



**Pubs Code
Adjudicator**

PCA Tied Tenants Survey 2025

Relationship with Pub Company

Ipsos interviewed a representative sample of 1217 tied tenants by telephone between 15th January and 26th March, 2025.

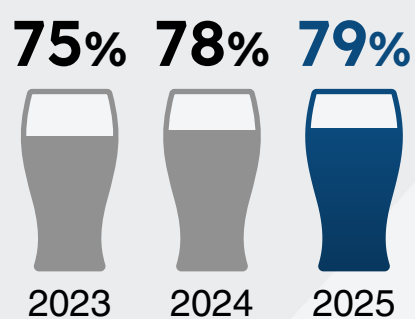
Overall satisfaction
has remained at
6 in 10 tenants
between 2023
and 2025.

61%
are satisfied

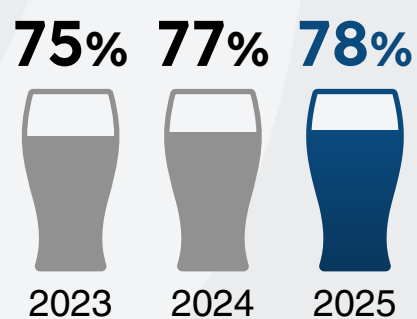
23%
are dissatisfied

The top three Pub Companies for tenant
satisfaction have stayed the same since 2023.
Star is above average this year.

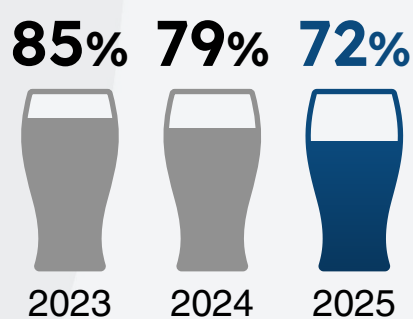
admiral
T A V E R N S




GREENE KING

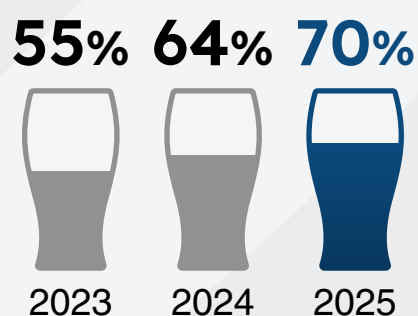



MARSTON'S

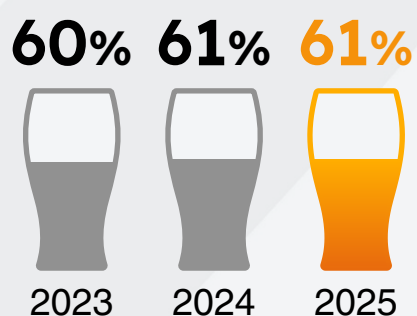


-  Above average satisfaction
-  Average satisfaction
-  Below average satisfaction

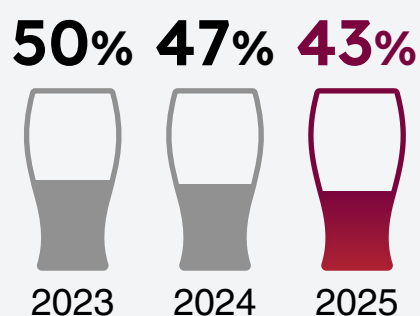
STAR
P U B S



PUNCH
PUBS & CO



Stonegate Group





Pubs Code Adjudicator

PCA Tied Tenants Survey 2025

Awareness of the Pubs Code

Ipsos interviewed a representative sample of 1217 tied tenants by telephone between 15th January and 26th March, 2025.

Over four in five tenants are aware of the Pubs Code.



