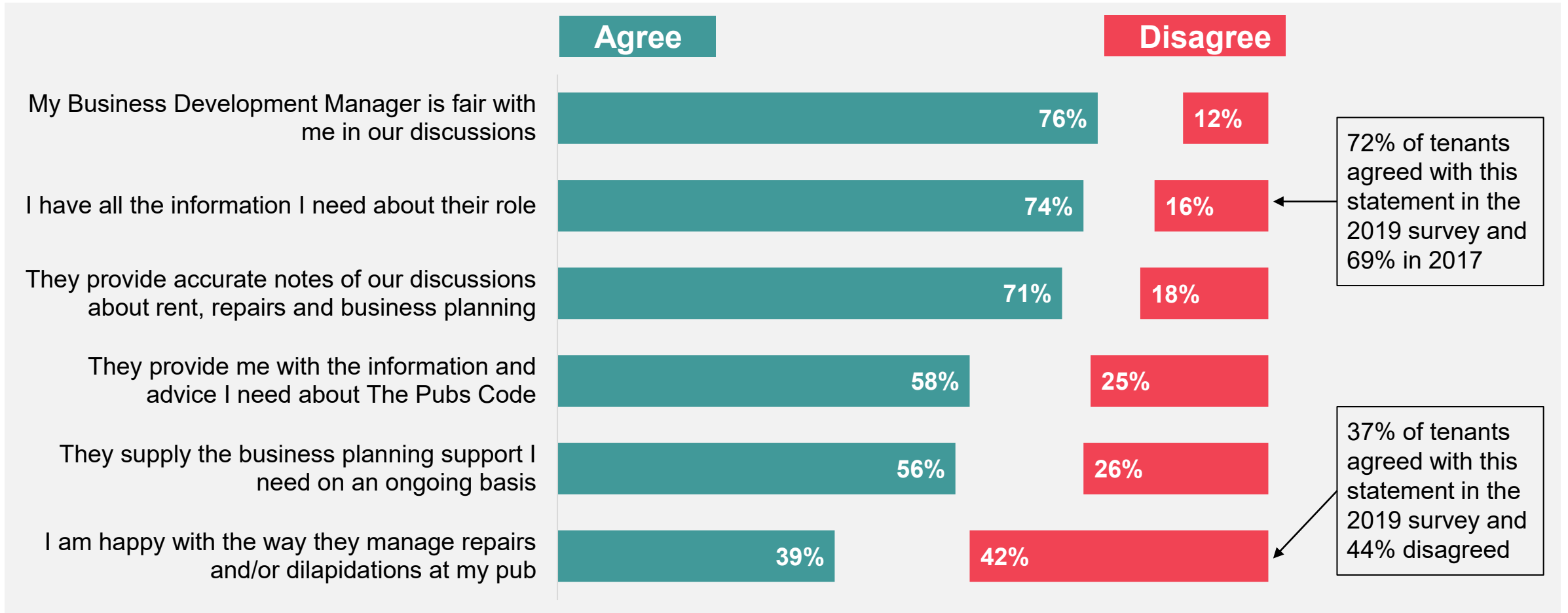
Tenants were asked a series of statements about their business development manager (BDM) and Code Compliance Officer (CCO) and those that responded that they did not know who their BDM/CCO was were excluded from the base. The proportions of tenants not aware of their BDM or CCO are displayed below.



Base: All tied pub tenants (614)

