

# **Scottish Tied Pub Licensee Survey: Methodology & Key Findings Overview**

**Report produced by CGA Strategy for  
CAMRA**

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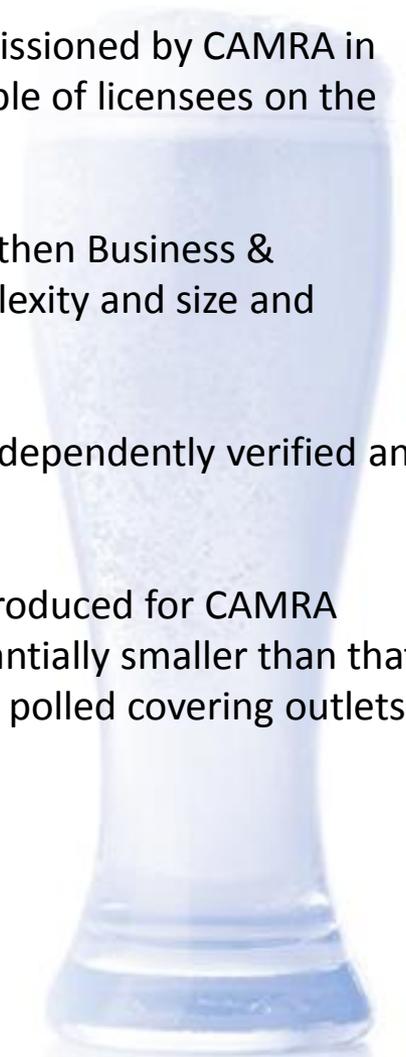


# CAMRA Scottish Pub Tie Survey

## History/ Context



- As an independent on trade research consultancy, CGA Strategy was commissioned by CAMRA in 2011 and 2013 to produce a telephone survey to a randomly selected sample of licensees on the subject of the effects of the pub tie
- The project concept and methodology was based upon CGA's work for the then Business & Enterprise Select Committee (BEC) survey of 2009 reduced slightly in complexity and size and additionally covering freehold and free of tie outlets
- The remit and project scope provided to CGA by CAMRA was to offer an independently verified and statistically valid view of current licensee sentiment toward the pub tie
- The survey undertaken in August of 2014 used elements of the structure produced for CAMRA previously focusing purely on the Scottish Tied Pub Sector – which is substantially smaller than that in England & Wales. As a result a headline sample base of 200 outlets were polled covering outlets from across the Scottish TV Region



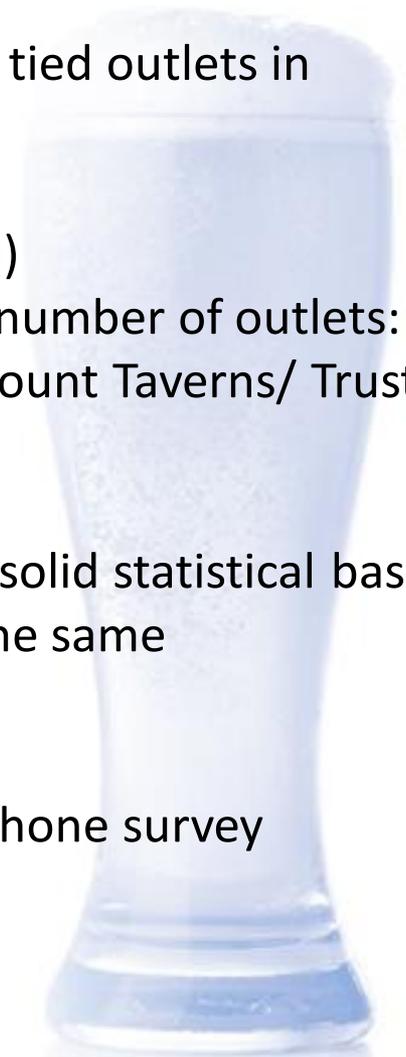
# Methodology statement

- A random total sample of 200 leased/ tenanted pub outlets was used – due to the relatively small size of the tied sector in Scotland this provided c. 20% of the total giving a statistically well substantiated number which lies well within a robust error rate of +/- 3%
- The turnover and income/profit questions were based on licensee declarations split into a number of standardised bands – again using wording and option frameworks as agreed with BEC and repeated in the 2011 & 2013 CAMRA projects
- Overall, the survey undertaken for CAMRA in August 2014 follows a standard set of criteria as used by CGA in multiple projects in recent years



