



More than a Mart

The Role of UK Livestock Auction Markets in Rural Communities

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More than a Mart: The Role of UK Livestock Auction Markets in Rural Communities *Full Report*

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Welcome

Here at The Prince's Countryside Fund, our role is to support all those who live and work in the countryside, with the aim of building confident and vibrant farming and rural communities.

Agriculture today is facing some of the most significant changes in living memory, following Britain's exit from the EU. On top of this, the Covid-19 pandemic has placed new day-to-day pressures on people living in rural areas, at the same time as encouraging the wider community to appreciate more the role of British farmers in providing local, sustainable food supplies.

Britain's family farmers need support, not only to survive these seismic shifts in their environment, but also to thrive by making the most of new opportunities.

In this publication we draw upon research we commissioned from the University of Exeter's Centre for Rural Policy Research to examine the often hidden role of the UK's auction marts – the places where farmers buy and sell their livestock.

The research, entitled *More than a Mart: The role of UK livestock markets in rural communities*, confirms that auction marts can provide a good deal of useful advice and services to boost farming businesses. They can play a part in improving farmers' health and wellbeing. The researchers also discovered that many auction marts already step way beyond their core role of buying and selling, and many others have the potential to hugely expand what they do.

Through this publication, we illuminate best practice and offer new ideas to rural communities about how auction marts could broaden what they offer to more effectively support not only farmers, but also the towns and villages in which they are based.

It's by building connections that these changes can be made. We want to see discussions take place between those working in agriculture, along with town and district councils, health services, local community groups and businesses.

Together we can all make the most of our local auction marts to help secure a real future for rural Britain.

Keith Halstead
Executive Director
The Prince's Countryside Fund

Foreword

Livestock markets have been at the heart of the rural community for generations, not only in playing an integral part in the red meat supply chain, providing the much valued independent, transparent, open and competitive forum used to determine the true market value of livestock, but also through providing a myriad of alternative services and support for the local farming community. One such benefit that all livestock markets create, during every market day, is the greatly valued “social hub”, where farmers and friends meet and socialise whilst conducting their business.

The Livestock Auctioneers’ Association welcomes the valuable report, *More than a Mart*, which is summarised in this publication, and we support the opportunities it will create. The report highlights the valuable role livestock market businesses play within UK agriculture and rural life generally, but equally importantly, it identifies many additional opportunities available to the operators of markets to enhance the services and support platforms they provide, all of which will benefit the wider community.

For many within farming, especially livestock farming, the short to medium term outlook may appear daunting. However, despite the many challenges on the horizon, there are also real opportunities, and we must all take up the challenges presented and embrace and develop them to our advantage. The UK’s exit from the EU, the removal of farm support in the form of direct payments and the Covid-19 pandemic, to name but three, highlight the transition and challenges farming families are facing.

The Prince’s Countryside Fund report findings and recommendations will assist auctioneering businesses throughout the UK to prepare and equip their businesses for the many changes we all face, ensuring that the services and support they provide continue to develop, prosper and deliver true benefit, whilst strengthening their position and resilience within the agricultural sector and the wider rural community.

It is important that livestock market businesses adapt and continue to prosper through the changing times ahead, ensuring that they can continue to provide both core and associated services to the farming and wider rural communities.

Chris Dodds FLAA, ARAgS
Executive Secretary
Livestock Auctioneers’ Association

Executive Summary

Introduction

The sale of livestock through auction marts has been a feature of agricultural life in the UK for over two hundred years, however, the number of marts continues to decline. This report examines what livestock auction marts could do not only to ensure their own survival into the future, but also to support farmers and the rural community. Specifically, the report examines the role of livestock auction marts by exploring:

- The social value of auction marts and their value to rural communities, particularly in areas where smaller farms predominate.
- The challenges faced by auction marts in the current climate and opportunities to increase their business.
- The role of physical and mental health support services based at auction marts.

The research was undertaken through use of the following methods:

- A review of the literature covering the history and current economic situation of auction marts.
- Face-to-face and telephone interviews undertaken across England, Northern Ireland, Scotland and Wales, at 17 locations where marts exist, or once existed. A total of 90 interviews were conducted, comprising 42 farmers, 27 auction operators/auctioneers, 15 individuals from support organisations, and 6 other stakeholders.
- An online survey of mart operators, which resulted in 37 responses.
- A Call for Evidence which ran from November 2019 to February 2020, and received a total of 21 responses. In response to the COVID-19 pandemic of 2020, the Call for Evidence was re-opened for two weeks in early May 2020, and 9 further responses were received in response to this second call.

Background to marts

The number of markets has declined by some 80% since the 1960s. The volume of livestock traded through auction marts has been reduced through waves of major structural change in the industry. Pigs and poultry, once a staple feature of many small family farms, are now largely concentrated in highly specialised large units which, for disease reasons, are often closed units with animals born and reared on site only leaving at point of slaughter for the abattoir. The foot-and-mouth (FMD) epidemic of 2001 and the ongoing challenge of Bovine Tuberculosis (TB) have both served to dampen the enthusiasm of some for buying and selling of cattle and sheep through marts. Other farmers have found it beneficial to negotiate contracts for direct sale to supermarkets. However, many still like to see at first-hand the stock they might purchase, and the auction mart is a tried and tested way of achieving this and of determining prices in an open and transparent way. Moreover, this traditional route of selling animals brings people together, which is important to an industry facing considerable challenges.

Not only has the number of markets reduced, many have also re-located. Only 30% of surveyed marts describe themselves as a 'traditional' town centre livestock market. A slightly higher number (33%) classify themselves as having 'recently moved to another location', while 25% classify themselves as an agri-business centre. Agri-business centres are more common in southern England and Scotland, while traditional town centre marts are more prevalent in the north of England and Wales. Finally, there are those 'out-of-town' sites who moved less recently, anywhere between 30 to 100 years previously. Changes in location are not necessarily to the detriment of the social and community role of auction marts. While smaller, traditional marts

should be championed for their crucial community role, larger premises and improved facilities can assist in enhancing wellbeing.

Farmers using markets in towns reported that they frequently used local services, whereas in the case of new out of town marts, accessing town services could become more difficult. Many of the large, agri-business hubs cater for the loss of town services, by hosting businesses such as hairdressers, food produce stalls, accountants and feed stores. Some farmers preferred greater accessibility to 'town services', while others chose to attend a particular mart or marts for their character, for a particular auctioneer, for convenience, or simply due to family history and loyalty. Others appreciated the professionalism, ease of access and design of some of the agri-business hubs. While the loss of a mart might negatively affect local economies and businesses, often new mart locations rapidly attract agriculture-related businesses to their environs.

The social value of the livestock auction mart

While livestock auction marts should always be recognised principally as businesses, levels of social isolation have encouraged many marts to explore their potential as rural 'hubs' from which other services can operate. Many interviewees referred to the social isolation experienced by farmers in their areas, whether referring directly to themselves or to others whom they encountered both at, and outside of, the market. Young and older farmers alike were seen as at risk of social isolation. As one farmer expressed it:

They work on their own and they're very isolated [...] they don't go out and meet people and they are working all day, and as farming has got harder and harder and tighter and tighter, they tend to be working more longer hours and finding it more stressful financially (Farmer).

Markets were seen as, potentially, a critically important antidote to this social isolation for those still able and willing to attend. Few respondents reported socialising outside of market day, and for those who stated that they frequently socialised off-farm, they knew of many more who were unlikely to leave the farm specifically to socialise, unless it involved attending market. Moreover, some agricultural discussion groups and farmer networking groups use the mart location to meet, further emphasising the role of the mart outside of the sales arena. Some of our farmer respondents, of varying ages and farm types and sizes, attended the mart even if not buying or selling. Auction managers estimated that between 5 and 20% of mart attendees tended to come for social reasons only. Many of these are older or retired farmers for whom the mart was important as a hub for social opportunities. At many markets, it was clear that the mart community tended to 'keep an eye' on how the older attendees were and if they were present on any given day. It seemed that the café and the ability to get a hot meal was also high on their priorities, and some retired farmers would travel to several markets a week throughout the region simply to meet with peers and enjoy the mart experience.

The market café is pivotal as a place where farmers and auction workers can eat a proper meal, or perhaps two, during the day. It is a space where business matters are discussed, tips are traded, and gossip is shared:

I've always believed that the livestock market café for social interaction and for mental health is probably the most important part of the market (Anonymous – Call for evidence).

The visiting researcher was struck by the fact that almost no mobile phones were seen being used while in any of the mart's cafés. Time seemed precious and conversations were fully engaged in by all, in a way rarely seen in other public places today. The menus at mart cafés varied little, and only a handful of those marts visited offered a 'healthy option' (and of these, the availability of said options was sometimes limited). Some of the nurses or farmer support organisations operating within marts, highlighted poor diet as a key issue. And this was recognised by some farmers:

Farmers do need to talk about their diet. Lots of them are overweight and probably need to think about portion sizes, so we have quite a lot of fun with that, because most of them pile their plates up, much bigger than they should (Farmer).

The social, and indeed wider economic, value of marts is also to be found through the formal training hosted at some auction marts covering health and safety, beef or sheep finishing, book-keeping. Farmers were enthusiastic at the prospect of expanding this provision, some seeing this as a means of attracting some of the younger farmers.

The mart and local communities

Some parts of the UK covered in this study feel a strong sense of belonging, as part of cohesive communities. This was the case in north Wales and in the Scottish islands and Northern Ireland also claimed such levels of community spirit. Northern Irish marts tend to hold some sales in the evenings, a pattern not reported elsewhere, usually accompanied with a meal. Other less remote regions of the UK, conversely, saw farmers stating that they barely knew or interacted with their neighbours and, whether geographically remote or located closer to urban areas, reported feeling extremely isolated, able to go several weeks without seeing anybody outside of their own personal or familial unit and knowing few people in their local community. While cohesiveness might be positive for regular attendees, there is a risk that 'new' visitors to the mart might struggle to become part of such an embedded community and we found a few examples of this.

A number of marts host events to which the agricultural community, as well as the general public, are invited. Examples include carol services, boxing matches, charity vehicle rallies, Christmas fairs, exhibitions, and dances. Such attempts at integrating the general public with their local agricultural community were seen as important by almost all interview respondents:

I think it's important that the general public do get the opportunity to see farm livestock, and probably farmers, at close quarters (Farmer)

It's a social place for the local community to gather together, and also allows the public to become in touch with the rural community (Anonymous – Call for evidence)

The level at which marts actively encourage the general public into the mart however varies, and while all auction operators believed in the importance of bridging the divide between farming and consumer, some were tentative about members of the general public attending on market day.

Support services

Many external organisations harness the auction mart as a location for which to offer opportunities to assist farmers. Marts differed greatly in the level of availability of this support. Several had a health hub, rural chaplains, support organisation stands, and clear signposting to mental health and wellbeing services throughout the mart. Others had less awareness of these opportunities but expressed interest in affiliating with similar organisations for their own mart communities. Some auction operators had never heard of a livestock mart health hub, while others were unaware of the presence of rural chaplains or their role in supporting farmer wellbeing within communities. While many marts are affiliated to the Livestock Auctioneers' Association (LAA) in England or the Institute of Auctioneers and Appraisers in Scotland (IAAS), with regards to wellbeing services many marts operate as silos. However, in the case of establishing permanent clinics there is evidence of the sharing of best practice between marts. A wider sharing of information on support services could prove extremely beneficial to all marts and their customers.

Auction marts are ideal venues for primary healthcare services, given that farmers often do not seek, or have limited access to, mental and physical health assistance. The majority of interview respondents referred to an 'I'm ok' culture amongst farmers in the UK, particularly among older farmers. There are problems in some farmers accessing the healthcare they require, so the presence of health check stands, roving nurses, and permanent clinics at livestock auction marts offer a solution. By gaining the trust of the visiting farmers, cultural and attitudinal barriers can, to some extent, be remedied, and by providing a service specifically aimed at farmers and the agricultural community in-situ, without the need for an appointment, the stress associated with visiting a local surgery is alleviated. Attending a mart-based health hub is quick, convenient, and free for the visiting attendee. There is usually a limited or zero waiting time and farmers are not expected to change out of their farm gear in order to be attended to. One respondent from a farmer support organisation reported an average of 54 people attending a health hub on market day. The significance was set out very clearly by one respondent:

In the early stages, some of the results were really quite dramatic. What I mean by that is I can certainly think of one case, one auction mart, where the first time it was done, there were almost 30% of the farmers that were seen that were strongly advised that they must see their GP urgently (Farmer)

The establishment of a primary healthcare facility at a livestock auction mart requires sufficient and consistent funding, appropriate staffing, and a suitable site (anything from a purpose-built room to a space for a pop-up tent, gazebo or mobile vehicle), and learning from other initiatives. Although it might appear important to have the backing of farmers and other farming community members from the outset, evidence shows that this will usually develop once the initiative is in place. Marts offering primary care services do so in multiple ways. Some offer an extensive service involving the presence of a nurse, a physiotherapist, a podiatrist and other healthcare professionals and operate out of a purpose-built, well-equipped clinic every time the mart opens. Others host roving nurses who work specifically with farmers and who visit marts on a rotational basis according to the day on which market day falls. Such marts usually offer a private space for the nurses to see attendees rather than a purpose-built clinic, although basic equipment is usually available for use. And other marts might agree to host pop-up clinics offered and arranged by various organisations on an ad hoc basis.

The strength of the presence of health and wellbeing services at a livestock auction mart lies not only in the ability to improve physical health, but it was revealed that underlying mental health issues were frequently discovered as a result of seemingly simple physical health checks. This leads us into the next section, which further explores the role of the auction mart in supporting the mental health of the auction mart attendee.

