

# **Pubs Code Adjudicator Tied Tenants Survey 2024**

**Headline findings**

# Overview

# 01

# Methodology

## The Process:

- 1,203 tenant interviewed by phone between Jan 9<sup>th</sup> and March 13<sup>th</sup>, 2024.
- Pubs invited to take part at random by Ipsos.
- Quotas were placed on interviews achieved by size of pub company estate and region within.
- Confidence intervals for the whole sample are approx. +/- 3 percentage points and range from +/- 5 to 8 points by pub company.

## Final number of interviews achieved:

Pub company	Interviews
Admiral	152
Marston's	165
Punch Pubs	134
Star Pubs & Bars	233
Greene King	135
Stonegate	384
<b>TOTAL</b>	<b>1203</b>

# Findings at a glance (1)

- Many findings consistent with 2023. Awareness of code unchanged at 78% and awareness of PCA at 55% (+1pt from 2023).
- Familiarity with code rights at similar levels to 2022/ 23 – as is satisfaction when experiencing them.
- Overall satisfaction with tenant relationship at 63% (+1pt from 2023), dissatisfaction at 21% (-1).
  - Marstons (79%), Admiral (78%) and Greene King (77%) above average. Stonegate satisfaction the lowest (47%). Biggest movers are Star with a 9 pt year on year increase in tenant satisfaction (64%).
  - BDM scores largely unchanged overall. Marstons, Admiral and Greene King tenants tend to give best scores – reflecting positive overall satisfaction scores.
  - Perceptions BDMs fair in discussions has fallen back slightly from 2023 (-4 pts) but is at similar high levels to 2022 (76%) and fall is driven primarily by Stonegate tenants.
- More awareness of CCO this year but performance scores fall back to 2022 levels.
- Trust in the PCA's independence has improved this year – especially in terms of being independent from pub companies (64%, +7 pts).

# 02

# Profile of tied tenants

# Profile of tied tenants – some key stats

- 58% male.
- Almost 2/3 (65%) aged 45 or over (around one in ten aged under 35).
- 9 in 10 are white.
- 1 in 10 have a disability or long-term illness.
- 52% have held tenancies 10 years or more.
- 62% started current tenancy arrangement since code came into force.
- 85% single operator (2023: 88%).

Base: All tied pub tenants (1203)

# 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	36%	24%	5%	37%	53%	27%	43%
A tied tenancy	42%	57%	15%	51%	36%	51%	43%
A franchise agreement	10%	1%	71%	0%	0%	10%	0%
A short agreement of less than 12 months or tenancy at will	7%	14%	5%	7%	6%	5%	6%
Something else	6%	5%	5%	5%	5%	7%	7%

Base: All tied pub tenants (1203), Franchise includes those referring to themselves as operating under a retail agreement

# 03

# Topline findings

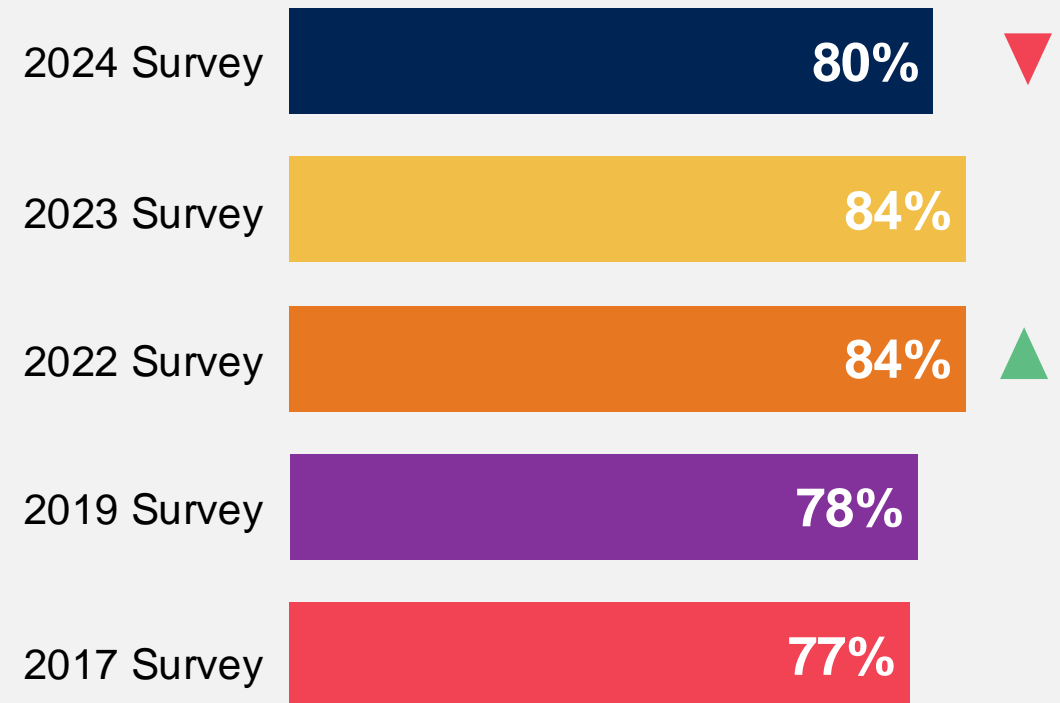


# Whether tenants have received information about the Pubs Code

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

- 80% of tenants have heard of the pubs code – a significant drop on 2023 but still at high levels.
- Awareness is below 8 in 10 for tenants of Star (76%) and Stonegate (79%) but still at healthy levels overall.

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

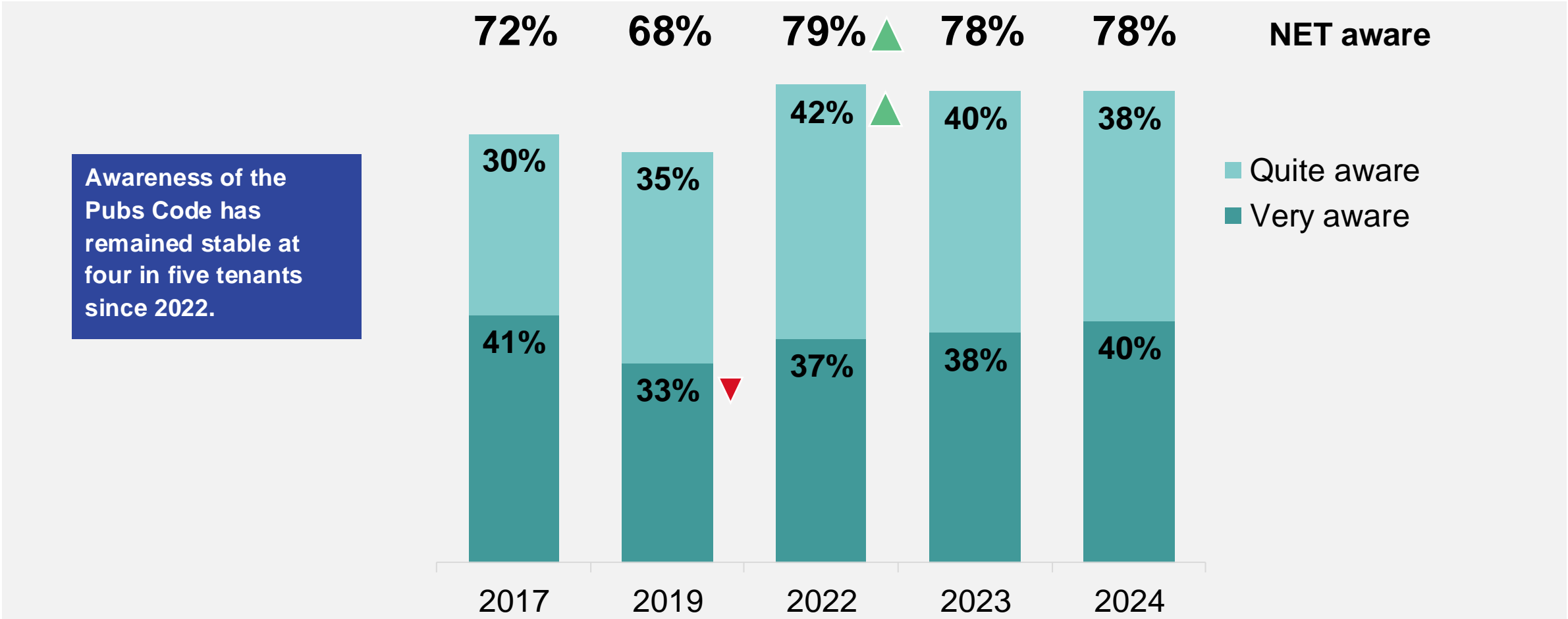


Base: All tied pub tenants (1203)

▼▲ Statistically significantly different from previous survey

# Awareness of the Pubs Code

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



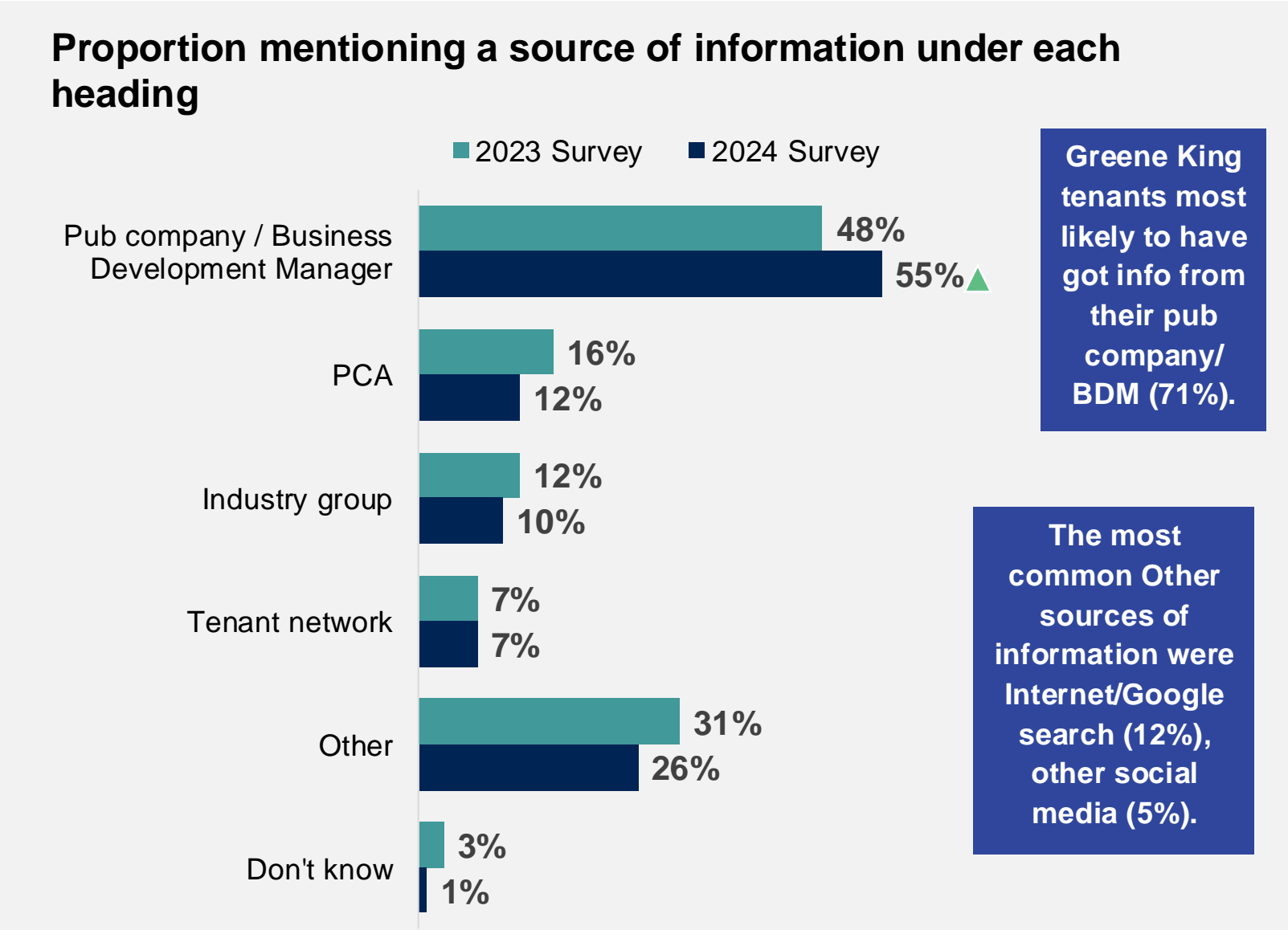
Base: All tied pub tenants (1203)