Tenant ratings of business development manager

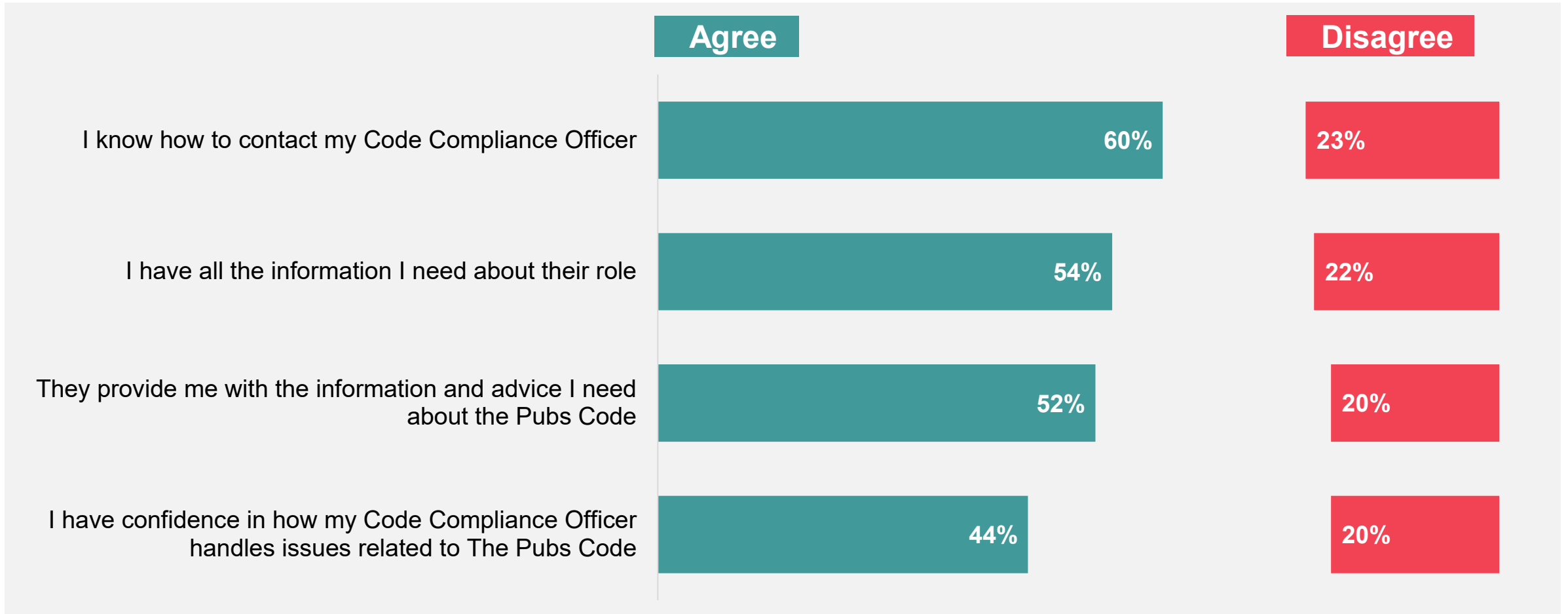
D1. To what extent, if at all, do you agree or disagree with the following statements about your business development manager?



Base: All tied pub tenants who knew who their business development manager was (603)

Tenant ratings of Code Compliance officer

D2. And thinking now about your Code Compliance Officer, to what extent, if at all, do you agree or disagree with the following statements about the Code Compliance Officer?



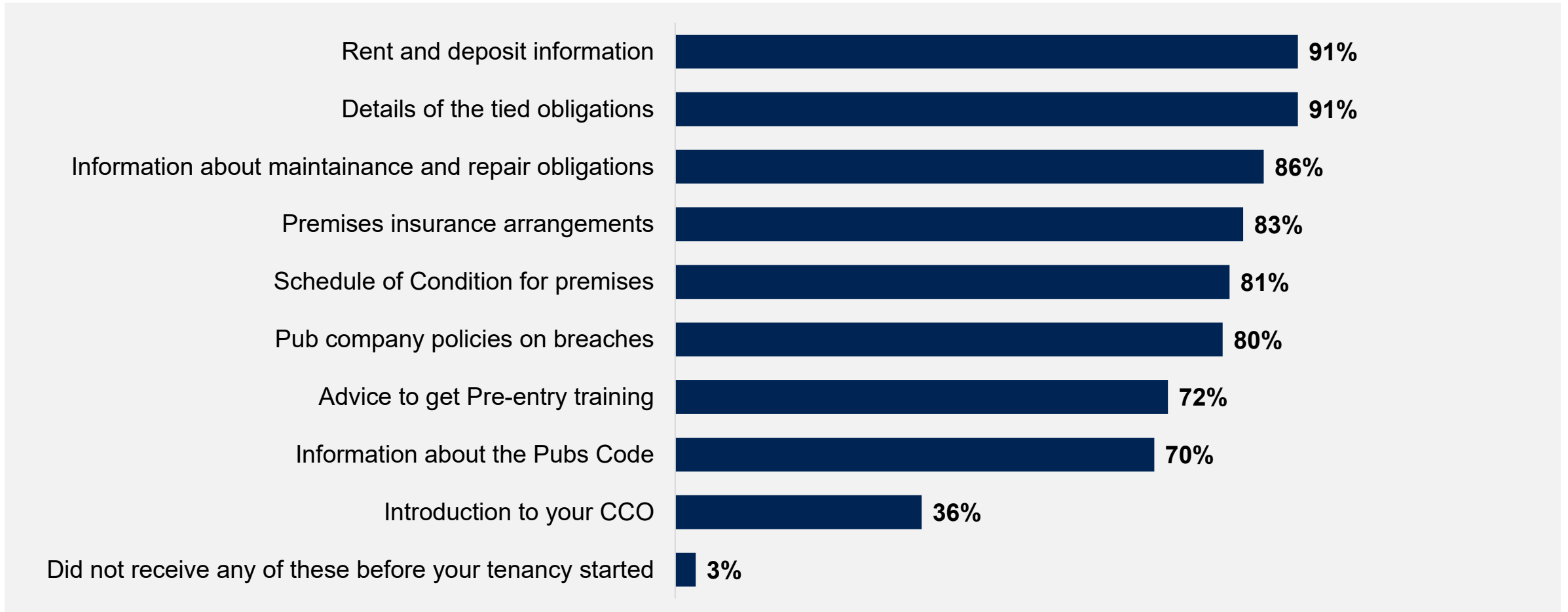
Base: All tied pub tenants who knew who their Code Compliance Officer was (173)