Mental health is a particular challenge addressed at some marts. The mental health and well-being challenges facing farmers extend to other members of farming families, ancillary staff and auction mart staff. Respondents attributed mental health issues to financial burdens, social isolation, animal disease, regulatory practices and inspections, lack of or loss of confidence, disasters (such as flooding), easy access to firearms, and routine exposure to death. Other issues, as reported by auction operators and auction staff, are family-related, be it marriage or other family relationship breakdowns, succession issues, squabbles and disagreements. Anxieties attached to TB test results are also significant and several suicide incidents were reported as probably directly linked to TB results. 29% of the farmers we interviewed reported knowing of at least one farming-related person within their region, auction mart community, and sometimes, within their own family, who had committed suicide during their lifetime. Many tragic incidents were disclosed by farmers, support individuals, and auction managers, describing a range of age profiles, multiple family suicides, and a variety of trajectories leading to the deaths:

Within 10 miles of me, I know 6 people have taken their own lives within the last 8 years [...] all farmers (Farmer)

Marts have the potential to act as a meeting point for support organisations and farmers. Many individuals working at auction marts admitted not knowing what to do should they be alerted to potential suicide cases. Possibilities for markets include formal training for at least one auction worker in suicide awareness, liaising with the local church community to bring in a rural or agricultural chaplain to the mart, or organising for another appropriately trained individual to regularly attend market, such as a nurse employed for the purpose of the health hub.

The agricultural chaplain is one of the unsung heroes of many livestock marts. Their role is to be known, recognisable, present and available.

It's about standing there until somebody calls you, until somebody needs you. Cos if you don't stand there, you're not around (Rural Chaplain)

Many chaplains are affiliated to a wider farmer support organisation, such as the Farming Community Network (FCN). Some chaplains appear fairly understated, while others wear jackets emblazoned with their role so that, from every angle, it is known who they are and why they are there. Some are mental health awareness trained and many have extensive experience working within agricultural communities. The presence of a rural chaplain at livestock auction marts was, for some regions of the UK, a normal part of the fabric of a day at the auction. The chaplain and their purpose at the mart appeared to be well known to the mart attendees and chaplains reported feeling welcome, recognised, valued by the communities within which they operate, and as playing a crucial role in the wellbeing of the attending farmers.

Farmer support organisations, such as those listed in The Prince's Countryside Fund National Directory of Farm and Rural Support Groups, will occasionally maintain some level of presence at local marts. This might be in the form of a stand or alerting farmers in need to the existence of the organisation and how to contact them. Some organisation members will carry out a role similar to that of the rural chaplain, mingling among mart attendees and making it known that they are available to talk.

In addition to support of both physical and mental health, other support services were mentioned during interviews which, although more business-focussed, might help with the overall wellbeing of farmers, by preventing stress and anxiety related to business matters. One response to the call for evidence suggested advice regarding retirement and legal advice would be useful to many farmers. Other mart attendees cited help with administration and paperwork, and being kept up to date with important agricultural news. The strength of the auction market as a hub for the agricultural community means that the mart is well placed to act as a site from which strategic training, information and advice relating to all business needs of a farmer or farming-related individuals can be based.

The provision of services beyond simply that of providing an arena for buying and selling remains relatively low. For example, 18% of surveyed marts have a primary healthcare service and 6% facilitate business training. This is partly due to limitations such as finances and space, but also a number of auction managers are not aware of all possible opportunities, or do not have the time, experience or advice to be able to take them forward. However, a majority of those interviewed who do not currently operate any form of physical or mental health support facility were interested in doing so at some point in the future.

Women in farming

The role of women in the agricultural community emerged as a key theme, related to business health, community health, and physical and mental wellbeing. Interview data revealed that some

female farmers felt uncomfortable or lacked confidence at the thought of conducting business at auction marts. Several organisations at marts offer specialised support to women in farming, assisting them in ways that benefit both the farmer and the mart itself:

For myself, personally, it has been a huge boost. It has given me so much more confidence to do things and I do feel that I can talk to people, and sometimes it's easier to talk to people outside the family than it is inside the family (Female farmer)

Although the role of women might seem minor with regards to the viability of livestock auction marts, their role is increasing in terms of running farm businesses and in terms of mental health and wellbeing. Auction marts would do well to integrate the role of women in farming into any plans they have for the future.

Business health

Many auction managers perceived the current state of their businesses positively but suggested that the next five years might not look as favourably upon them. Not one auctioneer or manager described their business as 'on the up' in interviews.

It's certainly not on the up. The golden years have been, which we will never get back, i.e., the 60s, 70s, 80s, when you turned over a lot more and your bills were less, so you made a very good living thank you very much. But because the overheads have gone up so much and you have got collection centres now that you didn't have years ago, some people selling them dead, everybody taking a little bit of the slice out of the cake, so there is less of the cake left, isn't there? (Auction manager)

Several respondents attributed a decline in throughput to changes in farming including a lack of succession and a lack of labour on farms, leading to smaller farms being swallowed up by larger businesses, which tend to sell most or all of their animals deadweight. Other challenges, include the cost of rates, competition from other marts, bovine TB control requirements, a decline in abattoir numbers, effluent disposal costs, bad debt, a decline in the number of farms, animal welfare issues, compliance pressures, health and safety legislation and what was described as an 'anti-auction agenda' from supermarket chains and large abattoirs.

While staff overall appeared to be highly valued and very well treated at all marts visited, staffing also presented a variety of challenges for many, one being the succession of new auctioneers. Attracting new auctioneers or auction managers who are right for the job has been difficult for some marts. A particular challenge acknowledged by a number of auctioneers and farmers was the treatment of staff by customers. Some reported high stress levels associated with farmer interactions. It is important to stress that this was not common to all marts or all mart workers, and where it was the case, auction workers were extremely understanding as to the pressures farmers are under.

Bad debt is one potential contributing factor to a market failing or at least, struggling. Auction managers with substantial bad debt tended to assume that all markets suffered similarly, although several managers stated that bad debt was either not a problem for their business or they did not have any at all.

We are in a vulnerable position in that somebody can come in, wave their finger in the air, and buy something. And then it's our job to persuade them to pay us, and we guarantee the farmers the money we pay on the day or we BACS it in later in the same week if that's how they want to receive it. It is a constant struggle to keep the buyers up to date. Some of them are very good. Some of them are very bad. The majority are somewhere in between. But we tend to try and deal with everybody on an individual basis. We don't have the sort of

blanket system, and if people are in a pickle or they need a bit of help, we've always been prepared to listen (Auction manager)

It is widely acknowledged among participants that the larger proportion of market attendees tend to be in the 'older' bracket and for many, this is perceived as yet another issue faced by the marts. Another challenge is represented by concerns over animal welfare.

Business opportunities and the path to a more resilient market

Survey respondents, aware of the risks to marts, envisaged one or more of the following possibilities to mitigate risk: i) reduce costs, such as staff redundancies ii) increase commission rates iii) reduce number of sales iv) amalgamate with other mart/s and v) diversify. The report focussed, in particular, on the diversification route as a means to allow markets to become more resilient. Such diversification activities might take the form of an insurance business, estate agency, land agency, print business, finance business, income from unit rentals, and the hiring out of spaces for weddings, parties, sporting events, theatre events, conferences, exhibitions and so forth. One auction business stated that only 30% of its turnover now came from livestock sales, while 64% of all surveyed businesses stated that livestock sales still made up over 90% of the turnover. So, while diversification might remain low on the agenda for some market businesses, others have recognised their need to expand beyond simply the selling of livestock. While the principal reason for this is likely to be economic, the result is usually a mart that is more appealing to members of the agricultural community, and in some cases, also attracts the general public. A mart's ability to diversify will depend upon a number of factors, such as ownership/rental status, availability of space, attractiveness to ancillary businesses, customer demand, knowledge and skill set of the operator, creativity and vision, and sufficient capital. Operators of larger or newer marts frequently identified the risk associated with a single-business model and therefore diversification activities are commonly incorporated into the design of new markets.

We are in a bit of a state of unknown, aren't we? Spending £8 million on a brand new facility in an industry that's well, some might, say is slow to decreasing, that's a bit of a worry. But it's not going to be all about livestock, so we have got internal units for people who have some form of relationship with the agricultural industry, so there is an income stream from them, we've also got outline planning for areas around the site as well from letting units as well, also they have to be agricultural based as well so there is an income stream incoming from them as well, so we are diversifying into and spreading the risk (Market Operator)

The rental of business units was a source of income for some auction mart businesses, including agricultural supply stores, feed stores, veterinary practitioners, machinery dealers, butchers, accountants, solicitors, insurance companies, hairdressers, ironmongers, technology service providers, land agents, timber merchants, surveyors, meat processing plants, colleges, equine supplies retailers, and vehicle dealerships.

Livestock marts in the time of Coronavirus

Initial fieldwork for this study was completed two months prior to the COVID-19 outbreak in early 2020 with the report being written during the crisis. While the initial few weeks of the virus saw uncertainty and some financial loss for many marts, they quickly adapted to the new situation and were identified by the government as a vital part of the food chain. New measures were introduced by the authorising bodies such as Defra, stating that only buyers could attend market, with sellers dropping off their animals and leaving the site prior to sales. It is reported that these requests were willingly accepted and adhered to by both buyers and sellers. Farmers agreed a minimum price with the auctioneer in order to maintain some control over the sale, or conditional

sales were agreed whereby the sale continued as normal but before closing the sale, the seller would approve the winning bid. Some marts live-streamed their auctions, while others set up online auctions, with varying success. Several marts already had a live-bidding service set up, so sellers could see their livestock going through the ring as long as they had sufficient internet connection. The COVID-19 crisis demonstrated that markets are not scared of technological advance, even though the use of live rings is still preferred. Such a transition to electronic auctions will likely be harder for smaller marts.

The effects of the pandemic felt by mart personnel included challenges such as adapting organisation skills to manage staff in a different way, keep staff to a minimum, and ask many older workers who were potentially vulnerable to stay away. Communication required ratcheting up as buyers had to book in, unable to simply turn up as usual, and sellers were instructed to arrive before a certain time or between certain times which added extra time and management to staff workloads. One call for evidence respondent stated that the pandemic situation had caught them by surprise in terms of how much extra work was required, but it was still 'better than not operating'.

All of the above created extraordinary amounts of work for auction operators and staff, as they tried to keep their customers safe, maintain high standards of animal welfare, and offer an efficient service.

Conclusion

Auction marts have their own culture. They are each their own community. They are not merely sites where trade takes place but intricate assemblages of people, animals and networks. As different as each livestock market may seem, they are all operating using a traditional system that is deeply entrenched within the lives of their customers, and as they evolve and transform, they are still somehow linked to the generations that have come before them. Few other trading experiences can be compared to a day at the market, and while locations, technology and society have all transformed, the actual experience of the sale itself has changed little.

The livestock auction mart is well-placed to act as a hub for business health, community health, and the physical and mental wellbeing of all of the stakeholders who use it. As other possibilities for social activity and networking among the farming community have gradually diminished, the mart has come into its own. By acting as a crucial platform for the livestock industry not only to buy and sell animals, but also to support those who are the backbone of that industry in as many ways as possible, auction marts can encourage not only their own survival into the future but also that of the livestock industry.

The mart is a place which can create positivity in the life of a farmer, be it through the pride achieved through showing an animal, meeting up with friends, or learning something new. It is a space for networking, getting a meal, and receiving updates on all of the news. The simplest of town centre marts seeing minimal change over many years might be as popular as the newest mart, purpose-built for both business and customer in modern times. But all businesses should seek to be as versatile as possible by diversifying their business where there is potential, as well as collaborating with key organisations and individuals to deliver a variety of services which will serve the local community. There has never been a greater need to bring the livestock industry back into public view in as positive way possible, an opportunity best harnessed by the livestock auction mart and the communities to whom they belong.

For The Prince's Countryside Fund

- Through The Prince's Countryside Fund farm support coordinator, continue to encourage close working relationships between farm support groups and auction marts, strengthening the position of auction marts as trusted places of advice.
- Disseminate findings from this research through a best practice/how to guide.

For central and local government

- Make use of auction marts as essential centres of learning to engage with the farming community on, for example, agri-environment schemes and other policy changes.

For auction mart operators

- UK auction marts should implement best practice and pursue business diversification.
- Auction marts in England should engage with their Local Enterprise Partnership to ensure that they are part of local initiatives which will benefit from the Prosperity Fund.
- Engage with existing industry events to showcase how mart activities can benefit the local community.
- Look to bring younger farmers into auction marts through targeted activity.
- Proactively seek relationships with town councils, local authorities and other similar bodies, as well as farm support organisations in your local area.
- Ensure staff are supported to deal with mental health challenges, both their own and for mart attendees, through appropriate training such as suicide awareness or mental health first aid schemes.

For livestock farmers

- Engage with support services and social activities at your mart.
- Take advantage of events, training, discussion groups, networks and other business support offered by livestock markets to better inform both personal and business decisions.

For farmer support organisations

- Proactively work with your local auction marts to offer support to the farming community

1. Introduction

And so the farmers went to market – in hundreds and then in thousands they went every week to their local mart. Not only to the sale but to meet their corn merchant, their seedsman, their implement merchant and their friends. Getting on their better boots, they made it the focus of their week (John. A. Thomson 2015)

I don't think markets are just there to sell. Markets are there to act as a hub and they're there for the health and wellbeing of the farmers and the country community every bit as much as they are to make money (Farmer 20)

The sale of livestock through auction marts has been a staple feature of the agricultural community in the UK for over two hundred years. Despite having faced numerous challenges, such as disease outbreak, changes in regulation, rising costs, competition, and changes in transport and infrastructure, many auction marts have survived. Such resilience has not, however, prevented the loss of a significant number of auction marts across the United Kingdom. In England and Wales alone, numbers have decreased by 80% since the 1960s (ADHB 2017; Rickard 2019). Following a report examining the economic contribution generated by livestock auction markets in England and Wales (Rickard 2019), the Prince's Countryside Fund recognised the need to understand in more detail the social role marts play within rural communities, to examine the future viability of livestock marts, and to identify examples of good practice where markets have effectively harnessed opportunities which benefit the livestock auction mart business and the farmer, and in some cases, the wider community.