▼▲ Statistically significantly different from previous survey

# Where tenants have seen information about the Pubs Code

## C3. Where have you read, seen or heard anything about The Pubs Code in the past 12 months?

- Most tenants get their information from their pub company or BDM. Within this category, the most common response was from **pub company emails** (25%), followed by **pub company website** (13%) and **information or advice from BDM** (8%).
- There was a wide variety of responses under Other for sources of information.



Base: All tied pub tenants who have read, seen or heard anything about the Pubs Code (2023: 1010; 2024: 963)

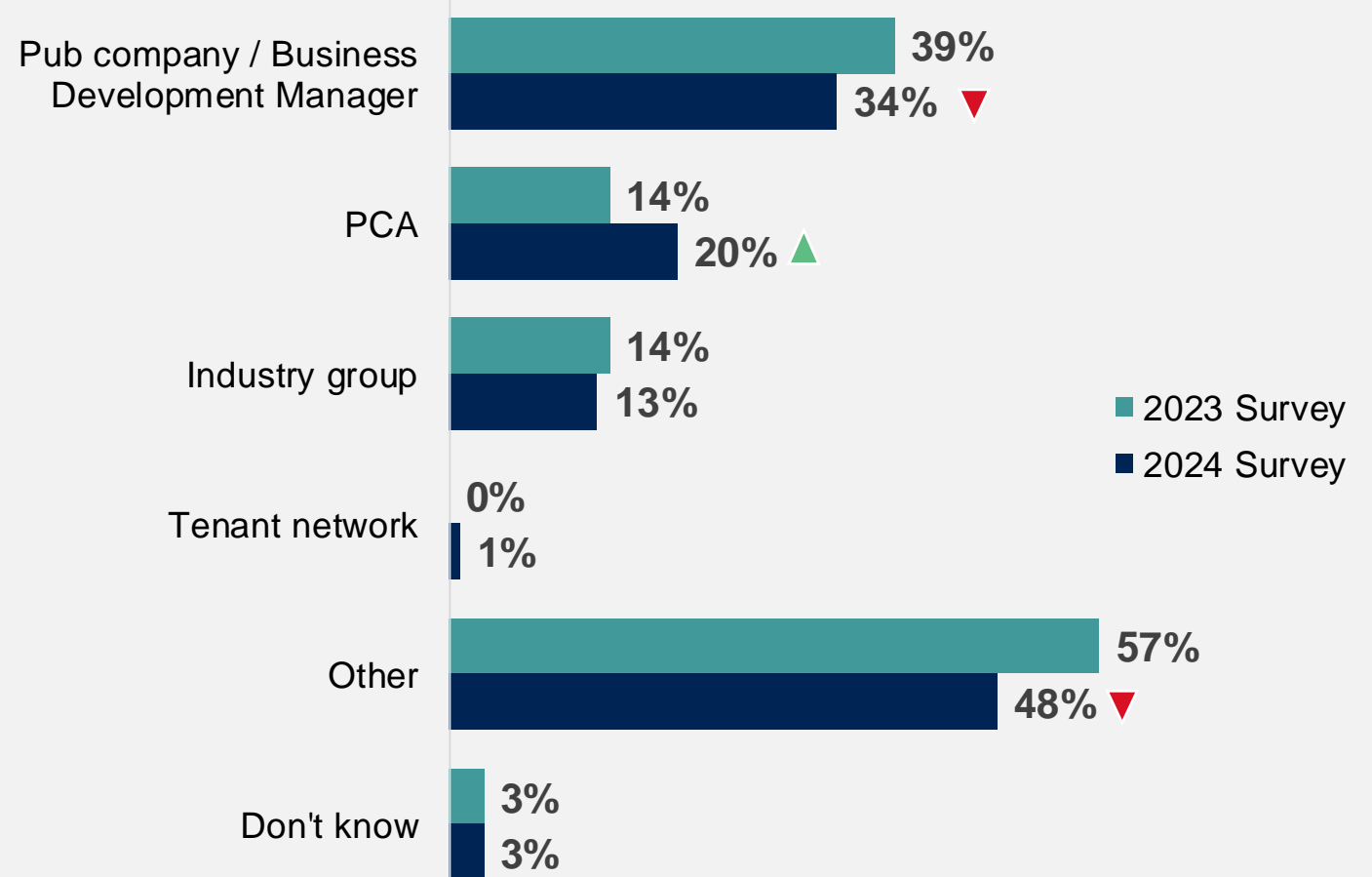
▼▲ Statistically significantly different from previous survey

# Where tenants would go for information about the Pubs Code

## C4. If you wanted to find out some information on The Pubs Code, where would you go for this information?

- Half of tenants (45%) said they would search the **Internet/Google** if they wanted information about the Pubs Code (under Other). This was the most common response – others sub 5%.
- Pub company/ BDM was the second most common potential source of information. One in five tenants (16%) said they would go to their **pub company website** for information and 8% said they would go to their **BDM**.
- There has been an increase in the proportion of tenants that say they would visit the PCA website (17%, +7pts).

### Proportion mentioning a source of information under each heading

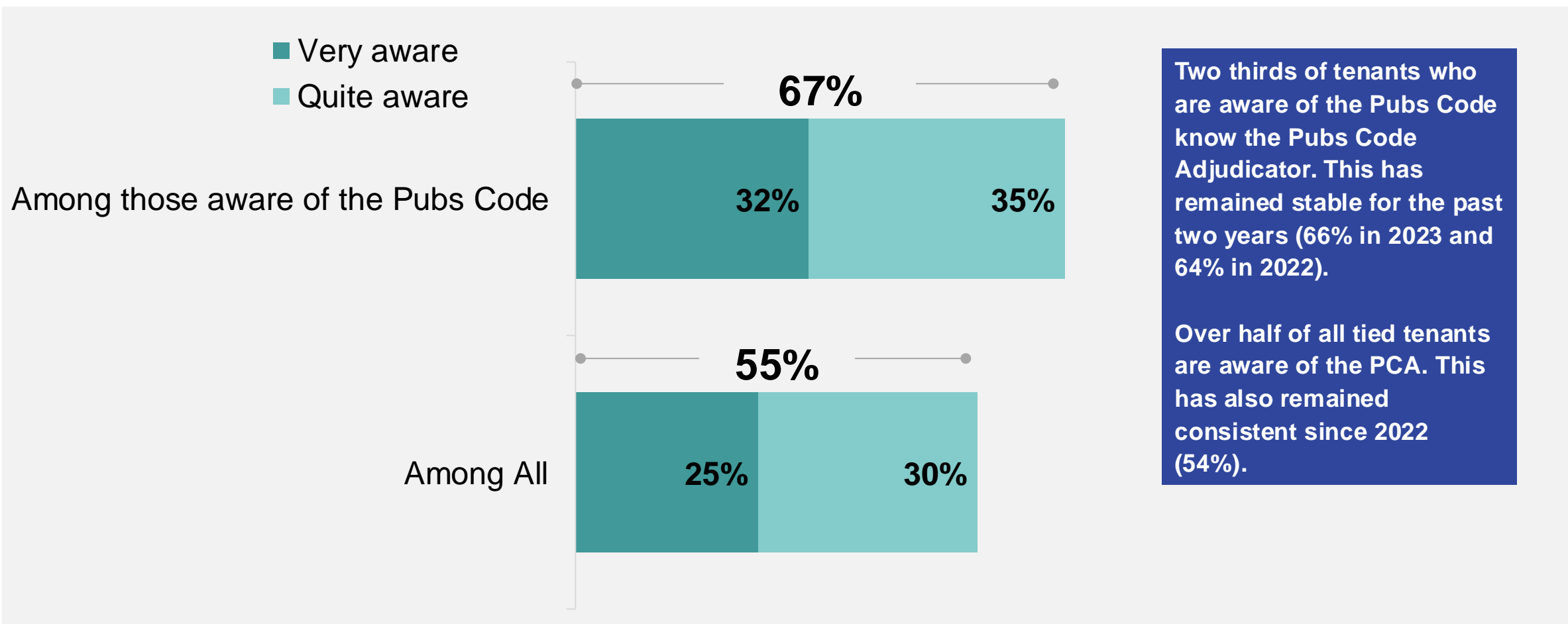


Base: All tied pub tenants (2023: 1206; 2024: 1203)

▼▲ Statistically significantly different from previous survey

# Awareness of the Pubs Code Adjudicator

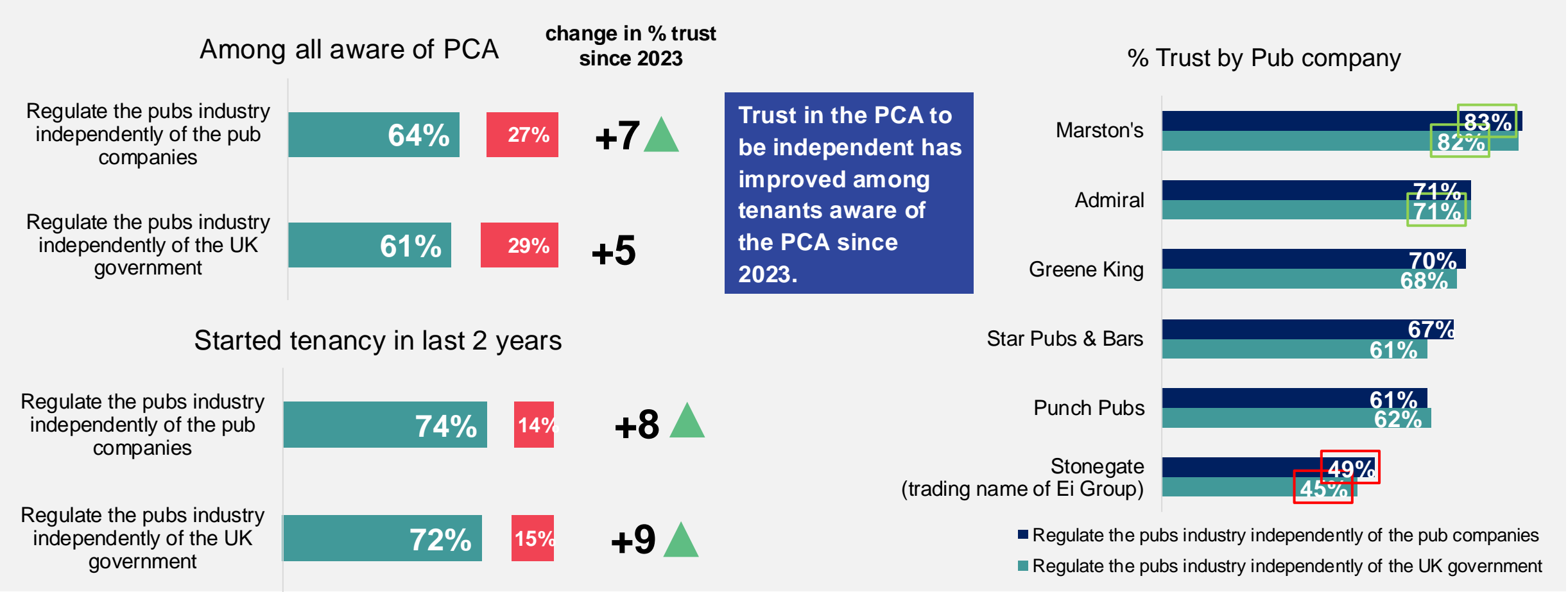
F1. Before today, how aware, if at all, were you of The Pubs Code Adjudicator?



