

June 2024

PCA – Tied Tenants Survey 2024 Technical Report

**Prepared for the Pubs Code Adjudicator by
Ipsos**



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1 Background

This technical report outlines the methodology for the 2024 PCA Tied Tenants Survey. Ipsos first delivered an iteration of this survey in 2017, followed by a second wave in 2019. In 2021, Ipsos was commissioned by the Pubs Code Adjudicator (PCA) to run the survey for three years. Beginning in 2022 and finishing this year, the core aims of the survey have been to measure awareness and familiarity with the Pubs Code and the PCA among tied tenants over the three years, while also exploring the tenant relationship with each of the respective Pub Companies over time. There has been a particular focus on how Pub Companies manage repairs this year. The survey also covered how the PCA communicates with tenants and captured some demographic information about tenants too for analysis purposes.

The scale of this survey changed in 2023, with the total number of interviews increased from n=600 to a target of n=1200 to facilitate analysis of results by Pub Company. This approach has continued this year with 1203 interviews completed in 2024.

2 The 2024 Tied Tenants Survey

2.1 Sample selection

Sampling for the telephone survey broadly replicated the approach taken in 2023.

- We were aiming to achieve 1200 interviews with tied tenants of pubs from the six main pub companies.
- Pub companies only provided Ipsos with pub names and addresses. Therefore, Ipsos needed to source telephone numbers for tenants independently.
- As in 2023, Ipsos targeted the full sample this year in order to achieve 1200 interviews, approaching tenants at random within quotas set to ensure a representative sample was achieved.

After signing mutual non-disclosure agreements, the six pub companies provided lists of tenanted pubs in their estates, including pub names and post codes. Ipsos then compared the number of pubs provided with PCA records for the size of each estate to see if numbers matched what was expected. The numbers broadly matched what we expected, apart from Punch Pubs. As was the case in previous years, certain retail contracts were excluded on the request of Punch that were not deemed to be tied tenants.

Table 2.1: Comparison of pubs received versus estimated estate size

	Number of pubs received from Pub Company	Expected size of Pub Company estate from PCA records
Greene King	766	766
Punch Taverns	802	889
Admiral Taverns	1,035	1,056
Stonegate / El group	2,588	2,643
Star Pubs & Bars	1,757	1,741
Marston's	948	945
Total	7,896	8,040

Once Ipsos had the pub names and addresses for the agreed universe of 7,896 pubs, targets were set for the number of interviews to be achieved by pub company within our total of n=1200. For analysis purposes, the decision was made to keep the number of tenants targeted in each pub company broadly proportional to the tenant universe by size of estate but to ensure minimum targets were set of n=150 interviews for the smaller pub companies. Quota targets were then set ahead of fieldwork by pub company and region within them to ensure a representative sample of tenants were surveyed, subject to the slight imbalance caused by surveying a minimum of n=150 tenants per pub company within our n=1200 target overall. The below table shows the imbalance between the target number of interviews set

by pub company and how this corresponds to the number of contacts provided by the pub companies. As we can see, this imbalance is small and easily corrected by weighting at the data analysis stage (see section 2.4 Weighting of survey responses for more).

Table 2.2: Target number of interviews for each pub company compared to estate size

	Number of pubs received from Pub Company	%	Target number of interviews	%
Greene King	766	9.70%	150	12.50%
Punch Taverns	802	10.16%	150	12.50%
Admiral Taverns	1,035	13.11%	150	12.50%
Stonegate / EI group	2,588	32.78%	370	30.83%
Star Pubs & Bars	1,757	22.25%	230	19.17%
Marston's	948	12.01%	150	12.50%
Total	7,896	100%	1200	100%

Once these targets were set, a two-stage, iterative sampling process was undertaken:

Stage 1) Sample selection

1. Lists of tied tenants from all pub companies were combined into one file and stratified (sorted) by pub company and region.
2. All records were loaded for selection given the sample size and approach for survey at random. The CATI team monitored quotas by region and pub company during fieldwork to ensure the sample was representative of the pub company universe.

Stage 2) Matching telephone numbers

As pub companies did not provide contact details for tenants, Ipsos had to source these manually through a combination of purchased lists and manual online searches. The provider used for telematching pub names and addresses to phone numbers for this project was Datascope. We then ran the records through the DNC (do not contact) register. This meant 14 records were removed ahead of calls beginning. In the end Ipsos contacted a sample of 7,882 pubs. More information on the achieved response rate by pub company and the profile of survey respondents can be found in sections 2.3 Fieldwork and achieved response rate and 2.4 Weighting of survey responses below.

2.2 Questionnaire design

The survey instrument for the 2024 survey of tied tenants was designed by Ipsos, in partnership with the PCA, based on the previous iteration of the survey with a few small amendments following a discussion with the PCA in October. The survey itself can be found in the annex of this report but key themes included:

Table 2.3: Summary of survey themes

Theme	Areas covered
Introduction and screener questions	<ul style="list-style-type: none"> ▪ Purpose of research explained, consent sought. ▪ Respondents screened to ensure tied tenant from one of six pub companies & other profiling information such as single vs multiple operator or type of tenancy. ▪ NEW: Asking leaseholders if they were the original leaseholder of it they had taken an assignment from another party.
Information about code and experience of rights	<ul style="list-style-type: none"> ▪ Awareness of code, where information received, familiarity with rights. ▪ Experience of code events and satisfaction with pub company response. ▪ NEW: Asking those that price matches premises insurance if they contacted the Pub Company to discuss further.
New tenant questions	<ul style="list-style-type: none"> ▪ When tenant became tied to pub company. ▪ Reasons for choosing type of agreement, satisfaction with it, why? ▪ Information received as new tenant, usefulness of it and usefulness of sustainable business plan.
Relationship with pub company	<ul style="list-style-type: none"> ▪ Awareness and satisfaction with Business Development Manager (BDM) / Code Compliance Officer (CCO) across several measures. ▪ Overall satisfaction with relationship with pub company and why? ▪ NEW: Questions around repairs and dilapidations from previous years split out to deal with each separately.
PCA and comms	<ul style="list-style-type: none"> ▪ Awareness and perceptions of PCA. ▪ Use of website and satisfaction with it. ▪ Use of enquiry line and satisfaction with it. ▪ NEW: Asking those concerned about independence of the PCA why.