05

Information received by new tenants

What information new tenants remember receiving before starting

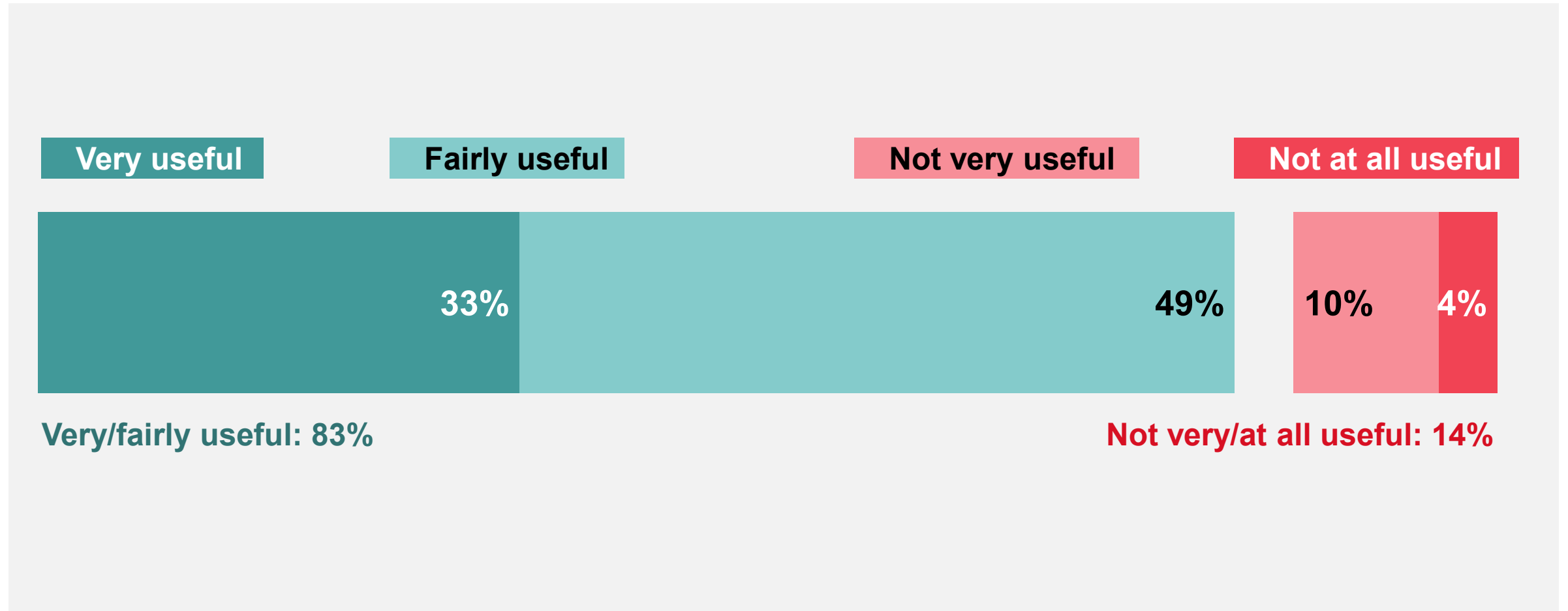
G7. What, if any, of the following information do you remember receiving from [PUB COMPANY] BEFORE your tenancy started?



Base: All tied pub tenants who started their tenancy after 21st July 2016 (346)