Moments of life at the auction mart have been captured mostly through paintings, photographs, newspaper clippings, and anecdotal written records, such as the publications of John Thomson (2015). Given their importance to the livestock sector and rural economy and society, there are surprisingly few older or contemporary studies of these long-standing institutions in either academic research or technical reports¹. Exact numbers of marts across England, Northern Ireland, Scotland and Wales are not entirely clear, although the estimated number stands at between 136 and 148². While many of these sites run independently, a proportion function under one business umbrella with such mergers usually being regional. Despite their continued presence across the country, few people who exist beyond the edges of the world of livestock are aware of the importance of marts to the food system, the extent to which auction marts are embedded within their local communities, or the critical roles they play within them. Even across auction marts themselves, awareness and uptake of opportunities and extended services vary greatly. Two recent reports (ADHB 2017; Rickard 2019) detail the economic importance of livestock auction marts to the agricultural industry, but neither fully explore the life experience of those individuals for whom these marts act as a central hub beyond simply that of a site to engage in business transactions.

This study concentrates primarily on the social role of livestock auction marts, as such detailed data are lacking elsewhere. Following an introduction to livestock auction markets, including a brief exploration of their history and role, the report highlights how auction marts can contribute to the social, health and business wellbeing of their attendees. The current viability and business resilience of auction marts are also considered in order to ascertain if and how they can continue to play an important role in the lives of farmers into the future.

¹ Exceptions include: Addison 1952; AHDB 2017; Bateman et al 1971; Carlyle 1973, 1975; Cooper and Henderson 1970; Dickinson 1934; Dickinson and Henderson 1931; Gray, 1984, 2000, 2002; MLCSL 2010; Rickard 2019; Rowling 2015; Trow-Smith 1959; Williams 1972.

² Some markets operate on an ad hoc or infrequent seasonal basis.

1.1 Project Aims

This study was carried out between September 2019 and May 2020. The principal aims of the research were as follows:

1. To explore the social value of auction marts and their value to rural communities in the UK, particularly in areas where smaller farms predominate, over and above their purpose facilitating the sale of livestock.
2. To identify the challenges faced by auction marts in the current climate and explore opportunities available to them in order to increase their resilience as businesses.
3. To highlight examples of 'good practice', identifying auction marts which successfully employ a number of functions over and above the sale of livestock³.
4. To collate information regarding physical and mental health support services based at auction marts in order to provide a list of guidelines to marts currently without, or wanting to improve upon, these services.

1.2 Research method

A mixed-methods approach was chosen to capture the lived experiences, perceptions, and attitudes, of those individuals most commonly associated with auction marts, as well as to effectively identify the current commercial circumstances of auction mart businesses. These methods are outlined below:

1. **Literature review:** Available literature was reviewed in order to understand both the history and current economic situation of auction marts in the UK and to inform the design of the interviews, survey and call for evidence fieldwork methods.
2. **Semi-structured interviews:** Face-to-face and telephone interviews were carried out with 90 stakeholders across England, Northern Ireland, Scotland and Wales, at 17 locations where marts exist, or once existed. 42 farmers, 27 auction operators/auctioneers, 15 individuals from support organisations, and 6 other stakeholders (such as chairpersons or trading standards officers) contributed to the interviews and each of the 17 'case mart' locations were visited by a member of the research team⁴.
3. **Online survey:** An online survey, aimed specifically at auction mart operators, which received 37 responses.
4. **Call for evidence:** The original Call for Evidence ran from November 2019 to February 2020 and received a total of 21 responses. In response to the COVID-19 pandemic of 2020, the Call for Evidence was re-opened for two weeks in early May 2020, in order to allow for written contributions to be made by any individual on behalf of themselves or their business with regards to the impact of the Coronavirus. 9 responses were received in response to this second call for evidence.

Before data collection began this research was reviewed favourably by the Research Ethics Committee of the Collage of Social Sciences and International Studies at the University of Exeter.

It is important to bear in mind that, due to the limitations of the study, it was not possible to capture further data from individuals external to the livestock auction mart who choose not to use them as a route for selling or for any other purpose. Some bias is, therefore, likely to have occurred within this study.

³ These good practice examples are reported on in a separate report: *Build a better mart: Strengthening business and community*.

⁴ On a market day, where possible

Due to the richness of the data captured during this study, the report uses direct quotes from farmers, auction operators/auctioneers and other market-related individuals from the semi-structured interviews. We have also included quotes from call for evidence and survey respondents. Where quotes arise from interview data, each respondent received an ID tag to protect their anonymity so are labelled as follows:

A – Auction operator/auctioneer

F – Farmer

FS – An individual working in a farmer support role (e.g., a rural chaplain or health practitioner)

O – Other (e.g., chairpersons or trading standards officers)

Call for evidence and survey respondents are labelled as such, but names have been omitted to protect their identity.

2. The story of the livestock auction mart in the UK

2.1 A brief history

The experience of market day has, for the majority, changed significantly over the last two hundred years, when sale by auction first emerged in already long-established fairs and markets (Trow-Smith 2006). Livestock markets were traditionally held in town centres, usually occurring alongside other trading activities which altogether contributed to the busy, bustling 'market town' atmosphere experienced in increasingly fewer locations across the UK today. Animals were 'driven' to market from their farms on foot for up to five to ten miles by drovers, sometimes further, thus requiring large numbers of local market towns to operate throughout the country (ADHB 2017). In the 1930s, it was illegal to establish a new market within $6\frac{2}{3}$ miles of an already existing market – a time when approximately 1,000 markets were in operation across England and Wales (ADHB 2017). The advent of the railway network enabled a new method of transportation for livestock farmers, increasing their radius for buying or selling by up to 30 miles. However, such a change was at the cost of some of the smaller markets, which began to close down as size of catchment areas for more popular markets increased.

A day at the market usually presented the opportunity of a day out for the family. Travel to and from the market, with the addition of buying, selling and socialising, meant farmers had to allocate an entire day to the process. They were often accompanied by spouses and children who would take advantage of the opportunities presented by the thriving town location, so 'market day' provided not only a significant boost to the town's economy but also an opportunity for people to socialise, exchange information and spend some time away from the farm. The central location and open model of the market allowed the non-farming community to mingle amongst farmers as their lives interspersed for the day. In the nineteenth and early twentieth centuries, with a significant proportion of the population employed in agriculture, and the wide prevalence of markets throughout the country, agriculture was an accepted and normal part of life for both rural and town dwellers.

Structures built purposely for the sale of livestock began to be constructed as early as the mid nineteenth century, with sites often driven by their proximity to railway stations. Many of these sites still exist today, either in their original or new, improved form. While 939 markets across the UK were recorded in the early 1960s (ADHB 2017), numbers started to drop as many railway lines began to close, a factor exacerbated by the emergence of the motorway network and the continuous improvement of vehicles, including those designed to carry livestock. In addition, the viability of markets has been challenged by a number of both agricultural and non-agricultural drivers of change. Agriculturally, the volume of livestock trade through auction marts has been reduced through waves of major structural change in the industry. For example, pigs and poultry, once a staple feature of many small family farms, are now largely concentrated in highly specialised large units. For disease reasons, these are often closed units with animals born and reared on site, only leaving at point of slaughter for the abattoir. In the case of pigs, the death knell for mass sales through marts was accelerated by the emergence of Swine Vesicular Disease in the early 1970s, a highly infectious disease with many of the early cases linked to buying and selling through marts (Loxam and Hedger 1983). The foot-and-mouth (FMD) epidemic of 2001 and the ongoing challenge of Bovine Tuberculosis (TB) have both served to dampen the enthusiasm of some farmers for use of marts for buying and selling of cattle and sheep. The restrictions placed on markets as a result of FMD certainly encouraged some farmers to try different means of selling their stock, often directly for slaughter. And Bovine TB has encouraged some farmers to focus on rearing their own replacements rather than what they might perceive as risky trading through marts. There has also been an increase in 'collection centres', which in some cases are managed by marts. Under this model animals, for example

dairy calves, are brought to a collection centre where they are valued and subsequently collected by a buyer, often linked to contract rearing. Other farmers have found it beneficial to negotiate contracts for direct sale to supermarkets, especially when they can achieve a premium for compliance with a particular assurance scheme or through the marketing of a specific provenance. Other farmers have moved towards direct retail to consumers.

In the context of all these changes that have reduced the flow of livestock through markets, the obvious question that emerges is why marts continue at all. The AHDB have examined this question and point to the continued preference expressed by buyers to see first-hand the stock that they are considering purchasing:

While various other forms of sales for store and breeding livestock (e.g., using computer and video technology) have been tried they have not proved as popular thus far, with buyers still wanting to see first-hand the stock that they are considering purchasing. Many livestock in 2001/2002, but very soon after the livestock markets were re-opened the support for this system diminished to the extent that it soon became unviable. Markets trialled such systems during the immediate aftermath of FMD. As long as farmers and buyers wish to see the live animal before they make a purchase, the live market system in England provides a tried and tested way of assembling livestock for sale and arriving at a price in an open and transparent way on which the trade can be made. (AHDB 2017: 10)

Cattle and sheep are far less standardised, with more breeds and a wider range of production systems, than are commercial pigs and poultry where relatively homogenised intensive production systems combined with genetic developments and retail initiatives have reduced variability (see Godley and Williams 2010 on poultry).

As other forms of selling have drifted away from the traditional auction model (see Figure 1) to set-priced retail or online outlets, this report examines how the more traditional route of selling animals brings people together. It reveals how important that route is to an industry facing considerable challenges, and explores what more livestock auction marts could do not only to ensure their own survival into the future, but also to support farmers, their customers, and the rural community, as the UK's agricultural industry steers itself towards an uncertain future.

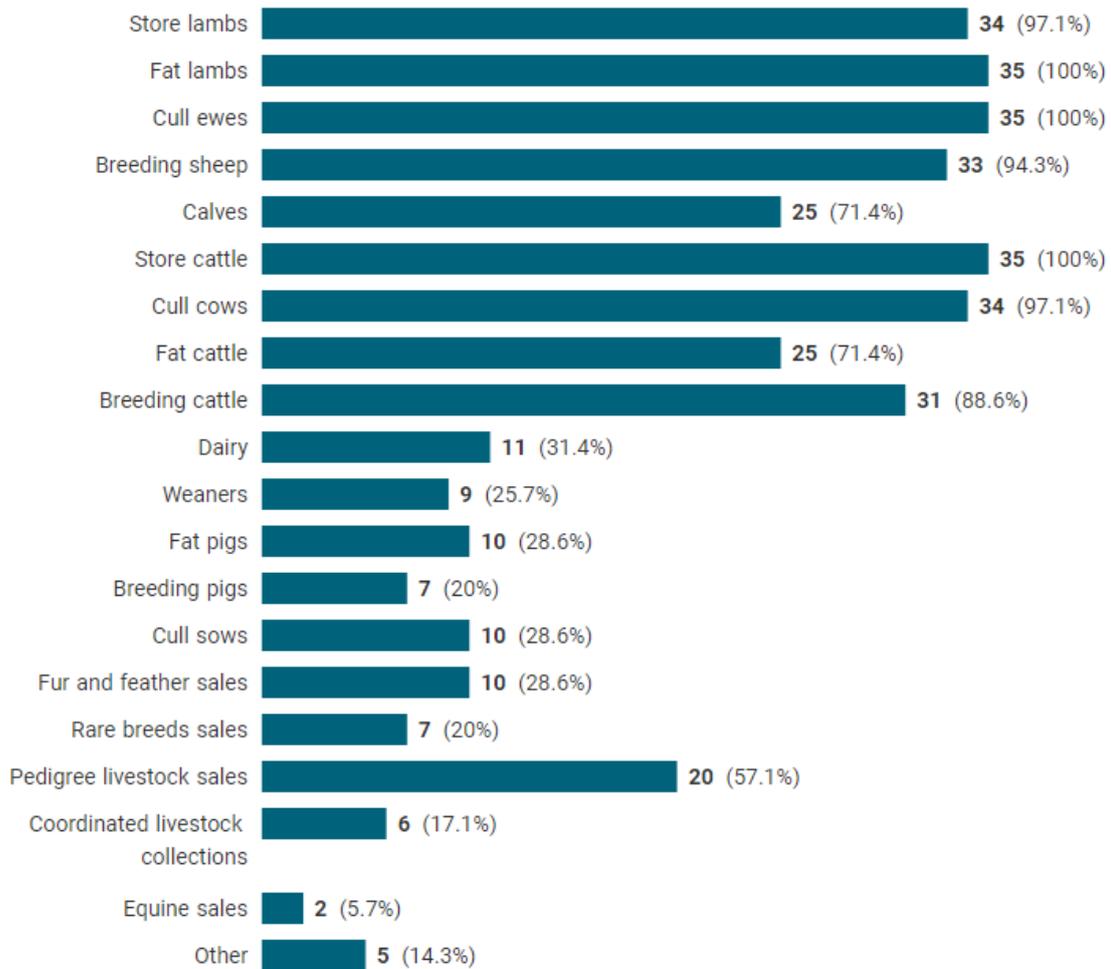


Figure 1. Proportion of auction mart surveyed engaging in specific livestock trade activities

2.2 The auction mart and change

It is part of the structure of the rural community (A27)

When I started on buying lambs over 30 years ago you used to see the housewife, the son, the daughter and the farmer there. Then as the years went passed, the wife went out to work and you'd only see the son and the daughter. But by now you only see them when on the farm, and a lot of farmers are only working part-time anyway [...] you have got to work harder to get the same level of aggregate really (F17)

The necessary evolution of livestock auction marts, such as the rationalisation of the industry, the movement of many away from their original locations, the impact of various crises, and changes in the structure of the livestock industry itself, have all contributed to transformations in the place, space and running of the auction mart. Add to this external forces, such as overall societal and cultural transformations, and it becomes clear why the auction mart experience has altered so significantly for all individuals and businesses to whom they are important. This section examines how auction marts have changed, from the perspective of farmers and market operators, and what these changes might mean for the future of the mart.

