



PCA Tied Tenants Survey 2022

Ipsos interviewed a representative sample of 614 tied tenants by telephone between 12th January and 18th February, 2022.

Our analysis allows us to look at key survey results broken out by tenants of different pub companies. A summary of which is found below:

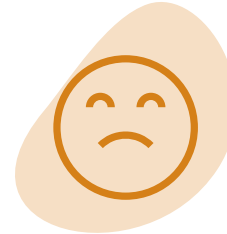
% satisfied with tenant/pub company relationship

Overall 62% of tenants are satisfied with their pub company relationship. Tenants of Admiral the most satisfied and tenants of Punch taverns the least.



80%

Admiral
(1st)



47%

Punch
(6th)

% agree BDMs are fair in discussions

Overall 76% of tenants agree their BDMs are fair in discussions. Tenants from Marston's and Admiral most likely to agree.



88%

Marston's
(1st)



86%

Admiral
(2nd)

% aware of Pubs Code

79% of tenants were aware of the Pubs Code before taking the survey. Tenants from Greene King and Admiral had the highest levels of awareness.



90%

Greene King
(1st)



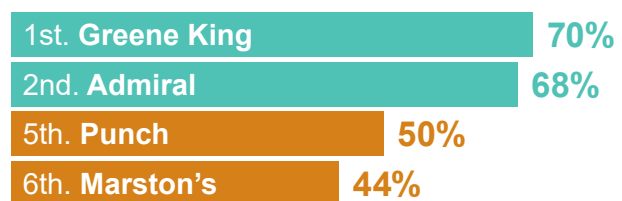
86%

Admiral
(2nd)

% familiar with code rights across four areas (average score)*

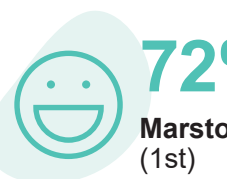
Tenants of Greene King and Admiral are most familiar with their code rights, Punch and Marston's the least.

*Tenants were asked familiarity with rights concerning MRO, Rent Proposals, Rent Assessment Proposals and Premises insurance. Scores opposite denote the average score for each Pubco.



% agree BDMs handle repairs/dilapidations well

Tenants of Marston's and Admiral gave BDMs the highest scores for managing repairs / dilapidations. Stonegate the lowest.



72%

Marstons
(1st)



62%

Admiral
(2nd)



27%

Stonegate
(6th)



PCA Tied Tenants Survey 2022

Ipsos interviewed a representative sample of 614 tied tenants by telephone between 12th January and 18th February, 2022.

One topic of discussion was their awareness of the Pubs Code and their rights under it.

Awareness of the Pubs Code has increased since the last survey in 2019



84%

of tenants have heard of the Pubs Code – up from 78% in 2019.



79%

were either very or quite aware of the Pubs Code before the survey – up from 68% in 2019.

Tenants tend to get information about the code from their Pub Company and would typically go online in future



45%

of those that have heard of the code received information through their Pub Company or BDM.



49%

would search the internet / use Google if they needed information in the future.

Majority of tenants familiar with code rights overall but rights around premises insurance least understood:



62%

familiar with rights when receiving a Rent Proposal.

61%

familiar with right to request MRO in certain circumstances.

61%

familiar with rights when receiving a Rent Assessment Proposal.

53%

familiar with right to price match premises insurance on the open market.



PCA Tied Tenants Survey 2022

Ipsos interviewed a representative sample of 614 tied tenants by telephone between 12th January and 18th February, 2022.

One topic of discussion was their relationship with their Pub Company.

Majority of tenants satisfied with tenant / pub company relationship



62%

are satisfied with the relationship.



22%

are dissatisfied.

Tenants becoming tied with their pub company since the code came into effect were more satisfied (67%) than those starting their tenancy before then (56%)

Tenants are much more likely to know who their BDM is than their CCO



98%

know who their Business Development Manager (BDM) is.



27%

know who their Code Compliance Officer (CCO) is.

Tenants hold positive views of BDMs but repairs and dilapidations are a key pain point. When asked about their BDMs...

76%

agree they are fair in discussions with tenants.

74%

agree they have the information they need about the BDMs role.

58%

agree they provide the information and advice tenants need about the Pubs Code.

56%

agree they supply business planning support on an ongoing basis.

