

PCA Tied Tenants Survey 2025 Technical Report

June 2025



Pubs Code
Adjudicator



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Background

This technical report outlines the methodology for the 2025 PCA Tied Tenants Survey. This year marks the beginning of a new three-year commission from the Pubs Code Adjudicator (PCA) for Ipsos to deliver this survey. Ipsos having first delivered the survey in 2017.

Since inception, the core aims of the survey have been to:

- Measure awareness and familiarity with the Pubs Code and the PCA among tied tenants.
- Explore the tenant relationship with their pub company over time.

For 2025, a key priority was to dig more deeply into tenant experiences of how rent negotiations and repairs are managed, while retaining the core survey content to allow the PCA to track tenant awareness and satisfaction over time. The survey also covered how the PCA communicates with tenants and captured some demographic information about tenants for analysis purposes.

In 2023, the scale of the survey increased from n=600 to a target of n=1200 interviews per year representing approximately 15% of the tied pub estate, to ensure robust analysis of survey results by pub company. This approach was maintained in 2025, with 1,217 completed interviews this year. As in previous years, all interviews were conducted by telephone.

The 2025 Tied Tenants survey

Sample selection

Sampling for the telephone survey was consistent with the approach taken in 2024.

- We were aiming to achieve 1200 interviews with tied tenants from the six main pub companies.
- As in previous years, for data confidentiality reasons the pub companies only provided Ipsos with pub names and addresses. Therefore, Ipsos needed to source telephone numbers for tenants independently.
- As in 2024, Ipsos targeted the full sample this year to achieve 1200 interviews, approaching tenants at random within quotas set to ensure a representative sample was achieved.

The process began with the six pub companies signing mutual non-disclosure agreements and providing 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, with the exception of Stonegate, who provided a larger number of pubs than expected due to a transition of some pubs to Pub Code agreements.

Table 1.1: Comparison of pubs received versus estimated estate size

	Number of pubs received from Pub Company ¹	Expected size of Pub Company estate from PCA records
Greene King	759	759
Punch Pubs	878	917
Admiral Taverns	1015	1030
Stonegate	2972	2628
Star Pubs	1719	1720
Marston's	863	928
Total	8,206	7,982

Once Ipsos had the pub names and addresses for the agreed universe of 8,206 pubs, targets were set for the number of interviews to be achieved by pub company within our total of n=1200. For analysis purposes, minimum targets of n=150 interviews were set for the smaller pub companies while aiming to ensure the number of tenants targeted in each pub company was broadly proportional to the tenant universe by size of estate. Quotas were 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. 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 **weighting of survey responses** for more).

¹ "The survey samples included in the results took into account the PCA's statement on innovative agreement types published on 13 March 2025. Those agreements which appeared to be of the type considered by the PCA in that statement were not included. The approach to the methodology for the 2025 survey, its results and associated publications should not be understood as conclusive as to the regulator's view as to the PCA's powers and duties in relation to profit or turnover share agreements, or as to any future regulatory activity that the PCA might carry out. The PCA reserves the right to carry out any future regulatory activity within the scope of its statutory functions."

Table 1.2: 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	759	9.25%	150	12.50%
Punch Pubs	878	10.70%	150	12.50%
Admiral Taverns	1015	12.37%	150	12.50%
Stonegate	2972	36.22%	370	30.83%
Star Pubs	1719	20.95%	230	19.17%
Marston's	863	10.52%	150	12.50%
Total	8206	100%	1200	100%

As in previous years, 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 telephone interviewing 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

Since pub companies did not provide contact details for tenants, Ipsos sourced these through commercially available lists supplemented by 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. 17 records were identified as DNC and removed, with a further 4 removed as they could not be matched to a region. This meant 21 records in total were removed ahead of calls beginning. In the end, Ipsos contacted a sample of 8,185 pubs. More information on the achieved response rate by pub company and the profile of survey respondents can be found in sections **Fieldwork and achieved response rate** and **Weighting of survey responses** below.

