



**Pubs Code
Adjudicator**

PCA Tied Tenants Survey 2024

Relationship with Pub Company

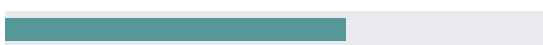
Ipsos interviewed a representative sample of 1203 tied tenants by telephone between 9th January and 13th March, 2024.

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

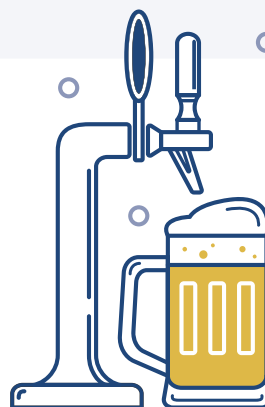
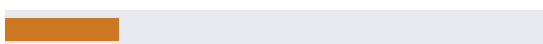
Overall satisfaction has remained at 6 in 10 tenants between 2022 and 2024



63% are satisfied

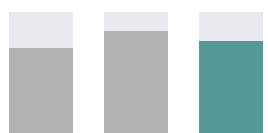


21% are dissatisfied



The top three Pub Companies for tenant satisfaction have stayed the same since 2022. Star has shown improvement this year.

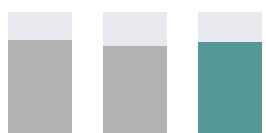
73% 85% 79%



2022 2023 2024

Marston's
(Satisfied)

80% 75% 78%



2022 2023 2024

Admiral
(Satisfied)

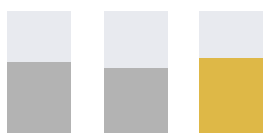
67% 75% 77%



2022 2023 2024

Greene King
(Satisfied)

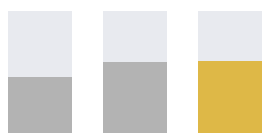
60% 55% 64%



2022 2023 2024

Star
(Satisfied)

47% 60% 61%



2022 2023 2024

Punch
(Satisfied)

59% 50% 47%



2022 2023 2024

Stonegate
(Satisfied)

■ ■ ■ These show sub group is statistically significantly higher, lower or shows no difference vs the total sample



For more information, read the full report and get the data at the PCA website.
<https://www.gov.uk/government/organisations/pubs-code-adjudicator>





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PCA Tied Tenants Survey 2024

Satisfaction with agreement type

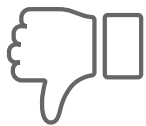
Ipsos interviewed a representative sample of 1203 tied tenants by telephone between 9th January and 13th March, 2024.

One topic of discussion was satisfaction with their type of agreement.

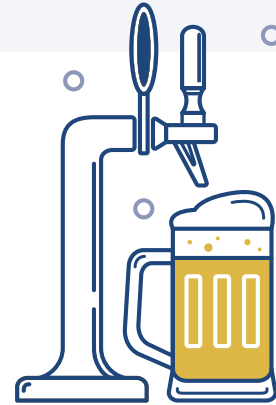
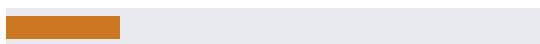
Satisfaction with agreement type has increased significantly since 2023



68% are satisfied **+6 increase from 2023**



17% are dissatisfied



Satisfaction with type of agreement has improved this year. Star has shown a significant improvement since 2023.

73% 79% 83%



2022 2023 2024

Marston's
(Satisfied)

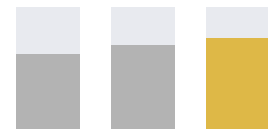
77% 74% 79%



2022 2023 2024

Admiral
(Satisfied)

64% 69% 75%



2022 2023 2024

Greene King
(Satisfied)

57% 57% 68% ▲



2022 2023 2024

Star
(Satisfied)

56% 64% 65%



2022 2023 2024

Punch
(Satisfied)

56% 53% 57%



2022 2023 2024

Stonegate
(Satisfied)

■ ■ ■ These show sub group is statistically significantly higher, lower or shows no difference vs the total sample

▲ ▼ These show statistically significant differences between 2023 and 2024





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Adjudicator**

PCA Tied Tenants Survey 2024

Business Development Manager and Code Compliance Officer

Ipsos interviewed a representative sample of 1203 tied tenants by telephone between 9th January and 13th March, 2024.