2.2.1 Auction mart locations

Some marts are easily approached on foot from a train station, yet are more difficult for larger vehicles to access. Others are easily accessible by vehicle, but are impossible to visit without personal transportation. Some marts appear as fortresses, imposing and difficult to enter for the uninitiated passer-by, while others shout their wares from all available external walls and entice you in with the promise of mixed-offerings and a very warm welcome to all. Once inside, the smallest, oldest, and simplest of marts can be crammed full of buyers and sellers, while the largest, newest and most expensive of marts might offer a different atmosphere entirely. Usually marts lie somewhere along one of these continuums. Of course, such snapshots of the 'mart experience' change according to price, season, demand and day, but overall every mart, regardless of history, size, or location, has something unique to offer.

Only 30% of marts surveyed now describe themselves as a 'traditional' town centre livestock market. A slightly higher number (33%) classify themselves as having 'recently moved to another location' but do not class themselves as an agri-business centre, while 25% of those surveyed do classify themselves as an agri-business centre. It appears that agri-business centres are more common in England and Scotland, while traditional town centre marts are more likely to be found in the north of England and Wales. A smaller selection describe themselves as 'out-of-town' sites but moved less recently, anywhere between 30 to 100 years previously. Such diversity demonstrates that, despite rationalisation and the encroaching pressures of modernity, no blanket model of a livestock auction yet exists which determines success. This suggests that a variety of factors are recognised by auction mart users as being important, beyond simply good facilities or vehicle access. Such factors are examined further throughout the report.

Interestingly, where in the past many towns built themselves gradually around livestock markets, some auction operators described how they had moved their mart out of town to a slightly more remote or 'rural' area, only to watch the town gradually expand and build around them again.

Why do markets move or stay in place?

It was felt at the time, not by us but by the town council, that the town needed the market more than the market needed the town (A1)

A lot of these houses around us, they don't want us here (O2)

People before were quite accepting. Now they're not (O3)

Adoption of innovative ideas and business development ideas is constrained by not only planning permission but access to development capital or other fiscal measures to support investment, as well as access to suitably skilled staff or accessible skills training (Anonymous – Call for evidence)

It was reported by interview and call for evidence respondents that town councils often play a role in the movement of a mart. A market might be moved out of town in order for the site to be used for parking or new housing, as a result of negative feedback from local residents, or simply because the infrastructure creates 'an impossible situation' with regards to access or business expansion.

Some local-authority owned marts on rolling rental agreement terms reported a lower tendency to want to invest as they were never sure for how long they would be able to continue on a specific site, thus feeling discouraged from investing in permanent, infrastructural improvements.

We've seen that change, from markets getting out-of-town centres onto agri-business centres or business hubs, and that will continue in the future. I mean, one of the other reasons why a lot of markets were desperate to get out of towns [...] was that there were all

sorts of problems with waste effluent, you know, having to go into town sewers, and markets were being charged an absolute fortune for this to happen as an industrial waste and other pressures. You know, getting big wagons into the middle of a town to pick stock up, to take it away... So yeah, there are some markets around the country still left in towns, but they will have significant pressures of their own. And very much the rule of thumb nowadays is if you're thinking of building a market, the auction mart, the livestock mart will always be the centre of the hub, but you will build around that as many opportunities for other businesses to be located on that site, or use of other resources on that site to bring other people there (FS5)

For similar reasons, a mart might be closed down completely, although this rarely occurs without substantial attempts by local users to ensure its survival. Town councils have also been known to pressure marts to sell private land for the betterment of the local area, or to have clashed with auction operators over their royal charter obligations⁵ and possible expansions. Other examples, however, have shown how a town council might regard a mart as crucial to the local economy and will therefore prevent it from moving, or ensure the location to which it is moved remains close. In these cases, councils and marts have been seen to work together, by the local council supporting the mart, and the mart providing parking for visitors on non-market days, for example.

While respondents reported reluctance at changes in location of marts, people appear to adapt quickly to the 'new', acknowledging how certain benefits might outweigh other aspects that have been lost.

Quite a number of the markets, once they move out of the town centre, they lose the atmosphere. Here they seem to have managed to keep that. They did lose it for a little while to be fair. When they first moved it felt different. It felt not right. But they have got a farm shop there and got all the other things that is going on around it now [...] which has helped to put people back into it. And it has created an atmosphere again. You must have in these markets, an atmosphere (F40 commenting on a new market)

We all thought it won't work, it will be horrible, and that was the good old days when everyone used to pop to the pub when they finished selling and all the rest of it. But it couldn't have carried on where it was at and it couldn't have, you know, it was a fraction of this size and, so yeah, I am very happy with this market (F41)

The 'character' of marts was referred to by many respondents, farmers and auction managers alike. Nevertheless, many stakeholders, as well as customers, often thought that the exchange of the older, traditional, more 'characterful' markets for a larger, purpose-built, improved facility offering multiple services was worth it. There was also a suggestion that such easily accessible sites might attract a greater number of buyers, a major pull for sellers.

We built them new premises and [...] their customer base has expanded as a result because farmers increasingly, they want to come somewhere where they can actually deal with, certainly livestock, but if they want to go next door to the land agents as well, and deal with some basic farm payment issues etc., they do that at the same time. If they need to go to the vets, they do. Then I've got the usual animal health suppliers on site who provide lots and lots of competition which again is another magnet to this site because anywhere where they are short of competition the suppliers begin to monopolise the price (A25)

⁵ Essentially from the 12th century onwards fairs and markets could only be legally held through the granting of a charter, usually in the gift of the monarch and usually bestowed upon members of the nobility. Those holding a charter could charge market tolls. Over time these charter rights were acquired by trading companies, private individuals and local authorities.

At the same time, some newer markets went to extensive efforts, using lighting and design, to recreate the 'character' of a more traditional mart.

Operators of larger out-of-town auctions were emphatic about the benefits of a purpose-built mart.

Because it's a modern facility, we can portray a modern image and I think that just makes everybody think we've just become a little more professional [...] It has evolved with a new centre and we've tried to keep it clean. We've tried to keep it fresh. Whereas in an old market you sort of let things fall apart a bit, you don't bother, you know, replacing pens or rails or sheds or anything that, you know, really is a big cost (A26)

We have had people point the finger and say that we are getting too corporate here, and it is too big, and [it results in] the death of all the local markets to a big place and all the rest of it. That is not true [...] If you walk into a market and it is dwindling and dying on its feet, there is no atmosphere. There is nobody chatting because there is nobody really there, so that has already gone. It has already died if you haven't got the stock coming through. Yes, we are big [...] but also there is still the personal touch because of the nature of what we do. And we see the same customers and clients week in week out, so we all know who is called Bob and who is called John, and they like that and long may that continue (A24)

Changes in the location of a livestock auction mart, therefore, do not necessarily need to be to the detriment of the social and community wellbeing of auction mart attendees, if the marts are run with such aspects kept in mind. While smaller, traditional marts should be championed for their crucial role to the communities within which they operate, larger or newer operations do not mean the 'end' of the positive market experience. In fact, larger premises and improved facilities can assist in improving the wellbeing of both farmer and animal as well as the wider community.

I think that it's a bigger emphasis on supporting the farmer. I think we have a responsibility not only to look after the farming livestock that is sold here but also to look after our flock of customers. [...] All the farming help charities are represented here. And I think it's, you know with Carol services, Easter services, all that type of thing, it's bringing the community in to make this really a rural community hub (A26)

Due to the presence of other agriculture-related businesses at agri-business centres, it is believed that more farmers will be encouraged to attend the site itself, even if not always to buy or sell, and that such access to services might ensure loyalty to the market as a route for selling. Moreover, moving to a larger location often means that greater numbers of livestock can be sold and general timings tend to be faster due to overall efficiency. Call for evidence respondents seemed particularly in favour of the medium to large auction mart and mergers. Although at the same time, a large proportion of call for evidence respondents also stated that fewer marts meant that both buyers and sellers needed to travel further which in itself had negative implications, with regards to time, fuel costs, and the environment.

Some smaller markets have adapted by running less frequent, but specialist sales, tending to operate in more remote areas. These are said to be popular and well attended on sale days, the importance of which should not be overlooked.

2.2.2 Changes in attendance patterns

This is not something that used to happen years ago. In most instances a haulier would bring in the stock, the farmer would finish his jobs on the farm, put on his best bib and tucker, polish his boots, watch, and chain, and he would appear at some time, watch what sold, draw the money, and maybe take a couple of drinks before he sets off home arriving

back when the lads had finished whatever jobs needed doing there. That has changed. We are now seeing people either coming in their muck soaked boiler suit on a tractor at the last minute, bringing their own stock in because the farms have been denuded of labour as such. Some of them drop it off, leave us in charge, and we send them the money. Others will hang about and make a dash for it as soon as the cheque's on the counter (A1)

Respondents revealed that a proportion of market day attendees choose to drop their animals off prior to sale, and remain off-site at the time of sale. While some auction managers suggested that this has always been the case, others stated that it has become more frequent in recent years. No pattern was reported as to who is more likely to sell their animals in this way, but suggested reasons for this being the case included:

- A greater incidence of part-time farmers and hobby farmers, who often drop off the animals before going to their 'day-job'.
- Time limitations where, due to sparse labour availability on farm, farmers need to return to the farm in order to fulfil work requirements.
- Time management, where some farmers choose to use the time that could be spent at auction to pursue other pursuits, such as hunting, shooting, sporting events or spending time with friends and family.
- A personal preference not to attend the auction at all.

Again, due to this practice becoming the 'norm' for a number of sellers, few auctioneers reported it as being a problem.

2.2.3 Changes in technology

Many respondents referred to the technological changes in the auction mart experience, such as cattle passports, scanning, electronic identification, bar code readings, ring screens, rostrum computers, billing systems and so forth. Overall these are well-received due to their ability to streamline the experience and improve ensure animal welfare standards

Generally such changes in technology were regarded as positive by farmers and auction operators alike, improving the efficiency of the business, streamlining the experience for all stakeholders and improving animal welfare across the board. The COVID-19 crisis also stimulated the need for fast technological adoption or adaptation by many marts, in order to improve systems for bringing animals in and out of the mart for health and safety as well as efficiency reasons, and through the incorporation of online auctions, live streaming of sales, and the use of social media to assist with helping farmers feel more included (see Section 6).

2.3 Livestock auctions and the local economy

You take the mart out of here you have got nothing. Well, you have got some businesses. You have got farm supplies and things, you know, that are a good business up the road there, but [they are] all dependent on the farming community in some shape or form. You have got the shops that would do well because of the mart day. You have got the pubs that would do alright because of the mart day. It brings people in, you know [...] You look at a lot of the old marts, this is a classic here [...] the town has grown around it. This is why you find a lot of these marts, these very old marts, in prime sites really; development sites, in the middle of the village, because the marts came first (A15)

While the location of many markets has moved from town centre, or train station-side locations, several markets still remain either in, or close to, the local town. Many of these towns are described as having grown around the market and a number of respondents believe that the market still has a significant impact upon the local economy. One auction stated that moving the

mart would 'take the heart out of the village' (A15), with several others perceiving that the local area would suffer a negative economic impact if the mart were to move out of town. This might occur not only from a fall in farmer spending on market day, or a drop in exhibitors/visitors/guests attending the mart for events, and thus affecting the local hospitality industry, but also because numerous agricultural supply businesses often situate themselves close to auction marts and are reliant on the flow of farmers to the area for business.

If you go into the cafes [...] in town and the [other eating establishments] and whatever else there is across there, I suspect if you go and ask them which is their best day of the week I'll almost guarantee they will say [market day] (A2)

On [market day] for example, we can have between four and five thousand through the doors throughout the day. So, if you take that away then sure, it is going to have an effect on the town (A6)

Where town-located marts had closed down or moved, such towns were described as having changed significantly.

[Town] used to be quite a vibrant town and it's quite wealthy. There's a lot of professional people live in [Town] but there is, now, there is a Marks and Spencer's, an Aldi, there's a Tesco. There is a Co-op at the west end but the high street is empty. It's full of charity shops and coffee shops. There is nothing there. It's a disaster really. I mean the market again used to be in the middle of town, and they moved not that far but just a mile away or half a mile away, but it's just taken the heart out. The heart has been taken out of the town (A3)

[Name of] market used to be in the town, used to have a pannier market on the same day and they moved the market out to a, you know, green field site, and the town is dying. The shops are dying. No farmers really want to go there (F19)

It was a very viable rural community [until the market closed] (F19)

But once that goes you take [away the market], [name of town] now its shut and it's like a ghost town now (F7)

Town-located markets can differ hugely, from very basic market facilities only, to larger markets offering a great variation of services and retail outlets with both an agricultural and non-agricultural focus. Farmers using markets in or near to towns did report that they frequently used local services or spent money in the town. Where marts were moved slightly out of town or to new motorway-side sites altogether, some farmers reported that accessing town services became increasingly difficult due to parking issues, time constraints, and distance. Therefore, while many positives come from the development of new, out-of-town sites, the impact upon the local economies should not be entirely overlooked.

In addition to the many farmers concurring as to their use of other outlets in the town on market day, one also described how the proximity to the town went beyond simple function and accessibility to services. The experience became one of importance due to being able to connect with the local community.

