

**Relationship with Pub Company**

Ipsos interviewed a representative sample of 1,201 tied tenants by telephone between 12<sup>th</sup> January and 27<sup>th</sup> March, 2026.

**Overall tenant satisfaction has decreased since 2025.**

**56%**  
are satisfied

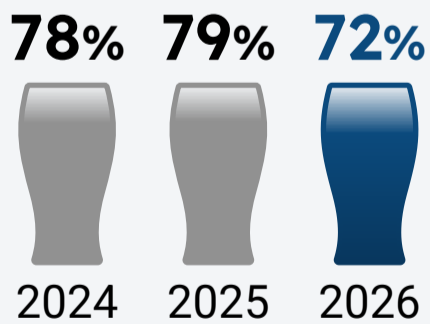


**26%**  
are dissatisfied

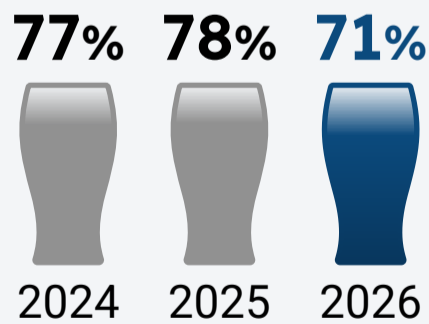
▲▼ Statistically significantly different compared to 2025.

**The top three Pub Companies for tenant satisfaction has changed since 2025, with Star replacing Marston's in the top 3.**

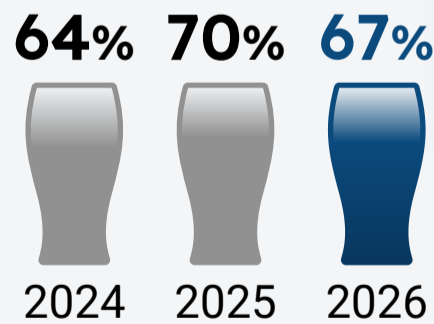
**admiral**  
T A V E R N S



**GREENE KING**

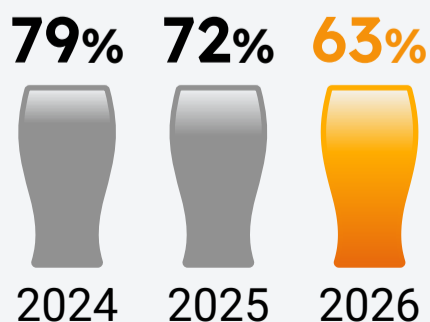


**STAR**  
PUBS

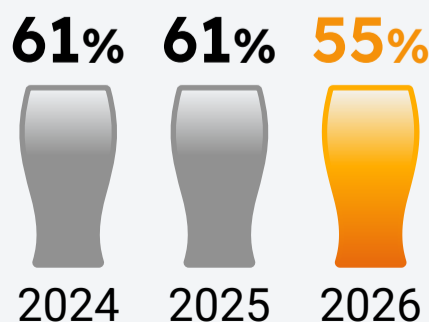


- Above average satisfaction
- Average satisfaction
- Below average satisfaction

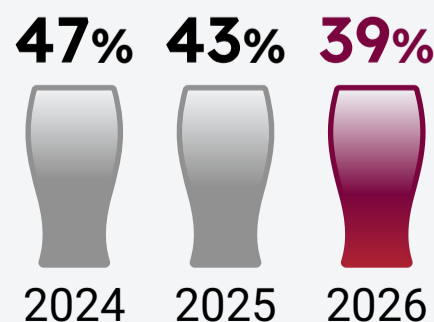
**MARSTON'S**



**PUNCH**  
PUBS & CO



**Stonegate Group**





**Awareness of the Pubs Code**

Ipsos interviewed a representative sample of 1,201 tied tenants by telephone between 12<sup>th</sup> January and 27<sup>th</sup> March, 2026.