At the end of the survey, respondents were asked some demographic questions for analysis purposes (age, gender, ethnicity, disability status) and how long they had been working in the pubs industry as a tenant. Recontact questions were also asked in case of future research or queries about answers given.

2.3 Fieldwork and achieved response rate

Overall, 1,203 telephone surveys were conducted between January 9th and March 13th, 2024. The average interview length was 21 minutes and 21 seconds. Interviewers were briefed before calling by the CATI team manager and the pub companies sent an email to their tenants designed by Ipsos and the PCA to introduce the survey and try to help boost response rates. The introductory email also gave tenants the opportunity to opt out of the survey using an automated form which Ipsos monitored during fieldwork. The survey was launched during the week commencing January 8th. Fieldwork was kept open for 2 additional days in order to maximise response rates for two pub companies – Punch Taverns and Greene King. As in 2023, fieldwork closed with the number of completed interviews for Punch Taverns and Green King slightly below their initial targets. However, the proportion of completes per pub company as a percentage of the total number of completes is broadly similar to the proportion of pubs per pub company as a percentage of the total universe. The table below summarises the quotas, interviews achieved and the breakdown of interviews achieved per pub company compared to target universe.

Table 2.4: Comparison of sample loaded and interviews completed

	Initial quota	Interviews completed	% total completes	% of pubs in universe
Admiral Taverns	150	152	12.6%	13.1%
Stonegate / El Group	370	384	31.9%	32.8%
Greene King	150	135	11.2%	9.7%
Marston's	150	165	13.7%	12.0%
Punch Taverns	150	134	11.1%	10.1%
Star Pubs and Bars	230	233	19.4%	22.3%
TOTAL	1,200	1,203¹	100%²	100%

The unadjusted response rate for this survey was 15%. This is consistent with last year.

¹ Note. In previous years some stakeholders have expressed concern that not enough multiple operators have been surveyed e.g. those holding tenancies with more than one pub. This year, Ipsos worked with UK Hospitality to identify multiple operators to approach for survey. 20 relevant tenants were identified and approached by email and a further 2 tenants took part in the survey.

² Note percentages may not sum to 100% due to rounding

2.4 Weighting of survey responses

As mentioned above (see table 2.4.), there was a small (deliberate) imbalance within the n=1203 interviews achieved, between the number achieved by pub company and their relative size in the tenant universe provided. Smaller pub companies were overrepresented to achieve a big enough sample size to make comparisons between this sub-group. RIM weighting was used to correct for this imbalance, ensuring that the final data set was representative of the tenant universe by pub company and by region within them.

Specifically, this means that in our final weighted dataset:

- 1) The proportion of tenants within each pub company cohort is representative by region.
- 2) The proportion of tenants from different pub companies in the overall sample is representative of the size of the respective pub company estates.

As there was little difference between achieved responses and the target universe, the weighting efficiency for this survey was a healthy 96%.

2.5 Analysis and reporting

Data tables were provided alongside verbatim comments in XL and a PowerPoint presentation / infographic of key findings. Key analysis was provided by:

- 2023 vs 2024
- Pub company 2023 / 2024
- Length of tenancy
- Type of tenancy
- Single / multiple operator
- Awareness of Pubs Code
- Awareness of PCA
- Satisfaction with tenant / pub company relationship
- Tenant demographics such as age and gender

2.5.1 Reporting of trends and subgroup analysis

Results in any quantitative study are subject to sampling variability. As we have only spoken to a sample of tied tenants, we cannot be certain that the figures obtained will exactly match those amongst the tenant population as a whole (the 'true' values). We can, however, predict the variation between the sample results and the true values based on the size of the samples on which the results are based, and the number of times a particular answer is given. The confidence with which we can make this prediction is usually chosen to be 95 percent – that is, the chances are 95 in 100 that the true value will fall within a specified range (the margin of error). Based on the sample size used here (n=1203), we can expect the true values to lie within 3 percentage points either way of the figures obtained in this survey.

In order to analyse results by pub company we ensured a minimum of n=100 tenants from each pub company were interviewed. However, we should still acknowledge that confidence intervals with these subgroups will be larger than they are with the overall achieved survey sample and this should be taken into account when considering the results. For reference, the confidence intervals for results at an individual pub company level will vary between plus or minus 5 and 8 percentage points.

3 Appendix

3.1 Advance email invitation

Ipsos / PCA Tied Tenants Survey 2024

Dear tenant / licensee,

I am writing to let you know about a telephone survey being run by independent research company Ipsos on behalf of The Pubs Code Adjudicator. This year Ipsos aims to speak to 1,200 tenants, after successfully reaching this number in last year's annual survey.

The PCA has commissioned this work to better understand the views of tied tenants and licensees in several areas. Topics include:

- Your awareness and understanding of your statutory rights under the Pubs Code,
- Your experience of these rights and any further information you might need on them,
- How satisfied you are with your relationship with your pub company in several areas and why,
- Your views about the new tenant process and the information you received at that time,
- Your awareness of the PCA itself and views on any interaction you may have had with them in the past.

I would like to stress that this work is being conducted independently by Ipsos on behalf of the PCA and not your pub company. All survey responses will be strictly anonymous. Survey participants will be called at random by Ipsos and neither the PCA nor your pub company will know who has taken part.