39%

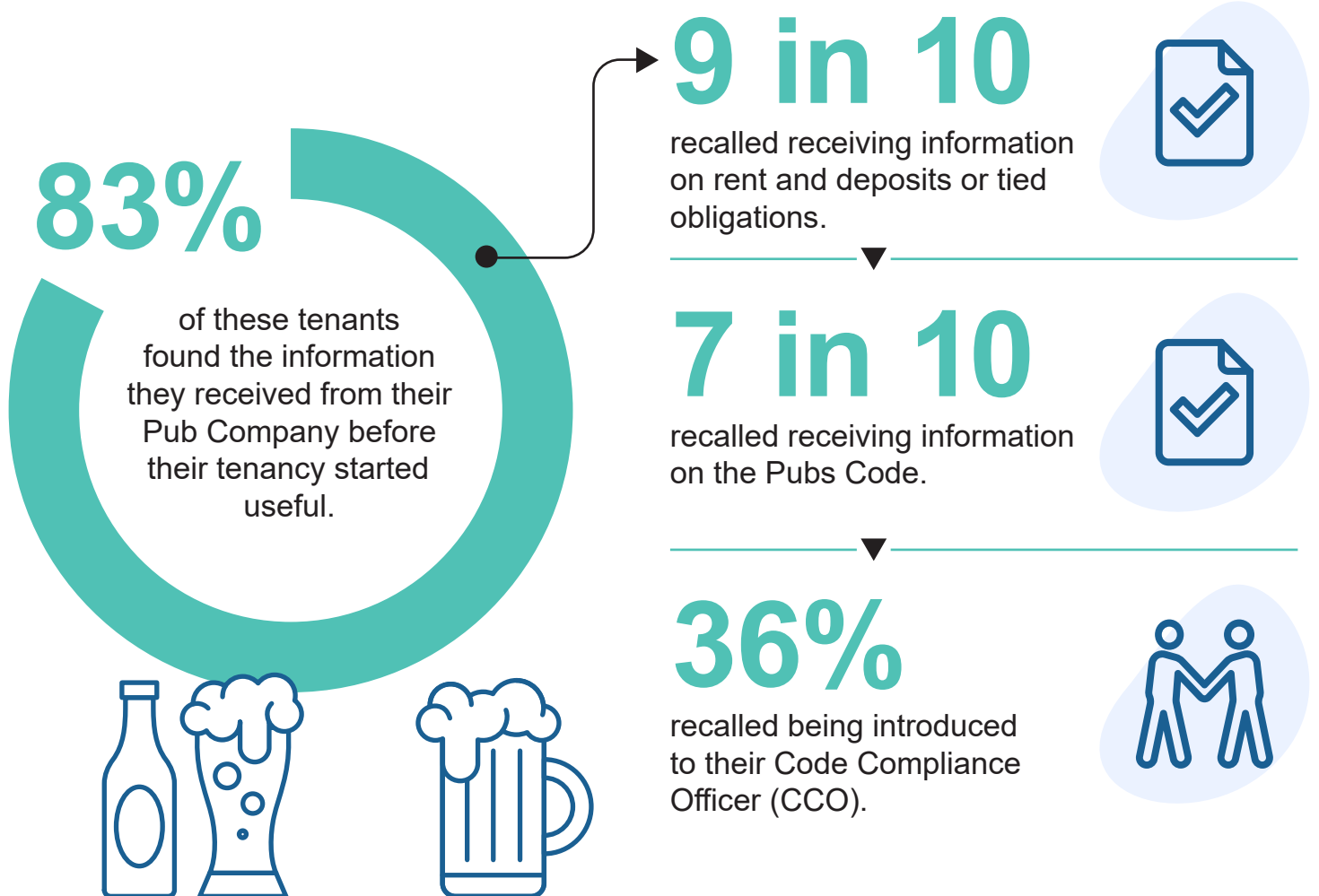
agree they are happy with how BDMs manage repairs and dilapidations.



PCA Tied Tenants Survey 2022

Ipsos interviewed a representative sample of 614 tied tenants by telephone between 12th January and 18th February, 2022.

One topic of discussion was the information received as new tenants. These questions were only asked of those becoming tied since the code came into force.



59%

find their sustainable business plan useful in managing their tenancy.

27%

do not find it useful.



10%

do not remember agreeing one.

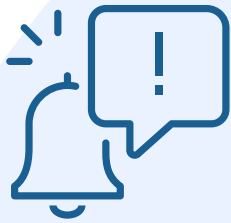




PCA Tied Tenants Survey 2022

Ipsos interviewed a representative sample of 614 tied tenants by telephone between 12th January and 18th February, 2022.

The final topic of discussion concerned awareness and perceptions of the PCA and how it communicates with tied tenants.



54%

of tenants were aware of the PCA before the survey...



which is up from **47%** in 2019.

57%

trust the PCA to regulate the pubs industry independently of the **UK government**.



35% do not

58%

trust the PCA to regulate the pubs industry independently of the **Pub Companies**.



32% do not

32%

(1 in 3) tenants have visited the PCA website in the past 2 years – mainly to get information about the Pubs Code or MRO rights in particular.



71%

(7 in 10) of those visiting the website said the information they found there was helpful.