How useful new tenants found information received before starting

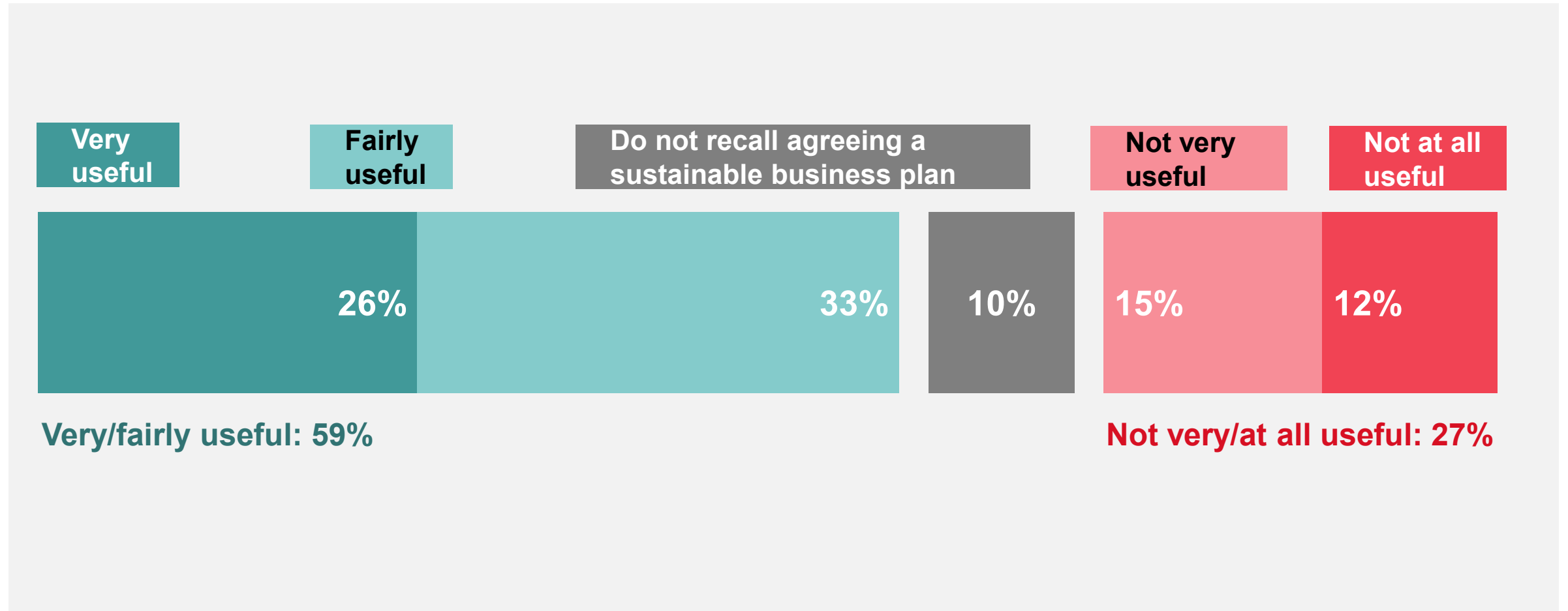
G8. And how useful or not did you find the information you received from [PUB COMPANY] before your tenancy started?



Base: All tied pub tenants who started their tenancy after 21st July 2016 (346)

How useful new tenants found their sustainable business plan

G9. How useful, or not, do you find your sustainable business plan in managing your tenancy?



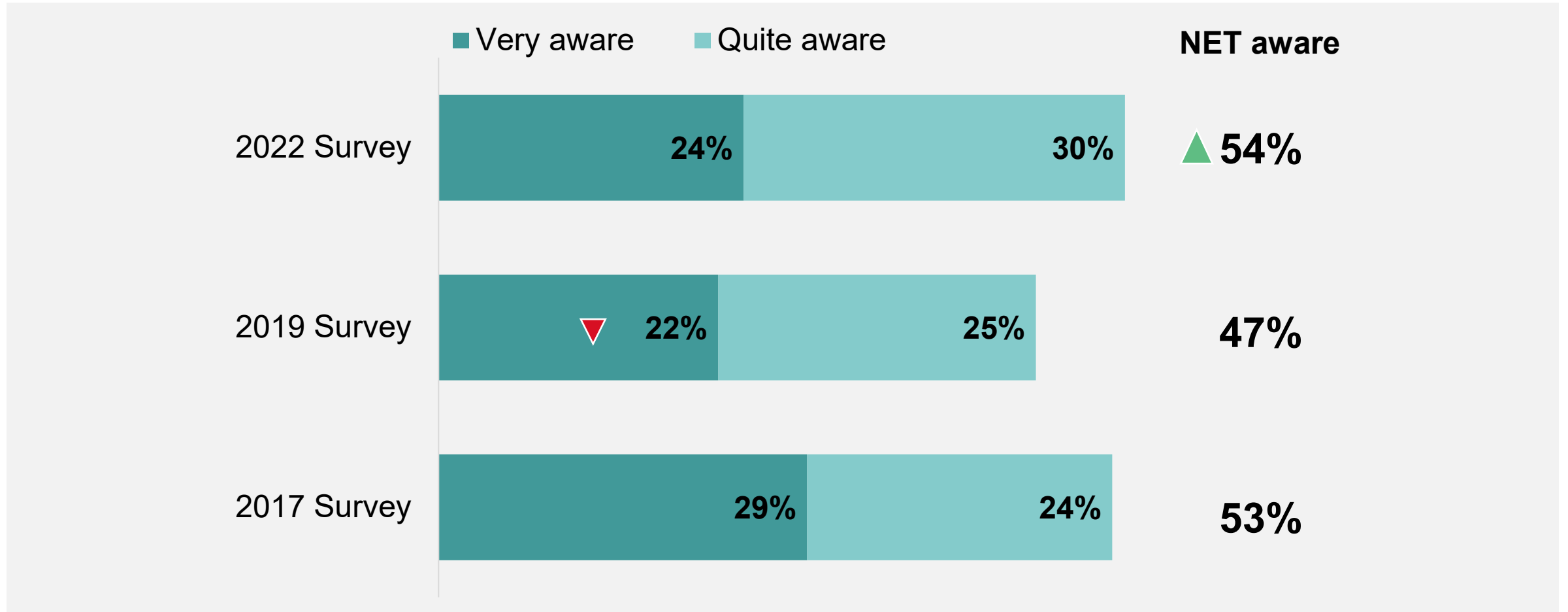
Base: All tied pub tenants who started their tenancy after 21st July 2016 (346)