We hope you can find the time to participate if called. Your feedback will help the PCA better understand the views of Tied Tenants and Licensees and how The Pubs Code – and industry generally – might work better in the future.

What happens next?

You may be called in the next few weeks by an Ipsos interviewer to invite you to take part in the research and to arrange a time for the interview. **The interview will take around 20 minutes to complete depending on your answers.** We appreciate that for some tenants you may not be on-site very often, especially if you run multiple tenancies, so please let your staff know to pass the call on or provide an alternative number if Ipsos call when you are out but you want to take part.

If you have any questions about the research, you can get in touch using the following email address UK-SRI-TiedTenantsSurvey2024@ipsos.com. Alternatively, **if you would like to opt out of the study** you can do so by entering your pub name and post code here: https://ipsos.uk/pca_tiedtenantssurvey24_optouts or by letting the interviewer know when they call.

How will my survey responses be used?

Ipsos is a member of the Market Research Society and as such follows all its rules. Everything you say in the survey will be treated as strictly confidential and only used for research purposes. Your identity and your company's identity will not be passed on to any third party. Anonymised survey responses will be used in aggregate form (compiled and considered as a whole and at a pub company level). Any personal information you do provide will be held securely and data will be destroyed within 3 months of the survey ending unless you consent to being recontacted within 12 months.

No individual will be identifiable from their survey responses and nobody will know you have taken part other than Ipsos.

For further information on your rights and how Ipsos uses your data please consult the following privacy policy linked here : https://ipsos.uk/pca_privacypolicy.

May I take this opportunity to thank you in advance for assisting us with this important study.

Kind Regards,



Fiona Dickie
Pubs Code Adjudicator



Why am I being contacted?

The PCA wants to hear from pub tenants who have a tied tenancy agreement with your pub company. Your pub company has provided Ipsos with a list of pub names and postcodes for tenants on their estate. Ipsos has then sourced phone numbers from a combination of publicly and commercially available sources. No personal information has been shared about you by your pub company.

Who will be invited to take part?

Ipsos aims to interview 1,200 tied tenants and licensees in total, which amounts to approximately 15% of the total tied tenant estate in England and Wales. Ipsos will approach a representative sample of tenants at random and nobody outside of Ipsos will know who has been called or taken part.

Where can I find out more?

If you would like more information about this research, please find some useful contact details below:

- If you would like to **verify the authenticity of this research**, OR if you have any **other questions for the Pubs Code Adjudicator or PCA** please contact office@pubscodeadjudicator.gov.uk or visit the PCA's Twitter page <https://twitter.com/pubscodepca>
- If you would like more **information about Ipsos** and how this research is being undertaken, please email UK-SRI-TiedTenantsSurvey2024@ipsos.com. Someone will aim to get back to you within 48 hours of your email.
- For more information **about how your data will be used** please consult the privacy policy [here](#).

3.2 Telephone survey questionnaire

Question text in Black

Scripting instructions in PURPLE

Introduction

INTRODUCTION

Good morning/afternoon my name is I am calling from Ipsos, an independent research agency.

We are conducting a major research project for the Pubs Code Adjudicator or the PCA. We are NOT connected to [PUB COMPANY FROM SAMPLE]

May I speak to the tenant for this pub please?

IF NEEDED: We are looking for the person who holds or controls the tenancy with the Pub Company for this establishment. This may be the person who owns the limited company which controls the tenancy, or the leaseholder.

WHEN THROUGH: Hello there. We are conducting a survey of tied tenants and licensees on behalf of the PCA. We want to explore your awareness and understanding of your statutory rights, your experience exercising them, if any, and any further information you might need in future. We also want to understand your relationship with your pub company and about your experiences when you were a new tenant.

TO THE TENANT: You should have received an email in early January from [PUB COMPANY FROM SAMPLE] about this survey? If not, I can send you an email now, if you are happy to confirm an appropriate email address?

1. SEND EMAIL TO [EMAIL ADDRESS]
2. DO NOT SEND EMAIL [CONTINUE]

The survey will take around 20 minutes depending on the answers you give. Are you happy to continue?

1. Speaking to correct person/put through and agreed to continue – **START INTERVIEW (INTRO1)**
2. Other outcome – **RECORD OUTCOME**

INTRO1

Before we begin, I'd like to inform you that Ipsos is a member of the Market Research Society. All information that you give us will be treated in the strictest confidence and your identity / your company's identity will not be passed on to a third party or connected to your answers in any way.

We follow strict quality control procedures and record calls for this purpose - audio files are destroyed within three months.

INTRO2CONSENT

Anonymised survey responses will be used by the PCA and other industry stakeholders for analysis, evaluation and to help feed into policy making. You and your pub will not be individually identifiable by anyone based on the answers you give.

More information about how your survey responses will be used can be found in our privacy policy, which I can send to you at the end of the survey if you wish. (https://ipsos.uk/pca_privacypolicy)

Participation in this survey is voluntary, and you can withdraw at any point of the interview by letting me know.

Are you happy to proceed with the interview based on the conditions I have outlined?

3. Yes
4. No – **CLOSE**
5. Not sure – **offer reassurances below, confirm consent afterwards**

INTERVIEWER IF NECESSARY: Offer reassurances below if participant asks, and if respondent wants further information, offer contact name at Ipsos or to email the privacy notice before the interview takes place.