One topic of discussion was the tenants' relationship with their Business Development Manager and Code Compliance Officer.

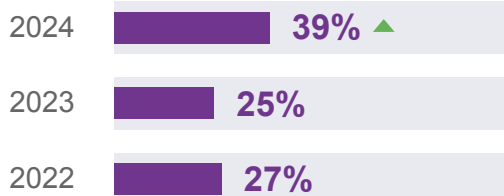
Tenant awareness of their Business Development Manager has stayed the same between 2022 and 2024



98% of tenants are aware of their BDM



More than a third of tenants now know their Code Compliance Officer



Tenant perceptions of their BDM are consistent with 2023. 3 in 4 tenants still agree their BDM is fair in discussions.

76% 81% 77% ▼



2022 2023 2024

agree BDM is fair in our discussions

74% 73% 74%



2022 2023 2024

I have all the information I need about their role

71% 72% 69%



2022 2023 2024

They provide accurate notes

58% 58% 60%



2022 2023 2024

They provide me with the information and advice I need about The Pubs Code

56% 55% 57%



2022 2023 2024

They supply the business planning support I need on an ongoing basis

39% 37% 40%



2022 2023 2024

I am happy with the way they manage repairs at my pub*

*in previous years this was "repairs/ dilapidations"

▲ ▼ These show statistically significant differences between 2023 and 2024



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PCA Tied Tenants Survey 2024

Business Development Manager

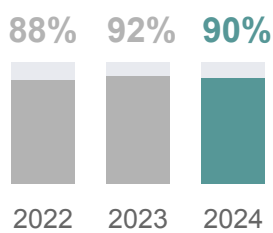
Ipsos interviewed a representative sample of 1203 tied tenants by telephone between 9th January and 13th March, 2024.

In this survey, we are able to compare tenant views of BDM fairness in discussions and the business support they provide by pub company.

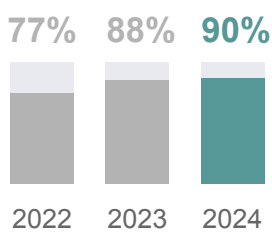
3 in 4 tenants agree their BDM is fair with them in their discussions

This is a significant 4 point drop from 2023, driven by a 10 point drop in agreement among Stonegate tenants.

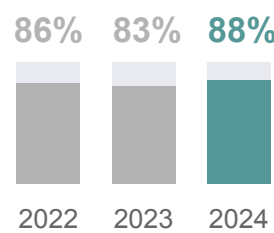
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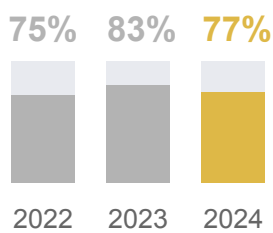
Marston's



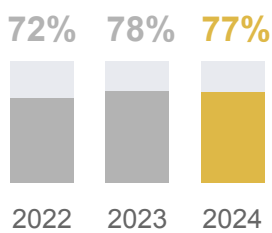
Greene King



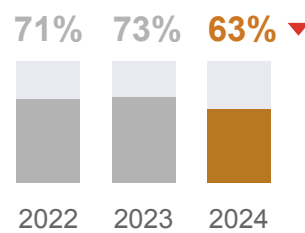
Admiral



Star



Punch

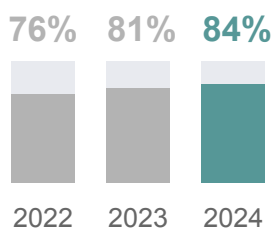


Stonegate

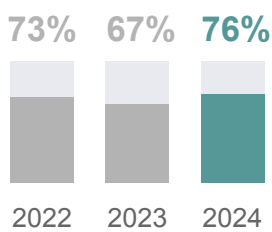
▲ ▼ These show statistically significant differences between 2023 and 2024