Base: All pub tied tenants (1203), Tied tenants aware of the Pubs Code (938)

# 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 (970)

▲ Statistically significantly different compared to 2023

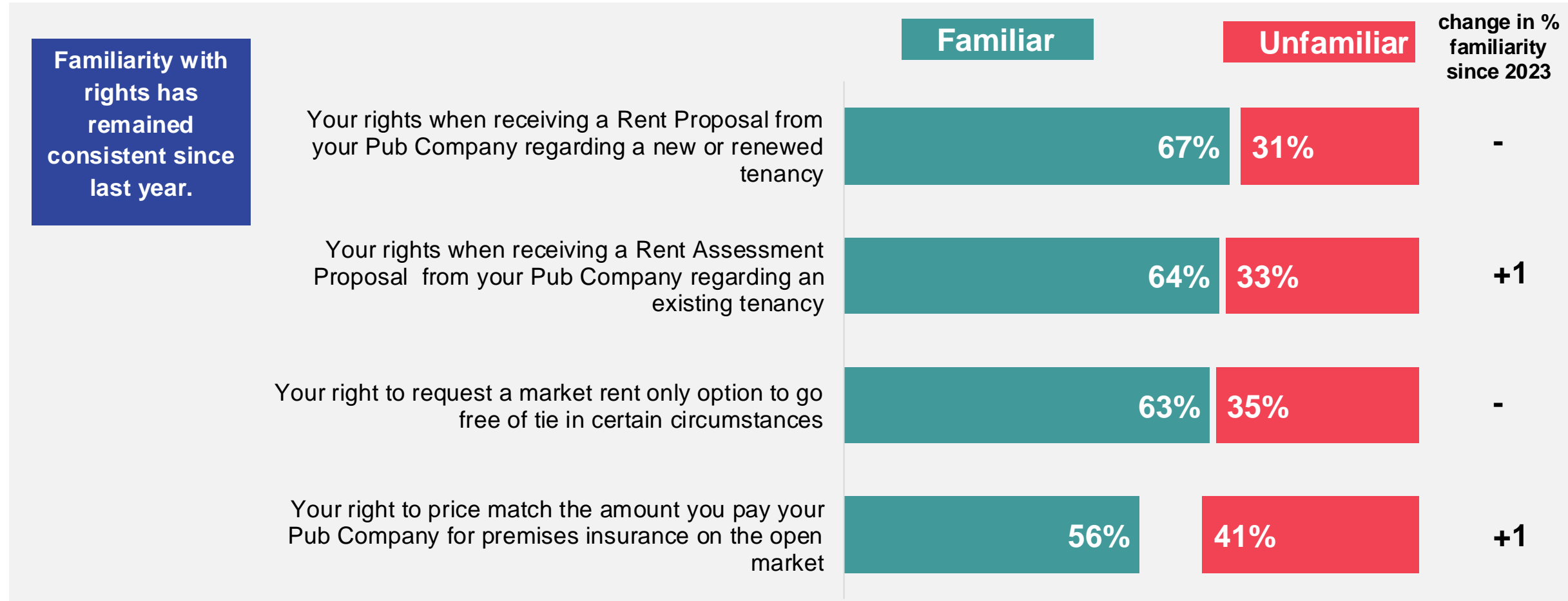


# 04

## **Awareness and experience of code rights**

# Familiarity with 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?

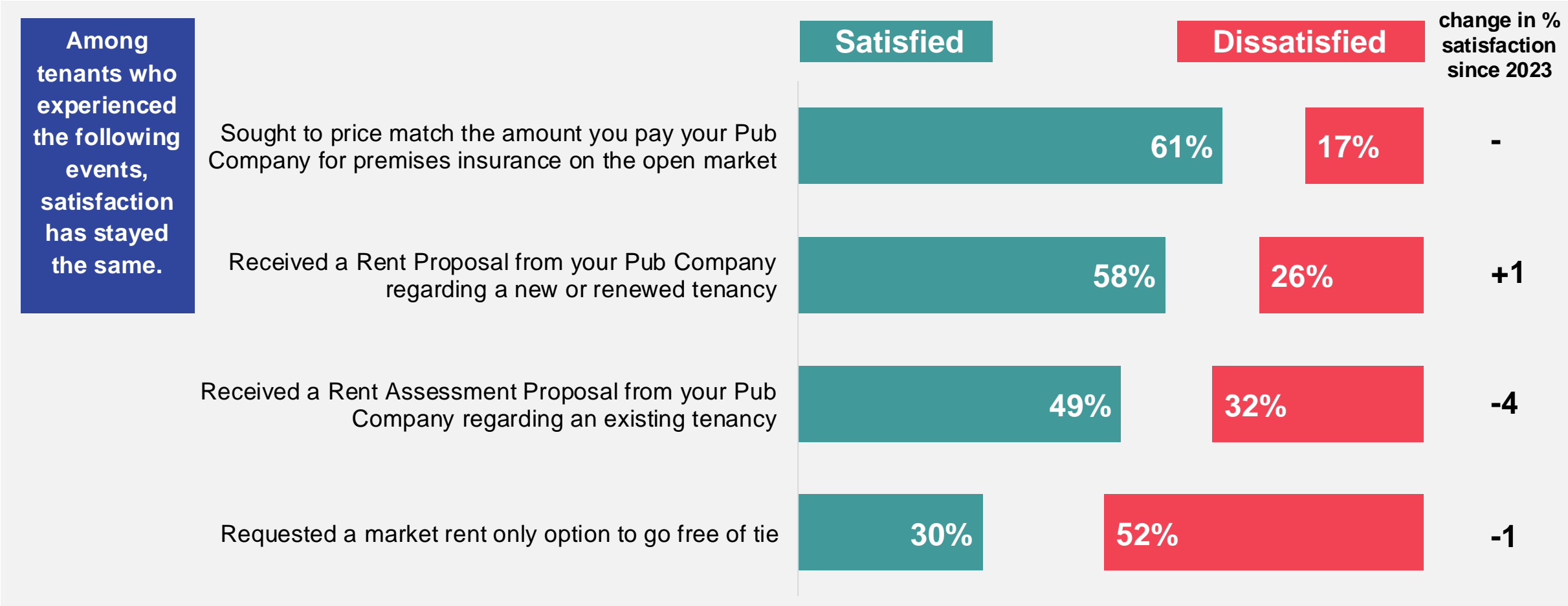


**Base:** All tenants with a tied tenancy, tied lease agreement, something else or who don't know what their agreement is (992)



# 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?

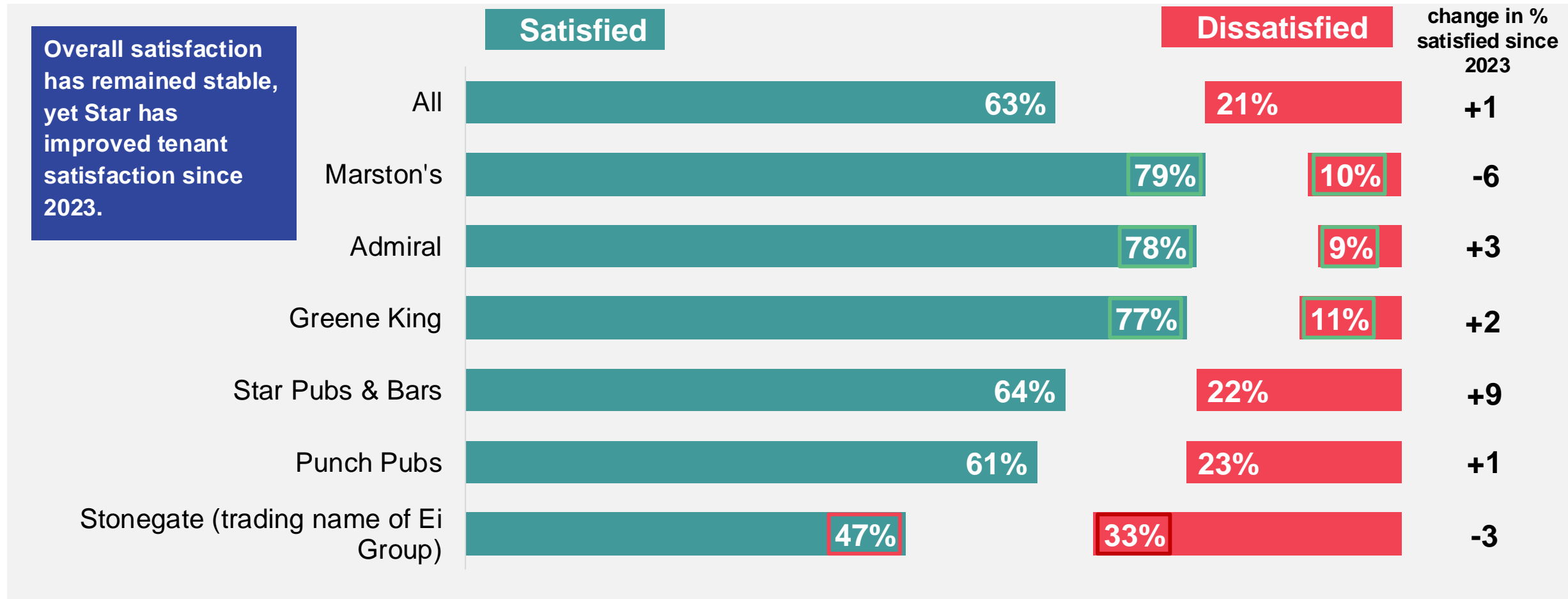


# Tenant satisfaction with tenancy and pub company

# 05

# 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 (1203) with Admiral (152), Marston's (165), Punch Pubs (134), Star Pubs and Bars (233), Greene King (135), and Stonegate (384)