1. **Who commissioned the survey?** The survey is conducted on behalf of Pubs Code Adjudicator or PCA.
2. **How did you get my details?** Establishments have been chosen at random to take part. Your Pub Company has given us your Pub’s name and post code and we have sourced your phone number from commercially and publicly available sources. Your pub company is aware that you might be contacted but you can check with them also.
3. **Will I be identifiable in the survey results?** No information about individuals or tenancies will be identified in the results shared with the Pubs Code Adjudicator and other industry stakeholders. All information collected will be used only for research purposes.
4. **How will survey results be used?** The results will be based on an amalgamation of individual survey responses with anonymised individual survey responses published on the PCA website in SPSS format for research purposes. You and your pub will not be identifiable from the responses you give.
5. **What do we mean by industry stakeholders?** Each Pub Company will receive their own results but these will be anonymised – nothing will identify yourself. The department for Business Energy and Industrial Strategy will also have access to the results too but only in an anonymous format. They will not be able to identify you or your pub from your responses.
6. **Where can I find out more?**
 - If you would like to confirm that Ipsos is a bona fide Research company, you can call the Market Research society, free of charge, on 0800 975 9596
 - If you have any queries about the research, please contact Ipsos by email at UK-SRI-TiedTenantsSurvey2024@ipsos.com
 - If you would like to speak to someone at the PCA about this research please contact Julia Tortise, the Finance and Operations Manager at the PCA, by email at Julia.Tortise@pubscodeadjudicator.gov.uk
 - If you would like to read our privacy policy before taking part in the research I would be happy to email you a copy or you can view this at https://ipsos.uk/pca_privacypolicy. Alternatively, we can send you a copy at the end of the survey and you can withdraw consent for your survey responses to be used at any time by letting me know.

Q1. Can I just check, is that **(PUB NAME FROM SAMPLE)** at **(POSTCODE FROM SAMPLE)?**

Yes	1	CONTINUE
No	2	TYPE IN DETAILS FOR RECORD AND CLOSE

SCREENING

READ OUT: To start the interview I just need to ask a few questions about your tenancy and any pubs you operate.

BASE ALL

S1a. Can you confirm which Pub Company you are currently a tied tenant with in relation to **[PUB NAME FROM SAMPLE]... Is it [PUB COMPANY FROM SAMPLE]?**
SINGLE CODE ONLY

1. Yes
2. No
3. Don’t know

BASE = if S1A = No / don’t know

S1b. Which pub company is it?

1. Admiral

2. Marston's
3. Punch Pubs
4. Star Pubs & Bars
5. Greene King
6. Stonegate (trading name of Ei Group)
7. None of the above **CLOSE**

BASE ALL

S2. And how many pubs, whether tied or not, do you operate anywhere in the UK?
DO NOT READ OUT. SINGLE CODE TO LIST. INTERVIEWER NOTE: SOME WILL REFERENCE THEMSELVES AS AN OPERATOR OR RETAILER.

1. Single operator
2. Multiple operator: 2 - 4 pubs
3. Multiple operator: 5 - 9 pubs
4. Multiple operator: 10 - 25 pubs
5. Multiple operator: 25 or more pubs
6. Don't know/refused **:CLOSE**

IF MULTIPLE OPERATOR (S2 CODES 2-5) READ OUT: Ok. Please just answer in relation to your tenancy with [PUB NAME FROM SAMPLE] for the rest of the interview

BASE ALL

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

PROMPT IF UNSURE OF DIFFERENCE BETWEEN TIED TENANCY AND LEASE AGREEMENT: A tied lease will typically be for a longer period and may include a right to renew under the Landlord and Tenant Act 1954, but is likely to make the tenant fully responsible for repairs to the premises during the lifetime of the lease. A tied tenancy will typically be for a shorter period and with no statutory or contractual right for the tenant to renew and is likely to have less onerous repairing obligations.

READ OUT SINGLE CODE

1. A tied lease agreement
2. A tied tenancy
3. A franchise agreement
4. A short agreement of less than 12 months or tenancy at will
5. **[IF PUB COMPANY=MARSTONS]** A retail agreement such as pillar, foundation or other type of tied retail agreement
6. You are employed by the pub company to manage the pub - **CLOSE**
7. Free of tie - **CLOSE**
8. Something else **(SPECIFY)**
9. Don't know **(DON'T KNOW).**

BASE ALL WHO HAVE A TIED LEASE AGREEMENT, S3=1

S3A. And thinking about the existing lease on the pub, are you the original leaseholder, or did you take an assignment of the lease from another party?

DO NOT READ OUT. PROMPT TO CODE.

1. Original leaseholder
2. An assignee **(PROMPT IF NEEDED: An assignment is when a tenant transfers the remaining duration of the lease to another person)**
3. Something else **(DO NOT READ) (SPECIFY)**
4. Don't know **(DO NOT READ)**

SECTION C: Information on the Pubs Code and awareness of Code rights

READ OUT: Thank you. I would now like to ask you about the Pubs Code...

BASE ALL

C.1 Have you ever read, seen or heard anything in relation to The Pubs Code?

READ OUT. SINGLE CODE.

1. Yes
2. No
3. Don't know / can't remember

READ OUT

The code came into force as a statutory code on 21 July 2016 and applies to all pub companies owning 500 or more tied pubs in England and Wales. It governs their relationships with their tied tenants but not with their managed houses or free-of-tie pub tenants.

BASE ALL

C.2 How aware, if at all, were you of The Pubs Code before today?

READ OUT. SINGLE CODE ONLY. REVERSE CODES 1-4.