# Statistical Validity Considerations

- CGA were able to poll a valid and representative number of tied outlets in Scotland across all types and companies:
  - Total Number of Scottish Pubs: 4,663
  - Total Number of Scottish Tied Pubs: 1,028 (22% of total)
  - Top 5 Breakdown of Tied Pubs by Operator/ Pub Co by number of outlets:  
Punch/ Star Pubs & Bars/ Iona Pub Partnership/ Rosemount Taverns/ Trust Inns
- Based on the number of results, CGA was able to provide a solid statistical base in line with the methodologies used by BEC and following the same requirements as the CAMRA commission in 2011 & 2013
- The findings are robust as output from a standardised telephone survey



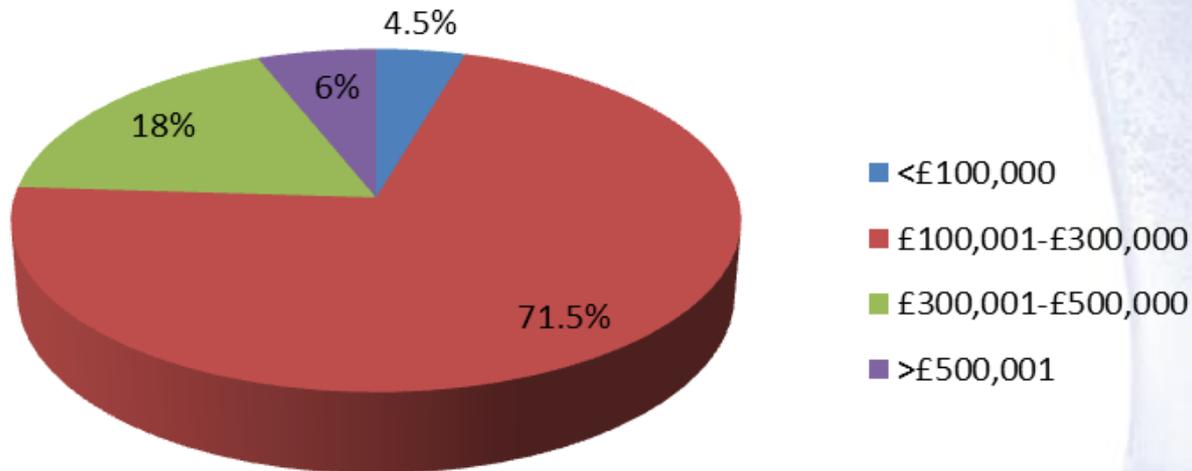
# **CAMRA Scottish Pub Tie Survey – August 2014**

## ***Key Results Findings***



# Annual Turnover

- Results were based on the following number of individual licensee responses:
  - Scottish Tied Pub: 200
  - Private/ Confidential Responses: 37 (18.5%)
- Proportionally the number of non confidential respondents with a turnover of between £100k-£300k was the largest with 71.5%, only 4.5% had a turnover less than £100k