Statistically significantly different compared to 2023

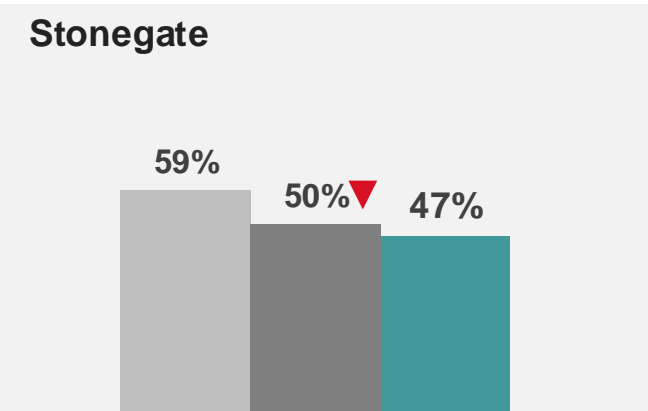
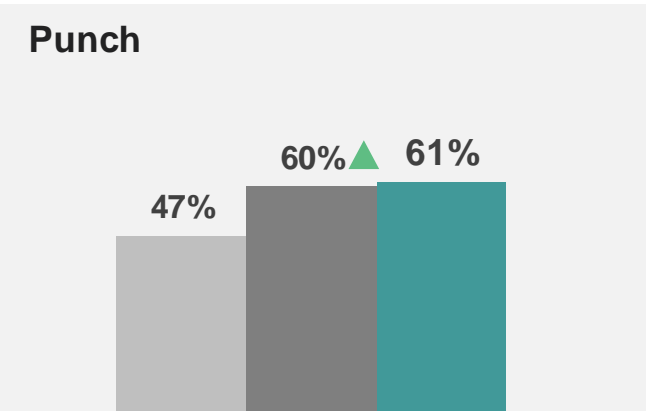
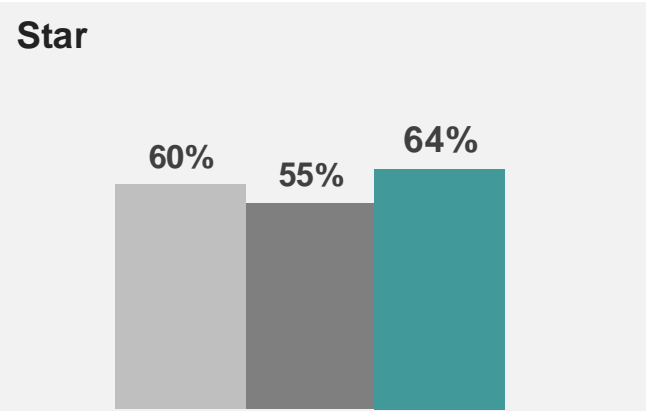
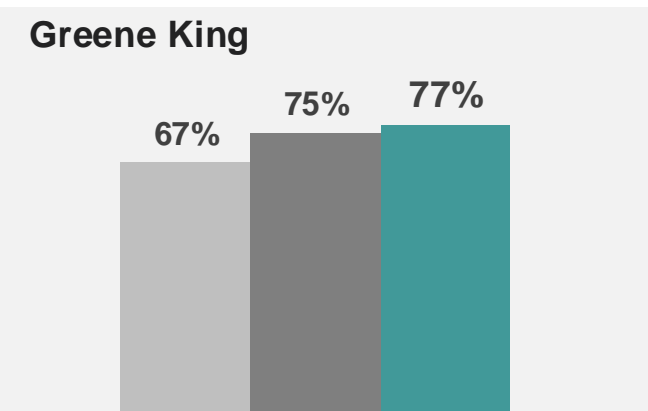
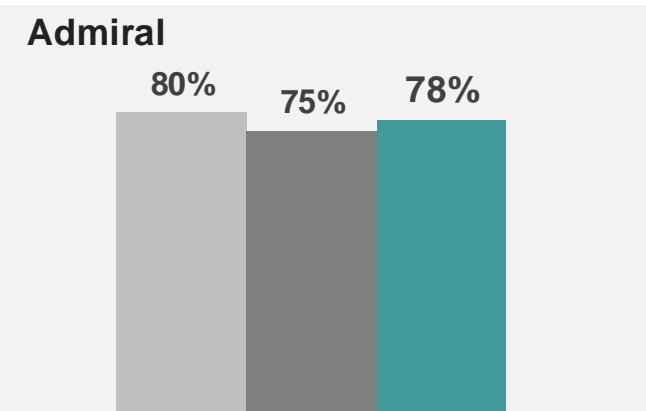
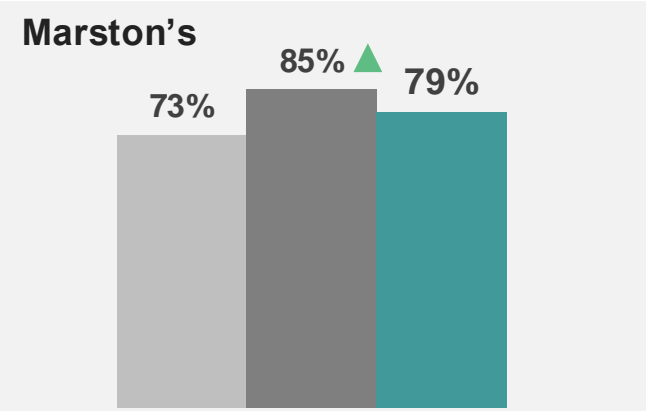
Indicate the proportion of a sub group is statistically significantly higher or lower than the total sample



# Satisfaction with pub company year on year

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

2022 2023 2024



Satisfaction with Marston's, Admiral and Greene King remains high. While Admiral has been more stable, Greene King has steadily improved over the 3 years. Star has improved 9 pts since 2023, while Punch has maintained its 2023 improvement. Stonegate has not recovered from falling last year.

Base: All tied pub tenants (1203) with Admiral (152), Marston's (165), Punch Pubs (134), Star Pubs and Bars (233), Greene King (135), and Stonegate (384)

▲ ▼ Statistically significantly different compared to 2023



## Reasons tenants are satisfied with the relationship

**D.4 What are the main reasons why you are [fairly satisfied/very satisfied] with the relationship?**



- **Good communication and relationship with BDM/ area manager**
- **Listens and responds to issues quickly**
- **Provides information**
- **Fair and transparent**
- **Gives freedom**
- **Supportive during Covid-19 pandemic/ cost of living crisis**

“I think they are fair and honest – most of that comes from the good relationship that I have with my BDM.”

### ***A tied lease agreement***

“Any issues we have they are on it and quick. I am happy with that.” **Multiple operator, 2-4 pubs**

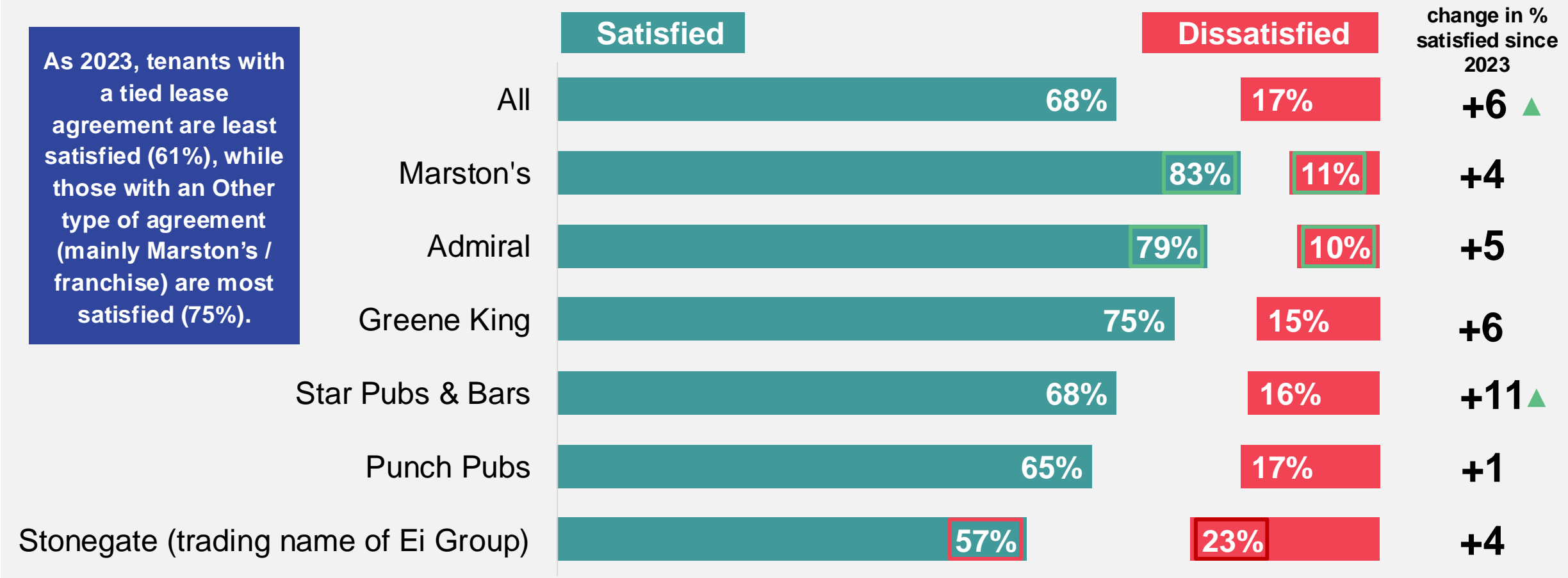
**Base:** All tied tenants who are satisfied with their relationship at D3 (756)





# Satisfaction with type of tenancy agreement

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

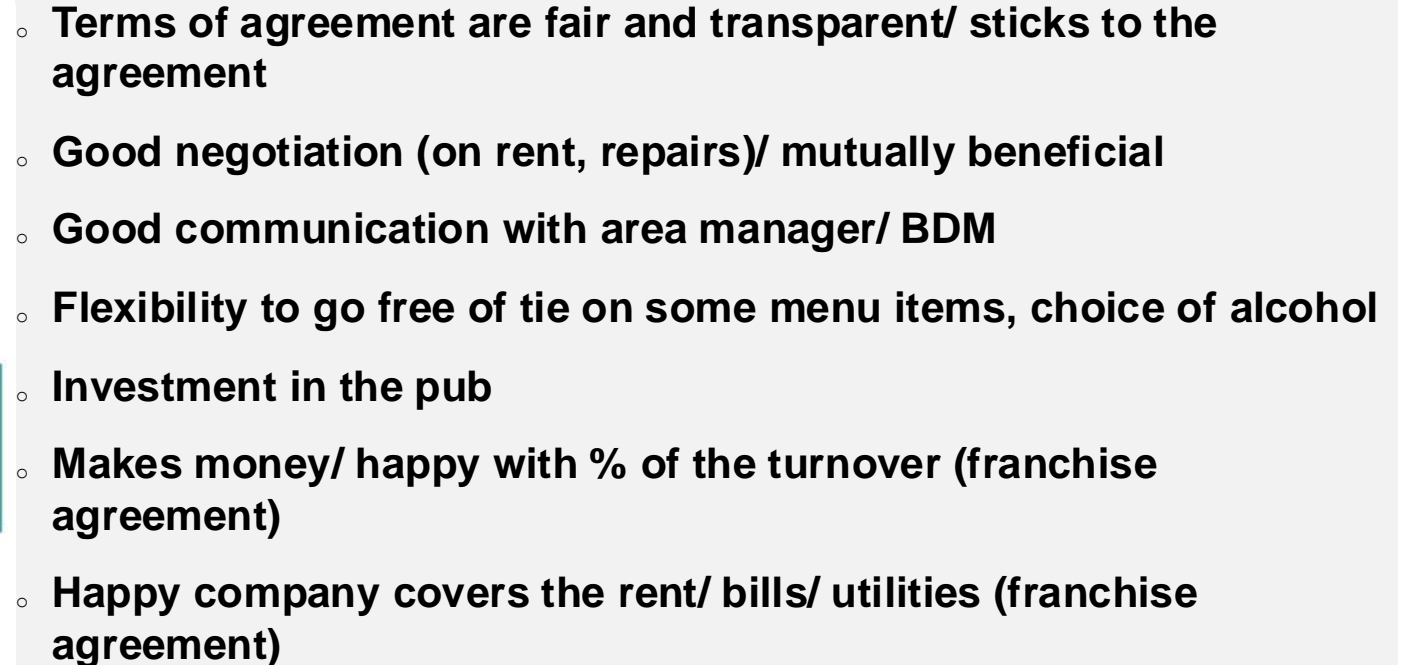


Base: All tied tenants who knew their type of agreement (1184), Admiral (151), Marston's (163), Punch Pubs (134), Star Pubs & Bars (228), Greene King (130), Stonegate (378)