1. Very aware
2. Quite aware
3. Not very aware
4. Not at all aware
5. Don't know **(DO NOT READ OUT)**

BASE ALL READ SEEN OR HEARD ANYTHING ABOUT THE PUBS CODE C1=1

C.3 Where have you read, seen or heard anything about The Pubs Code in the past 12 months? DO NOT READ OUT. CODE ALL THAT APPLY. PROBE FULLY

PCA:

- Website
- Enquiry line / Phone the PCA
- Morning Advertiser
- Factsheets / flowcharts
- Magazines
- Leaflets – hard copy information
- Videos
- PCA social media
- Events

PUB COMPANY / BUSINESS DEVELOPMENT MANAGER:

- Website
- Email
- Roadshows
- Leaflets
- Information or advice from BDM
- Information or advice from CCO
- Information or advice from other pub company employees

TENANT NETWORK:

- Tenant representative groups
- Word of mouth – internal / external colleagues
- Publications
- Websites

INDUSTRY GROUP

- British institute of innkeeping (BII)

CONSUMER GROUP

- CAMRA

OTHER:

- Radio programmes / news
- Internet / google
- Newspapers
- Other social media
- Smart device
- Elsewhere [specify]

Don't know **EXCLUSIVE**

I have not read, seen or heard anything about the pubs code in the last year **EXCLUSIVE**

BASE ALL

C.4 If you wanted to find out some information on The Pubs Code, where would you go for this information? DO NOT READ OUT. CODE ALL THAT APPLY. PROBE FULLY

PCA:

- Website
- Enquiry line / Phone the PCA
- Morning Advertiser
- Factsheets / flowcharts
- Magazines
- Leaflets – hard copy information
- Videos
- PCA social media
- Events

PUB COMPANY / BUSINESS DEVELOPMENT MANAGER:

- Website
- Email
- Roadshows
- Leaflets
- Information or advice from BDM
- Information or advice from CCO
- Information or advice from other pub company employees

TENANT NETWORK:

- Tenant representative groups
- Word of mouth – internal / external colleagues
- Publications
- Websites

INDUSTRY GROUP

- British institute of innkeeping (BII)

CONSUMER GROUP

- CAMRA

OTHER:

- Radio programmes / news
- Internet / google
- Newspapers
- Other social media
- Smart device
- Go elsewhere [specify]

Don't know **EXCLUSIVE**

I would not look for information about the pubs code **EXCLUSIVE**

BASE ALL

There are various events under The Pubs Code that you may have experienced since 21st July 2016.

C5. READ OUT: Which, if any, of the following have you experienced with [PUB OWNING BUSINESS] in the last 12 months?

READ OUT STATEMENT. CODE ALL THAT APPLY.

- A. [IF S3=1,2,8,9] Requested a **market rent only option to** go free of tie
- B. Received a **Rent Assessment Proposal** from your Pub Company regarding an existing tenancy
- C. Received a **Rent Proposal** from your Pub Company regarding a new or renewed tenancy
- D. Sought to price match the amount you pay your Pub Company for **premises insurance** on the open market
- E. None of these **EXCLUSIVE**
- F. Don't know **(DO NOT READ OUT) EXCLUSIVE**

BASE ALL WHO SOUGHT A PRICE MATCH, C5=D

C5A. And when you sought to price match the amount you pay your Pub Company for premises insurance on the open market, did you?

- 1. Look for a better deal and contact your Pub Company to discuss further
- 2. Look for a better deal but did not contact your Pub Company to discuss further
- 3. Something else **(SPECIFY) (DO NOT READ OUT)**
- 4. Don't know **(DO NOT READ OUT)**

BASE ALL

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?

READ OUT SCALE. REVERSE CODES 1-4. SINGLE CODE PER STATEMENT.

- 1. Very familiar
- 2. Somewhat familiar
- 3. Not very familiar
- 4. Not familiar at all
- 5. Don't know **(DO NOT READ OUT)**

RANDOMISE STATEMENTS A-D

- A. [IF S3=1,2,8,9] Your right to request a **market rent only option to** go free of tie in certain circumstances
- B. Your rights when receiving a **Rent Assessment Proposal** from your Pub Company regarding an **existing tenancy**
- C. Your rights when receiving a **Rent Proposal** from your Pub Company regarding a **new or renewed tenancy**
- D. Your right to price match the amount you pay your Pub Company for **premises insurance** on the open market

BASE ALL EXPERIENCED EACH EVENT

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

IF NEEDED. Please think about the most recent time you experienced each event.

READ OUT SCALE. REVERSE CODES 1-5. SINGLE CODE PER STATEMENT.

- 1. Very satisfied
- 2. Fairly satisfied
- 3. Neither satisfied nor dissatisfied
- 4. Fairly dissatisfied
- 5. Very dissatisfied
- 6. Don't know **(DO NOT READ OUT)**

RANDOMISE STATEMENTS A-E

- A. [IF C5=A] Requested a **market rent only option to** go free of tie

- B. **[IF C5=B]** Received a **Rent Assessment Proposal** from your Pub Company regarding an existing tenancy
- C. **[IF C5=C]** Received a **Rent Proposal** from your Pub Company regarding a new or renewed tenancy
- D. **[IF C5=D]** Sought to price match the amount you pay your Pub Company for **premises insurance** on the open market

SECTION G: Becoming a new tenant

READ OUT: We would now like to ask you about your relationship with your pub company in more detail. Firstly, thinking back to when your tenancy started...

BASE ALL

G1. When did you become a tied tenant for [PUB NAME FROM SAMPLE] with [PUB OWNING BUSINESS]?

IF UNSURE / LEASEHOLDER OR OTHER ARRANGEMENT: When did you first enter into a tied tenancy, lease agreement or other arrangement with your pub company for your pub?

NOTE FOR INTERVIEWER: We are interested in when the tenancy first began, not when it was most recently renewed.

1. **OPEN RESPONSE - RECORD MONTH AND YEAR.**
2. Don't know **(DO NOT READ OUT)**

CODE 2 AT G1 OR JULY 2016 AT G1

G2A. Are you able to estimate when you first became a tied tenant for [PUB NAME FROM SAMPLE] with [PUB OWNING BUSINESS]?

READ OUT. SINGLE CODE

1. Before the 21st July 2016
2. On or after the 21st July 2016
3. Don't know

BASE ALL

G2B. Was [PUB OWNING BUSINESS] your pub company when you first took over the pub?

READ OUT. SINGLE CODE.

