



Pubs Code Adjudicator

PCA Tied Tenants Survey 2023

Relationship with Pub Company

Ipsos interviewed a representative sample of 1206 tied tenants by telephone between 10th January and 17th March, 2023.

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

6 in 10 tenants are satisfied with their pub company relationship

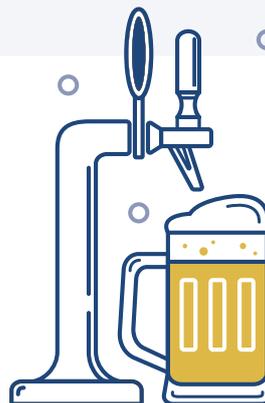
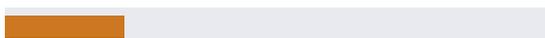
Overall satisfaction has remained the same since 2022



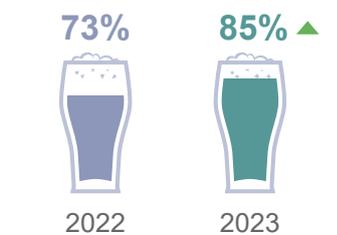
62% are satisfied



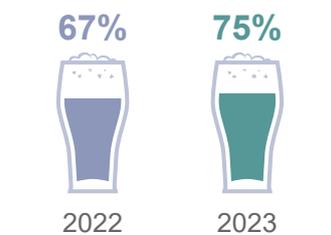
22% are dissatisfied



Marston's tenants are most satisfied with their relationship, while Stonegate tenants are least satisfied



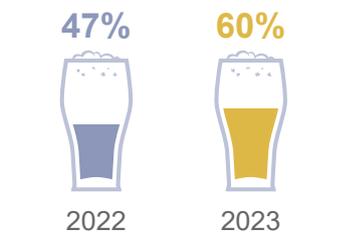
Marston's
(Satisfied)



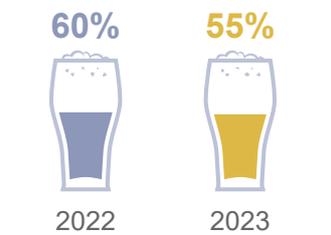
Greene King
(Satisfied)



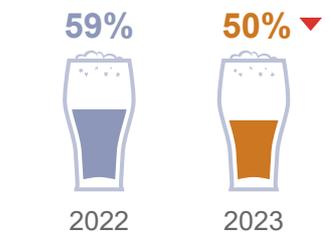
Admiral
(Satisfied)



Punch
(Satisfied)



Star
(Satisfied)



Stonegate
(Satisfied)

▲ ▼ These show statistically significant differences between 2022 and 2023



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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Business Development Manager and Code Compliance Officer

Ipsos interviewed a representative sample of 1206 tied tenants by telephone between 10th January and 17th March, 2023.

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

Almost all tenants know their Business Development Manager



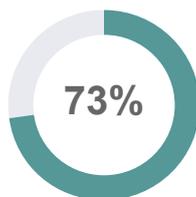
1 in 4 tenants know their Code Compliance Officer. Greene King tenants are most likely to know them



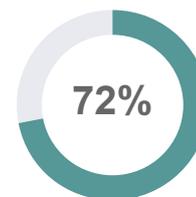
4 in 5 tenants agree their BDM is fair in discussions, but only just over a third are happy with how they manage repairs and/or dilapidations



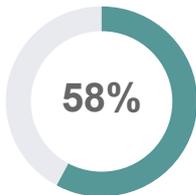
agree BDM is fair in discussions



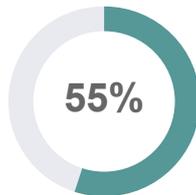
agree they have all the information about BDM's role



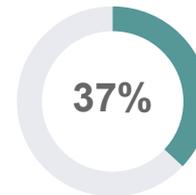
agree BDM provides accurate notes of discussions about rent, repairs and business planning



agree BDM provides the information and advice they need about The Pubs Code



agree BDM supplies the business planning support they need on an ongoing basis



are happy with the way BDM manages repairs and/or dilapidations

▲ ▼ These show statistically significant differences between 2022 and 2023



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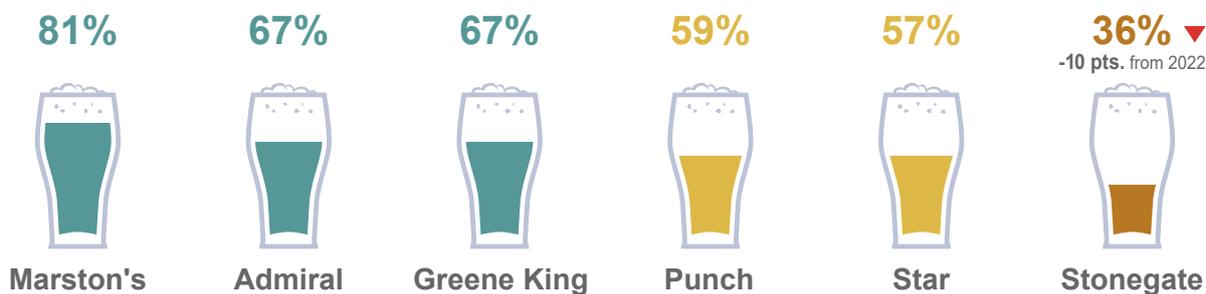
Business Development Manager and Code Compliance Officer