▲ Statistically significantly different compared to 2023

Indicate the proportion of a sub group is statistically significantly higher or lower than the total sample

### G5. And why do you say that?

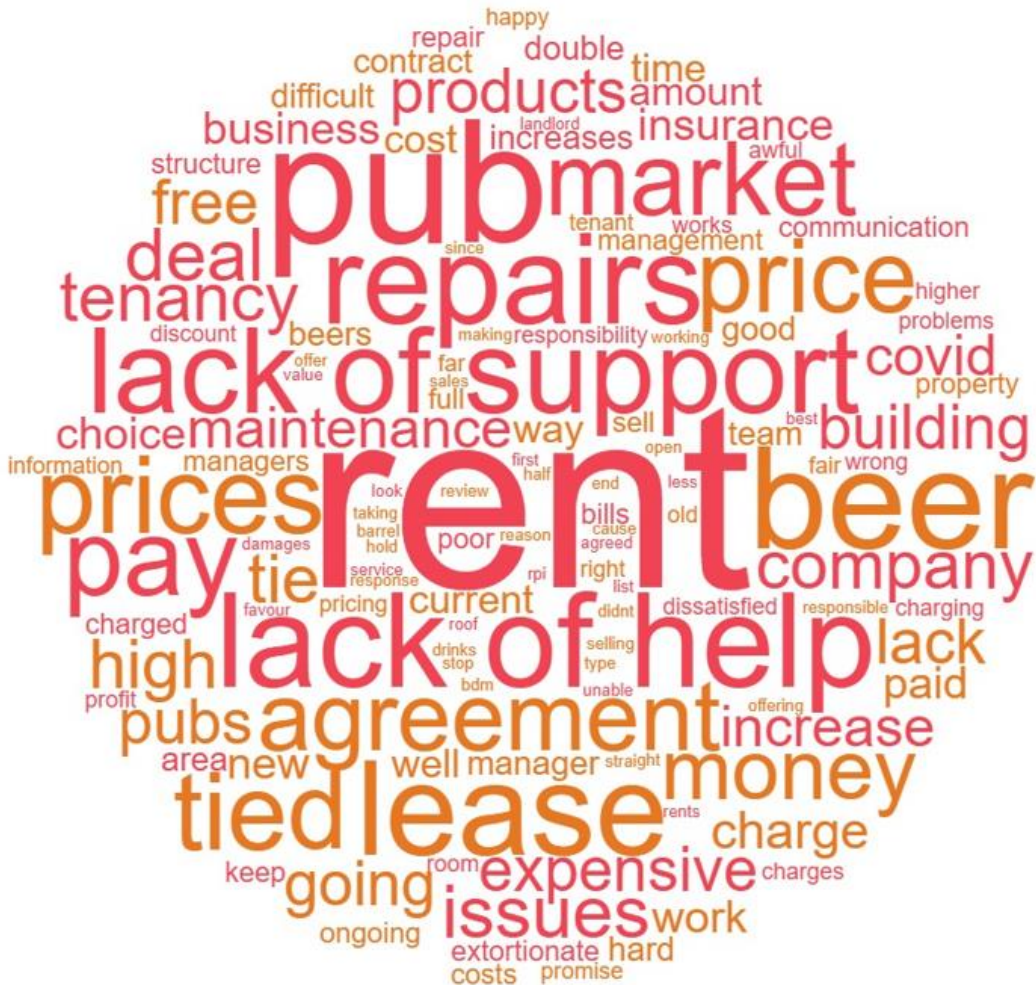


“[The] BDM is very supportive, the framework is clear in relation to managing repairs and the condition of the building.” ***A tied lease agreement***

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## Reasons tenants are unhappy with their type of agreement



- **High/ increasing prices (rent, tied products etc.)**
- **Self-repairing lease issues/ disputes over responsibility for repairs and dilapidations**
- **Slow to make repairs/ late paying for repairs**
- **Lack of support/ difficult to contact**
- **Lack of transparency (do not inform on changes, not following through with investment promises, hidden charges)**
- **Inflexible (negotiating contracts, what drinks they can sell)**
- **Slow to renew agreements**

“For the amount of rent they charge [and] the amount of repairs I have to do.” ***A tied tenancy***

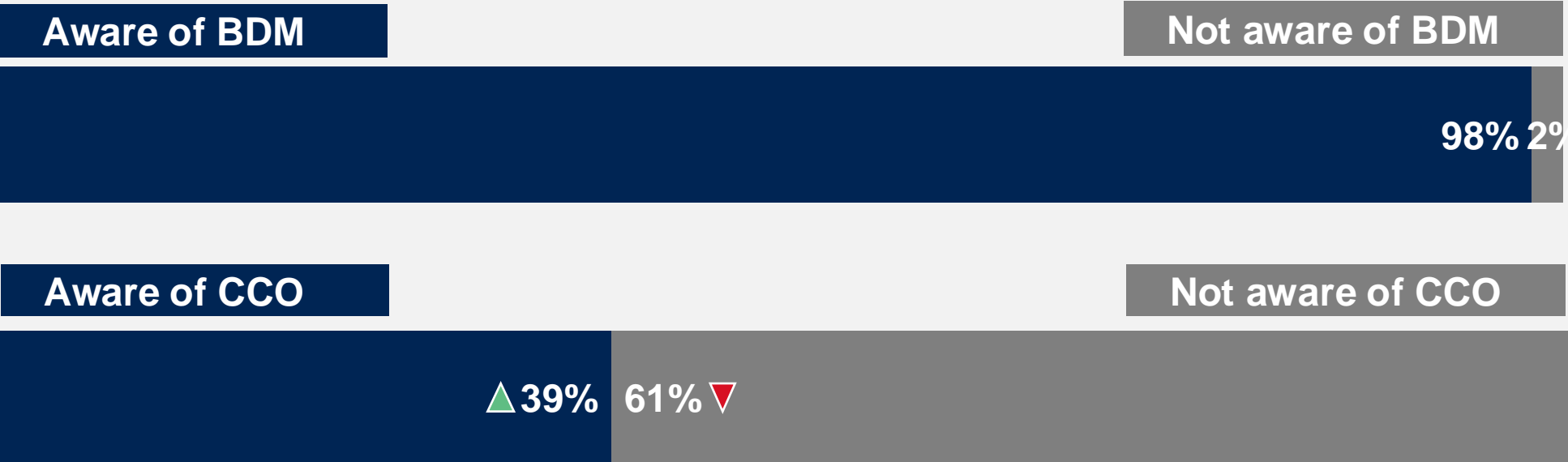
# 06

## **Relationship with pub company**

# 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.



There has been a significant uplift in tenant awareness of who their CCO is – from 25% in 2023 to 39% this year.

Awareness still highest for Greene King (48%) but now others are catching up e.g. Marstons (44%).

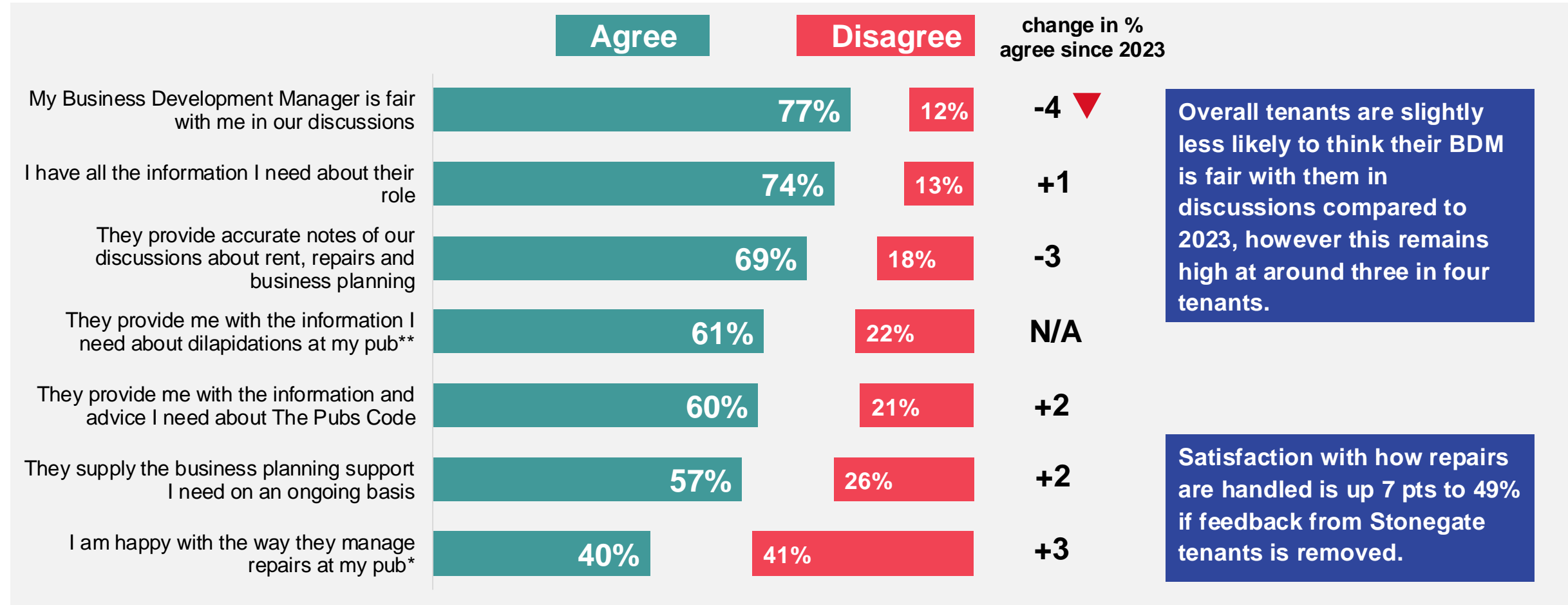
Base: All tied pub tenants (1203)

