



Tenant Awareness and Engagement with The Scottish Pub Code Adjudicator: Survey findings

A report by Rocket Science

Table of Contents

Executive Summary.....	2
Introduction	3
Context to the Scottish Pub Code Adjudicator.....	3
Research aims	3
Report overview	3
Methodology.....	4
Survey	4
Survey administration and responses	4
Evaluation Themes & Analysis	5
Respondent demographics	5
Motivations for choosing the tied pub model	5
Challenges experienced by tied tenants.....	6
Tenants' perceptions of the adjudicator.....	6
Tenants' awareness, importance and confidence of their rights and the importance of their rights	7
How the Adjudicator can best support tenants	9
Conclusions and Recommendations (1 Page).....	10

Executive Summary

In 2026, Rocket Science was commissioned by The Scottish Pub Code Adjudicator (the Adjudicator) to undertake an independent survey of tied tenants of Pub Owning Businesses (POBs), to develop an evidence base on tenant experience of the Scottish Pubs Code to:

- Inform the strategy for the Adjudicator to better support tenants
- Identify opportunities to strengthen the Scottish tied pubs brand

31 responses from tied tenants and 2 from tenants that had recently moved to a Market Rent Only (MRO) lease were achieved.

The research highlighted the following key themes:

- Tied tenants face various challenges, often related to rent increases, pricing models, and unfavourable lease terms.
- There is a lack of engagement by tenants to the Adjudicator for support.
- Tenants feel that the rights in the Scottish Pub Code are important, but they often have limited awareness of what the rights mean and a lack of confidence in how they can exercise them.
- It is difficult to reach tied tenants, and there is no single method of reaching and supporting tenants that works for all tenants.

To better overarching recommendations have been made as a result of the research:

- Increase visibility of the Adjudicator.
- Create more accessible advice and guidance for tenants
- Increase work with POBs.

Introduction

Context to the Scottish Pub Code Adjudicator

The Scottish Pub Code Adjudicator is a new statutory body established in 2025 under the [Tied Pubs \(Scotland\) Act 2021](#). The Adjudicator, Sarah Havlin, is responsible for overseeing and enforcing the Scottish Pub Code. See Figure 1 for some examples of the Adjudicator's role and responsibilities.

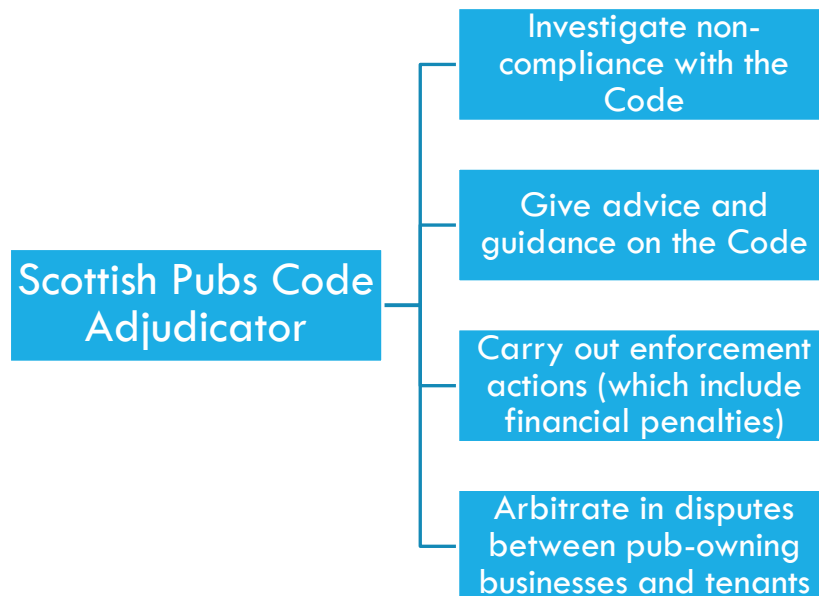


Figure 1: Role & Responsibilities of the Scottish Pubs Code Adjudicator

Research aims

The Scottish Pubs Code Adjudicator commissioned Rocket Science, an independent research consultancy to conduct this research, with the following objectives in mind:

- Inform strategy for the Adjudicator to better support tenants
- Identify opportunities to strengthen the Scottish tied pubs brand

Report overview

This report provides analysis of survey results from tied pub tenants on their views of the Adjudicator, their experiences of Pub Operating Businesses (POBs), and the support the Adjudicator can provide.