Ipsos interviewed a representative sample of 1206 tied tenants by telephone between 10th January and 17th March, 2023.

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

55% of tenants agree their BDM supplies the business planning support they need on an ongoing basis

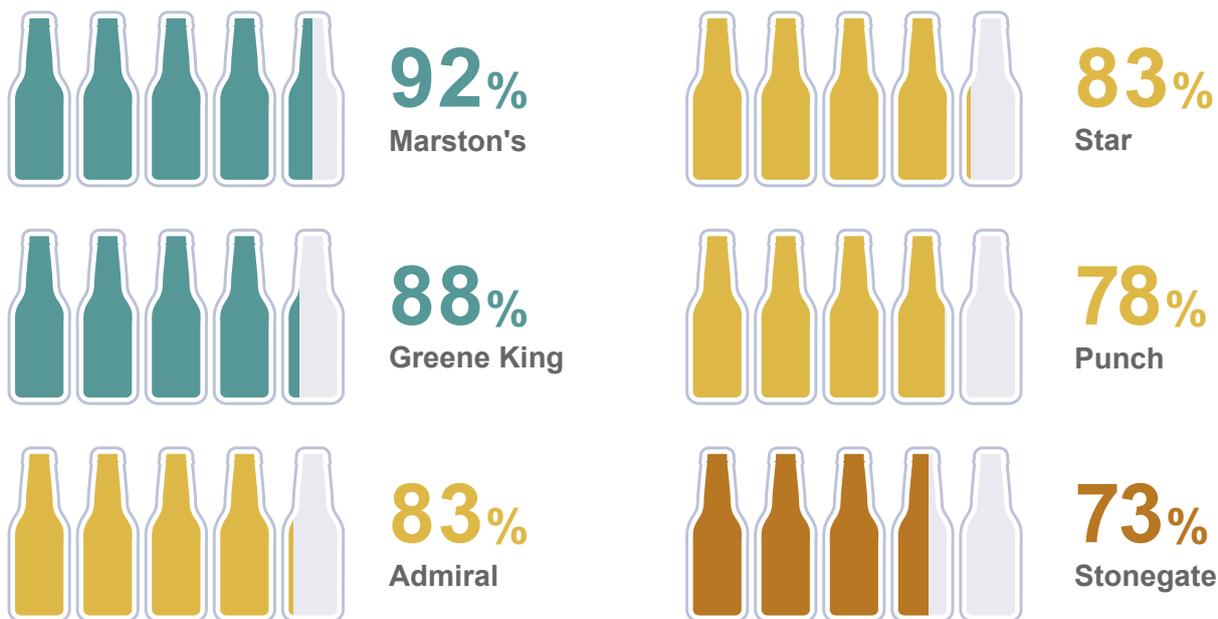
Marston's, Admiral and Greene King score above average for BDMs providing ongoing business support



▲ ▼ These show statistically significant differences between 2022 and 2023

81% of tenants agree their BDM is fair with them in their discussions

There is generally a high level of agreement that BDMs are fair with tenants in their discussions across the pub companies (with a significant 5 point increase overall year on year)



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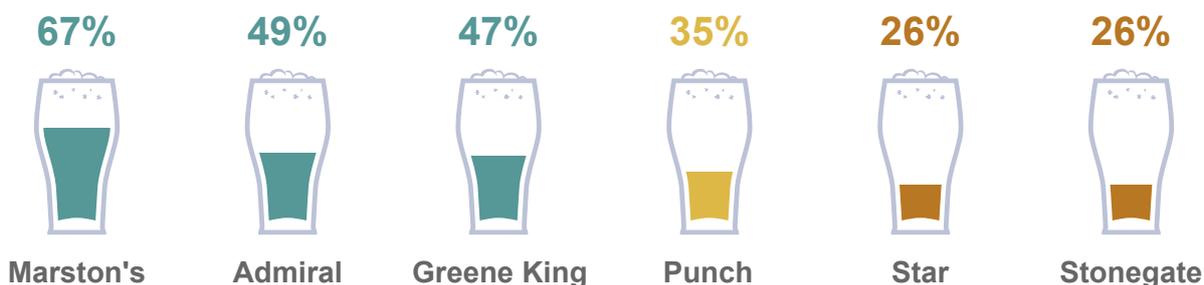
Handling Repairs and Dilapidations

Ipsos interviewed a representative sample of 1206 tied tenants by telephone between 10th January and 17th March, 2023.