Questionnaire design

With the start of the new three-year contract in 2025, Ipsos and the PCA worked in partnership to refresh the survey instrument based on learnings from previous iterations and with the aim to inform the PCA's new strategy. The PCA invited views from principal stakeholders on changes to the survey questionnaire. Key measures around tenant awareness of the Code/ familiarity with their rights and tenant satisfaction with their pub company relationship were retained for trending

purposes, with around 30% of the existing survey content updated. Following a workshop with the PCA in November, Ipsos designed the new survey instrument. The survey itself can be found in the annex of this report but key themes included:

Table 1.3: Summary of survey themes

Theme	Areas covered
Introduction and screener questions	<p>Purpose of research explained, consent sought.</p> <p>Respondents screened to ensure tied tenant from one of six pub companies and other profiling information such as single vs multiple operator or type of tenancy.</p> <p>Asking leaseholders if they were the original leaseholder of it, or if they had taken an assignment from another party.</p>
The Code	Awareness of code and familiarity with rights.
New tenant questions	<p>NEW: When tenant became tied at their pub with their pub company.</p> <p>NEW: When most recent agreement came into force.</p> <p>Satisfaction with type of tenancy arrangement and why.</p> <p>Information received as new tenant, usefulness of it and usefulness of Sustainable Business Plan.</p>
Rent and MRO NEW SECTION	<p>NEW: Whether tenant has agreed or renegotiated rent in the last 2 years.</p> <p>NEW: Type of negotiation.</p> <p>NEW: Satisfaction with information provided by pub company on rent offer, usefulness of information provided, satisfaction with pub company handling of negotiation.</p> <p>NEW: Whether tenant submitted an MRO request in the last 2 years, if not why not?</p> <p>NEW: Satisfaction with MRO information provided and satisfaction with how pub company handled tenant during MRO process.</p>
Relationship with pub company	<p>Awareness and satisfaction with Business Development Manager (BDM) / Code Compliance Officer (CCO) across several measures.</p> <p>NEW: Overall satisfaction with BDM.</p> <p>Overall satisfaction with relationship with pub company and why?</p>
Repairs and premises insurance	<p>NEW: Who is responsible for repairs?</p> <p>NEW: Understanding of the process if the pub company is responsible.</p>

Theme	Areas covered
NEW SECTION	<p>NEW: Satisfaction with pub company dealing with repairs and why?</p> <p>NEW: Satisfaction with how the pub company deals with the tenant if the tenant is responsible for repairs and why?</p> <p>NEW: Satisfaction with information provided on dilapidations.</p> <p>NEW: Whether tenant has contacted their pub company to price match premises insurance in the last year.</p> <p>NEW: Satisfaction with how their pub company dealt with them if contacted for price matching.</p>
PCA and comms	<p>Awareness and perceptions of PCA independence.</p> <p>Asking those concerned about independence of the PCA why.</p> <p>NEW: Contact with the PCA in the last year.</p> <p>NEW: Methods of contacting the PCA.</p> <p>NEW: Satisfaction with information provided by the PCA during contact.</p>

At the end of the survey, respondents were asked 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.

Fieldwork and achieved response rate

In total 1,217 telephone surveys were conducted between January 15th and March 26th, 2025. The average interview length was 22 minutes and 30 seconds. The CATI team manager briefed interviewers ahead of fieldwork beginning. Ipsos and the PCA designed an email for the pub companies to send out prior to fieldwork starting 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 13th.

As in 2024, fieldwork closed with the number of completed interviews for Greene 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 1.4: Comparison of sample loaded and interviews completed

	Initial quota	Interviews completed	% total completes	% of pubs in universe
Admiral Taverns	150	158	13.0%	12.4%
Stonegate	370	375	30.8%	36.2%
Greene King	150	135	11.1%	9.2%
Marston's	150	181	14.9%	10.5%
Punch Pubs	150	154	12.7%	10.7%
Star Pubs	230	214	17.6%	20.9%
TOTAL	1,200	1,217	100%²	100%

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

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

Weighting of survey responses

As mentioned above (see table 1.4.), there was a small (deliberate) imbalance within the n=1217 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. Random Iterative Method (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%.

Analysis and reporting

Data tables were provided to the PCA alongside verbatim comments in Excel, a PowerPoint presentation and infographic of the key findings. Key analysis was provided by:

- 2024 vs 2025
- Pub company 2024 / 2025
- Length of tenancy with pub company
- Length of most recent agreement
- Type of tenancy
- Single / multiple operator
- Experience of rent negotiation
- Rent responsibility
- Awareness of PCA
- Satisfaction with tenant / pub company relationship
- Tenant demographics such as age, gender and disability

Reporting of trends and subgroup analysis

Results in any quantitative study are subject to sampling variability. Since we only interview 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). However, with a statistic method we can 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 ($n=1217$), we can expect the true values to lie within 3 percentage points either way of the figures obtained in this survey. That is, if our survey finds 61% of tenants are satisfied with their pub company, we can be 95% confident that the true proportion of tenants who are satisfied is between 58% and 64%.

In order to analyse results by pub company we ensured a minimum of $n=100$ tenants from each pub company were interviewed. This allowed us to make reasonable comparisons while acknowledging that the margin of error will be larger for individual companies than for the overall sample and 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. When comparing results between pub companies, it is important to focus on differences that are statistically significant to avoid interpreting small differences that could be due to sampling variation.