82%
are aware

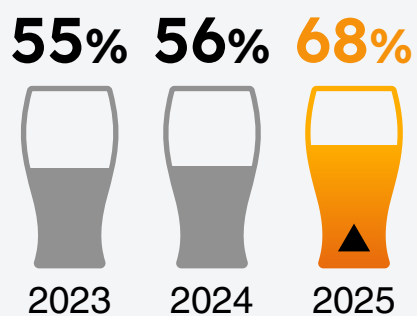


18%
are unaware

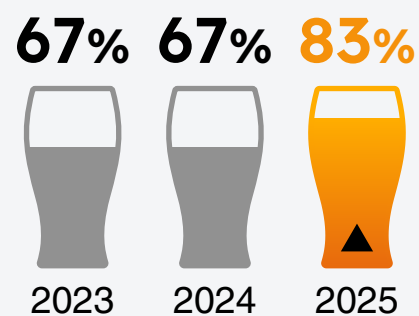
Tenant familiarity with their rights under the Pubs Code has improved this year.

% familiar with right(s)...

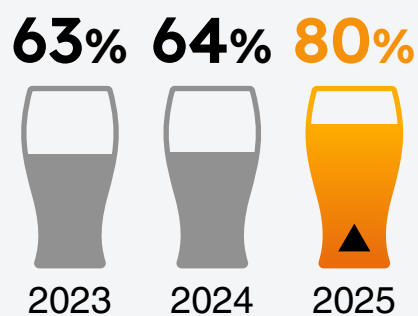
To price match the amount you pay for premises insurance



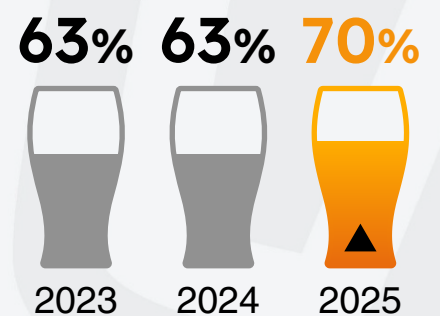
When receiving a Rent Proposal



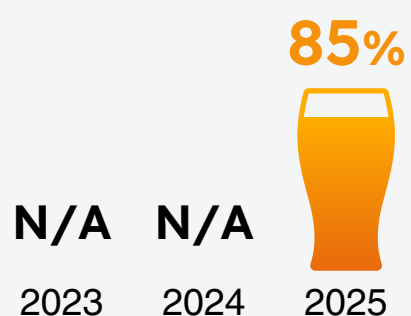
When receiving a Rent Assessment Proposal regarding a rent review



To request a market rent only option



To copies of Meeting Minutes



▲▼ Significant difference between 2024 and 2025

Base: Tenants with a tied tenancy, tied lease agreement, something else or who don't know their agreement type.



**Pubs Code
Adjudicator**

PCA Tied Tenants Survey 2025

**Business Development Manager (BDM)
& Code Compliance Officer (CCO)**

Ipsos interviewed a representative sample of 1217 tied tenants by telephone between 15th January and 26th March, 2025.

**Tenant awareness of their BDM is high.
Awareness of the CCO has improved again.**



98%

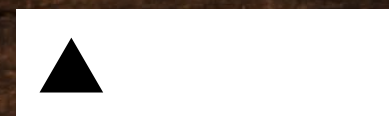
of tenants
are aware of
their BDM

2025



46%

2024



39%

2023



25%

of tenants aware
of their CCO

**7 in 10 tenants are satisfied with BDM relationship
but scores vary significantly by pub company.**

admiral
T A V E R N S

84%



STAR
— P U B S —

81%



GREENE KING

81%



MARSTON'S

75%



PUNCH
PUBS & CO

68%



Stonegate Group

55%



- Above average satisfaction
- Average satisfaction
- Below average satisfaction



**Pubs Code
Adjudicator**

PCA Tied Tenants Survey 2025

Rent Negotiations

Ipsos interviewed a representative sample of 1217 tied tenants by telephone between 15th January and 26th March, 2025.



40%

of tenants said they've agreed or renegotiated their rent with their pub company in the last 2 years.

Of these agreements or renegotiations...