I feel linked to the town then. I don't feel cast aside if you like, you know, which tends to be the whole ethos of most semi-urban people or whatever you want to call townspeople in the countryside. It seems to be to isolate themselves a little bit from their actual food systems now. And so I like the idea that we're there and they can see us and we can see them and hopefully they feel that they're part of us as well (F16)

For those marts which have moved to locations distant from towns, unless designed specifically to draw in either farming family members or non-farming groups, the experience is reported as being very different to that of traditional town centre marts.

I used to take my wife in shopping and the kids, take them off to market when they got off [...] Fairly safe to say, it's not happening in this [other] market. Nobody drops their wives down town much at all (F23)

Many of the large, agri-business hubs have catered to some extent for the loss of town services accessible to their customer, by providing services such as a hairdresser, food produce stalls (such as groceries, cakes and biscuits) and ancillary services such as accountants and feed stores. Others, however, have directly transferred a traditional town market to an out-of-town location, reducing customer accessibility to certain services as well as reducing the appeal to other members of the farming family.

Some farmers demonstrated a preference for greater accessibility to 'town services', while others chose to attend a particular mart or marts more for their character, for a particular auctioneer, for convenience, or simply due to family history and loyalty. At the same time, farmers expressed appreciation for the professionalism, ease of access and built-for-purpose design of some of the agri-business hubs.

While the loss of a mart might negatively affect the local economies and businesses where they were originally based, it is often the case that new mart locations rapidly attract agriculture-related businesses to their environs, thus creating new business and employment opportunities.

A large proportion of call for evidence respondents referred to the fact that cash generated at auction marts tends to be redistributed within the local economy. Equally, the role of the local mart as an employer was strongly emphasised. According to Rickard (2019), livestock auction marts across England and Wales employ approximately 2,599 people in total. Surveyed marts employ an average of 34 people, a little above Rickard's average of 24. Numbers will, of course, vary according to the size and business model of the mart, as well as the season and type of sale.

This section has introduced how marts have developed within, transitioned for, and connected with their local communities, already revealing their importance to multiple stakeholders within the rural community. While it is important to determine the business resilience of livestock auction marts, this has to some extent already been established in other studies (AHDB 2017; MLCSL 2010; Rickard 2019). The next section, therefore, will explore the role the livestock auction marts play within the lives of those who attend them from a social, health and wellbeing perspective.

3. The social value of the livestock auction mart

3.1 Introduction

Arguably, the most vulnerable farmers and farming businesses tend to be the people that attend auction marts. That's a sweeping generalisation, but it has some measure of truth to it (FS6)

I think that everybody in the livestock industry underestimates how important it is that people meet each other in a space that they feel relaxed in, and they can talk about good things and bad things, and trade, and the weather (A5)

The social value of auction marts has long been recognised⁶ and is mentioned in recent technical and feasibility reports (AHDB 2017, Rickard 2019). However, detailed examination of the social significance of auction marts and their impact upon wellbeing within contemporary rural communities has been sparse. While livestock auction marts are principally businesses and should always be recognised as such, the increasing levels of social isolation and associated issues have encouraged many marts to explore their potential as rural 'hubs' from which other services can operate in order to assist the wellbeing of their customers. This section explores the need for such a 'hub' within agricultural communities. It examines the reality of social isolation among livestock farmers across the UK, and highlights the perceptions of market attendees regarding customer access and attitudes to healthcare, for both physical and mental wellbeing.

3.2 Social isolation in farming

If you're not feeling great yourself, you're not actually going to function very well within your business (FS2)

Farming in the UK has seen significant structural change in the post war period. Although spatially and sectorally uneven, the dominant pattern of restructuring has resulted in an agricultural sector based around fewer, larger farms, with a greater degree of enterprise specialisation. At the same time, economies of scale, technological advances, increased financial pressure and a move towards greater use of contract labour means that the total number of people employed on farms has declined significantly (Lobley et al, 2019). One consequence of this is that farmers frequently work alone for long periods of time with limited opportunities to build and maintain social relationships (Lobley 2005). Respondents were very aware of the resulting social isolation that faces many within the farm sector. Several respondents referred to the decrease in the number of people employed on farms, a change which has dramatically affected the on-farm working dynamic and everyday experience for many farmers. Where previously farmers could enjoy the company of other workers being on-farm and working alongside them, this is rarely the case now. In fact, only a handful of farmers interviewed now employ any labour at all.

The majority of our farming respondents stated that they either work alone or with one other family member. However, due to the time pressures resulting from such a significant fall in labour, even those family members tend to be spatially split, rarely finding the time to work together. This, coupled with the likelihood that spouses are also much more likely to work off-

⁶ Not that historical references to markets are always positive. George Henderson (1944), a mid-twentieth century farming writer refers both to his encounters with rigged and corrupt markets (see also Watson 1934), and to the dire consequences of weekly drinking at market in the case of another farmer.

farm (Shortall 2014), has resulted in many livestock farmers having no choice but to endure very long days spent alone. Although not necessarily an issue for everybody, for some, such isolation can quickly turn into a more serious problem.

The reduction in the number of small farms and changing relationships with neighbouring farmers was also cited by some farmers as further increasing a sense of isolation.

It used to be wonderful when I started here farming [...] When it came to things like harvest or straw carting or that sort of thing, we all worked together [...] Everyone got together in the evening and had supper together before they packed up and went home and it was wonderful, and the atmosphere was light, and everybody knew everybody well (F20)

It used to be an awful lot of visiting done, you know. My parents are both gone, like, but they would have visitors every weekend without fail, or else out visiting someone. That's all died out... like that social thing, that's died out (F33)

When I was younger, we went to visit our next-door neighbours. And we would have a night in their house, and they would come along to our house, and we'd have supper in the garden, and you would go out to the byre and see the cattle and see how they were doing. And you ken, the women would come as well, and they would be sitting in the house with the kids, and all that. But that doesn't happen anymore (F43)

Time constraints, financial constraints, changes in how farm work is carried out and an increasing sense of individualisation among farmers across many regions of the UK mean that often farmers do not interact with their neighbours or peers unless the opportunity is presented to them. Such an opportunity includes attendance at the livestock auction mart.

These transitions in agriculture, combined with significant social change in the countryside (e.g. changes in the composition of the population of rural areas with an increasing proportion of 'incomers') have been associated with increased social friction (e.g. Bell, 1994, Day 1998), an increasing sense of separation between producer and consumer (Lobley et al 2019), burdensome regulatory demands, and economic volatility in the industry, have led to a situation where members of the agricultural community are frequently socially isolated (Lobley et al 2019). Although social isolation and/or loneliness are known to contribute towards impaired well-being, the distinction between social isolation and loneliness is important here, as one does not necessarily accompany the other (Newall and Menec 2019) and, in an industry where lone-working is commonplace, it cannot be assumed that all socially isolated farmers feel lonely. Indeed, the relationship between isolation and well-being is complex with different research methodologies producing different results (See Lobley, 2019 for a discussion). Some farmers do not wish to engage in wide social networks and are enthusiastic and optimistic about their occupation and lifestyle (Lobley et al. 2019). Generally, the associations and pathways between social isolation, loneliness and poor mental health within farming communities are not well understood. That said, lone working, lacking a close confidant and limited social support networks have all been linked to farming suicide (Stark et al 2006). Structural factors also play a role. For example, one respondent identified 'small, livestock, often tenanted - those three elements' as the farmers who are most likely to struggle.

As other sites to communicate and connect have gradually disappeared or transitioned over the last fifty years, particularly on-farm working communities, and, more recently, public houses, the importance of the livestock auction mart as a hub for the agricultural community has become more important than ever. Numerous respondents lamented the loss of pubs as gathering places for members of the farming community.

In [name of closed] market they'd have a little bar in the market. Yeah, it was a weekly session in there, farmers and drinking in general. No farmer, literally no farmer in this

market will go down to the town and go in a pub with three or four of his friends. I couldn't think of anybody would be doing that. Just go off home you know [...] Drinking has gone [...] Our local pub now, has been there for generations, hundreds of years, is now shut (F23)

This 'loss' was not always in reference to an actual closure but was often linked to the changing fabric of local communities where significant in-migration of people from outside of the community had occurred, resulting in locals less likely to 'know their next door neighbour' (A3). Attendance at the local church or chapel will also have been an important part of farming families' lives in many cases until 20-30 years ago. However, cultural change and a general decline in religious attendance, as well as ever-increasing time constraints, have meant that fewer farmers are able to participate in their local religious communities, limiting the potential to gather weekly at events outside of the mart even further.

Many interviewees referred to the social isolation experienced by farmers in their areas, whether referring directly to themselves or to others whom they encountered both at, and outside of, the market. It was revealed that young and older farmers alike are at risk of social isolation and this was referred to by respondents from all interview groups and across all ages, regions, and farm types.

They work on their own and they're very isolated [...] they don't go out and meet people and they are working all day, and as farming has got harder and harder and tighter and tighter, they tend to be working more longer hours and finding it more stressful financially (F1)

We are stuck on the farm 24/7 (F11)

Farming is so lonely at times. I don't care about it most of the time, but you can be at home day in day out. It can be, and I think it gets, darker and darker (F15)

[The market is] such an important part of life. Otherwise you might not see anyone (F25)

I don't really socialise outside the markets really. I don't really socialise that much in the week with other people (F39)

Apart from, you know, the odd lorry driver and things like that, you know, we don't really see a lot of people (F39)

Farms are lonely places. And can be very lonely for a lot of folks [...] I have neighbours that never go off the farm, really, without going to market (F40)

I am in a position where I am in a semi-rural area so I am not that isolated, but there are a lot of lads up the dale that may not have seen anybody for two or three weeks [...] so yes [the mart] is important (F9)

3.2.1 How livestock markets help to combat social isolation

Where farmers had been known to suffer with stress, social isolation and mental health issues, a small number of respondents attributed this to their lack of connection with other farmers, and more specifically, to the fact that they never attended their local mart.

This neighbour of mine [who committed suicide] was one who was very private, to be honest. Market didn't make any difference to him, because he never went there, and that's part of the problem [...] If we could have got him to come and you know talk to others, sitting around the café table... (F20)

A lot of people have stopped going to the markets. And that's when they go and feel lonely (F14)

Some also believed that pressures in farming caused farmers to use other avenues of selling other than the mart, which might also have a detrimental effect on farmer wellbeing.

Market day is the only day they go [off-farm]. And they're getting less, because of the collection centres and what have you, that are starting up. They can go to the collection centre. Come to a market and it's half a day gone. You can go to the collection centre and you have an hour and a half out of the day, two hours at the most and you are back home and back to your job. And that is because of the pressures of work and the jobs that are to do and you know, there isn't enough money in farming, in the small family farms, insufficient income to pay for someone else to be at home. So, if they haven't got their sons coming along, which they can leave at home to do the work and they go to the market, nothing gets done whilst they are away that day. So, they go to the collection centre and that is not always a good thing, because they are not mixing with people, and you can see that (F40)

Regular attendance at a livestock mart is, therefore, considered to be very important to farmer wellbeing. This is due not only to the social benefits provided by the mart, but also to the fact that it provides a routine which allows farmers to get off the farm.

Their whole week is orientated around the mart. So if they come here on a Wednesday, they'll come in and do their banking on a Wednesday, the wives might come in and do the shopping on a Wednesday, and then Thursday, Friday is settling new cattle in if they've bought it, or preparing, and then the Monday, Tuesday getting ready for market. So everything orientates around the sale day. If that went, there's nothing to orientate your week around and I think that just exacerbates that issue of loneliness and isolation. So I think it's vitally important (FS12)

The ability to mingle with like-minded individuals, connect with friends, stay up to date with news and network has, according to the majority of respondents, led to the livestock auction mart becoming invaluable to the wellbeing of the livestock farmer.

There are many that come from Norfolk that probably don't see people for six days of the week or see very few people and certainly wouldn't go into a city for a day but they come here and it is a busy old spot and then they just interact. It is complete wellbeing this place (A17)

There is a lot of our farmers here that would see nobody the whole week and then when they come in on a Thursday they see a lot of friends and they chat, which is great. I think talking is good therapy for everybody (A23)

They are not sitting in an office talking to their colleagues; their office is out in their fields, so I guess this is as close as they get, is coming to the market (A20)

Market day is, therefore, not simply another opportunity to interact with, engage with, and enjoy the company of other people. For many, it was revealed, it is the only opportunity.

Some get involved in some bits and some get involved in a lot and there's still this proportion that wouldn't get involved in any other social event really (A12)

I don't think there is anywhere else that they can go and congregate with like-minded people without any pressure on them or commitment or having to pay. They don't have to pay to come in here (A26)

A lot of farmers will come in, they will stand around the ring, they will talk for two/three hours. You get that farmer in the middle there, put him in the coffee shop in the middle of

town, he will be like a fish out of water. He is not going to talk or do anything, but he will do it in the mart (A22)

Few respondents reported socialising outside of market day, and for those who stated that they frequently socialised off-farm, they knew of many more who were unlikely to leave the farm specifically to socialise, unless it involved attending market. This might be attributed to character, fewer opportunities to socialise being available in very rural locations, a lack of time due to heavy workloads, or a small network of friends/peers with whom to partake in such activities. Where farmers did socialise elsewhere, such opportunities to do so included attending the local hunt, local choirs, NFU meetings, agricultural discussion groups, farmer networking groups, and regularly taking part in sporting events (either attending or engaging in) such as tennis, rugby, badminton, golf, football, skittles, table tennis, darts, and cricket. Some agricultural discussion groups and farmer networking groups, however, use the mart location as their meeting place, further emphasising the role of the mart site outside of the sales arena.

A large number of farmers, of all ages and farm types and sizes, admitted that they still attend the mart even if not buying or selling. Auction managers stated that between 5 and 20% of mart attendees tended to come for social reasons only. Some cited price benchmarking as a reason, but for the majority it seemed it was the opportunity to connect with other farmers which drove this behaviour in attendance.