In this survey, we are able to compare tenant views on how BDMs handle repairs / dilapidations by pub company and tenancy type.

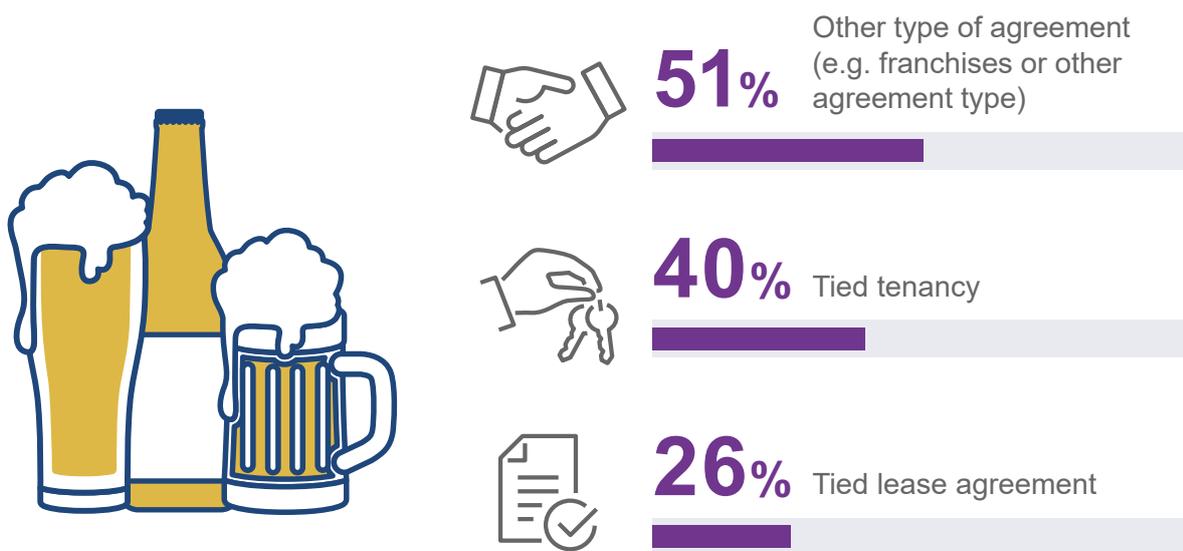
37% of tenants agree they are happy with the way their BDM manages repairs and/or dilapidations at their pub. 45% disagree

Tenants with Marston's, Admiral and Greene King are most satisfied with how the issue is managed



Satisfaction levels vary by tenancy type

Tenants with a tied tenancy or tied lease agreement are less satisfied with how repairs and/or dilapidations are managed than tenants with another type of agreement (e.g. franchise agreement or other)





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New Tenant Information

Ipsos interviewed a representative sample of 1206 tied tenants by telephone between 10th January and 17th March, 2023.

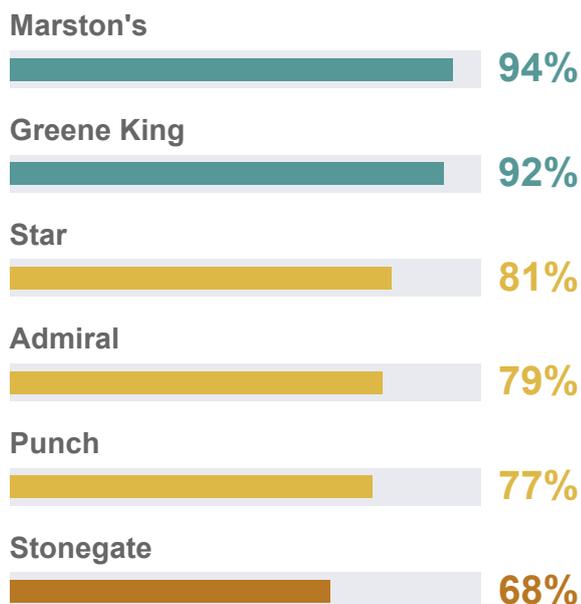
One topic of discussion was how useful tenants found information they received before their tenancy started and their sustainable business plan.

8 in 10 new tenants found pre-tenancy information useful

We asked tenants who started their tenancy after 21st July 2016 how useful they found the information they received before their tenancy began



Tenants with Marston's and Greene King found the information most useful and Stonegate the least



6 in 10 new tenants find their sustainable business plan useful

We also asked these tenants how useful they found their sustainable business plan



Tenant's with Marston's and Greene King are most likely to find their sustainable business plan useful, those with Stonegate the least