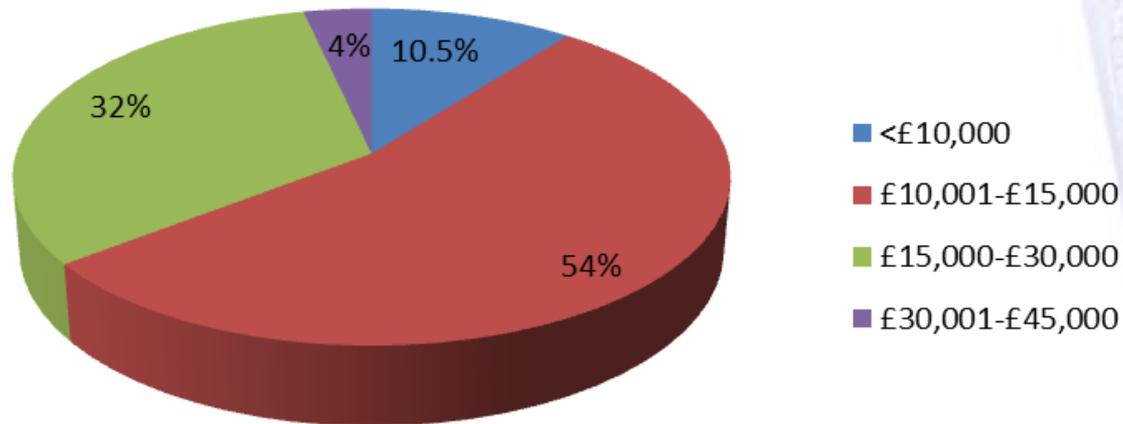


\*Chart Based on 163 non confidential responses



# Personal Earnings/ Income

- Results were based on the following number of individual licensee responses:
  - Scottish Tied Pub: 200
  - Private/ Confidential Responses: 37 (18.5%)
- Almost two thirds (64.5%) of non confidential respondents earn/ have an income of less than £15k, of these 10.5% earn less than £10,000 per annum

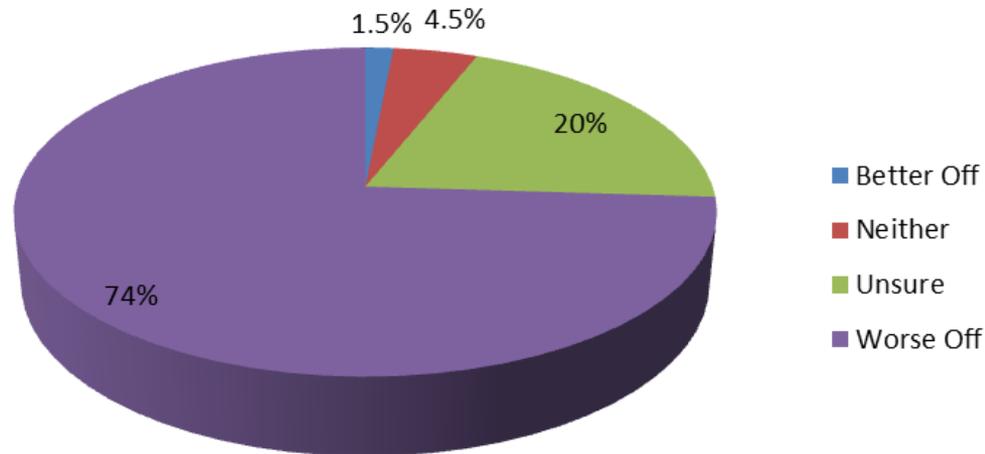


\*Chart Based on 163 non confidential responses



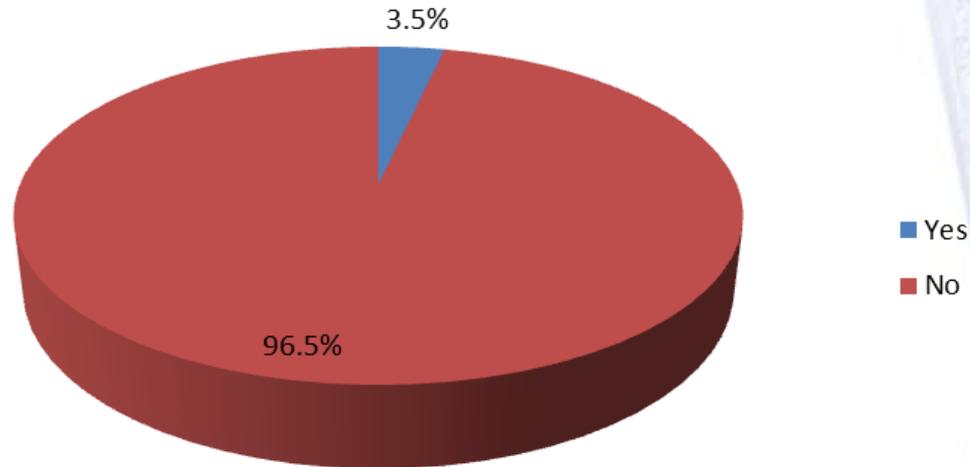
# Financial Sentiment: Better/ Worse Off