- First, a summary of the approach used to contact tenants and collect data is provided
- Next is an analysis of the survey data, organised into key themes.
- Conclusions and recommendations for how the Adjudicator should engage and support tied pub tenants are then provided.

Methodology

Survey

Rocket Science designed a survey to better understand tenant perceptions and awareness of the Scottish Pubs Code, the Adjudicator, and their rights. Where appropriate, questions align with the English [Pubs Code Adjudicator Annual Tied Tenant Survey 2026](#). Given that tied pub tenants had proven hard to reach due to the usual busy pub environment, the survey was kept short and accessible for better response rate.

The survey covered multiple topics including:

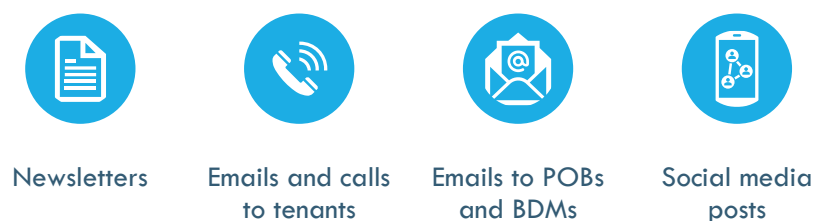
- Respondent gender and location
- Awareness of the Code
- Awareness of, importance of, and confidence in exercising their rights
- Perception on the Scottish Pubs Code Adjudicator
- Barriers to engagement with the Adjudicator
- Hopes for future support and outreach.

A webinar was also organised and hosted to provide tenants an opportunity to meet the Adjudicator, learn more about the Scottish Pubs Code, and hear interim survey results.

Survey administration and responses

Both Rocket Science and the Adjudicator's office administered the survey via a variety of mediums (see Figure 1).

FIGURE 1: MEDIUMS USED TO REACH TENANTS



Existing learning from other attempts to reach tied tenants was used to shape the administration approach. However, key challenges remained primarily that existing contact details do not always lead directly to the tenant, and often the only way to contact tenants is via POB generic emails or numbers.

In total, the survey achieved 33 respondents. This is a low response rate given hundreds of tenants will have received the survey, but remains the highest engagement rate the Adjudicator has had with tenants since forming. Further lessons about engaging tenants are provided in the recommendations.

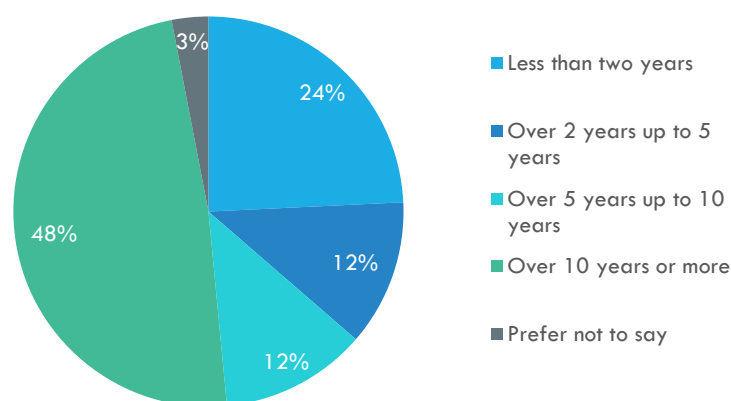
Evaluation Themes & Analysis

Respondent demographics

Over 2 in 3 of respondents were males, whilst females represented 27% of respondents. Geographically, respondents came from across Scotland, representing both urban and rural areas.

Among the respondent tenants, for 79%, this is their first time running a pub as a tied tenant, but most people have experience running pubs in other ways (such as running non-tied establishments or working as a general manager). The length of tenancy, as visible in Figure 2, showed a mix, with around one quarter running the pub for less than 2 years, and around half for more than 10.

FIGURE 2: TENURE AS A TIED PUB TENANT



Note: n=33

Motivations for choosing the tied pub model

Participants were asked about the factors that initially attracted them towards the tied pub tenant model. Participants cited multiple reasons for choosing the model, with around 2 in 5 respondents reporting it as an easy way of entering the sector and lower up-front costs as major drivers.

Open-text responses indicated that decisions were also frequently shaped by the location, character or availability of a particular pub, as well as circumstances such as redundancy or limited alternatives. This suggests that, for some participants, the tied model was incidental to securing a specific opportunity rather than an attraction in itself.