Appendix

Advance email invitation

January 2025

Ipsos / PCA Tied Tenants Survey 2025

Dear tenant / lessee / 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 (PCA). Ipsos is aiming to speak to 1200 tenants, having run similar surveys in recent years. The results from last year's survey can be found [here](#).

The PCA has commissioned this survey to provide data that helps pub companies know how to improve their relationship with their tied tenants. Topics include:

- Your awareness and understanding of your statutory rights under the Pubs Code,
- How satisfied you are with your relationship with your pub company and why including feedback on any information and support provided,
- Your views about information received by new tenants,
- Your experience with rent negotiations, repairs and premises insurance,
- Your awareness of the PCA itself and views on any interaction you may have had with them.

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 PubsSurvey2025@ipsosresearch.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](#) 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 by Ipsos or the PCA 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](#).

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

Kind regards,

Fiona Dickie
Pubs Code Adjudicator



Further information

Why am I being contacted?

The PCA wants to hear from pub tenants who have a tied tenancy 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 PubsSurvey2025@ipsosresearch.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](#).

Telephone survey questionnaire

Pubs Code Adjudicator Tied Pubs Tenant Survey 2025

Length of interview: 20 minutes including screener

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, lessees and licensees on behalf of the PCA. This survey aims to provide data that helps pub companies know how to improve their relationship with their tied tenants. So we want to explore your awareness of your statutory rights and how satisfied you are with your relationship with your pub company, including the information and support they provide you.

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?

SEND EMAIL TO **[EMAIL ADDRESS]**

DO NOT SEND EMAIL **[CONTINUE]**

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

Speaking to correct person/put through and agreed to continue – **START INTERVIEW (INTRO1)**

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. Results will be aggregated and you will not be named or identified in any outputs. Each Pub Company will receive their own results, however these will be anonymised. 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?

Yes

No – **CLOSE**

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 and Trade 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 PubsSurvey2025@ipsosresearch.com
 - If you would like to speak to someone at the PCA about this research please contact Julia Tortise, Director of Business Management and Development 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 questions

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]? IF NEEDED: When we say tied tenant we mean any tied tenancy, leasehold, short agreement or franchise arrangement requiring you to purchase at least some of your alcohol from your pub company.

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 Taverns
2. Marston's
3. Punch Pubs
4. Star Pubs
5. Greene King
6. Stonegate
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 may have no statutory or contractual right for the tenant to renew and is likely to have less onerous repairing obligations.

READ OUT SINGLE CODE

A tied lease agreement

A tied tenancy

A franchise agreement

A short agreement of less than 12 months or tenancy at will

[IF PUB COMPANY=MARSTONS] A retail agreement such as pillar, foundation or other type of tied retail agreementYou are employed by the pub company to manage the pub - **CLOSE**Free of tie - **CLOSE**Something else **(SPECIFY)**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)**
-

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

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-E

- 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 a rent review on 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
- E. Your right to copies of Meeting Minutes in connection with rent negotiations, repairs and business planning within 14 days of a business meeting taking place

Tenancy details

READ OUT: We would now like to ask you about your pub and tenancy in more detail.

BASE ALL

G1. How long have you been a tied tenant at [PUB NAME FROM SAMPLE] with [INSERT PUB COMPANY]?

DO NOT READ OUT, SINGLE CODE

1. Less than a year
2. Between 1 year up to 2 years
3. Over 2 years up to 5 years
4. Over 5 years up to 10 years
5. 10 years or more
6. Don't know **(DO NOT READ)**
7. Prefer not to say **(DO NOT READ)**

BASE ALL

READ OUT, SINGLE CODE

G3. And when did your most recent agreement with [PUB COMPANY] take effect? IF NEEDED: By this we mean when did your most recent tenancy, lease or other form of agreement get renewed or take effect

DO NOT READ OUT, SINGLE CODE

1. In the last year
2. Over 1 year and up to 2 years ago
3. Over 2 years up to 5 years ago
4. Over 5 years up to 10 years ago
5. Over 10 years or more ago
6. Don't know
7. Prefer not to say

BASE ALL WHOSE MOST RECENT AGREEMENT STARTED 5-10 YEARS OR DON'T KNOW, CODE 4 OR 6 AT G3

G3A. Are you able to estimate when your most recent agreement came into force?

IF NEEDED: By this we mean when did your most recent tenancy, lease or other form of agreement get renewed or take effect

READ OUT. SINGLE CODE

Before the 21st July 2016

On or after the 21st July 2016

Don't know **(DO NOT READ)**

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

G4. Overall, how satisfied or dissatisfied are you with the current 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]**

Tenancy information questions

READ OUT: We are now going to ask about your current tenancy agreement with your pub company.

