

[PCA Annual Tied Tenant Survey 2022 results now published](#)

The annual tied tenant survey 2022 was a large-scale survey of over 600 tied tenants. It is the first such survey since 2019, after being put on hold to allow the industry to focus on the pandemic. The results provide an important benchmark for how tenants view their pub company and the PCA. The sample size having been increased by more than 50% compared with 2019, the results allow more comparisons to be made between the different pub companies.

The key findings of the survey can be found on the PCA website [here](#). You can also find a helpful infographic showing a snapshot of the results, an executive summary of the findings, and the full survey data.

Tied Tenants' satisfaction with their pub company relationship

For the first time tenants were asked to rate their level of satisfaction with their pub company. Most tied tenants (62%) are satisfied with that relationship. It is encouraging to see that this is even higher (67%) when looking at those who started their tenancy after the Code came into force. The percentage of tenants who are dissatisfied with their pub company relationship is also lower for those newer tenants (18%) than for the whole pool of surveyed tenants (22%). The variation across pub companies however is noted, with Admiral having the most satisfied tenants (80% with 13% dissatisfied) and Punch having the least satisfied (47% with 29% dissatisfied).

An area where tenants are generally satisfied is with their Business Development Manager. 88% of Admiral tenants and 86% of Marston's tenants think their BDM is fair in discussions with them. Satisfaction with their handling of repairs and dilapidations is notably lower. Only 27% of Stonegate tenants think their BDM handles repairs and dilapidations well. Satisfaction with how pub companies handle a request for the Market Rent Only option was also notably low.

The PCA is pleased to be able to show the industry these comparisons between the different pub companies. The PCA will track change year on year. It is particularly good news that high numbers of tenants think their BDM is fair in discussions with them. These results will help the pub companies to see where they need to improve and inform the PCA's priorities for future work.

Handling of repairs and dilapidations is something the PCA is focusing on as outlined in Fiona Dickie's latest [Morning Advertiser column](#). The PCA is already taking steps to improve tenant experience of the MRO process, having recently [consulted](#) on guidance to help remove financial barriers to tenants accessing MRO. To be notified when this guidance is published you can sign up to email alerts on the [PCA website](#).

Experience of the Pubs Code and the Adjudicator

The survey also asked tenants about their awareness of the Code and a range of their Code rights, Turning to new tenants specifically, most of those surveyed had received the required information under the Pubs Code and had found it useful. We already know from the [last statutory review](#) of the Pubs Code that the wealth of information can be confusing for new tenants. The PCA is working with Code Compliance Officers to improve the new tenant experience. As part of this, we will be considering the use of the sustainable business plan, noting that 27% of new tenants did not find it useful in managing their tenancy.

Awareness of the Pubs Code is increasing, with 79% of tenants surveyed aware of the Code, up from 68% in [2019](#), although awareness of individual rights is lower. The PCA raises awareness of tenant rights through its factsheets, social media, Morning Advertiser column, and events. We are continuing to produce more tenant friendly information, expanding our collection of factsheets, and will be exploring other ways to ensure tenants are aware of the full range of rights they have under the Code.

Code Compliance Officers also play an important role in raising awareness. These are pub company employees who verify Code compliance and are a useful point of contact for tenants as they can answer queries about the Code. Awareness of the Code Compliance Officer was low amongst those surveyed and the PCA wants to support CCOs to ensure this improves. Contact details for all the Code Compliance Officers can be found on the PCA website [here](#).

Awareness of the PCA is up from 2019 (54% of tenants were aware of the PCA compared to 47% in 2019). While the increase is pleasing to see, we want to see more tenants aware of the PCA's role. We would also like to see more using the PCA website as it contains useful information for tenants and the wider industry. We have recently changed the way arbitration awards are displayed on the website to make them easier to access and we are currently exploring other improvements. While the results show that most tenants consider the PCA to be an independent regulator, we will also consider what more can be done to demonstrate this.

Fiona Dickie, Pubs Code Adjudicator, said:

"I am pleased to share the results of the PCA's annual tied tenant survey and once again I thank those tenants who took part. I expect the pub companies to carefully review these results and the action they need to take. My team and I will be doing the same.

There are some clear areas of focus for the pub companies and for the PCA as regulator, including discussions around repairs and dilapidations, requests for MRO, and the usefulness of the sustainable business plan in managing the tenancy. As tenants continue to navigate these challenging times, these are clearly matters of increasing importance".

Notes

The survey was conducted by independent research company Ipsos MORI on behalf of the PCA. You can find more information about how the survey was conducted in the [technical report](#).