06

PCA communications

Awareness of the Pubs Code Adjudicator

F1. Before today, how aware, if at all, were you of The Pubs Code Adjudicator?

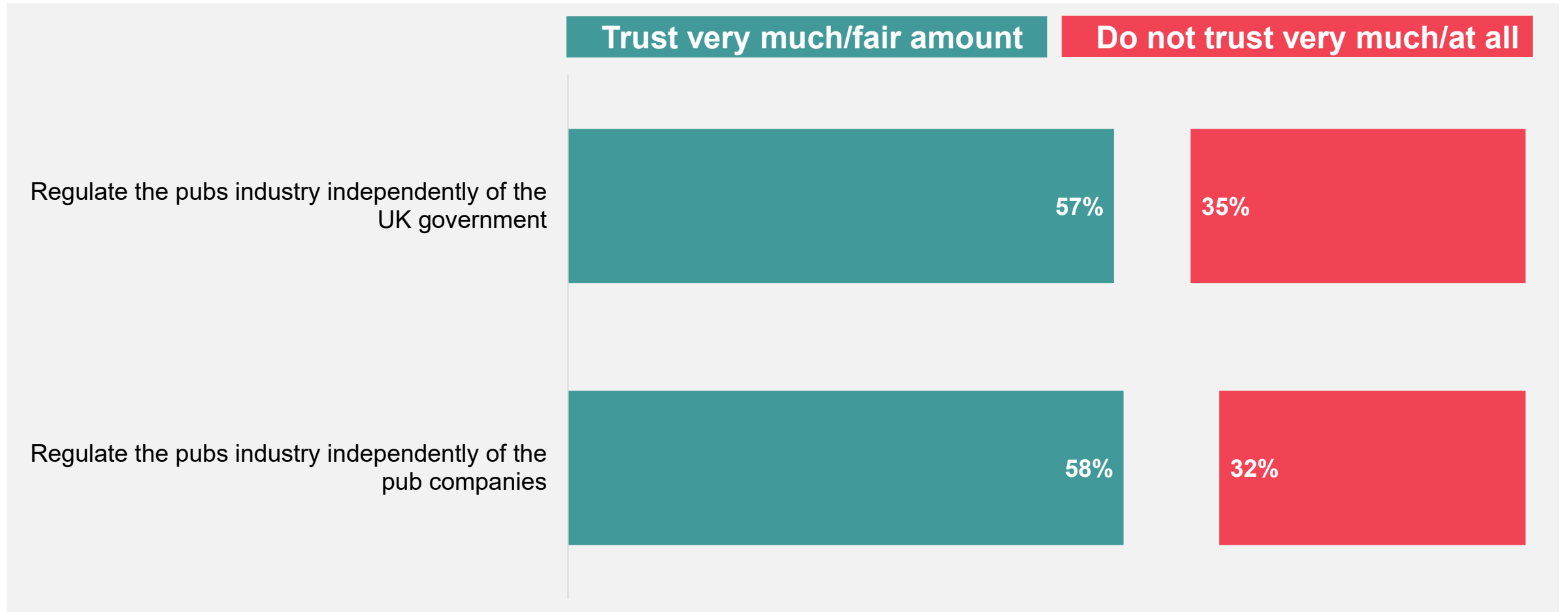


Base: All tied pub tenants (614)