1. **Yes**
2. **No – [PLEASE GIVE MORE DETAILS]**
3. **Don't know**

CODES 1,2,3,4,5 and 8 AT S3

G4. Overall, how satisfied or dissatisfied are you with the type of tenancy arrangement you chose for your pub?

READ OUT. REVERSE CODES 1-5. SINGLE CODE ONLY

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Don't know **(DO NOT READ OUT)**

CODES 1,2,3,4,5 and 8 AT S3

G5. And why do you say that?

1. **VERBATIM / OPEN ENDED RESPONSE**
2. Don't know **(DO NOT READ OUT)**
3. Prefer not to say **[DO NOT READ OUT]**

BASE ALL

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

DO NOT READ OUT. PROMPT TO LIST. MULTIPLE RESPONSES ALLOWED BUT CODES 3,4 EXCLUSIVE

1. Yes - trial period
2. Yes – break clause
3. No – neither **EXCLUSIVE**
4. Don't know **(DON'T READ OUT) EXCLUSIVE**

BASE ALL AFTER JULY 2016 AT G1 OR CODE 2 AT G2A

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

READ OUT. RANDOMISE 1-10.CODE ALL THAT APPLY.

1. Advice to get Pre-entry training
2. Information about the Pubs Code
3. Introduction to your CCO
4. Schedule of Condition for premises
5. Information about maintenance and repair obligations
6. Details of the tied obligations
7. Rent and deposit information
8. Premises insurance arrangements
9. **IF CODE 3 AT S3:** Details of your share of turnover
10. Pub company policies on breaches
11. Did not receive any of these **before your tenancy started EXCLUSIVE**

BASE ALL AFTER JULY 2016 AT G1 OR CODE 2 AT G2A

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

READ OUT. REVERSE CODES 1-4. SINGLE CODE ONLY

1. Very useful
2. Fairly useful
3. Not very useful
4. Not at all useful
5. Don't know (**DO NOT READ OUT**)
6. I did not receive any information (**DO NOT READ OUT**)

BASE ALL AFTER JULY 2016 AT G1 OR CODE 2 AT G2A

READ OUT: Before entering into your tenancy agreement, [PUB OWNING BUSINESS] should have agreed a sustainable business plan with you. This includes things like financial forecasts for your tenancy.

BASE ALL AFTER JULY 2016 AT G1 OR CODE 2 AT G2A

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

READ OUT. SINGLE CODE. REVERSE CODES 1-4.

1. Very useful
2. Fairly useful
3. Not very useful
4. Not at all useful
5. I do not recall agreeing a sustainable business plan (**DO NOT READ OUT**)
6. Don't know (**DO NOT READ OUT**)

SECTION D: Relationship with the Pub Company

READ OUT: Now thinking about your relationship with your pub company more recently...

BASE ALL

D.1 To what extent, if at all, do you agree or disagree with the following statements about your business development manager?

Please note, your business development manager is anyone who negotiates with you over rent, repairs or business planning on behalf of [PUB OWNING BUSINESS].

IF NEEDED: If you have more than one please think about the person you deal with most often.

READ OUT. REVERSE CODES 1-5. SINGLE CODE ONLY PER STATEMENT

1. Strongly agree
2. Tend to agree
3. Neither agree or disagree
4. Tend to disagree
5. Strongly disagree
6. Don't know **(DO NOT READ OUT)**
7. I don't know who my business development manager is **(DO NOT READ OUT – MOVE TO NEXT QUESTION)**
8. Not applicable **(DO NOT READ OUT)**

READ OUT STATEMENTS. RANDOMISE.

1. I have all the information I need about their role
2. They supply the business planning support I need on an ongoing basis
3. They provide me with the information and advice I need about The Pubs Code
4. I am happy with the way they manage repairs at my pub
5. My Business Development Manager is fair with me in our discussions
6. They provide accurate notes of our discussions about rent, repairs and business planning
7. **[NOT TO FRANCHISEES S3=NOT3]** They provide me with the information I need about dilapidations at my pub **(PROMPT IF NEEDED: dilapidations are repair works required to be undertaken by the tenant at the end of the agreement)**

BASE ALL WHO AGREE OR DISAGREE WITH THEY ARE HAPPY WITH HOW THEIR BDM MANAGES REPAIRS, D1 _ 4=1-5

D1A. Earlier you said you [PIPE IN RESPONSES FROM D1_4] that you are happy with the way your business development manager manages repairs at your pub. Why did you say that?

1. **VERBATIM / OPEN ENDED RESPONSE**
2. Don't know **(DO NOT READ OUT)**
3. Prefer not to say **[DO NOT READ OUT]**

BASE ALL

D.2 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? If you do not know who your Code Compliance Officer is please say so.

READ OUT. REVERSE CODES 1-5. SINGLE CODE ONLY PER STATEMENT

1. Strongly agree
2. Tend to agree
3. Neither agree or disagree
4. Tend to disagree
5. Strongly disagree
6. Don't know **(DO NOT READ OUT)**
7. I don't know who my Code Compliance Officer is **(DO NOT READ OUT - MOVE TO NEXT QUESTION)**

READ OUT STATEMENTS. RANDOMISE.

1. I have all the information I need about their role
2. I know how to contact my Code Compliance Officer

3. I have confidence in how my Code Compliance Officer handles issues related to The Pubs Code
4. They provide me with the information and advice I need about the Pubs Code

BASE ALL

D.3 Overall, taking everything into account, how satisfied or dissatisfied are you with your relationship with [PUB OWNING BUSINESS] today?

READ OUT. REVERSE CODES 1-5. SINGLE CODE ONLY

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Don't know **(DO NOT READ OUT)**

ALL 1-5 AT D3

D.4 What are the main reasons why you are [ANSWER CODE FROM D3] with the relationship?