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

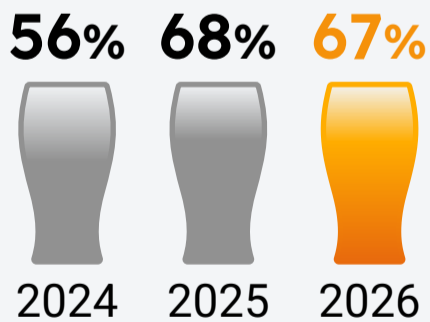
**18%**  
are unaware



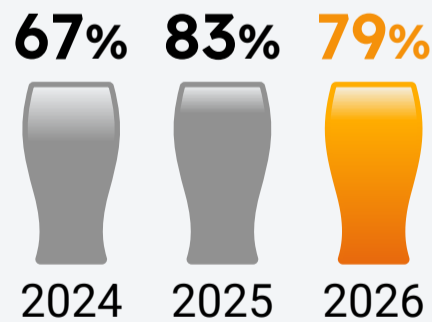
**82%**  
are aware

**Tenant familiarity with their rights...**

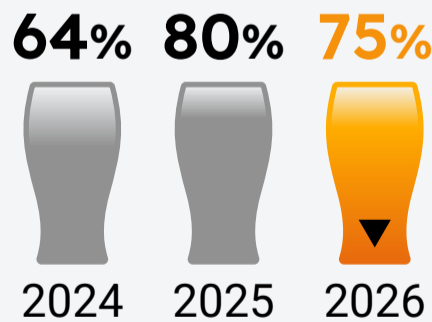
To price match the amount you pay for premises insurance



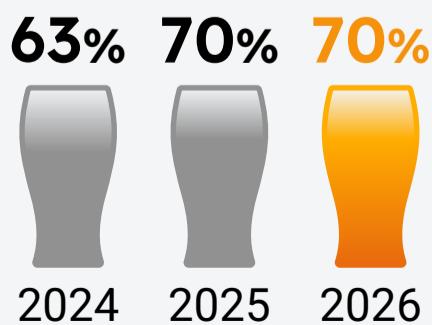
When receiving a Rent Proposal



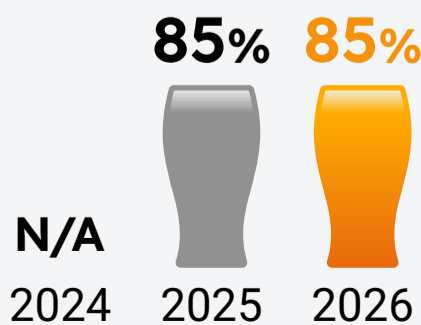
When receiving a Rent Assessment Proposal regarding a rent review



To request a market rent only option



To copies of Meeting Minutes



Base: All tenants with a tied tenancy, tied lease agreement, something else or who don't know what their agreement is (946).

▲▼ Statistically significantly different compared to 2025.



**Perceptions of BDM and CCO**

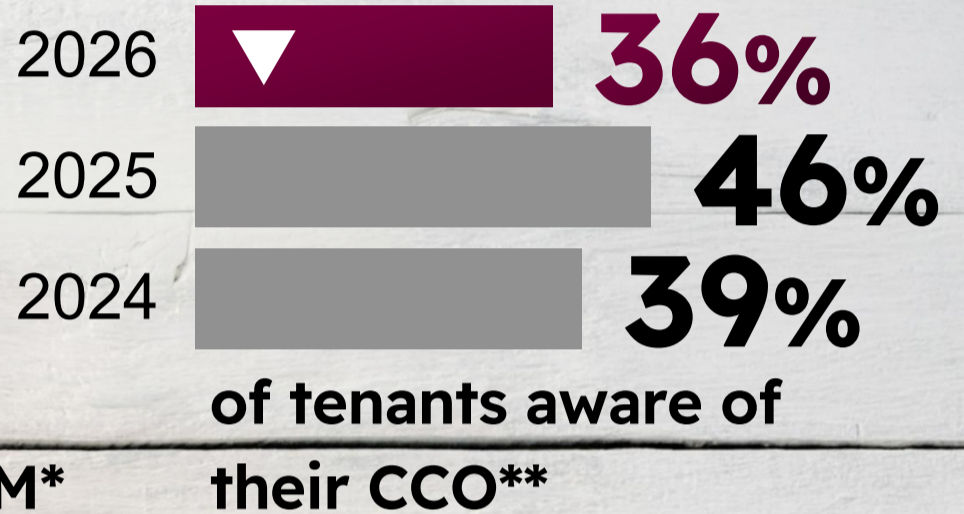
Ipsos interviewed a representative sample of 1,201 tied tenants by telephone between 12<sup>th</sup> January and 27<sup>th</sup> March, 2026.