It is very important. I mean I am not on social media [...] I would rather come and talk to somebody and all the news that I need I am able to get through face-to-face contact with somebody in the mart (F24)

Of those attendees visiting the mart with no intention to buy or sell, many were made up of older or retired farmers. The attendance of retired farmers did not change according to region, size of mart, or day. The mart proved extremely important to these individuals, some of whom may live alone or have had to move away from their farms. For the older farming generation, the mart serves as a hub for social opportunities, and at many markets, it was clear that the mart community tended to 'keep an eye' on how the older attendees were and if they were present on any given day. It seemed that the café and the ability to get a hot meal was also high on their priorities, and some retired farmers would travel to several markets a week throughout the region to meet with peers and enjoy the mart experience.

There's a lot of older people come and they're not doing business at all. But they just come in. And you notice if they haven't come. So at [name of market], they always used to talk about death row, and they had a row of seats in the sale ring, and they used to count them, didn't they, and if they're 'oh, such-a-body's not here today, wonder where he is..?' And so somebody would ring and see (FS13)

[They] love the experience, go in the canteen, sit for an hour and a half and just listen and talk and chat and watch. And then they come in my ring and watch me sell and then go back to the canteen for lunch and drift away home about 2 o'clock (A26)

I love it. It's my life. I've got nothing else (Retired F21)

They can come in sit in the bar, see their friends, go and watch some selling. They never have to go outside on a wet day. They come here and many do come here just for the social aspect of it even if they are not buying or selling anything, and probably, you were talking about mental health issues, that is probably what keeps some people sane coming out week on week to see us and see their friends, see their old pals. As it were, we've recently lost yesterday, one of my old clients died who used to come here buying a lot of stock off me. He hasn't bought anything really from me in a long while so he came last

Monday a week ago today. He came here he didn't look very well then. We knew then the end was nigh but he still wanted to come along because that's the only thing that kept him going (A anonymous)

The café as a space is pivotal to the activities of the mart. It is a place where farmers and auction workers can eat a proper meal, or perhaps two, during the day. It is a space where business matters are discussed, tips are traded, and gossip is shared. The importance of the mart café or in some places, food van, should not be underestimated. One of the most frequently cited social aspects of mart attendance was the ability to 'share the load' with other likeminded people who understand what the other is going through.

The café is the central point of the mart (O2)

I've always believed that the livestock market café for social interaction and for mental health is probably the most important part of the market (Anonymous – Call for evidence)

The livestock auction mart is a multi-faceted service which allows a point of contact for farmers and their families. Business and socialising go hand-in-hand during trading and in particular at the market's café/restaurant (Anonymous – Call for evidence)

It gets them off the farm and it gets them in here and they speak to like-minded people and... just by speaking about this cow that's lost her calf, that's getting the burden off of you. You've shared it, and then you can go home that night and you've kind of had a bit of a break and unburdened your problems and off you go again. So, I think it's very important (F31)

For many, knowing that they were not alone in such problems as losing an animal, being notified of disappointing test results, or feeling general frustrations with various aspects of their jobs, was enough to help alleviate stress, worry, and negative or possibly, dangerous thought patterns. Such burdens might not be so easily shared with family members due to the sense that they might either also feel stressed by the situation, or because spouses who were off farm during the day at jobs where interaction with others might be likely, meant that they might not fully empathise with the isolation felt by their partner working on the farm. According to respondents, this act of sharing often takes place in the café.

Places providing food differed greatly across the marts visited. From the simple food van situated just at the edge of the pens with a limited, but popular, choice of food and drink, to the greasy spoon, to the gastropub, the role across all marts remained the same; to provide a site to come together and communicate. The importance of the café was emphasised by the majority of the respondents. The visiting researcher was struck by the fact that almost no mobile phones were seen being used while in any of the mart's cafés. Time seemed precious and conversations were fully engaged in by all, in a way rarely seen in other public places today.

For some respondents, the option of having a 'good meal' was very important.

[Are you selling today?] No [So why are you here?] Well, I came for my breakfast actually! (F5)

A lot of people will come in just to get [...] dinner. A lot of farmers they are not married, they are single [...] Not even doing business. They are just in to get a lunch, talk to their friends. It is very much, you know, it is very much a social hub (A22)

One farmer, when queried about mental health provision at the mart, responded in terms of the café:

[What should the bare minimum be do you think?] The bare minimum should be that there is a big enough café area [...] That it is not essential that they turn over the people quickly [...] So that people can actually sit and talk together make a cup of coffee last, you know, they can sit and talk because its sitting and talking which is important (F20)

You've got to have a good café. That's the number one thing (F21)

One response to the call for evidence suggested that the mart could also hire out its café to support other social groups in the area, such as choirs, patchwork groups, or for dementia cafés.

The menus at mart cafés varied little, and only a handful of those marts visited offered a 'healthy option' (and of these, the availability of said options was sometimes limited). But attendees did not complain of this and all seemed very happy with the fare. Despite such high satisfaction levels with the food provided however, it is necessary to bear in mind feedback from some of the nurses or farmer support organisations operating within marts, who pointed out that poor diet among attendees was one of the key issues witnessed during health visits.

We add all the salt and the sugar and the fat, and all the other stuff that's not good for us. And also, we have to recognise that we're not as active, both as an industry, you know, our nurses have this conversation regularly with farmers – yes, you've got a good appetite and you enjoy your food, but just think about what exercise you're doing. You might think you're busy on the farm but actually, probably a lot of that work is tractor work or on a forklift, or something (FS2)

Farmers do need to talk about their diet. Lots of them are overweight and probably need to think about portion sizes, so we have quite a lot of fun with that, because most of them pile their plates up, much bigger than they should (FS2)

It is therefore important that healthy option meals should be made available at all mart catering sites alongside other options in order to facilitate positive dietary change where it might be needed.

One call for evidence respondent also suggested that a policy should be put in place that as much food as possible be sourced locally by those operating the café.

At the same time as socialising and networking, the mart also acts as a significant site of informal knowledge exchange, and in some cases, formal training.

It's very important, isn't it? You learn a lot from other farmers don't you, about developments, and you remind each other what have you there's a deadline next week has you filled in your whatever, etc. There's a lot of sharing of information going on naturally (F12)

You'd be surprised to see how many women are actually carrying the can on their own, perhaps been farming with dad all their life and dads died or husbands died or whatever it might be and they are actually managing on their own [...] But then there's all sorts of training things that have been put on [at the mart], food hygiene, health and safety, first aid, bookkeeping, and keeping up with whatever the latest legislation on farming side is (F18)

Farmers reported how important the mart had been in the development of their knowledge regarding animal husbandry, as well as more economical aspects of farming such as the price and effectiveness of feed.

You look at a farmer that is showing and say 'what have you got here? Your lamb is that big, mine won't grow that big' and they say, 'well we are doing X, Y and Z', or 'we are feeding A, B and C' and so on (F41)

If somebody's struggling with the TB test or sheep dipping or whatever it happens to be the market is the place to sort of come and have a word with somebody and say 'look, you know, can you spare me a couple of hours on Wednesday I need a hand' etc. We are a good place to come and get help in that sense and I think we probably do our fair share of matchmaking in the sense that people know who to find and where they are for all manner of reasons (A1)

In terms of formal training held at auction marts, much of this is hosted, rather than organised, by the mart itself. Such training might include health and safety, beef or sheep finishing, or book-keeping. Only 6% of marts surveyed reported offering any kind of business training, while 9% reported offering a course of some sort. While many smaller marts do not have the infrastructure to assemble large numbers of people in a space suitable for training purposes, such low numbers overall suggest that many of the marts capable of hosting such events are not doing so. Some market operators said that training options were being considered, but often time constraints, or lack of interest from external organisations offering training prevented such events from coming to fruition. However, farmers and other stakeholders across the board demonstrated high levels of enthusiasm at the prospect of attending training events at their local mart. Several stated that they believed a greater level of training offered at a mart might attract some of the younger farmers to attend. Call for evidence respondents were very enthusiastic regarding the potential of auction marts to provide farmer education events.

3.2.2 The mart and local communities

The best way for the public to be educated about farming is to talk to farmers (F9)

Some regions of the UK examined in this study demonstrate a strong sense of belonging, as part of particularly cohesive communities. For example, in north Wales, many of the farmer interviewees were part of a choir and considered attendance at this as important as going to the mart, partly because although not specifically a 'farmers choir', choirs were often made up mainly of farmers. Also, Scottish island farmers reported a thriving community spirit, perhaps incomparable with that experienced thirty to fifty years ago but nevertheless, busy, unified and connected, where everybody knew their neighbour and interacted with them regularly. Areas of Northern Ireland also claimed such levels of community spirit. Northern Irish marts tend to hold some sales in the evenings, a pattern not reported anywhere else. Such sales were usually accompanied with a meal and the 'social occasion' focus proved extremely popular among attendees. This was particularly the case for those unable to attend daytime sales.

Other regions of the UK, conversely, saw farmers stating that they barely knew or interacted with their neighbours and, whether geographically remote or located closer to urban areas, reported feeling extremely isolated, able to go several weeks without seeing anybody outside of their own personal or familial unit and knowing few people in their local community.

For the Scottish island farmers, although the mart proved extremely important socially, other events both agriculture and non-agriculture related, meant that the mart was, overall, much more important to their business than to their social connectivity.

With regards to the livestock auction itself, one hundred per cent of interviewed respondents stated that they would describe the individuals making up the auction mart as a community, a number significant in itself.

We all know one another and if you see somebody new come in you will know somebody is new and I think that is a good thing because then it shows that you are socially quite tight knit (A24)

I just like the atmosphere. I like the staff there, and it is like having a family really. When you come in twice a week, at least once a week, most times twice a week, you know, every week of the year, everyone is on first name terms. You know all the auctioneers, all the yard men, everybody (F41)

We are not just one community here, we are 4 or 5 communities because all our customers are completely different on each day of the week, they are all different like for example on a [market day] our fur and feather sale - 80% of the people that come here are from the Asian community so we're not just one community [...] 80% yes, exactly, a large Asian community come, Kurdish, Turkish, Chinese, you name it they all come (A6)

While such a sense of cohesiveness is positive for regular attendees, there is a risk that 'new' visitors to the mart might struggle to become part of such an embedded community. One small farmer wishing to buy and sell at his local mart stated that he chose not to do so as he was not 'made to feel welcome' when he had attended, citing a 'cliquey' atmosphere as the reason. Such an atmosphere was not referred to by any auction operator.

So you will get the lady and the chap comes in and the first thing they say to us is; this is my first time here; and then we show them what to do. And they are only ever going to sell ten sheep with us in a year or two cattle so we know we are not going to pay a mortgage with that. But also they are still valued and we want people speaking highly of what we do (A24)

Auction operators routinely stated that less regular attendees are welcome, but a small number of farmer respondents did admit that suspicion of new attendees, especially buyers, did exist among them, which might result in them being less friendly in the short-term. Often this suspicion is reported as being short-lived, however, and new attendees are gradually welcomed into the fold.

The term 'community', for some, extended beyond simply those attending the mart to the local community and beyond, with attempts being made to engage with or at least, provide a location for, the local community to integrate.

We cover quite a big area. There are obviously groups who know each other from different villages. There's a bit of a cross over in different ends of the [region] but then a lot of the buyers have been coming here for years and they see, obviously see the same people and they get friendly with them and its, yes, there's a community both ways in terms of amongst the locals and with the people who come to buy (A12)

We do consider that we are the centre of agricultural activity [...] masses of social activity or education and we do our best to put on various conferences and so on (A1)

Offering events to which the agricultural community, as well as the general public, are invited allows for both communities to mix. For some marts, this might occur as a result of diversification activities, such as shops, farmers markets and bric-a-brac sales. Others host events such as boxing matches, charity vehicle rallies, Christmas fairs, exhibitions, and dances. While some of these activities are space-dependent, they are not all reserved for the larger marts as some of the smaller sites also make efforts to engage their local communities. Such attempts at integrating the general public with their local agricultural community were perceived as being extremely important by almost all interview respondents in the study. The disparity felt by farmers between themselves and the consumer is considered to be significant so any means by which the general public might interact and engage with the farming industry is generally perceived as positive.

I think it's important that the general public do get the opportunity to see farm livestock, and probably farmers, at close quarters (A1)

The farm to fork and the local circular production is very important here [...] Farmers come to town to meet the fork and that is important (A16)

In this day and age it cannot be a bad thing that the public are interacting with farmers, the farmers are interacting with the public [...] We've become so bloody detached from them, haven't we really, as an industry (A17)

It's important to bring the general public in [...] People love to see livestock and things like that, so it's important to bring them in. Being in the town centre you have people walk past and they always stop and have a chat you know, and it's important to educate people about where livestock [...] comes from (A8)

[Auction marts are] an amazing educational resource. There's lots of ways it could be like the interface between the rural and 'the other' (F19)

It's a social place for the local community to gather together and also allows the public to become in touch with the rural community (Anonymous – Call for evidence)

The level at which marts actively encourage the general public into the mart does, however, vary greatly, from some site operators reporting that members of the general public would attend 'all the time' to others stating that non-farming individuals would be seen 'rarely'. And while all auction operators believe that bridging the divide between farming and consumer is of vital importance to the livestock industry as a whole, some mart operators were tentative about members of the general public attending on market day. Reasons given for this included negative experiences with animal welfare groups, health and safety fears (often arising from a bad experience in the past), and lack of infrastructure to allow for extra numbers.