▲ ▼ Statistically significantly different from previous survey

Tenant trust in PCA independence

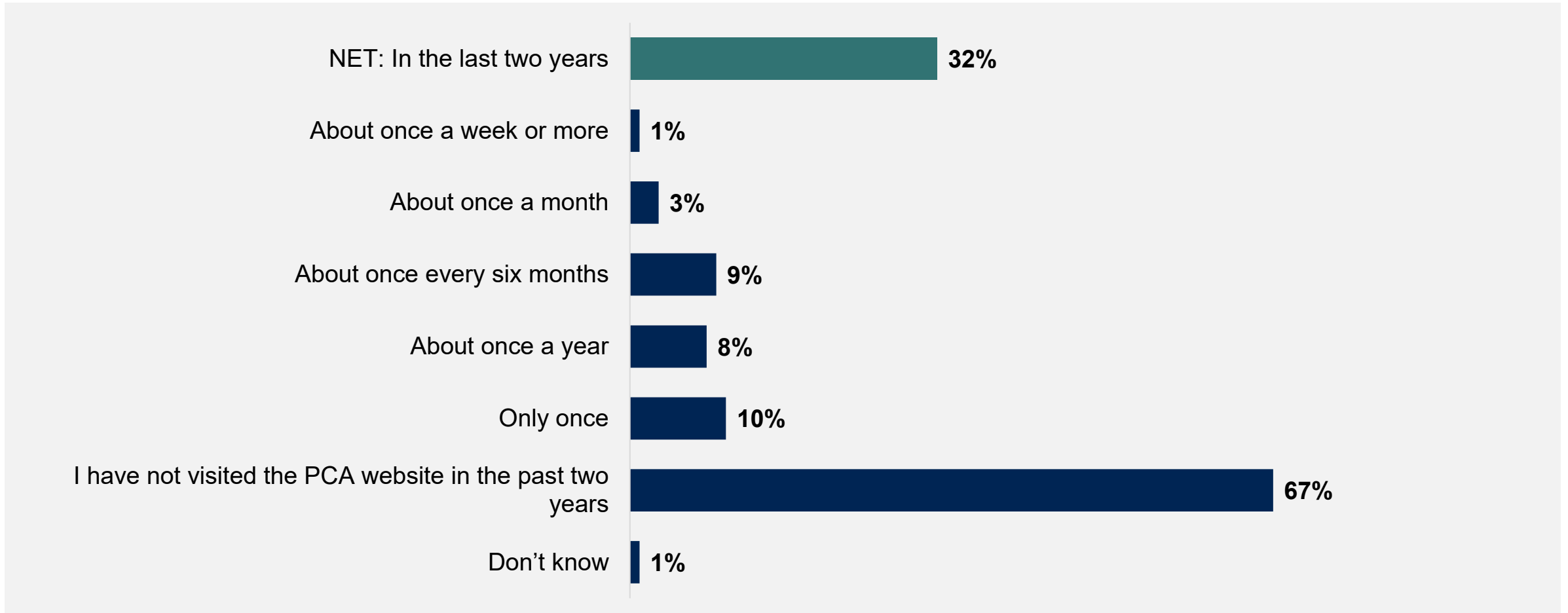
F2. To what extent if at all, do you trust the PCA to...



Base: All tied pub tenants who were very / quite / not very aware of the PCA (495)