**Tenant awareness of their BDM\* is very high. Awareness of CCO\*\* has dipped since 2025.**



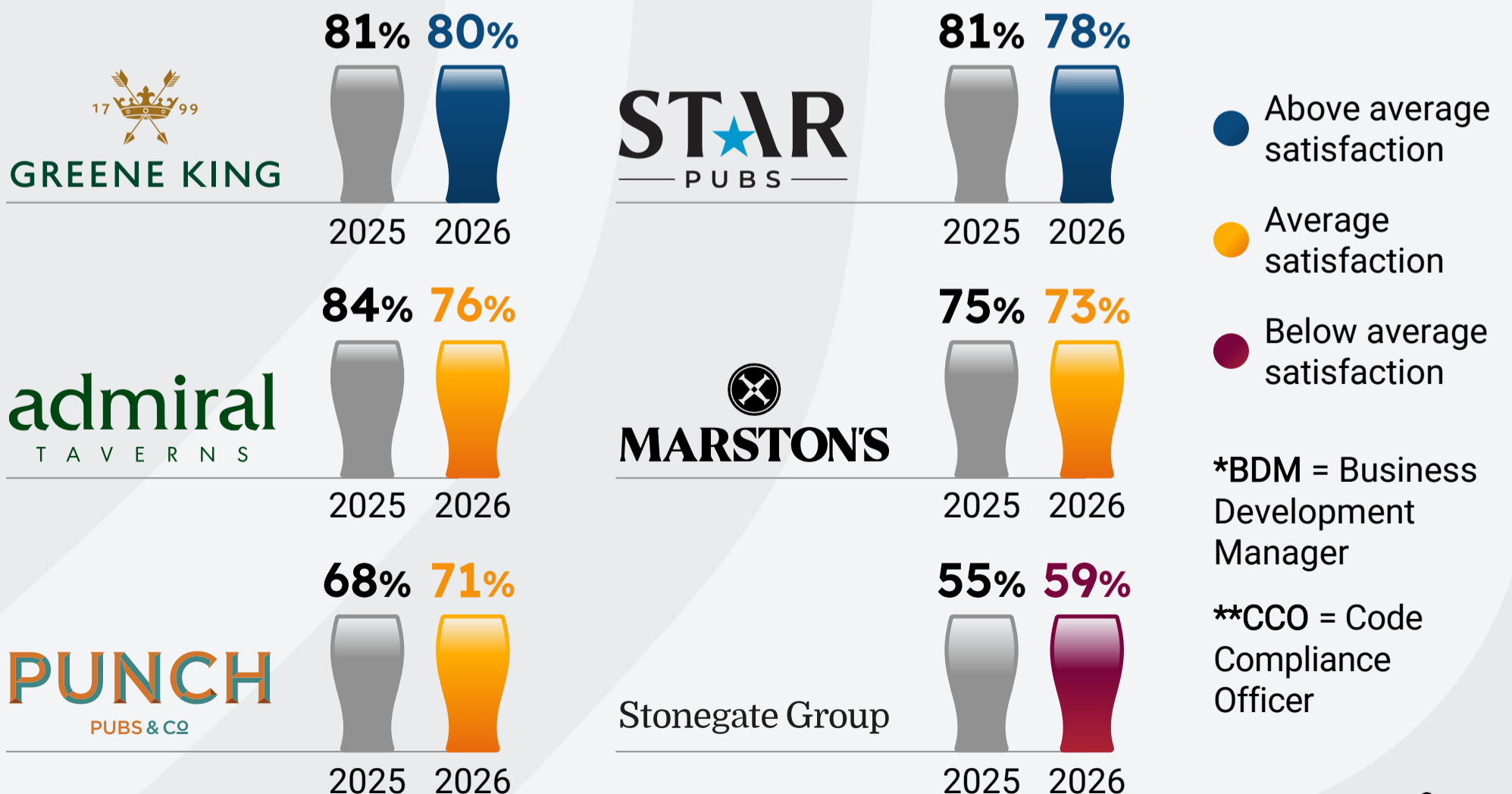
**99%**

of tenants are aware of their BDM\*



▲▼ Statistically significantly different compared to 2025.