57% of tenants agree their BDM supplies the business planning support they need on an ongoing basis

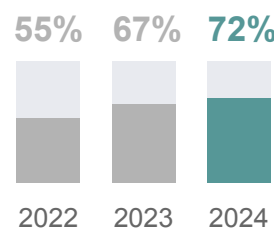
Marston's, Admiral and Greene King are most likely to agree.



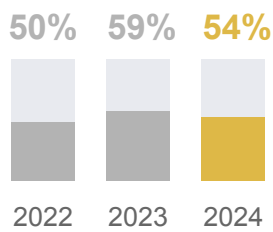
Marston's



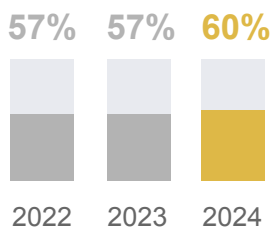
Admiral



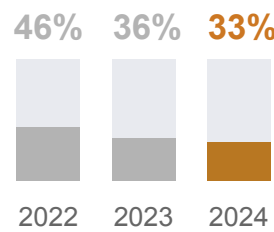
Greene King



Punch



Star



Stonegate

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PCA Tied Tenants Survey 2024

Business Development Manager

Ipsos interviewed a representative sample of 1203 tied tenants by telephone between 9th January and 13th March, 2024.

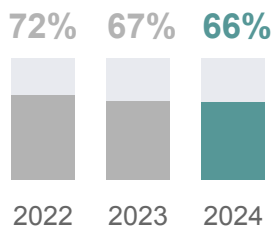
In this survey, we are able to compare tenant views about BDM management of repairs and provision of information about dilapidations by pub company

40% of tenants agree they are happy with the way their BDM manages repairs at their pub

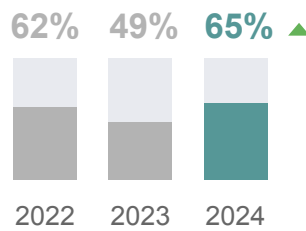
Marston's and Admiral are above average for BDMs managing repairs. Star and Admiral have seen statistically significant improvements to scores this year.

Please note - 2022 and 2023 asked about repairs and dilapidations, 2024 only repairs.

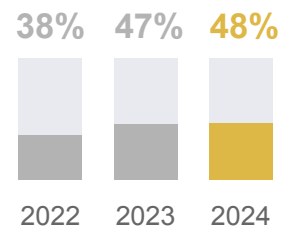
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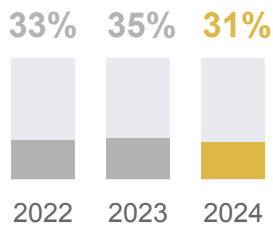
Marston's



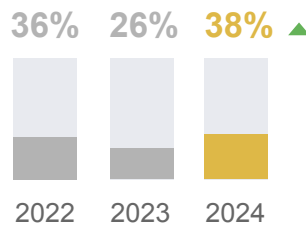
Admiral



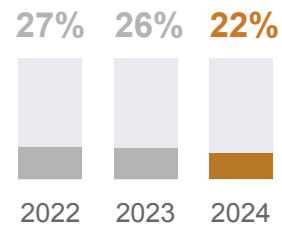
Greene King



Punch



Star



Stonegate

▲ ▼ These show statistically significant differences between 2023 and 2024

61% of tenants agree their Business Development Manager supplies information they need about dilapidations at their pub

7 in 10 tenants from Marston's, Admiral and Greene King agree. Stonegate below average.

Legend: ■ ■ ■ These show sub group is statistically significantly higher, lower or shows no difference vs the total sample



Marston's



Admiral



Greene King



Punch



Star



Stonegate