How often tenants visited the PCA website in the last two years

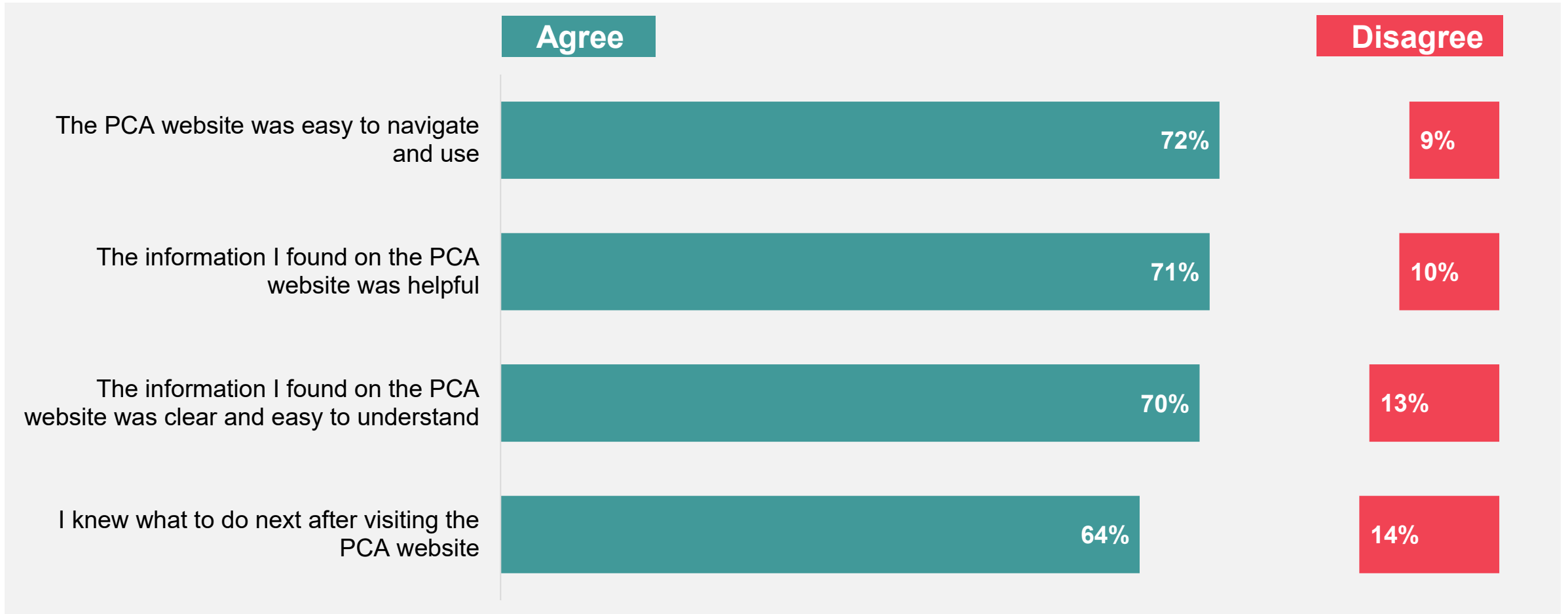
F3. How often, on average, would you say you have visited the PCA website in the last two years?



Base: All tied pub tenants (614)

Tenant ratings of the PCA website

F5. Thinking about the last time you visited the PCA website, to what extent, if at all, do you agree or disagree with the following statements?



Base: All tied pub tenants who visited the PCA website in the last two years (198)

Implications

07

Implications / Possible action areas

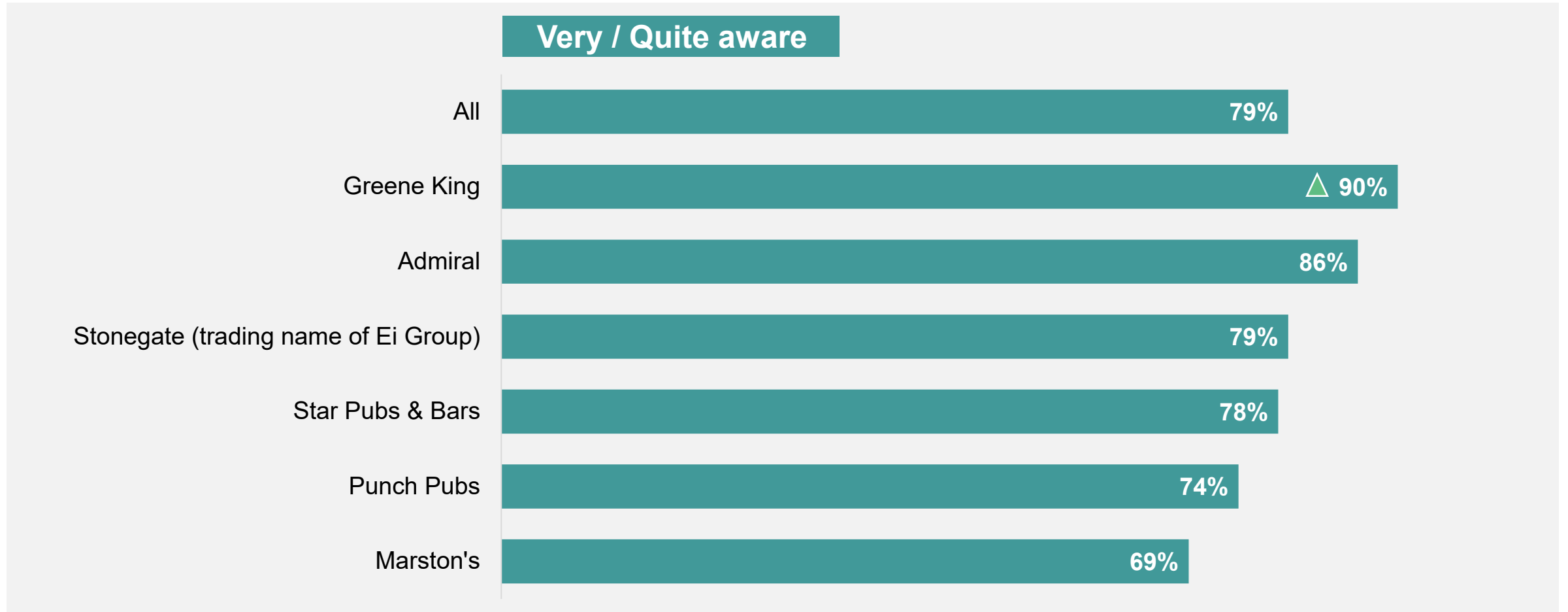
- Pub companies and internet searches / google are key sources of info for tenants on Pubs Code – latter is default option for where to go in future
- Around 1 in 3 are unfamiliar with individual rights as tenant – rights around insurance least understood
- The MRO process and dealing with repairs / dilapidations remain key pain points for tenants
- 1 in 4 do not find sustainable business plan useful in managing their tenancy, 1 in 10 do not remember submitting one
- More than 7 in 10 do not know who their CCO is
- Although clear majority trust PCA to be independent – 1 in 3 tenants do not