**7 in 10 tenants continue to be satisfied with their BDM relationship, but scores vary by pub company.**





**Rent Negotiations**

Ipsos interviewed a representative sample of 1,201 tied tenants by telephone between 12<sup>th</sup> January and 27<sup>th</sup> March, 2026.



**37%**

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

**Of these agreements or renegotiations...**



**29%**

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

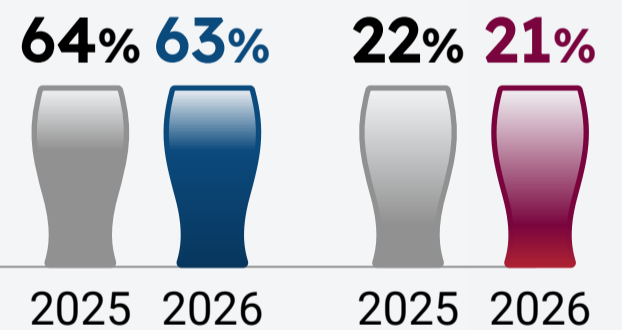
**42%**

were for a new agreement at the pub

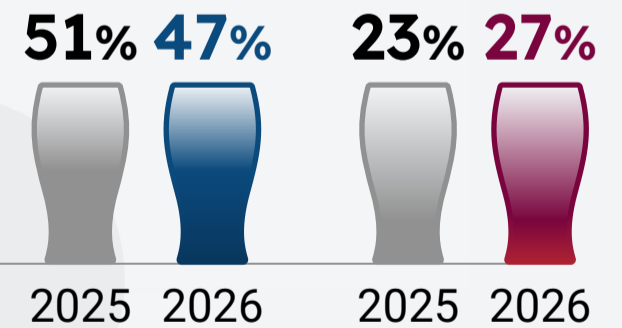
**22%**

were a mid term rent review

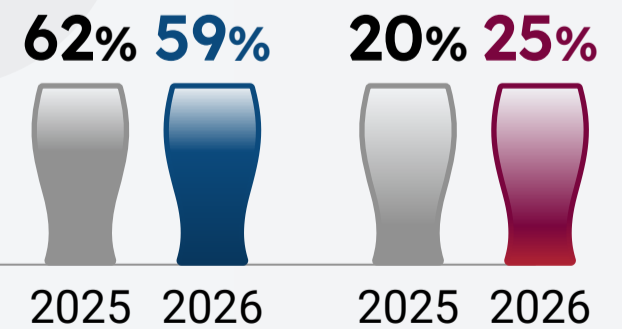
My pub company handled any negotiation fairly



The information they provided helped me in negotiations



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



● Agree ● Disagree





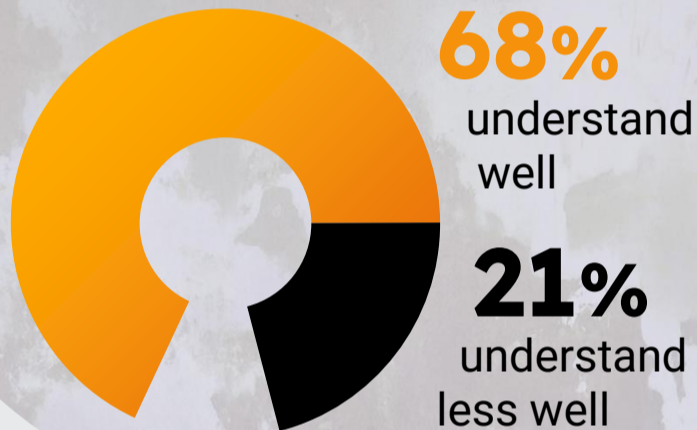
**Tenant Experiences of Repairs: Pub Company**

Ipsos interviewed a representative sample of 1,201 tied tenants by telephone between 12<sup>th</sup> January and 27<sup>th</sup> March, 2026.