They don't want to because of the aggravation and the activists and such like (A6)

It's difficult to get the public into a working auction mart because you can't walk all over the place. You don't want to be walking somewhere when there is ten cattle coming up (F10)

One respondent blamed any shift in general public engagement on FMD:

Because of foot-and-mouth they didn't want people being around animals so they changed the store stock day to a different day, so the pannier market happened on a different day [...] Foot- and-mouth really was sort of the beginning of the end for the market, because they didn't want local people engaging with farming [...] And you know the knock-on effect of that is yes, they don't engage with farming anymore and farming is really struggling (F19)

The consensus was that for simple geographical reasons town marts were more likely to be able to integrate with the general public, although from general observation this was not always the case, as some town marts are tucked away out of sight or make public access challenging, while some of the larger out-of-town markets offered events, food stalls and other means of enticing non-farmers to their site.

Another theme arising from interview data was pride, and how the ability to showcase your animal at an auction mart in front of peers can induce other positive emotions and feedback in a social situation. Pride is inextricably tied up in the sale of animals at auction mart, and it is likely that such pride is attached to the quality of animals produced. Such an institution of pride is not only beneficial at an individual level in terms of providing an emotional boost, but it also ensures that events such as shows, where awards are given, can be important in 1) the general

showcasing of animals 2) maintaining an interest in mart attendance 3) rewarding good husbandry 4) encouraging social engagement and 5) stimulating healthy competition.

They've kept the cow for nine months, they have calved her, they would have reared that cow, you know, for however long and put all that effort in. So naturally they are going to, you know, take pride in producing a good animal and most of the time they want to be there to see it sold (A22)

One call for evidence respondent stated that being present at a sale as a producer was not always just about receiving the right price, but also witnessing the completion of a lifecycle.

The being present at the selling is the other end of being present at the birth, it bookends the process. Whilst always knowing that stockmen like to be seen with their stock and to be proud of what they have done and want to know that wherever they go they will be well treated, it was the full extent of that emotional journey I had missed [...] There have been a few farmers for whom being at the sale is so important that they have held on to stock rather than sending them to market (Anonymous – Second Call for evidence (COVID-19))

This section has highlighted how the social opportunities facilitated by market day are crucial to the wellbeing of many livestock farmers and other members of the agricultural community across the country. And while for some, it may simply be a fraction of their day-to-day connections, for others, it is clear, that life without the auction mart would prove to be extremely challenging indeed.

3.2.3 A small note on arable farmers

Uncovering the importance of auction marts within rural communities led both researchers and respondents to debate where non-livestock farming stakeholders go to meet their social needs. This would require further, specifically-focussed research in the area, but the assumption is that 1) time pressures on arable farmers are different, and might therefore allow them more time to seek social input from outside of their farms and 2) that they are likely to achieve at least some social interaction through machinery sales and agricultural shows, although these are sparsely spaced throughout the year. This might be an area which could be examined by the Prince's Countryside Fund in the future. However, there is scope for auction marts currently seeking to adapt their service provision to local farmers to incorporate non-livestock farmers where possible into sales, events and training.

The next section will focus on the provision of primary healthcare services, mental health support, and other forms of support, by livestock auction marts. These were recurring themes arising from interview data, and emphasise just how pivotal the role of the auction mart can be to the lives of those living and working in rural communities.

3.3 Physical health support

A livestock mart is a brilliant way to reach out (FS1)

The point about the auction mart is that it is a meeting place. It's a place where people are drawn together, and the practicalities of trying to provide the same sort of basis by visiting the farms, certainly with chaplains who, generally speaking, are very, very busy people anyway, it's just not doable in most situations. The secret is to find those places where the constituency that's most likely to need help meet on a regular basis, and obviously auction marts is one of those. Now, there may be others, but there isn't that many in the farming situation. I mean, other examples would be farm sales. But they're obviously ad hoc and irregular. And part of the secret of this is the regularity of it, the relationship building. You

can't just waltz into a situation and offer help and expect people to respond. The relationship and the trust is absolutely fundamental (FS6)

We try to be a bit more than just a place to come and sell and buy livestock (A1)

Many organisations external to the auction mart business recognise the importance of the centrality of the auction mart to the rural community. These organisations harness the auction mart as a prime location from which to increase their reach to individuals in need and offer opportunities to assist farmers in a number of ways. This might be achieved on an ad-hoc basis, such as in response to recent events (like severe flooding or disease outbreaks), or on a more consistent basis, such as having a stand for farmers to visit each market day or a health clinic open at peak times. Marts differed greatly in the level of support offered to individuals. Several reported the presence of a health hub, rural chaplains, support organisation stands, and clear signposting to mental health and wellbeing services throughout the mart. Others demonstrated less awareness of such individuals, organisation or opportunities but expressed interest in affiliating with similar organisations for their own mart communities. Some auction operators had never heard of a livestock mart health hub, while others were unaware of the presence of rural chaplains or their role in supporting farmer wellbeing within communities. A potential gap, therefore, exists which might prevent the successful linkage of a farmer support organisation to a livestock auction mart and thus act as a barrier to farmers accessing support to improve their wellbeing. While many marts are affiliated with an umbrella body, such as the Livestock Auctioneers' Association (LAA) in England or the Institute of Auctioneers and Appraisers in Scotland (IAAS), with regards to the wellbeing services they provide, it appears that many marts operate as silos. This might result from the fact that these add-on services are usually instigated and operated by a third party, rather than being an integral part of the business model. The only occasion where this appears not to have been the case is where permanent clinics have been, or are due to be, established, in which case instigators reported having visited other marts offering primary care services in order to identify 'what works' for the creation of their own model. Whatever the circumstances, sharing such information could prove extremely beneficial to all marts and their customers, regardless of their perceived capacity to implement.

3.3.1 Primary healthcare services

We're there in their working environment. Some will come along and say 'I'm seeing the doctor, I'm under the doctor' and we're not too concerned about those. It's those that don't go to the doctor, and it's the younger ones who think they're invincible and they're going to live forever, we quite like to catch up with them. It is just, we're there, it's very quick, it's convenient, there's nothing mysterious about it, and they seem to like that (FS2)

Auction marts have been identified as ideal sites from which to offer primary healthcare services. There exists a general awareness among key farmer support individuals and organisations that the mental and physical health of farmers is often compromised due to that fact that they do not seek, or have limited access to, assistance. This can be distilled down to two reasons.

- 1) Culture and attitude – Research has demonstrated that farmers, particularly men, are unlikely to seek help for a health condition until it becomes extremely serious. Traditional notions of masculinity, stoicism and resilience to adversity in farming (Bryant and Garnham 2015; Garnham and Bryant 2014; Roy et al. 2015; Roy et al. 2017) contribute to a farming culture where men are less likely to seek help. The majority of interview respondents referred to the persistence of an 'I'm ok' culture amongst farmers in the UK, but the belief is that such an attitude is stronger among older farmers.

The older generation of farmers certainly they just keep going and going and going until they drop (F18)

I am probably one of them farmers. If it got really bad and you have a really bad chest, yeah eventually you have gone, because you need something to clear it up because as a farmer you are in a position where you can't take a day off, there is nobody else to do the job. So if you are crawling, you have still got to go and feed those animals (F41)

[Farmers] are good at looking after their animals but hopeless at looking after themselves (A27)

These folks will look after their own animals and then neglect themselves (FS4)

Respondents also revealed that a fear of hospitalisation and not having cover to look after the animals was attached to the reticence regarding booking an appointment to their see their G.P. Similarly, those who worked more than one job were referred to as having limited capacity to seek assistance with health issues.

Farmers don't just farm anymore. They do other jobs as well. A lot of them have 2 or 3 jobs as well as the wife going out to work (FS13)

- 2) Accessibility – While many respondents stated that they have little problem accessing their local healthcare service, several stated that they find it difficult to get appointments, and when they can, due to issues arising on the farm, appointments often had to be cancelled or the prospect of having to wait at the surgery beyond their appointment time put them off

The problem now is, I don't know if it's the NHS or what, is like on its knees and trying to get an appointment at your local surgery... it's happened here, two surgeries have gone to one [...] And you go in now, you don't even go and speak to the receptionist. You go to a machine, you type in your name, date of birth [...] And it certainly puts me off going. I'll only go if I really have to (F25)

It is a nightmare to get to the doctor. You get a doctor's appointment at whatever time and if you get held up or something changes at the auction and you can't get there. Whereas if there is someone [at the auction] you can ask if it's alright if you come back in an hour or whatever. So yeah, I think [a health hub] is probably, is something that would be a good idea (F42)

In addition to this, many farmers stated that they did not feel that they could visit the local surgery in their dirty work clothes, meaning that they would need to change clothes and shoes, all factors which put them off booking appointments. In terms of mental health issues, a number of respondents from several of the different interview groups suggested that the NHS capacity was extremely limited and that those requiring help were not receiving it.

A gap therefore exists between members of the farming community and the healthcare they require, so the presence of health check stands, roving nurses, and permanent clinics at livestock auction marts offers an opportunity to deal with the afore-mentioned barriers. By gaining the trust of the visiting farmers, cultural and attitudinal barriers can, to some extent, be remedied, and by providing a service specifically aimed at farmers and the agricultural community in-situ, without the need for an appointment, the stress associated with visiting a local surgery is alleviated. Attending a mart-based health hub is quick, convenient, and free for the visiting

attendee. There is usually a limited or zero waiting time and farmers are not expected to change out of their farm gear in order to be attended to.

We sit on a [market day] morning, and on the [following] Monday morning, the GP will have that paperwork on his screen. So that's how quick it is (FS14)

Such services have proven to be extremely popular overall. And while there is no specific model that could be precisely applied to all marts, the authors have compiled a 'toolkit' of factors to be considered in the delivery of a mart-based primary healthcare service (see section 3.3.2 for further details).

Health hubs were discussed with all 42 farmers and only 3 believed it a bad idea to locate such an initiative at a livestock auction mart. For those familiar with, and having had experience of a health hub, all were accepting of the concept, and of those to whom the concept was new or they had little to no experience, the majority were open to the idea both conceptually and in practice. Some farmers said they would be more likely to use health facilities at a mart than to visit their own doctor.

A small proportion of auction operators displayed reticence at the prospect of offering any kind of healthcare from their mart. One of the principal reasons for this being that they did not believe that farmers would use the service.

I don't think the farmers will have the confidence to go. And even if they went in there I personally think they would be too embarrassed (A14)

However, those auction operators with experience in maintaining a health hub on-site all described how any reticence on the part of the farmers always dissipated as trust was earned and the concept became normalised within the auction situation.

When [the nurse] first arrived when the market opened no one really went in there but they did start, and now I think sometimes they come to market just to go in there and see her. It's a lovely add-on to the market (A2)

Yes, it takes them a while to get that trust to talk to them and to coax them into that environment but once they are in the environment, it has been a massive success (A6)

I was a little bit sceptical about it thinking are farmers actually going to open up to people, because I know what farmers are like so, to be honest the work that they have done has been fantastic! You wouldn't want it to stop now (A6)

So, while it is reported that farmers do tend to demonstrate general reticence at visiting a healthcare facility at a mart during the early stages of its roll-out, not one mart stated that the facility did not come to be used. And for many, it was considered a very positive and valued addition to the site.

18% of surveyed marts reported that some kind of primary healthcare service was offered at their mart site. While some auction managers were not aware of such a service existing at other marts, of those who were, the majority believed it to be a good idea where it was possible to be implemented. Several were in the process of trying to set up something at their own mart, while others stated that it was an option currently "under consideration".

Just how important is a health hub to the health of the farmer?

While it has not been possible to collate detailed data regarding the impact of primary care services based across all applicable auction marts upon the health of farmers, it is clear that the services tend to be very well attended, especially in places where the initiative is well-established. One respondent working for a farmer support organisation reported an average of 54 people

attending a health hub on market day. Other sites demonstrated similar popularity, bearing in mind how numbers of mart attendees can differ greatly across different-sized marts.

There's two nurses that come and they literally do 11 o'clock to 1.30 because, again, that's the kind of slot when people are having their lunch and they've got time to sit down and have their health check. The rest of the time they're flying around looking after their stock, selling their stock and then they're wanting to be off home, so we've found that's a good chunk of time. So it's basically 11 to 1.30. So, it's a short window, but we have two nurses and we normally see about 45 people during that time (FS2)

We had to build their confidence up. And it slowly built up and now we're doing about, on a [...] morning, we see between 10 and 14 farmers (FS14)

The average figures are about 15 per Saturday. So it's only open from 8.30 to 12.30, so it's pretty strong. We are finding as well, every other week, we're having some sort of incident with some of our visitors, whether it's someone collapsing, or you know, more serious stuff where they do have a heart attack (FS15)

In addition to high attendance levels indicating the need for such a service, respondents described specific incidences which benefitted from the presence of a primary healthcare service.

It's going to be a busy day today, somebody will collapse out there [Really?] Oh yeah, we know that. That's why we've got a second defibrillator coming. We've got one out here. Now we're getting a second one [And you're confident that will happen today?] Yeah (FS14)

We have had two young people, actually, one of whom smoked very heavily and, as a result of having a health check and getting a bit of a wakeup call he's managed to stop smoking. And another guy - young man, who was quite overweight - it shook him into thinking carefully, much more carefully, about his diet and he's slimmed down and at a much more comfortable weight and he said 'oh, I just feel so much better'. So, yes sometimes it's just been a little wakeup call for people and, for some people... one of our nurses [...] she's picked up countless people who've been pre-diabetic (FS15)

In the early stages, some of the results were really quite dramatic. What I mean by that is I can certainly think of one case, one auction mart, where the first time it was done, there were almost 30% of the farmers that were seen that were strongly advised that they must see their GP urgently (FS6)

The collapses referred to are reported as being heart attacks, diabetes-related incidents, or epileptic fits, among other things. And it appears that the majority of physical problems detected tend to be associated with blood pressure, high cholesterol, diabetes, addictions (such as smoking and alcohol) or poor diet. More serious issues were also reported to have emerged from routine attendance at a mart health hub, such as serious heart defects. Attendance at a health hub could, therefore, act as a simple wake-up call or potentially reveal a serious and otherwise unknown health condition, the absence of which, in both cases, might potentially lead to much more serious health conditions in the future were to be they ignored.