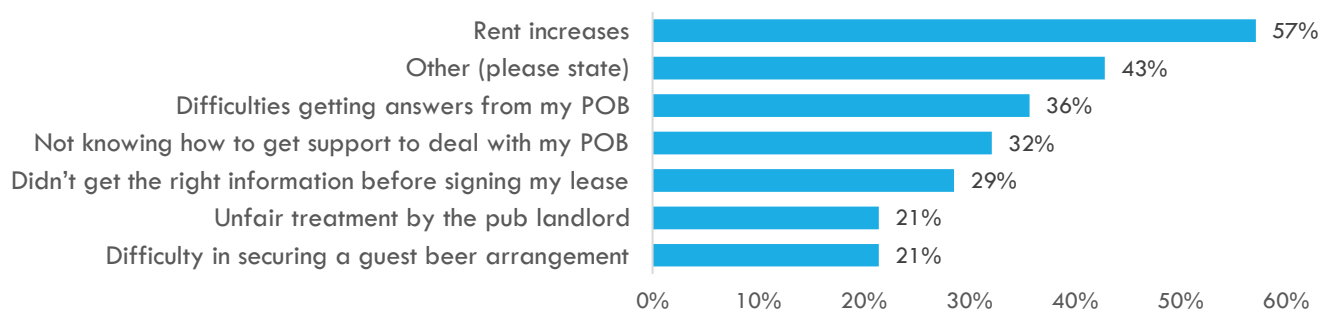
“Was the only way to get a pub in our area”

“Wanted my own business”

Challenges experienced by tied tenants

Respondent noted multiple challenges they had faced as a tied tenant, with over 50% highlighting rent increases as a challenge (see Figure 3). Similarly, around 1 in 3 respondents reported difficulties getting answers from their POBs and lack of awareness in accessing support to deal with their POBs. Multiple tenants also reported issues with the pricing models for tied products and ongoing challenges with their tenancy agreements.

FIGURE 3: CHALLENGES EXPERIENCED BY TENANTS



Note: n=28

“The pricing model for tied products make it difficult to compete with non-tied pubs.”

“... the due diligence process is one-sided to cover the landlord and not the tenant.”

If something goes wrong, tenants usually reported reaching out to BDMs and other people in their sectoral network. This highlights a gap to access where none of the respondents mentioned reaching out to the Adjudicator but either the BDM representative of the POB or informal sources.

“My BDM who is generally very supportive but, understandably, has to work within his remit as given by [the POB]”

Tenants' perceptions of the adjudicator

1 in 4

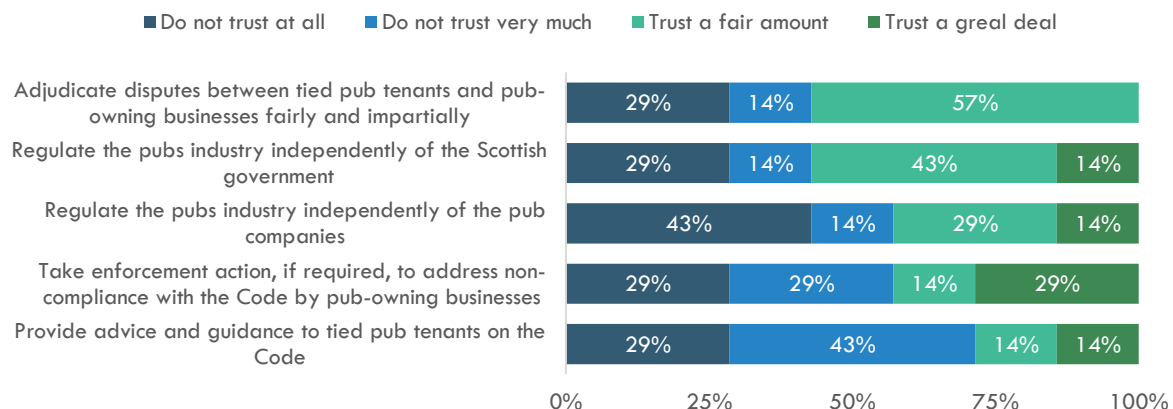
respondents have heard about the adjudicator but don't know what it is for

More than 4 in 5 respondents had heard about the Scottish Pubs Code adjudicator with 59% familiar with its work. However, around 16% reported not hearing about the adjudicator at all.