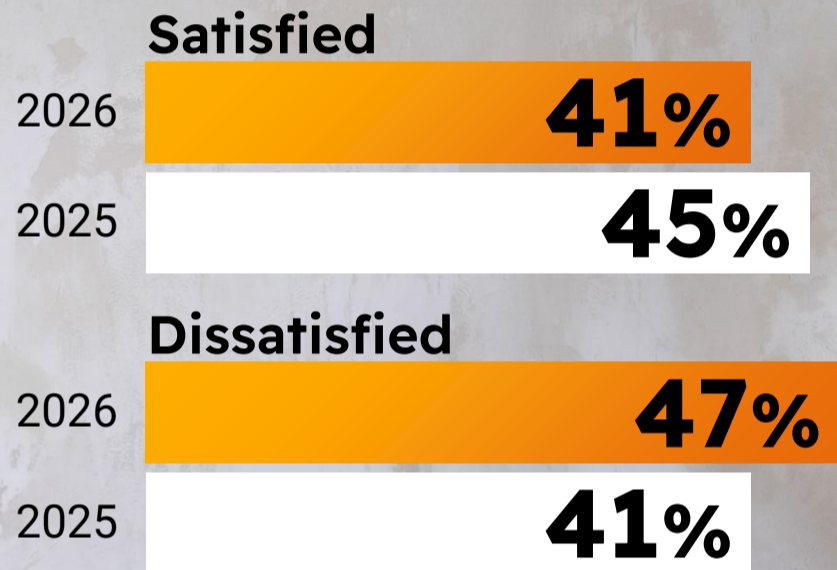
**Pub Company**

**We asked tenants about how repairs are handled when the pub company is responsible...**

Most tenants understand the process for how their pub company deals with repairs they are responsible for. This has not changed since 2025.



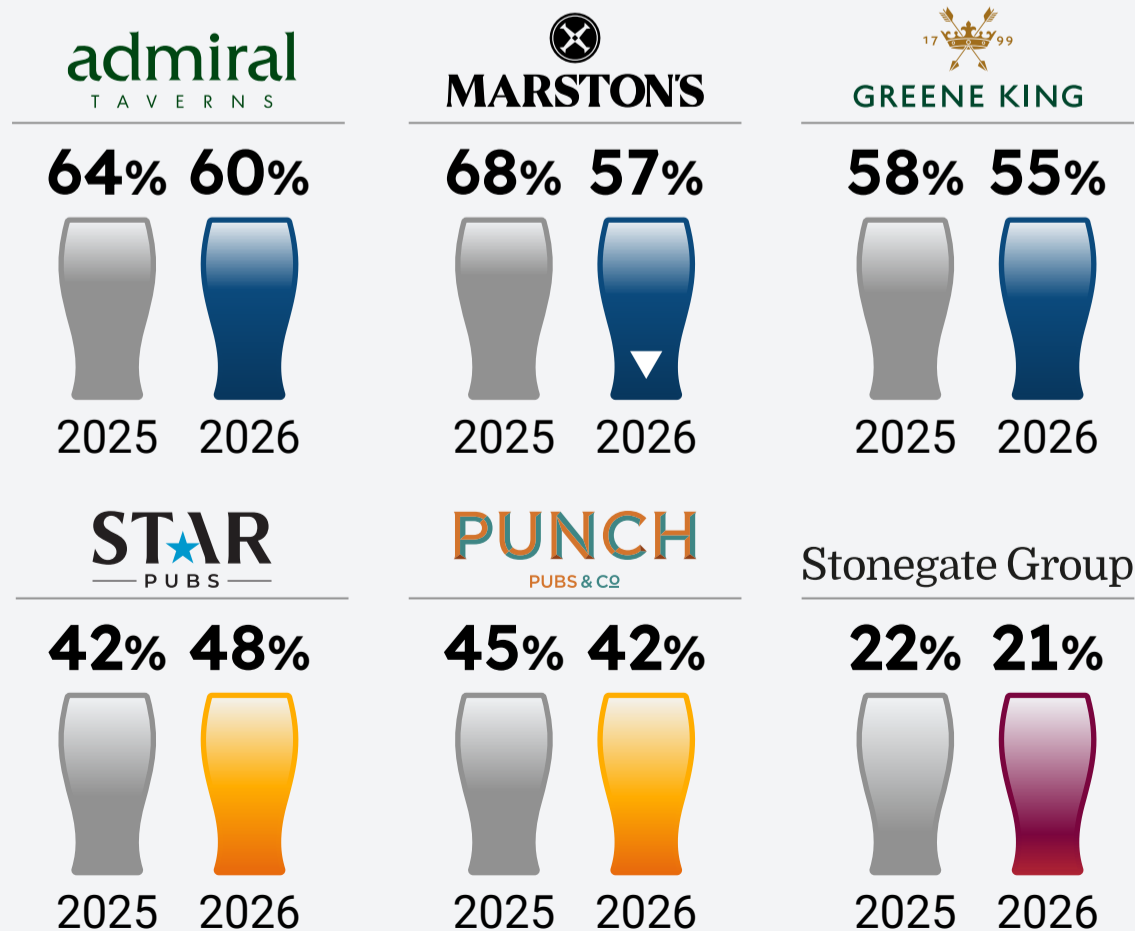
Tenants are now more dissatisfied than satisfied with repairs their pub company is responsible for.