▼▲ Statistically significantly different compared to 2023



# 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 (1181).

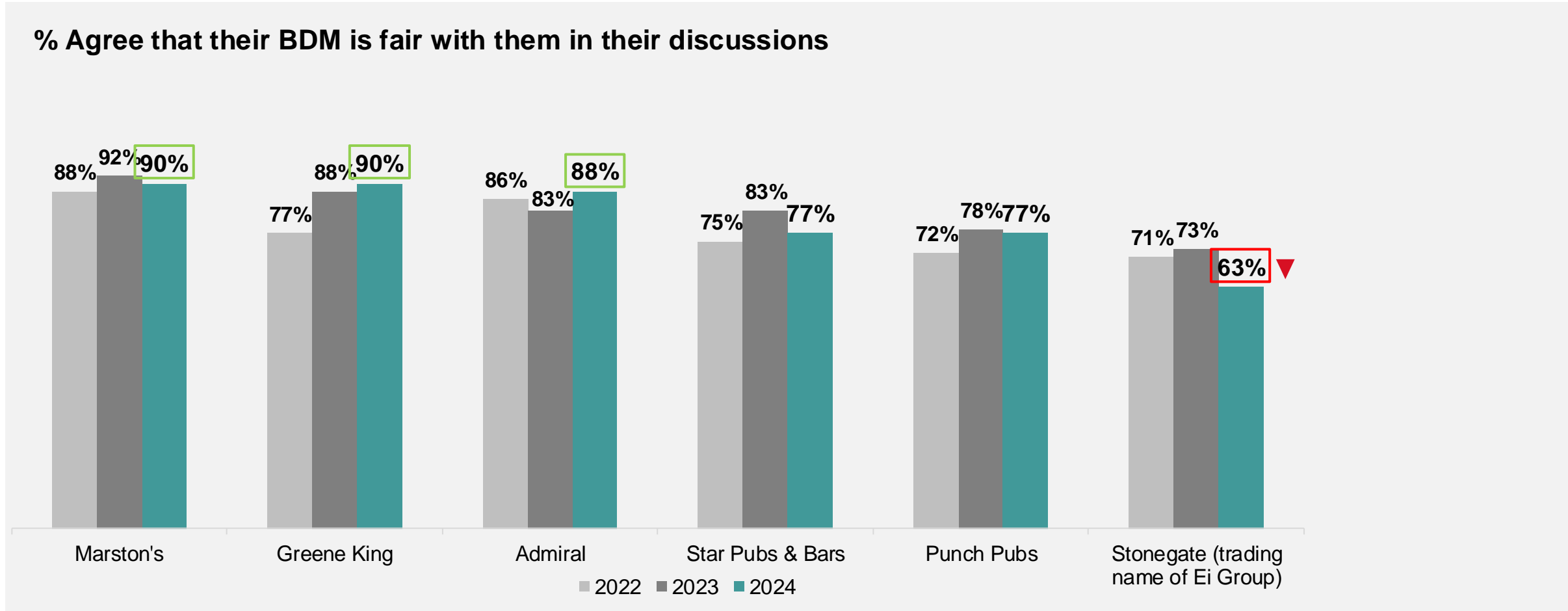
\*\*They provide me with the information I need about dilapidations at my pub not asked of franchises. All (1,157).

\*wording changed between 2023 and 2024 from "I am happy with the way they manage repairs and/or dilapidations at my pub"

▼▲ Statistically significantly different compared to 2023

# BDM fairness in discussions

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 that knew who their BDM was: Admiral (151), Marston's (165), Punch Pubs (130), Star Pubs and Bars (228), Greene King (134) and Stonegate (373)

Indicate the proportion of a sub group is statistically significantly higher or lower than the total sample

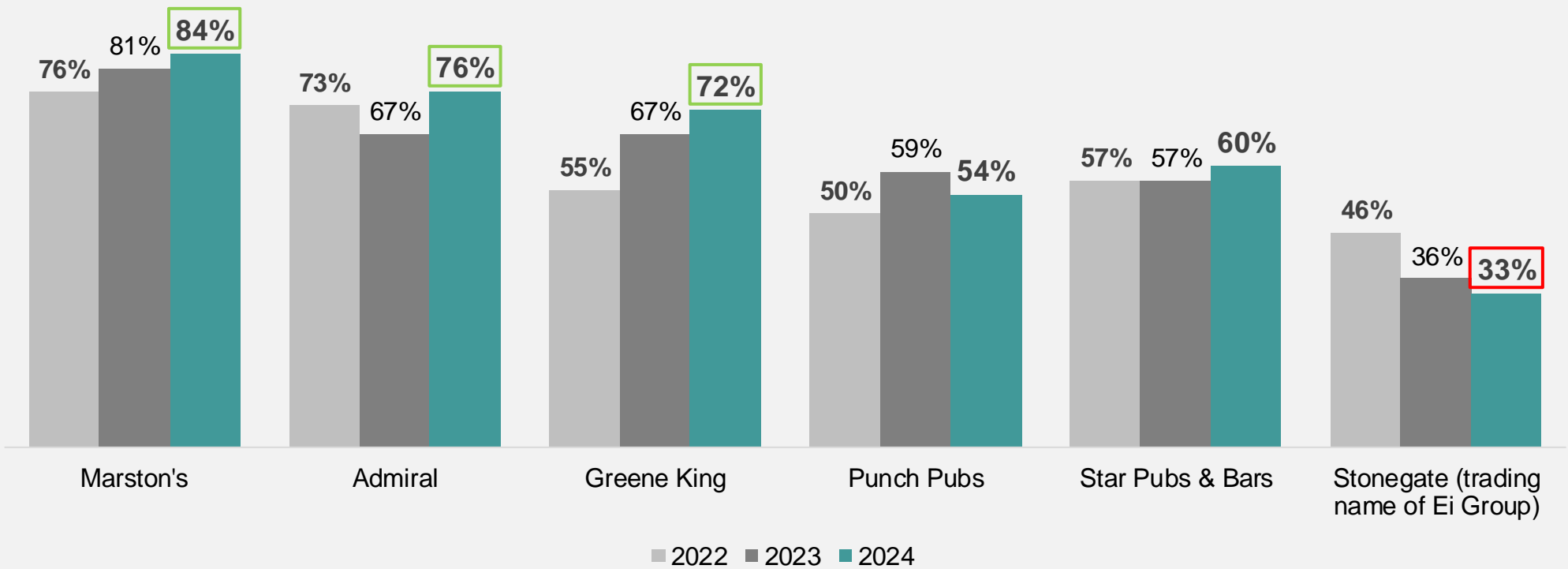
Statistically significantly different compared to 2023



# BDM ongoing business support

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

% Agree their BDM supplies the business planning support they need on an ongoing basis



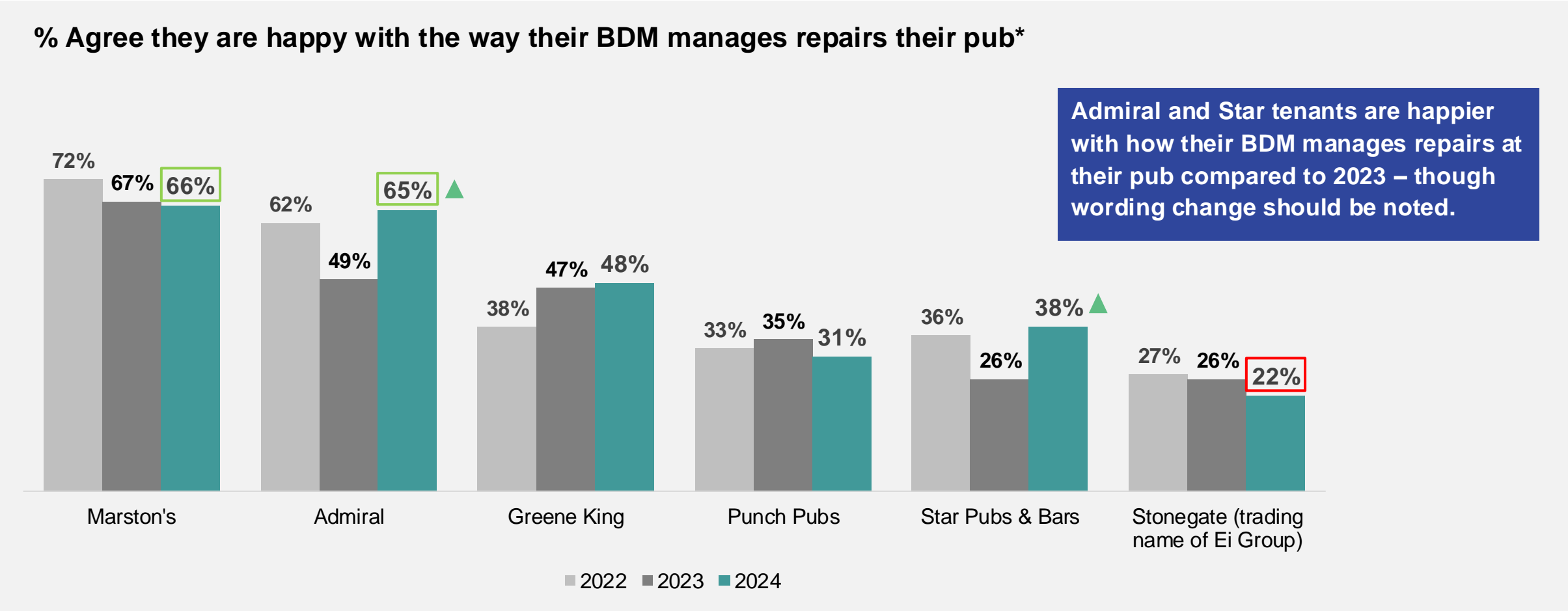
Base: All tied pub tenants that knew who their BDM was: Admiral (151), Marston's (165), Punch Pubs (130), Star Pubs and Bars (228), Greene King (134) and Stonegate (373)

Indicate the proportion of a sub group is statistically significantly higher or lower than the total sample



# BDM management of repairs

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 that knew who their BDM was: Admiral (151), Marston's (165), Punch Pubs (130), Star Pubs and Bars (228), Greene King (134) and Stonegate (373)

\*wording changed between 2023 and 2024 from "I am happy with the way they manage repairs and/or dilapidations at my pub"

▼▲ Statistically significantly different compared to 2023  
□ Indicate the proportion of a sub group is statistically significantly higher or lower than the total sample



# Reasons tenants are happy with how repairs are managed

D1A. Earlier you said you strongly / tend to agree that you are happy with the way your business development manager manages repairs at your pub. Why did you say that?

Reason	Quote
Repairs are done quickly	“Repairs are either completed or passed on to someone within 72 hours, which is the longest I have had to wait, the shortest was 24 hours”.
BDM helps push requests through	“When something goes wrong, they make it clear who is responsible. They make sure it is quick and if it is not fixed, they chase it up.”
BDM listens to problems/ has regular meetings to discuss repairs	“Because like I said, she's very fair...we have good meetings and she listens to what I have to say.”
BDM is approachable/ understanding/ easy to contact	“Anything you say to him is done immediately. He is always contactable, He is willing to pop in and see you so you can see him face to face and I can email him at any time. He is very easy to get in touch with.”
BDM gives information on who to contact/ what is tenant's responsibility	“I can go to him with a repair and he can give information on whether it's covered by the lease agreement. He helped liaise with [the pub company for] cheaper alternatives.