In terms of perception, the participants were asked about their level of trust in the Adjudicator across its different roles and responsibilities. Around 61% of respondents responded “don't know”, highlighting the lack of awareness about the roles and

responsibilities of the Adjudicator. Of the remaining 39%, as seen in Figure 4, over 50% of respondents trust the Adjudicator to adjudicate disputes and regulate the pubs industry independently. However, over 2 in 3 respondents reported that they don't trust the Adjudicator to provide advice and guidance to tied pub tenants or to take enforcement actions and regulate pub industries independently of pub companies.

FIGURE 4: LEVELS OF TRUST TOWARDS THE SCOTTISH PUBS CODE ADJUDICATOR



Note: n=7, i.e., respondents who did not select “Don’t know”

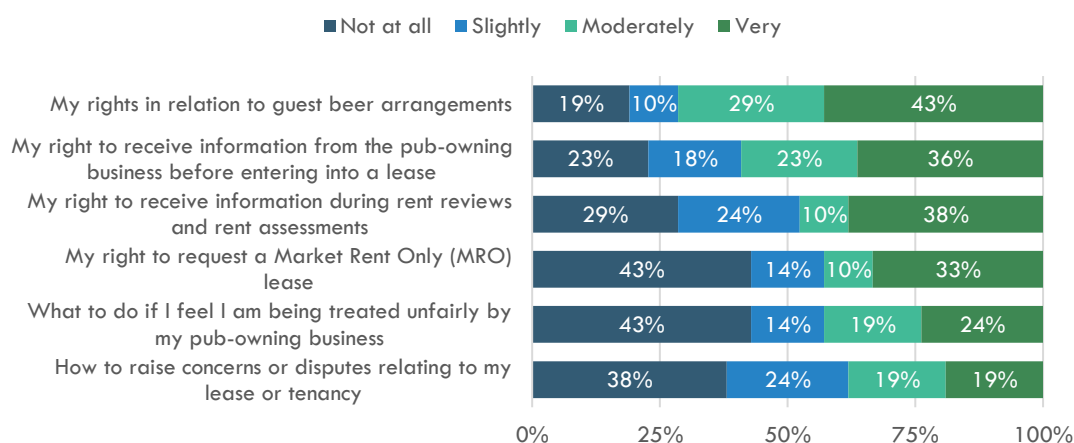
This reflects a general lack of awareness regarding the work of the adjudicator along with persisting challenges faced by tenants with the POBs.

“The reason I have stated- ‘don’t know’ to most of the answers is because I haven’t yet had cause to call upon the Scottish Pubs Code Adjudicator.”

Tenants’ awareness, importance and confidence of their rights

Tenants were asked about their level of awareness, confidence, and self-rated importance of their rights provided under the Scottish Pubs code. As seen in Figure 5, over half of respondents were most aware of their rights in relation to guest beer arrangements, followed by right to lease-related information. However, a general lack of awareness was noted with in terms of raising concerns and disputes, unfair treatment, requesting MRO and right to info for rent reviews and assessments.

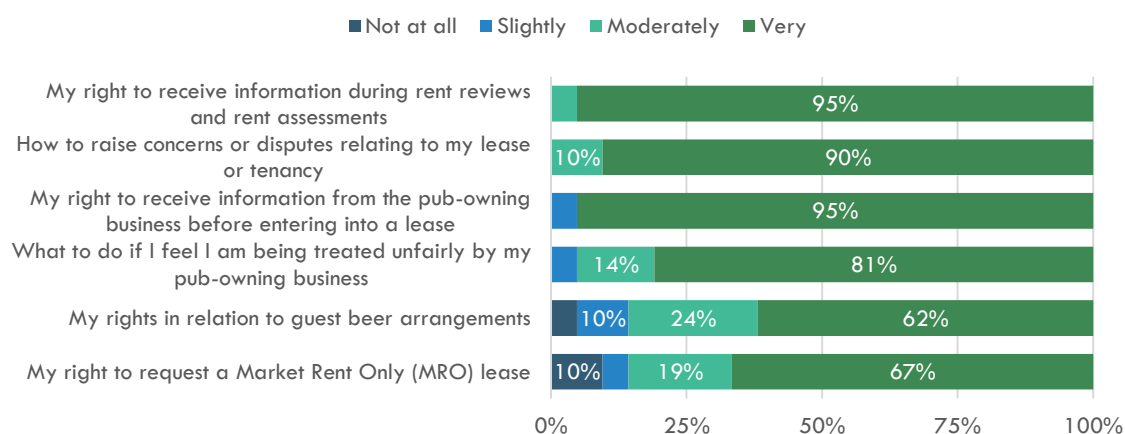
FIGURE 5: LEVEL OF AWARENESS OF RIGHTS



Note: n=21

In terms of importance of each right, the majority of respondents reported that all areas are important to them (see Figure 6). Over 4 in 5 respondents reported right to information, procedure to raise concerns or disputes regarding tenancy and unfair treatment as very important.