40%

were when the tenant had the right to renew an existing agreement

38%

were for a new agreement at the pub

17%

were a mid term rent review

My pub company handled any negotiation fairly

64% 22%



The information they provided helped me in negotiations

51% 23%



I was satisfied with the information they provided to support their rent offer

62% 20%



● Agree

● Disagree



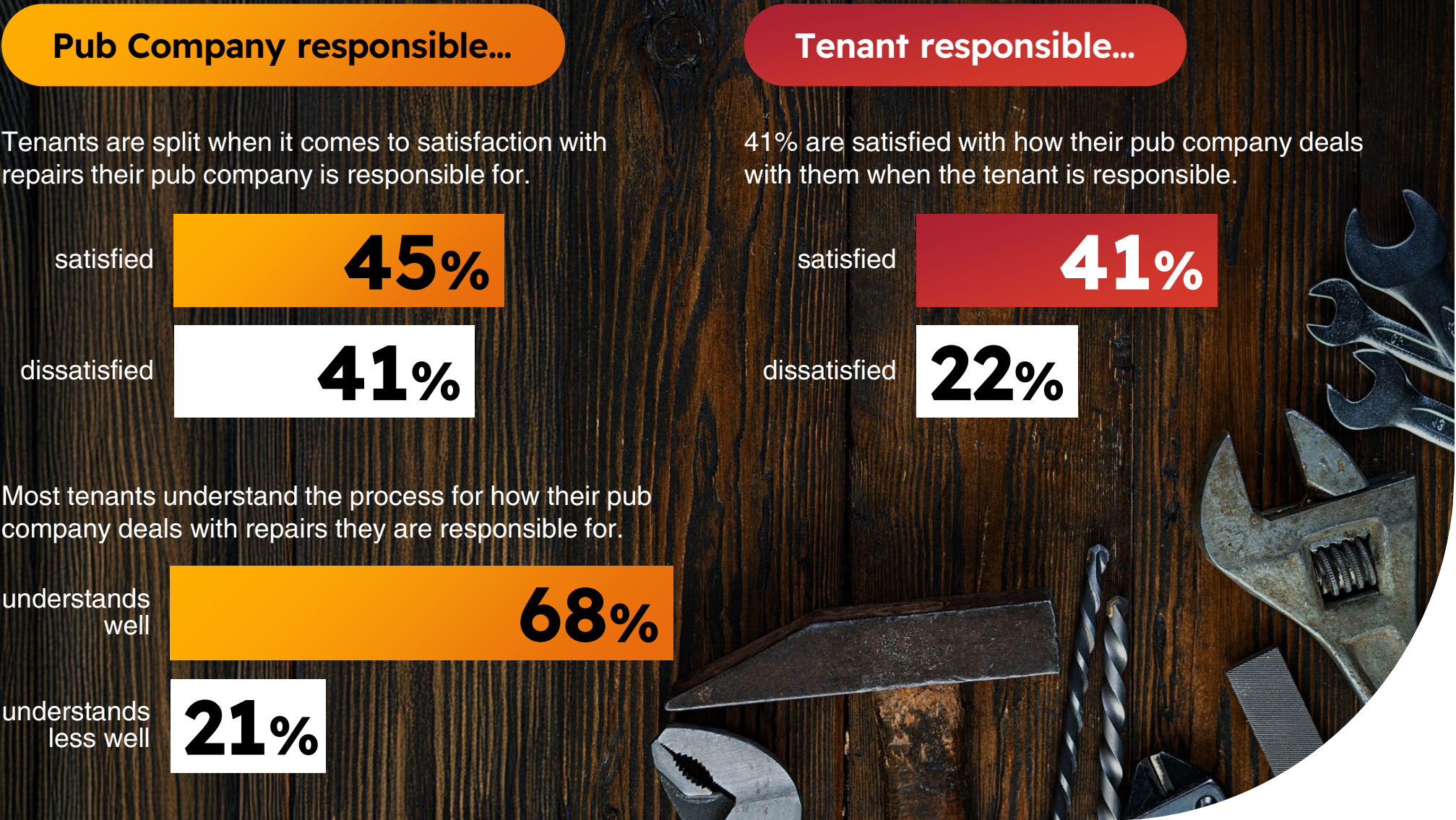
**Pubs Code
Adjudicator**

PCA Tied Tenants Survey 2025

Responsibility of Repairs and Tenant Experiences