**Base:** All tied tenants who knew who their business development manager was and agree they are happy with the way their BDM manages repairs at their pub at D1 (481)



# Reasons tenants are unhappy with how repairs are managed

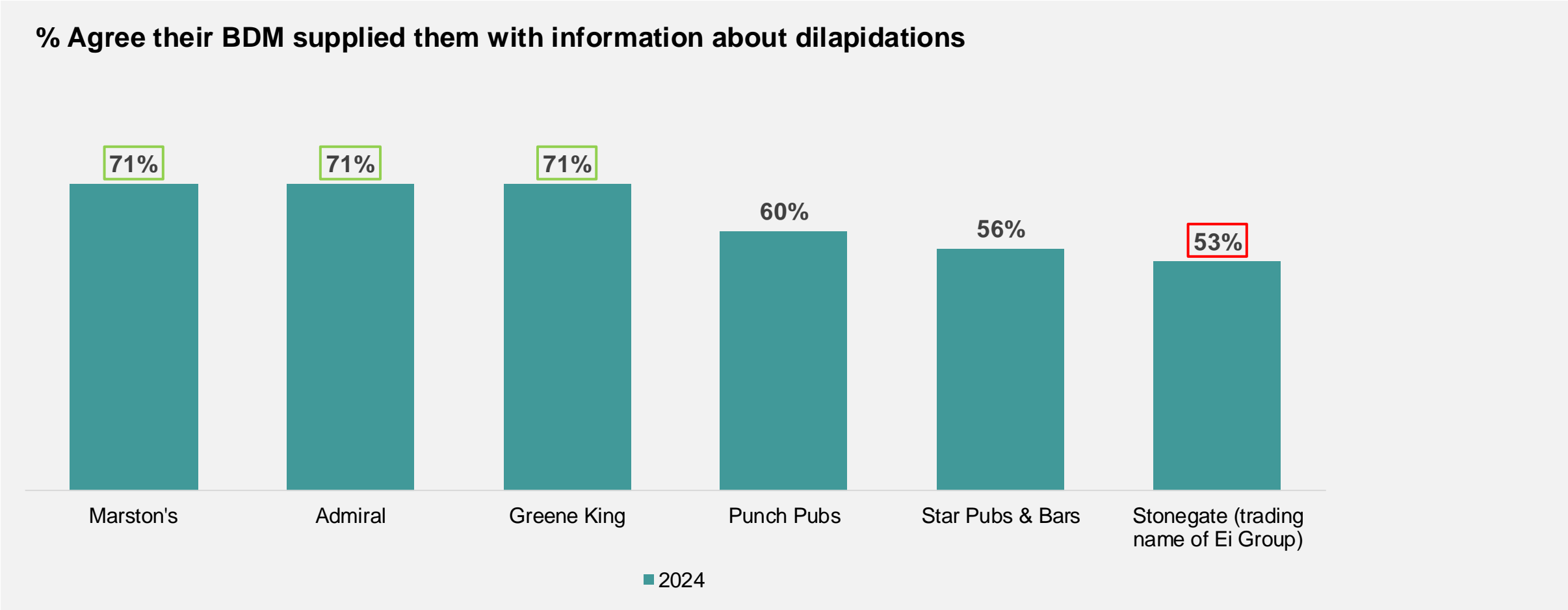
D1A. Earlier you said you strongly / tend to disagree that you are happy with the way your business development manager manages repairs at your pub. Why did you say that?

Reason	Quote
Repairs are slow	"We've had a lot of repair issues and have been waiting several months to be sorted. Which is down to the business manager, it's his responsibility."
BDM does not have enough power/ tenants need to use difficult system or portal	"It's not down to them. The BDM is good but the repairs through Head Office are absolutely useless."
Admin / website problems	"We have ongoing issues that the BDM cannot deal with because of the [pub company] property reporting system. You have to raise a ticket on the website portal and nobody responds to you."
BDM does not get involved or help to push requests forward	"He's not chasing up what we asked to be done and he is not checking up on us."
BDM is difficult to contact	"They give the area managers too many pubs and they can't concentrate on the personal stuff [like] the little details. You feel like they haven't got time for you".
Lack of information/ advice from BDM	"He does not communicate, no advice, it is a waste of meeting with him."

**Base:** All tied tenants who knew who their business development manager was and disagree they are happy with the way their BDM manages repairs at their pub at D1 (478)

# BDM provision of information about dilapidations

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 that knew who their BDM was and no franchise: Admiral (150), Marston's (159), Punch Pubs (129), Star Pubs and Bars (227), Greene King (121) and Stonegate (371)

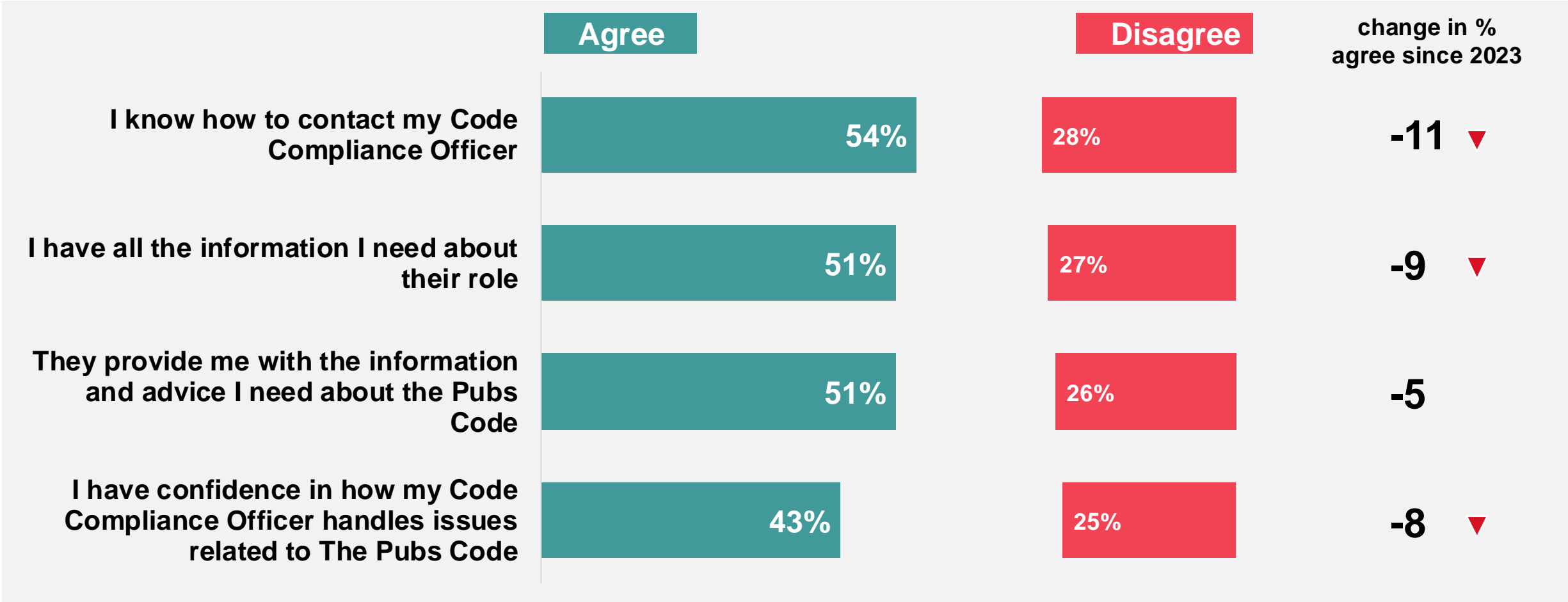


Indicate the proportion of a sub group is statistically significantly higher or lower than the total sample



# 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 (479)

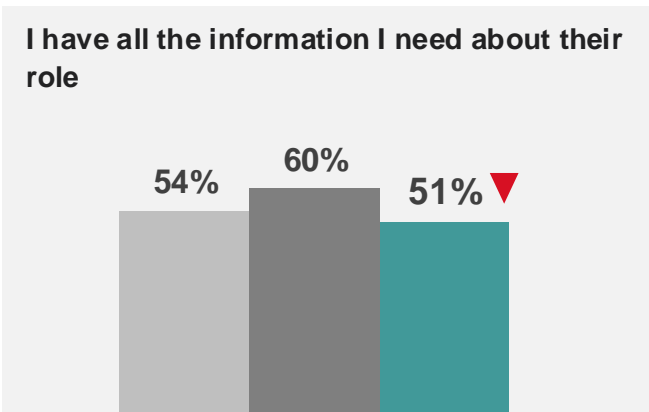
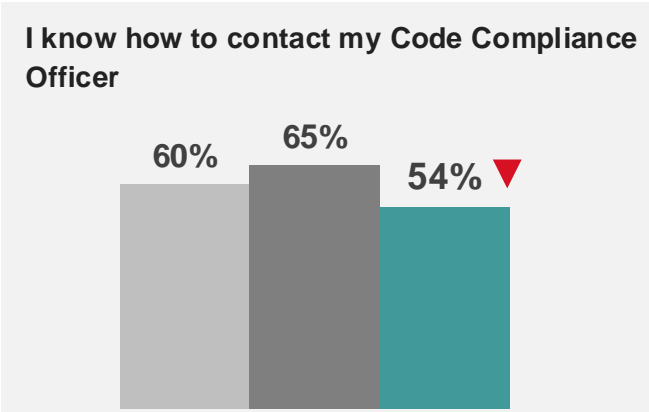
▼▲ Statistically significantly different compared to 2023



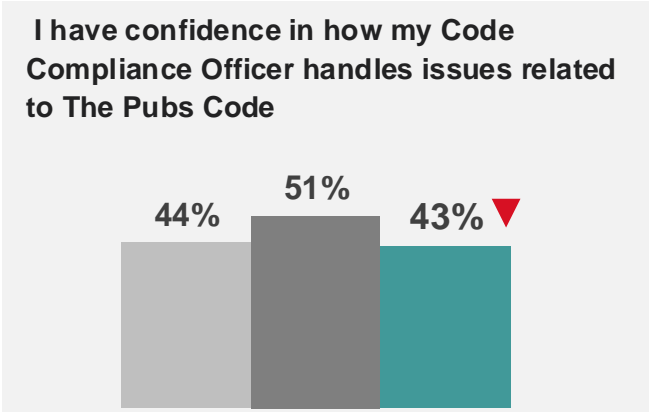
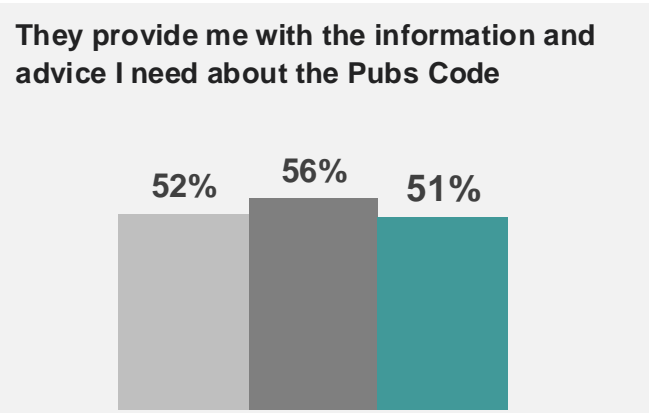
# Tenant ratings of code compliance officer year on year

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?

2022 2023 2024



As awareness of who their CCO is has increased, scores have fallen, though in most cases only to 2022 levels.