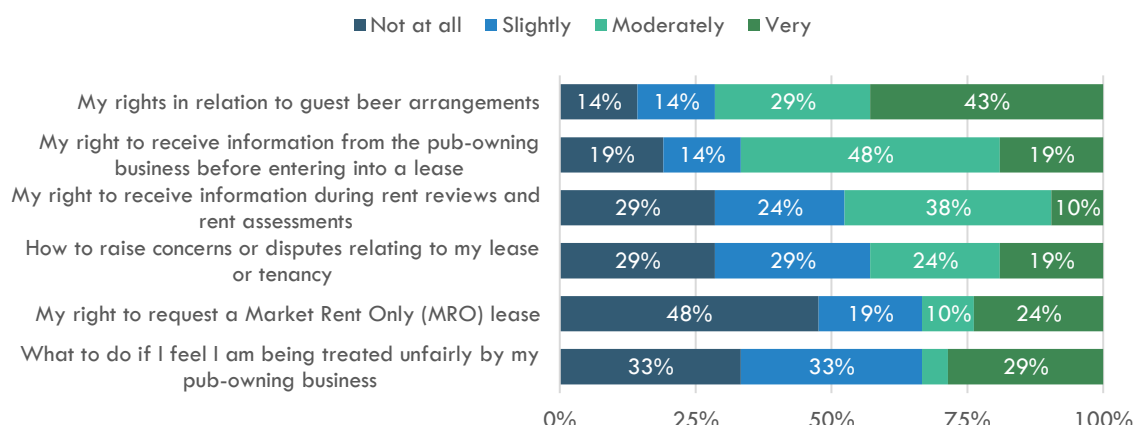
FIGURE 6: SELF-RATED IMPORTANCE OF RIGHTS



Note: n=21

Regarding confidence in exercising rights, similarly, respondent tenants were least confident in seeking redress for unfair treatment, concerns, and disputes, and right to MRO and information during rent reviews and assessments (Figure 7).

FIGURE 7: LEVEL OF CONFIDENCE IN EXERCISING RIGHTS



Note: n=21

Overall, a clear consistent pattern emerges across the three areas- the tied pub tenants have a general lack of awareness and confidence in exercising multiple rights despite a wide consensus on the importance of these rights. This highlights the need to scale awareness and understanding of the Scottish Pubs code, showing the benefits the Adjudicator can provide to the sector as an accessible institution for support.

How the Adjudicator can best support tenants

Participants were further asked on how the Adjudicator can better support tied tenants across Scotland. Respondent tenants reported a need for clearer advice on tenancy agreements, legal rights, policies and deadlines, alongside more proactive oversight of POBs. Other priorities included confidential support for raising concerns, fairer rent and arbitration processes, help with property maintenance and costs, and wider access to the MRO option without risking their lease.

“A system where tied tenants have the opportunity to air and discuss their grievances and concerns and receive appropriate support on a confidential basis.”

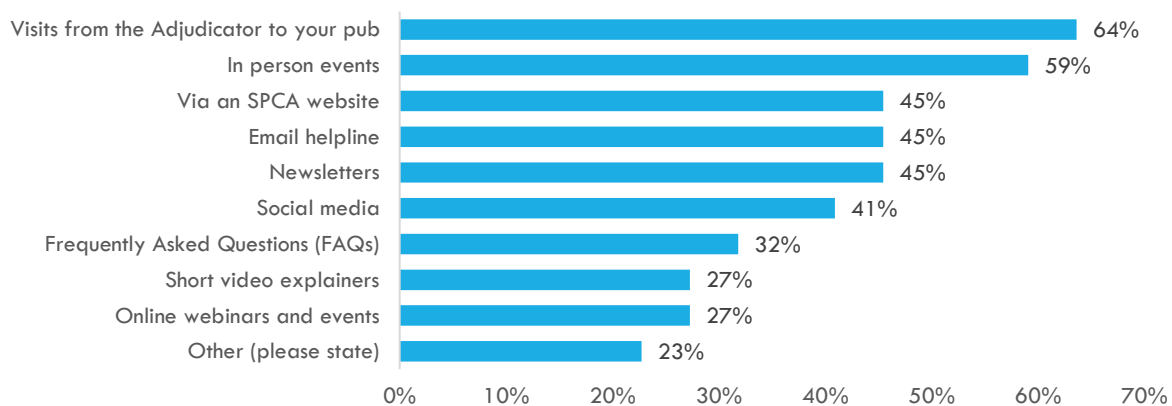
“Policies regarding how landlords should be treating tenants”