Annex

08

Awareness of the pubs code by pub company

C2. How aware, if at all, were you of The Pubs Code before today?

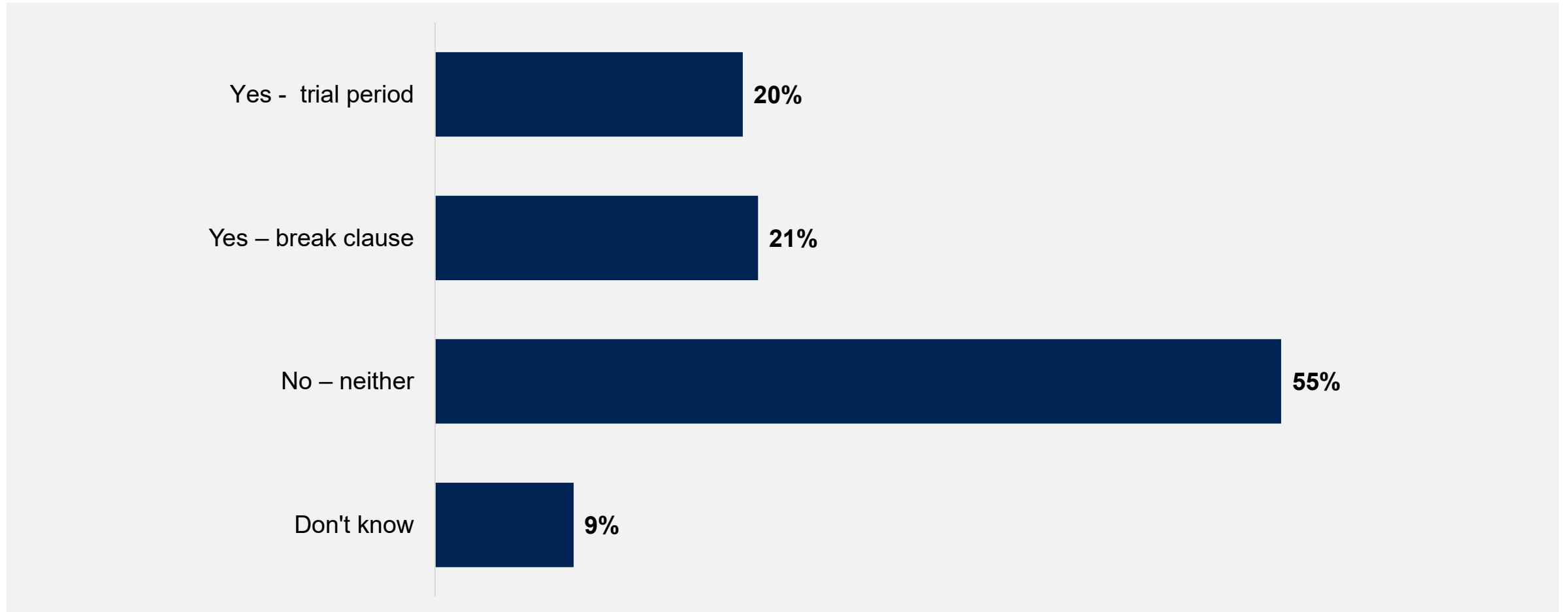


Base: All tied pub tenants (614) with Admiral (78), Marston's (76), Punch Pubs (75), Star Pubs and Bars (123), Greene King (78), and Stonegate (184)

▲ Statistically significantly different compared to the average

Whether tenants had a trial period or break clause when they started

G6. When you started your tenancy, did you have a trial period or break clause?



Base: All tied pub tenants (614)



Pubs Code Adjudicator Tied Tenants Survey 2022 – Key findings

For more information

Keiran Pedley
Research Director
Keiran.pedley@Ipsos.com