Base: All tied pub tenants who knew who their code compliance officer was (479)

Statistically significantly different compared to 2023

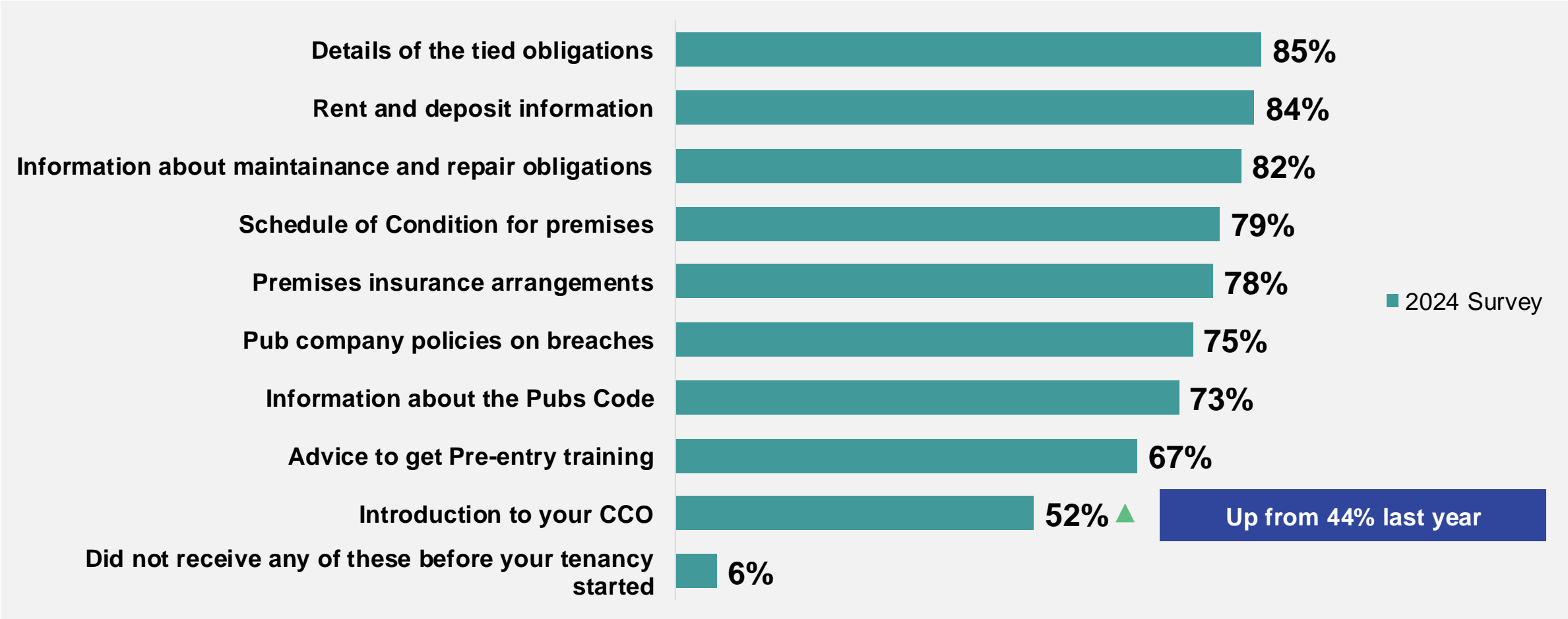


07

# 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?



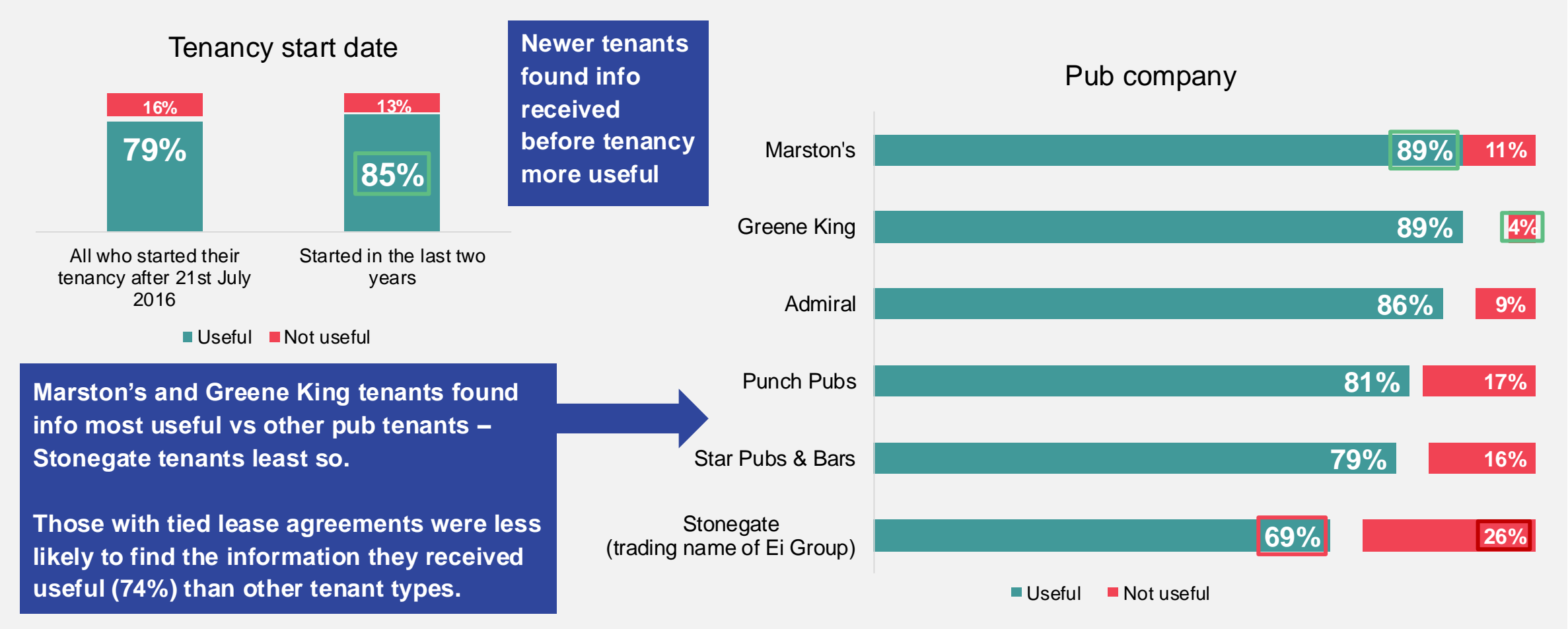
Base: All tied pub tenants who started their tenancy after 21 st July 2016 (746)

▲ Statistically significantly different compared to 2023



# How useful tenants found information before starting tenancy

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 (746), tenants who started between 2022 and 2024 (313)

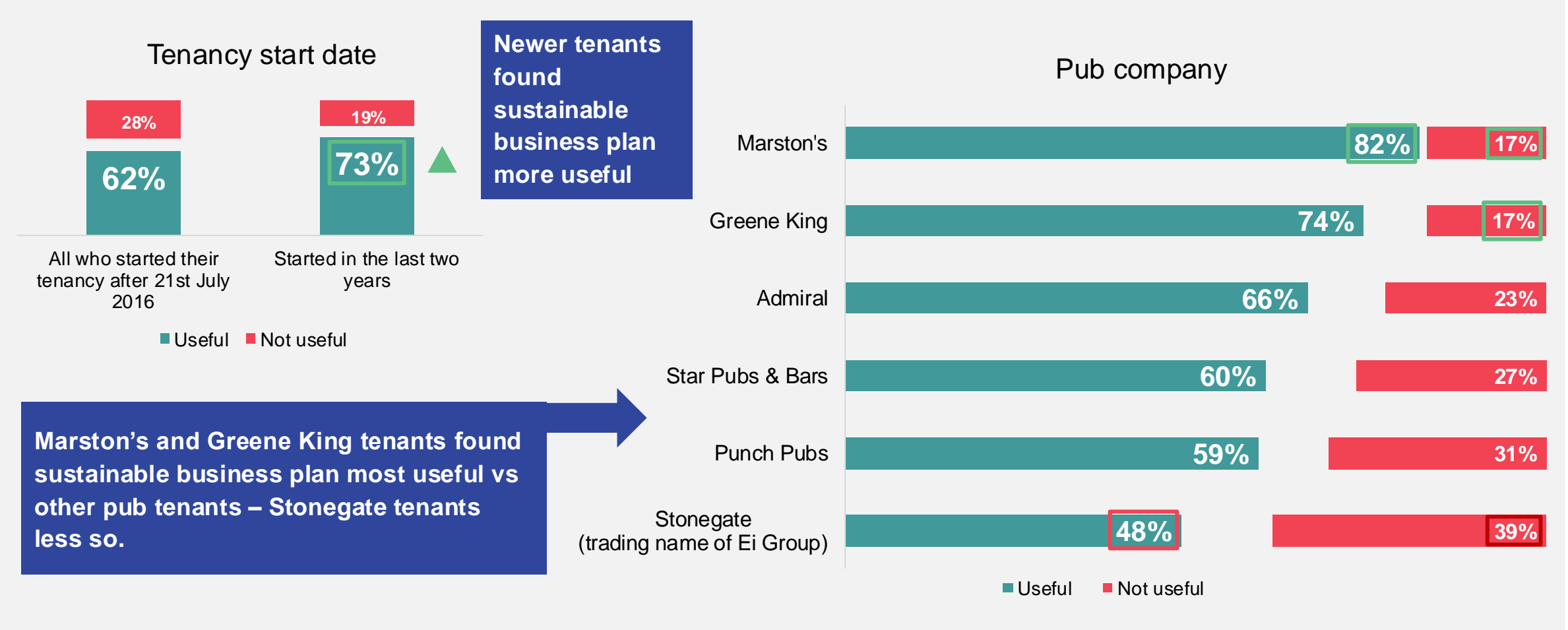


Indicate the proportion of a sub group is statistically significantly higher or lower than the total sample



# How useful 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 (746), tenants who started between 2022 and 2024 (313)



# In closing...

# 08

# What have we learned?

- Almost 8 in 10 tenants aware of the Pubs Code and majority of tenants aware of PCA.
- Just over 6 in 10 tenants are satisfied with the relationship with their pub company – with tenants of Marstons, Admiral and Greene King the most satisfied. Positive relationships are typified by transparent, open business relationships and strong business support.
- One in five tenants are dissatisfied with the relationship, with satisfaction levels amongst Stonegate tenants dragging the overall average down. Poor communications / lack of support key reasons for dissatisfaction.
- Handling of repairs remains a key concern for many tenants. Slow, bureaucratic processes blamed for dissatisfaction as is a lack of communication. Scores by pub company closely mirror the pattern of overall satisfaction.
- Some evidence that trust in the PCA's independence has improved this year – especially in terms of being independent from pub companies themselves.

# Final thoughts...

- Results continue to suggest link between positive Code interactions and tenant satisfaction.
- Relative POB rankings and movement consistent over many metrics.
- Tenant satisfaction relating to repairs shows signs of movement for some POBs.
  - What are pub companies doing to understand and improve tenant experience in this area?
- Is Code compliance sufficiently resourced?
- Compliance is a minimum. Can the industry work together to share best practice and how?



## **Pubs Code Adjudicator Tied Tenants Survey 2024 – Toplines**

**For more information**

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