**Satisfaction with repairs when the pub company is responsible...**

**Pub Company**

While overall satisfaction has decreased, tenants at Marston's, Greene King and Admiral are more satisfied than average with how repairs are handled when the pub company is responsible. Star is the only company where satisfaction has improved.



- Above average satisfaction
- Average satisfaction
- Below average satisfaction
- ▲▼ Statistically significantly different compared to 2025.





**Tenant Experiences of Repairs: Tied Tenants**

Ipsos interviewed a representative sample of 1,201 tied tenants by telephone between 12<sup>th</sup> January and 27<sup>th</sup> March, 2026.

**Tied Tenant**

**We asked tenants about how repairs are handled when the tied tenants are responsible...**

37% are satisfied with how their pub company deals with them when the tied tenant is responsible.

**Satisfied**



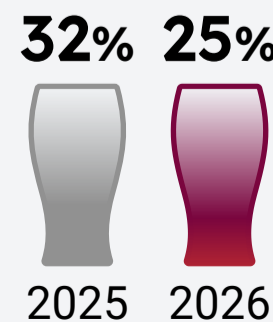
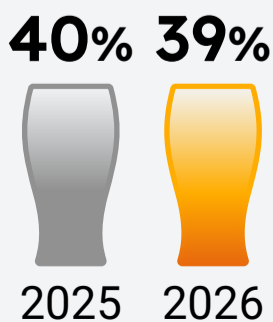
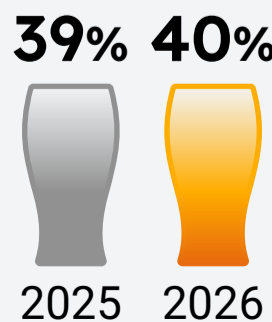
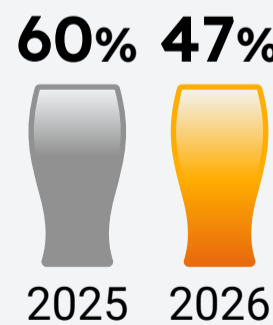
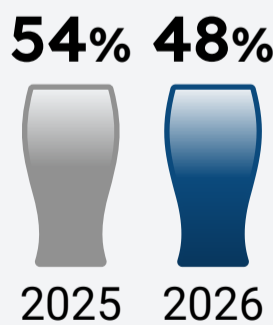
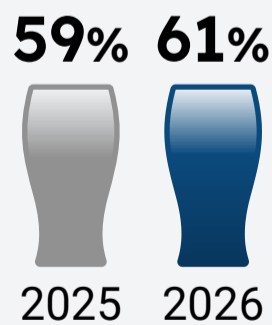
**Dissatisfied**



**Satisfaction with repairs when the tied tenant is responsible...**

**Tied Tenant**

While overall satisfaction has decreased, tenants at Admiral, Greene King and Marston's are more satisfied than average with how repairs are handled when the tied tenant is responsible.



- Above average satisfaction
- Average satisfaction
- Below average satisfaction