“More unannounced inspections of the pub company conduct rather than waiting on complaints”

In terms of how the Adjudicator can better support tenants, as seen in Figure 8, around 2 in 3 respondent tenants suggested more visits from the Adjudicator, with over half suggesting in-person events.

Respondents requested a diversity of formats to receive information, and during the webinar, noted that there is a need to reach them via a combination of channels given they may be busy and miss some engagement forms.

FIGURE 8: TENANT PREFERENCES ON TO RECEIVE INFORMATION FROM THE ADJUDICATOR



“Individual meetings to discuss significant concerns would be very important.” -Tied pub tenant

“...we need to be communicating via every channel.”- Tied pub tenant

In terms of social media channel of preference, all respondent tenants (n=9) selected Facebook as a preferred channel, followed by TikTok and other channels including website and emails.

Conclusions and Recommendations

Conclusions

Despite difficulties reaching tenants for the survey, the results shed light on key issues that affect tenants and that the Adjudicator should address in order to ensure tied tenants across Scotland are better supported. Key conclusions are:

- Tenants described multiple challenges faced, with rent increase, pricing model, and unfavourable lease terms as recurring issues.
- For the most part, tenants do not reach out to the Adjudicator for support when facing challenges, and there is a lack of clarity around whether the Adjudicator acts in their interests.
- All the rights in the Scottish Pub Code are important for tenants, but there is a lack of awareness of what the rights mean and a lack of confidence in how they can exercise them.
- There is no single method of reaching and supporting tenants that works for all tenants. There are barriers to engagement, with the POBs acting as gatekeepers.

Recommendations

In order for the Scottish Pubs Code Adjudicator to better engage with and meet the needs of tied tenants across Scotland, this research highlights several potential recommendations.

1/ Increase visibility of the Adjudicator

- **Why:** Many tenants are unaware of what the Adjudicator does or how it can support them.
- **How:** Use a variety of engagement mediums including:
 - a standalone website (noting this is already in progress),
 - more visits to tenants, in-person and online events,
 - social media engagement, focused on spreading messages via existing Facebook groups or creating content that can be easily shared such as videos that explain what the Adjudicator does and how it can support tenants
 - highlight success stories of what the Adjudicator has achieved for tenants across all mediums.

2/ Create more accessible advice and guidance for tenants

- **Why:** the Adjudicator is currently hosted on the Scottish Government website, information is difficult to navigate through, and is more focused on what rights are rather than how the Adjudicator can help.
- **How:** Additional resources that use plain English, and are more engaging using visuals, video explainers, eligibility checkers, FAQs, and real life examples. E.g.
 - Simple decision tools tenants can quickly click through to see if they qualify for MRO; if a rent review follows the Code, if they are entitled to a guest beer agreement, etc.
 - Real life examples to make the guidance feel less abstract. E.g., "John runs a village pub. His landlord proposes a rent increase. These are the documents he should receive and the questions he should ask..."
 - Focus on financial outcomes. Most small businesses think in pounds and pence, so practical guides that explain how rent assessments affect profitability, when MRO might help or hurt a business, costs associated with exercising rights, common financial mistakes tenants make can be helpful.
 - "Your Rights in 10 Minutes" guide that breaks down the seven guidance sections into less technical language.

3/ Increase work with POBs

- **Why:** POBs can support increased access to tenants, while tenants currently feel more can be done to encourage the POBs to better meet the Code.
- **How:** Host events with POBs, inviting BDMs to better explain their obligations according to the Code and to highlight the importance of sharing information about the Adjudicator and its activities. Where this doesn't lead to improvement, the Adjudicator may need to start proactively reviewing/ auditing POBs for breaches.