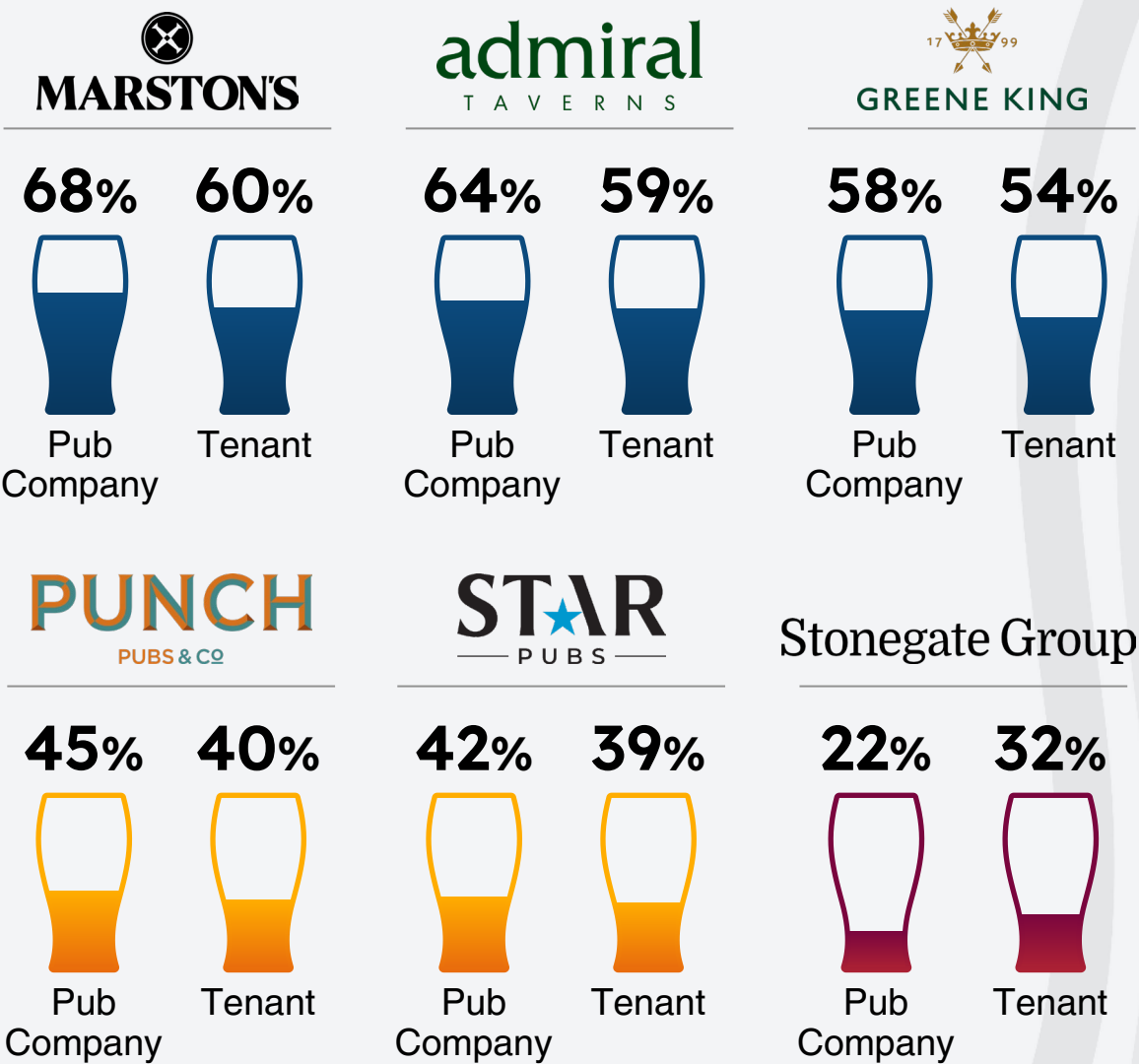
Ipsos interviewed a representative sample of 1217 tied tenants by telephone between 15th January and 26th March, 2025.

We asked tenants about how repairs are handled depending on who is responsible...



Satisfaction with repairs varies sharply by pub company.

Marston's, Admiral and Greene King tenants are more satisfied than average for how repairs are dealt with – whether the pub company or the tenant is responsible.



- Above average satisfaction
- Average satisfaction
- Below average satisfaction