- Results were based on the following number of individual licensee responses:
  - Scottish Tied Pub: 200
  - Unsure Responses: 40 (20%)
- Almost three quarters (74%) of respondents considered themselves worse off as a result of their tie. Only 1.5% felt they were better off



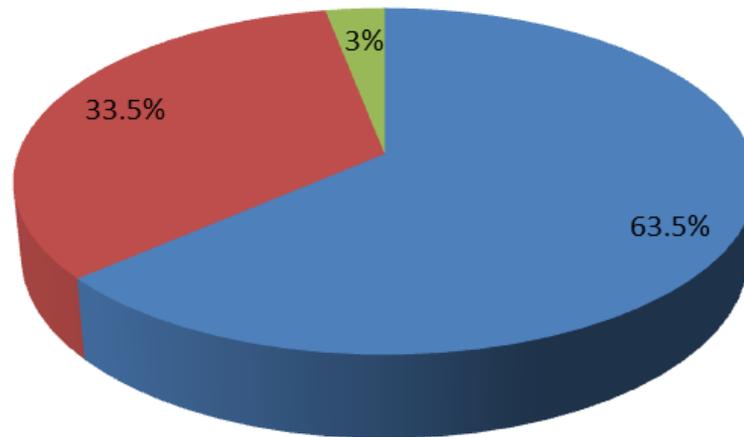
# Financial Sentiment: Reduced Rent/ Higher Prices

- Results were based on the following number of individual licensee responses:
  - Scottish Tied Pub: 200
- 96.5% of all respondents believed that paying a reduced rent did not fully take into account the higher prices they paid for their tied products



# Beer Tie Agreement Sentiment

- Results were based on the following number of individual licensee responses:
  - Scottish Tied Pub: 200
- Only 3% of respondents had a positive sentiment for their beer tie agreement; although a third (33.5%) of replies were neutral

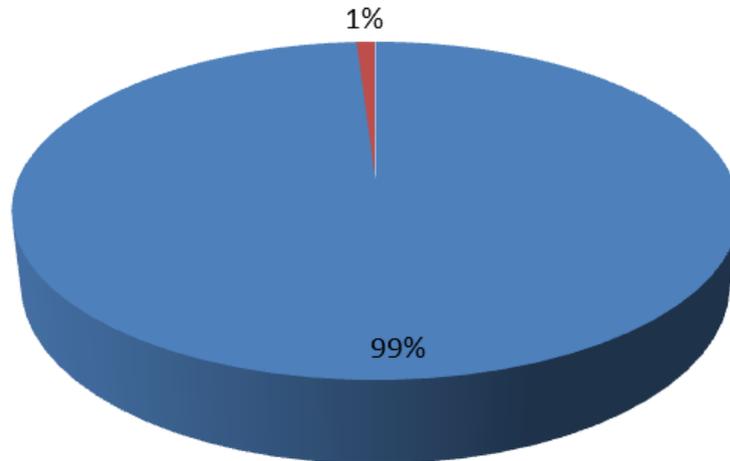


■ Negative  
■ Neutral  
■ Positive



# Required Scottish Government Action Sentiment

- Results were based on the following number of individual licensee responses:
  - Scottish Tied Pub: 200
- A resounding 99% of respondents felt that the Scottish Government should act to ensure the protections afforded to tied licensees in England & Wales also applied in Scotland



■ Yes  
■ No



# How to contact us...



**CGA Strategy Ltd**  
**Waterloo Place,**  
**Watson Square,**  
**Stockport, SK1 3AZ**

**T: 0161 476 8330**

**E: [info@cgastrategy.co.uk](mailto:info@cgastrategy.co.uk)**

**W: [www.cgastrategy.co.uk](http://www.cgastrategy.co.uk) ...**  
**... to visit our website**

**Or.. [@cga\\_strategy](https://twitter.com/cga_strategy) to follow us on**



**Jon Collins**  
**Chief Executive**

**Mark Newton**  
**Senior Partnership Development Manager**

**Beverley Winter**  
**Head of Research**