BASE ALL TENANTS WHOSE MOST RECENT AGREEMENT STARTED POST THE PUBS CODE, CODES 1-3 AT G3 OR CODE 2 AT G3A

G7. What, if any, of the following information do you remember receiving from [PUB COMPANY] BEFORE your most recent tenancy started? IF NEEDED: By this we mean when your current agreement took effect or was regranted.

READ OUT If you do not remember receiving any information please say so.

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 Code Compliance Officer
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. Where to get professional advice ahead of completing your Business Plan
11. Do not remember receiving any of these **before your tenancy started** **EXCLUSIVE**

BASE ALL TENANTS WHOSE MOST RECENT AGREEMENT STARTED POST THE PUBS CODE, CODES 1-3 AT G3 OR CODE 2 AT G3A

G8. And how useful or not did you find the information you received from [PUB COMPANY] before your current agreement 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 TENANTS WHOSE MOST RECENT AGREEMENT STARTED POST THE PUBS CODE, CODES 1-3 AT G3 OR CODE 2 AT G3A

READ OUT: Before entering into your tenancy agreement (unless it was a statutory renewal under the Landlord and Tenant Act 1954), [PUB OWNING BUSINESS] should have agreed a Sustainable Business Plan with you. This includes things like financial forecasts for your tenancy.

BASE ALL TENANTS WHOSE MOST RECENT AGREEMENT STARTED POST THE PUBS CODE, CODES 1-3 AT G3 OR CODE 2 AT G3A

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
 6. Don't know **(DO NOT READ OUT)**
-

Rent and MRO questions

READ OUT: I would now like to ask you some questions about any rent negotiations that may have taken place to do with your pub in the past two years.

NEW QUESTION

BASE ALL

G10. Have you agreed or renegotiated your rent at [PUB NAME FROM SAMPLE] with [PUB COMPANY] in the last 2 years?

DO NOT READ OUT. SINGLE CODE.

1. Yes
2. No
3. Don't know
4. Can't remember

NEW QUESTION

BASE ALL CODE 1 AT G10

G11. Thinking about the most recent rent negotiation, was this...?

READ OUT. SINGLE CODE. REVERSE CODES 1-3.

1. A new agreement at the pub
2. A mid-term rent review
3. When you had the right to renew an existing agreement
4. Something else **[SPECIFY] (DO NOT READ OUT)**
5. Don't know **(DO NOT READ OUT)**
6. Can't remember **(DO NOT READ OUT)**

NEW QUESTION

BASE ALL CODE 1-3 AT G11

G12. Thinking about the information the pub company provided to you to support their rent offer and the negotiation, to what extent do you agree or disagree, if either, with the following statements? If you did not receive any information please say so. INTERVIEWER: If this is the case code 6 for all statements.

READ OUT. REVERSE SCALE. SINGLE CODE

1. Strongly agree
2. Tend to agree
3. Neither agree or disagree
4. Tend to disagree
5. Strongly disagree
6. I did not receive any information to support their rent offer **(DO NOT READ OUT)**
7. Don't know **(DO NOT READ OUT)**

RANDOMISE

- A. I was satisfied with the information they provided to support their rent offer
- B. The information they provided helped me in negotiations
- C. **[INSERT PUB COMPANY]** handled any negotiation fairly

NEW QUESTION

BASE ALL TENANTS WHO HAD A MID-TERM RENT REVIEW OR RENT NEGOTIATION WHEN THEY HAD A RIGHT TO RENEW AN EXISTING AGREEMENT, CODES 2-3 AT G11

G13. You said you recently had [TO ALL CODE 2 AT G11] a mid-term rent review [TO ALL CODE 3 AT G11] a rent negotiation when you had a right to renew an existing agreement. [ALL] At this time, did you submit a formal MRO request to exercise your right to go free of tie?

DO NOT READ OUT, SINGLE CODE

1. Yes
2. No
3. I don't know **(DO NOT READ)**

NEW QUESTION

BASE ALL WHO DID NOT REQUEST MRO, CODE 2 AT G13

G14. Why not?

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

NEW QUESTION

BASE ALL WHO DID REQUEST MRO, CODE 1 AT G13

G15. Thinking about the information the pub company provided to you when you submitted an MRO request, to what extent do you agree or disagree, if either, with the following statements?