1. **VERBATIM / OPEN ENDED RESPONSE**
2. Don't know **(DO NOT READ OUT)**
3. Prefer not to say **[DO NOT READ OUT]**

SECTION F: The PCA service and communications

This final section now is about The Pubs Code Adjudicator specifically. Only a few more questions left...

READ OUT The Pubs Code Adjudicator or PCA is responsible for enforcing the statutory Pubs Code. The Pubs Code regulates the relationship between all businesses owning 500 or more tied pubs in England and Wales and their tied tenants. From now on we will refer to them as the PCA.

BASE ALL

F.1 Before today, how aware, if at all, were you of The Pubs Code Adjudicator? READ OUT. SINGLE CODE ONLY.

1. Very aware
2. Quite aware
3. Not very aware
4. Not at all aware
5. Don't know (**DO NOT READ OUT**)

ALL CODES 1-3 AT F1

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

READ OUT. REVERSE CODES 1-4. SINGLE CODE ONLY PER STATEMENT

1. Trust a great deal
2. Trust a fair amount
3. Do not trust very much
4. Do not trust at all
5. Don't know (**DO NOT READ OUT**)

RANDOMISE STATEMENTS

1. Regulate the pubs industry independently of the UK government
2. Regulate the pubs industry independently of the pub companies

BASE ALL WHO DISTRUSTS THE PCA TO BE INDEPENDENT, F2 CODE 1 OR 2=3-4

F2A. A moment ago you said you had some concerns about the independence of the PCA. Could you say why?

1. **VERBATIM / OPEN ENDED RESPONSE**
2. Don't know (**DO NOT READ OUT**)
3. Prefer not to say [**DO NOT READ OUT**]

ASK ALL

F.3 How often, on average, would you say you have visited the PCA website in the last 12 months? DO NOT READ OUT. SINGLE CODE TO LIST.

1. About once a week or more
2. About once a month
3. About once every six months
4. About once a year
5. Only once
6. I have not visited the PCA website in the past year
7. Don't know

ALL CODE 1-5 AT F3

F.4 When you last visited the PCA website what were you looking to do? DO NOT READ OUT. CODE ALL THAT APPLY. PROBE FULLY

Get information on the Pubs Code

- General information on the Pubs Code
- Rent Assessment Proposal rights
- Rent Proposal rights
- Premises insurance rights
- Right to receive notes from Pub Company on rent, repairs or your business plan

- Other information on the Pubs Code

Contact the PCA

- For advice about the Pubs Code
- To resolve a Pubs Code issue
- To report a Pubs Code breach
- For help with something not related to the Pubs Code

Other reason

- Other [specify]

Don't know **EXCLUSIVE**

ALL CODE 1-5 AT F3

F.5 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?

READ OUT. REVERSE CODES 1-5. SINGLE CODE ONLY PER STATEMENT

1. Strongly agree
2. Tend to agree
3. Neither agree or disagree
4. Tend to disagree
5. Strongly disagree
6. Not applicable (**DO NOT READ OUT**)
7. Don't know (**DO NOT READ OUT**)

RANDOMISE STATEMENTS

1. The information I found on the PCA website was helpful
2. The PCA website was easy to navigate and use
3. The information I found on the PCA website was clear and easy to understand
4. I knew what to do next after visiting the PCA website

ASK ALL

F.6 Have you contacted the PCA enquiry service in the past 12 months? This may have been by writing to the PCA, submitting an online enquiry form, using the PCA's telephone callback service, submitting a formal referral for arbitration or for something else.

INTERVIEWER: Code yes if they have done any of these in the past year.

DO NOT READ OUT. SINGLE CODE.

1. Yes
2. No
3. Don't know (**DO NOT READ OUT**)

ASK ALL IN CONTACT F6=1

F.7 How did you get in contact with the PCA on the most recent occasion?

DO NOT READ OUT. SINGLE CODE. PROMPT TO LIST.

1. Submitted an online enquiry form
2. Emailed the PCA
3. Used the telephone callback service
4. Wrote to the PCA by post
5. Submitted a formal referral for arbitration
6. Something else [specify]
7. I have not contacted the PCA in the last year
8. Don't know

ASK ALL IN CONTACT F6=1

F.8 Thinking about the last time you were in contact with the PCA, to what extent, if at all, do you agree or disagree with the following statements?

READ OUT. REVERSE CODES 1-5. SINGLE CODE ONLY PER STATEMENT

1. Strongly agree
2. Tend to agree
3. Neither agree or disagree
4. Tend to disagree
5. Strongly disagree
6. Don't know **(DO NOT READ OUT)**
7. Not applicable **{DO NOT READ OUT}**

RANDOMISE STATEMENTS

1. It was made clear after my initial contact when I would receive a response
2. I understood the response I received to my enquiry
3. I knew what to do next after the PCA responded to my enquiry

SECTION H: Personal Demographics

READ OUT Thank you. That's all the main questions I have for you today. Finally, I would just like to ask a few questions to help classify your answers. Everything you say will be treated in confidence and you do not have to answer any of these questions if you do not want to.

ASK ALL

H1. Which of the following best describes how you think of yourself?

READ OUT. SINGLE CODE

1. Male
2. Female
3. In another way
4. Prefer not to say

ASK ALL

H2. What is your age?

INTERVIEWER: PROMPT RESPONSE INTO BAND

READ OUT. SINGLE CODE

1. 16-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-74
7. 75+
8. Refused

ASK ALL

H3A. What is your ethnic group? Choose one option that best describes your ethnic group or background. You do not have to answer this question if you do not want to.

READ OUT GROUPS. SINGLE CODE.

1. White
2. Mixed/ Multiple ethnic groups
3. Asian/ Asian British
4. Black/ African/ Caribbean/ Black British
5. Chinese
6. Arab
7. Other ethnic group
8. Prefer not to say **[DO NOT READ]**

BASE = IF H3A=1,2,3,4,6,7

H4A. And which one of these best describes your ethnic group or background?