READ OUT. REVERSE SCALE. SINGLE CODE

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)**

RANDOMISE

- A. I was satisfied with the information **[INSERT PUB COMPANY]** provided when I submitted an MRO notice.
 - B. I was satisfied with how **[INSERT PUB COMPANY]** dealt with me during the MRO process.
-

Relationship with pub company questions

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 D2)**
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

BASE ALL WHO KNOW WHO THEIR BDM IS, NOT CODE 7 AT D1

D1B. Overall, how satisfied or dissatisfied are you with your relationship with your Business Development Manager?

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)**

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?

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 have a good understanding of the role of the Code Compliance Officer
3. I know how to contact my Code Compliance Officer if I wanted to raise a Pubs Code matter
4. I have confidence in how my Code Compliance Officer handles issues related to The Pubs Code
5. 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]**
-

Repairs and premises insurance questions

BASE ALL

I1. Now thinking about how repairs are handled at your pub in more detail. Who is responsible for repairs at your pub?

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

1. Only me
2. Only my pub company
3. A combination of the two
4. Don't know

BASE ALL THOSE WHOSE PUB COMPANY DEALS WITH REPAIRS, CODES 2 AND 3 AT I1:

I2. How well or badly, if either, do you feel you understand the process for how [INSERT PUB COMPANY] deals with repairs they are responsible for at your pub?

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

1. Very well
2. Fairly well
3. Neither well or badly
4. Fairly badly
5. Very badly
6. Don't know **(DO NOT READ OUT)**

BASE ALL THOSE WHOSE PUB COMPANY DEALS WITH REPAIRS, CODES 2 AND 3 AT I1:

I3. How satisfied or dissatisfied are you with how your pub company deals with repairs at your pub that they are responsible for?

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)**

BASE ALL I3=1-5

I3A: Any 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 THOSE WHO DEAL WITH REPAIRS, CODES 1 AND 3 AT I1:

I4. How satisfied or dissatisfied are you with how your pub company deals with you when you are responsible for repairs?

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)**

BASE ALL I4=1-5

I4A: Any 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 THOSE WHO DEAL WITH REPAIRS, CODES 1 AND 3 AT I1:

I5. How satisfied or dissatisfied are you with the information your pub company provides to do with dilapidations?

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)**

READ OUT: I would now like to ask some questions about premises insurance.

NEW QUESTION

BASE ALL

I6. Have you contacted your pub company to price match premises insurance in the last 12 months?

DO NOT READ OUT. SINGLE CODE ONLY.

1. Yes
2. No
3. Don't know

NEW QUESTION

BASE ALL WHO CONTACTED THEIR PUB TO PRICE MATCH, CODE 1 AT I6

I7. How satisfied or dissatisfied were you with how **[INSERT PUB COMPANY] dealt with you when you contacted them?**

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)**

The PCA service and communications questions

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.6 Have you had any contact with the PCA in the past 12 months?

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.9 And how did you get in touch 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. Spoke to the PCA in person
7. Something else **[specify]**
8. I have not contacted the PCA in the last year
9. Don't know

ASK ALL IN CONTACT F6=1**F10. Still thinking about this most recent occasion, how satisfied or dissatisfied were you with the quality of the information provided by the PCA?****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)**

Tenant demographic questions

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 your gender?

READ OUT. SINGLE CODE

1. Man
2. Woman
3. Non-binary
4. My gender is not listed
5. Prefer not to say

ASK ALL

H2. What is your age?

INTERVIEWER: PROMPT RESPONSE INTO BAND

READ OUT. SINGLE CODE

1. Under 25
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

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

J2. And would you be ok with Ipsos passing your contact details on to the PCA to take part in further research in the next 12 months? You would be under no obligation to participate.

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

IF 1 at J1 or J2

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 J2

QEMAIL Can I also please take your email address?

(interviewer enter email address and read back to respondent to confirm)

IF 1 at J1 or J2

J4. 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 - PubSurvey2025@ipsosresearch.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 PubsSurvey2025@ipsosresearch.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, Director of Business Management and Development 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 specific standard for market, opinion and social research, including insights and data analytics. Ipsos UK was the first company in the world to gain this accreditation.



Market Research Society (MRS) Company Partnership

By being an MRS Company Partner, Ipsos UK endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation and we were the first company to sign our organisation up to the requirements and self-regulation of the MRS Code; more than 350 companies have followed our lead.



ISO 9001

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

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



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

Ipsos UK is required to comply with the UK General Data Protection Regulation (GDPR) and the UK Data Protection Act (DPA). These cover the processing of personal data and the protection of privacy.



HMG Cyber Essentials

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. This is a government-backed, key deliverable of the UK's National Cyber Security Programme. Ipsos UK was assessed and validated for certification in 2016.



Fair Data

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

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About Ipsos Public Affairs

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.