BASE = IF H3A=1

1. English **[ROTATE TO SECOND PLACE IF PUB IN WALES]** / Welsh / Scottish / Northern Irish / British
2. Irish
3. Gypsy or Irish Traveller
4. Any other White background, please describe

BASE = IF H3A=2

5. White and Black Caribbean
6. White and Black African
7. White and Asian
8. Any other Mixed / Multiple ethnic background, please describe

BASE = IF H3A=3

9. Indian

10. Pakistani
11. Bangladeshi
12. Chinese
13. Any other Asian background, please describe

BASE = IF H3A=4

14. African
15. Caribbean
16. Any other Black / African / Caribbean background, please describe

BASE = IF H3A=6

17. Arab
18. Any other ethnic group, please describe

SHOW ALL

19. Prefer not to say [DO NOT READ]

ASK ALL

H4. Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?

READ OUT. SINGLE CODE

1. Yes, limited a lot
2. Yes, limited a little
3. No
4. Prefer not to say
5. Don't know

ASK ALL

H5. For how many years in total have you held pub tenancies? Please think across all experience in various pubs and/or Pub Companies.

DO NOT READ OUT - PROMPT TO RANGES**INTERVIEWER: PROMPT RESPONSE INTO BAND****READ OUT. SINGLE CODE**

1. Less than two years
 2. Over 2 years up to 5 years
 4. Over 5 years up to 10 years
 5. Over 10 years or more
 6. Don't know
 7. Prefer not to say
-

SECTION I: RECONTACT QUESTIONS

ASK ALL

QRECON. Thank you very much for taking part in the survey. Would you be willing for us to contact you if we have any further questions about the interview?

1. Yes
2. No

ASK ALL

I2. And would you be ok if Ipsos contacted you about any follow up research we might be conducting on behalf of the PCA in the next 12 months as part of the same study? You would be under no obligation to participate.

1. Yes – would be willing.
2. No – would not be willing.

IF 1 at I1 or I2

QNAME. In that case could I just take a note of your name? This is only so we know who to ask for if we call again.

(interviewer enter name and read back to respondent to confirm)

IF 1 at I1 or I2

I4. May I also check that [textfill PHONE NUMBER FROM SAMPLE] is the best number to reach you on?

Yes

No **(interviewer enter new number and read back to respondent to confirm)**

Quality Control Page

It is sometimes necessary to contact a small number of participants to verify that the interview took place, so I just want to inform you that you may receive a call from the quality control team for this purpose in the next few weeks.

IF NECESSARY READ OUT:

This is done to comply with industry guidelines and the call would only last one or two minutes.

This is part of our quality control procedure so there is no option to opt out of this, but if you happen to receive a call you are under no obligation to answer any questions if you do not wish to do so.

CLOSE – READ OUT

On behalf of Ipsos and the PCA, thank you very much for your time.

Before we finish would you like the web link to the privacy policy? **INTERVIEWER GIVE PRIVACY POLICY LINK - https://ipsos.uk/pca_privacypolicy**

If you have any queries regarding the survey or our company, I can give you the email, telephone number of the company or the Market Research Society Freephone number.

PROVIDE AS NECESSARY:

Company Number - 0131 500 0992

Company email - UK-SRI-TiedTenantsSurvey2024@ipsos.com

MRS Freephone Number - 0800 975 9596

Job number – 23-068898-01

INTERVIEWERS: MRS can only provide confirmation that we are a genuine Market Research Company.

IF SEEKING MORE INFORMATION ABOUT THE PROJECT If you have any queries about this research project you can contact Ipsos at UK-SRI-TiedTenantsSurvey2024@ipsos.com

IF SEEKING MORE INFORMATION ABOUT THE PCA OR PUBS CODE If you would like more information about the Pubs Code or the Pubs Code Adjudicator you can contact Julia Tortise, the Finance and Operations Manager at the PCA, by email at Julia.Tortise@pubscodeadjudicator.gov.uk

Our standards and accreditations

Ipsos' standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a "right first time" approach throughout our organisation.



ISO 20252

This is the international market research specific standard that supersedes BS 7911/MRQSA and incorporates IQCS (Interviewer Quality Control Scheme). It covers the five stages of a Market Research project. Ipsos was the first company in the world to gain this accreditation.



Market Research Society (MRS) Company Partnership

By being an MRS Company Partner, Ipsos endorses and supports the core MRS brand values of professionalism, research excellence and business effectiveness, and commits to comply with the MRS Code of Conduct throughout the organisation. We were the first company to sign up to the requirements and self-regulation of the MRS Code. More than 350 companies have followed our lead.



ISO 9001

This is the international general company standard with a focus on continual improvement through quality management systems. In 1994, we became one of the early adopters of the ISO 9001 business standard.



ISO 27001

This is the international standard for information security, designed to ensure the selection of adequate and proportionate security controls. Ipsos was the first research company in the UK to be awarded this in August 2008.



The UK General Data Protection Regulation (GDPR) and the UK Data Protection Act (DPA) 2018

Ipsos is required to comply with the UK GDPR and the UK DPA. It covers the processing of personal data and the protection of privacy.



HMG Cyber Essentials

This is a government-backed scheme and a key deliverable of the UK's National Cyber Security Programme. Ipsos was assessment-validated for Cyber Essentials certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet.



Fair Data

Ipsos is signed up as a "Fair Data" company, agreeing to adhere to 10 core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.

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Ipsos Public Affairs works closely with national governments, local public services and the not-for-profit sector. Its c.200 research staff focus on public service and policy issues. Each has expertise in a particular part of the public sector, ensuring we have a detailed understanding of specific sectors and policy challenges. Combined with our methods and communications expertise, this helps ensure that our research makes a difference for decision makers and communities.