3.3.2 Setting up a health hub

It should be in every mart in the country (FS1)

If you've got that evidence and you can do something like that, or commission a health needs survey, then there's got to be a [good] reason for them to not address it (FS11)

Farmers don't operate in normal working hours and they are often very much stuck on the farm. So, this is the one day a week when they get to come off the farm, come into market and they cannot just go to the bank, go and do their shopping, get their hair cut and get their jumper fixed; but they can also now get themselves fixed and that is very important - making that access to healthcare where people are there to consume it (A16)

The establishment of a primary healthcare facility at a livestock auction mart involves several important steps in order to ascertain both its viability as a service model as well as the likelihood of achieving sustainability of the service for the customer. The process can be lengthy, not least of all because of the logistical processes required, but also because respondents report that it takes time to attain the trust of auction attendees to become familiar with the service. Below is a simplified outline of how an auction mart or supporting organisation might approach setting up some form of health hub at their local auction mart.

- The key factors in setting up and delivering a successful health hub appear to be sufficient and consistent funding, having the appropriate individuals in place at all levels, and having a site from which to operate the service (which could be anything from a purpose-built room to a space for a pop-up tent, gazebo or mobile vehicle). Although it might appear important to have the backing of farmers and other farming community members from the outset, evidence shows that this will usually develop once the initiative is in place.

Look at all of those at the bottom [of the leaflet] there [...] They're your sponsors and everybody else that's helping that particular room. So the secret is to get all those people on board first, and then do it (FS14)

- The input from the market operator appears to be fairly limited, unless they themselves are the instigator of the service, as very few seemed aware of the details regarding the service provided on their site. By conceding to the facilitation of such an endeavour, it does not necessarily imply that extra work will be created for the market operator. Although this will, of course, depend on the type of initiative set up, and the organisation with whom they are collaborating. Space should be provided by the auction mart wherever possible. Once an initiative has been agreed between the auction mart and the collaborating organisation, the next steps should be followed.

It's a charity based thing and its funded by different things and grants and stuff like that [...] I hope it will continue because they will tell you themselves, because I have seen the number of people who have been throughout the [region], not just here, has been fantastic. They save lives (A6)

We wanted to make something that was easily accessible for them. They could just roll up, turn up in their wellies, anytime, no booking, and talk to a really approachable person. So no bureaucratic red tape, or anything, just literally, just roll up, drop in (FS15)

- Collate as much data as possible from marts around the country offering a similar provision to give weight to funding applications. Where it has worked/what has worked/how many people have benefitted? Will their model work at your mart? If viable, carry out a participatory health needs assessment of those you intend to aim the service at.

Just speaking to that right person opened doors (FS15)

It's a new phenomenon, and we've had to hold each other's hand to a certain extent. So, maybe as things become more current, maybe certain models can be copied and it would be easier to set up (FS15)

I think you have to flag up that a) you need movers and shakers to make it happen – it isn't easy, and b) you have to be very careful that you don't get snarled up in endless red tape and regulation [...] they would need to make a few enquiries about how it might happen before they went ahead and received money, or accepted money, to do it, to make sure that they really could do it (FS2)

- Have everything in place before funding bids go out. For example, are you able to access nurses at the times/dates required? What are the regulations? What barriers are in place to you providing this service? Once you are clear on all of this, then funding bids/fundraising can begin. Funding might be sought from a variety of sources, such as the Lions, local and national agricultural businesses and organisations, long-term sponsors, the Community Commissioning Group, auction fundraising events (e.g., give an animal for auction), other fundraising events (e.g., via local Young Farmers Club or local WI). Although the initial outlay will usually be the most significant financially, funding for the service will need to be maintained for as long as it runs. Also, try not to rely on just one source of funding. If offering the service at a show, for example, ask the show to sponsor the health service, so that other funding can be channelled elsewhere.

[How do you think it should be funded?] The honest answer is I really don't care. I really don't care how it's funded, because you're talking about a couple of people once a week [...] I think it should be a health board thing, if I'm honest. I think GPs surgeries or health boards, however they want to structure it, should be reaching out to rural communities rather than sitting in hospitals and GP surgeries waiting for people to come and see them [...] Yeah, I think it's... discriminatory isn't the right word, but it provides a very lesser service to rural people than it does to other people (FS1)

- Those auctions demonstrating good practice in this area are able to do so due to the ability to collaborate with multiple stakeholders, and while several operators cited lack of space as a reason behind offering fewer services, by engaging with said stakeholders, alternatives and solutions to perceived barriers are more likely to be found.

I asked if I could put up a little table and a couple of banners and, you know, just stand there. It was my first time I'd been to the mart and he said 'well, you're welcome to but there's nowhere I can think of'. So I had a look around, and it's really tiny, and he said 'oh, go on, go in one of the animal pens' [...] So, I went into one of the animal pens and set up a couple of banners, and there's the farmers all going past, and they're looking at all the livestock, and they look at this pen [...] And they'd say, 'who are you then'? And you know, 'what are you doing there'? And it was a brilliant place to be. And I was chatting with this one farmer and we talked about, you know, we talked about the livestock and the prices and talked about the weather and, marvellous, and I said 'do you know [name of organisation]?' 'No, no, so who are you'? And I told him about us. 'Ah, marvellous, ah, good work, well done!' And that was that. Couple of days later, I got a phone call on the helpline and it was 'Don't know if you remember me, we were talking at [the] mart. I was wondering, do you fancy coming down to the farm for a cup of tea?' [...] He was in all sorts of trouble. But our volunteers worked with him and helped him [...] and he's still farming today (FS1)

- Try to make the service as inclusive as possible. One way to do this is to ensure attendees do not need to be registered at a local practice. Another farmer support worker reported an initiative having a top age limit of 70, meaning that anybody over 70 was unable to visit the health service provider.
- Effective positioning of the clinic/hub/van is essential as the majority of respondents stated that farmers will be less willing to enter if their peers can see them doing so. The

space needs to be discrete at the same time as being accessible, but it is critical to ensure that everybody knows that it is there. Although one respondent working in farmer support suggests the health hub/clinic needs to be very visible.

The most important thing is the privacy with the nurse [...] most markets now will have that room. I don't care what anybody says (FS14)

We need to be quite visible. We need to be where people can see us, and also for those who perhaps haven't been brave enough to approach us, they can see that there's nothing really scary about it, there's nothing mysterious about it, and so we've found that works really well. Just to be very visible (FS2)

I know quite a lot of people in the farming fraternity and so you'd find somebody that you knew and you'd say 'just come along and have a quick health check – it's only gonna take 5 minutes' and then of course, their mates would be looking interested and because the nurses record their results on a little take away slip, they would then go and compare notes and their friend would come along and have a check (FS2)

- Timing is also key, so it is important to determine what time of day farmers are most likely to be able to attend. If the service can only be available for a few hours on the day, choose a slot between sales if possible, around lunchtime, when attendees are more relaxed and have time for other activities outside of selling/buying/organising stock.

The NHS did try 2 or 3 years ago [...] they bought a little gazebo. But they came at 9 o'clock and they wanted to go at 1 o'clock [...] Now, I found 2 or 3 and said, in this particular instance, here's the health checks, would you like to go and have them done. Probably a couple of them said yes we would, but we can't come until after we've finished loading the sheep. And that's after 1 o'clock. So these people who were trying to do a trial and demonstrate that this is what people want buzzed off [...] Well, you don't just rock up and expect people to use what you're offering first off [...] You gotta stick at it. And I think, if they'd stuck at it they would have found people (FS4)

We tend to do winter... the most intensive period of activity is through the winter months 'cos that's when the livestock markets are busier. In the summertime, we do some for the young farmers at the [local agricultural show], but we don't go into any of the marts because they're a bit quieter and people are just busy with other things somehow, so we tend to go through the winter and into the early spring, and that's the period of our more intensive activity (FS2)

- Be careful how nurses/practitioners are labelled. Putting on a badge saying 'mental health nurse' is unlikely to attract farmers.
- Once set up, make sure services are frequently posted on social media, at events, mentioned by staff etc, to gain trust, acceptance and confidence of the farmers, as well as to keep them updated. One health hub operation has volunteer meeters and greeters to encourage farmers into the clinic, and roving nurses often walk around the mart and café themselves handing out leaflets or brochures.

We also have a couple of volunteers going around the livestock market talking to people and making sure that they know the room is open. But not in any invasive way, but a very gentle way (FS15)

- For smaller marts with fewer resources, be encouraged to work with other local marts to set up a mobile clinic to visit different markets on sale days. This model already functions well in various parts of the country.

- It is important for organisations based out of marts to network with other organisations for support, confidence-building, information, data exchange, knowledge exchange, connection of customers etc.
- If, for whatever reason, the service cannot be run every week, find out which sale days and months are the busiest from the marts and plan for the service to be available on those days, for maximum outreach.
- Where possible, ensure there is a space for complete privacy. This will allow farmers to open up about further difficulties (such as mental health problems).
- Building up trust is essential. Continuity, trust and credibility are incredibly important and this applies to both health hubs AND farmer support organisations more generally.

It takes time to build up trust. That's why so many of these short term projects fail in a way, because it takes time for people to trust you enough. We've been so lucky with our nurses because we've had wonderful continuity and they've been willing to travel around, as well, but it has taken time for people to actually open up and start talking more about their other health issues and, certainly on the mental health side of things, it takes a lot of courage, to talk to somebody about that (FS2)

The key is getting those farmers through the door (FS5)

They were doing this health check in the café and they weren't getting folks to go. Farmers are shy [...] And so I went there and I had my health check and yeah they told me exactly what I knew, that I had got high blood pressure and told me I had to go and see my doctor, well I had already just been like. But they had a full run of folks all day then going, once they get started (F40)

Marts offering primary care services do so in multiple ways. Some offer an extensive service involving the presence of a nurse, a physiotherapist, a podiatrist and other healthcare professionals and operate out of a purpose-built, well-equipped clinic every time the mart opens. Others host roving nurses who work specifically with farmers and who visit marts on a rotational basis according to the day on which market day falls. Such marts usually offer a private space for the nurses to see attendees rather than a purpose-built clinic, although basic equipment is usually available for use. And other marts might agree to host pop-up clinics offered and arranged by various organisations on an ad hoc basis. While each model offers the mart attendee a different experience, all are valuable if utilised. There are advantages to having a known, well established service but often space or service limitations prevent this from happening so ad hoc opportunities should also be encouraged and developed.

3.3.3 Barriers to setting up a health hub

The logistics are hard, you have to find nurses that have the right indemnities in order to be able to do it, and you have to find the funding to pay them to do it. I think sometimes people don't think about the logistics of things, they just see them happening and thing 'oh, that's marvellous' but they don't think about the hard work and the endless quest for finding funding to make sure that these things can happen. They don't always appreciate just how hard it is (FS2)

Respondents reported a number of barriers to be considered before setting up a health hub:

- The greatest barrier reported by all organisations was funding (paying registered nurses, equipment, insurance, upkeep of vehicle if mobile clinic).
- Insurance costs.
- Accessing the 'right people' professionally. Professionals themselves could act as barriers, such as healthcare practitioners, and several health hub instigators stated that when they found the 'right person' the process became very smooth.

We'd actually got to the right person. So, from that conversation everything snowballed and fell into place (FS15)

- Choosing the appropriate level of healthcare to offer.
- Determining how to refer on to GPs.
- Sufficient confidentiality protocol, such as General Data Protection Regulation (GDPR), and record storage.
- Hygiene and cleanliness.
- Establishing clarity over what is and is not allowed how the availability of facilities might affect this (e.g., no finger pricking due to infection control, access to handwashing facilities, and availability of appropriate disposal for sharp instruments).
- Simple lack of awareness and/or preparation.
- The inability to prescribe or offer medication in-situ (cannot always guarantee farmer will follow-up with their GP after a visit no matter how serious). Two places discussed having looked into financing the presence of a GP onsite but so far this appears not to be on offer at any mart, as far as the researchers are aware.

The strength of the presence of health and wellbeing services at a livestock auction mart lies not only in the ability to improve physical health, but it was revealed that underlying mental health issues were frequently discovered as a result of seemingly simple physical health checks. This leads us into the next section, which further explores the role of the auction mart in supporting the mental health of the auction mart attendee.

3.4 Mental health support

In the end, as I say, the community saved me (F16)

[Wellbeing support at auction marts] can save lives physically and it can save lives from suicide because it gives you someone to talk to. It shows that somebody is listening, it shows somebody cares. These people can go for three weeks without seeing another human (FS1)

Sometimes they come in and they just want... they say, can you do me blood pressure. But actually they want to talk (FS13)

[Do you know what proportion of people that do come in are coming in for physical issues, and what proportion are coming in for mental health issues?] I would say 50:50 (FS14)

No farmer is immune [to the need for support] (FS1)

Mental health is one of the foremost challenges in today's agricultural community. Despite acknowledgement of such issues, there has been remarkably little recent academic research into the mental health and wellbeing of UK farmers, with the bulk of evidence coming from studies in the 1990s and early 2000s (e.g., McGregor et al. 1995; Deary et al. 1997; Lobley et al. 2004). This work identified a range of 'stressors' faced by farmers (e.g., regulatory burden and paperwork;

weather conditions, time pressures, machinery breakdown at difficult times). More recently Loblely et al (2019) point to lower levels of 'life satisfaction' amongst farmers in South West England than the population as a whole and note that life satisfaction amongst south-west farmers had declined between 2010-2016 whilst it had increased for the general population over a similar time period. The mental health and well-being challenges facing farmers extend to other members of farming families, ancillary staff and, in the interests of this report, auction mart staff although these groups have received much less attention from researchers.

While some of the older farmers interviewed were reluctant to discuss mental health at all, perhaps demonstrating that for some, there is still a stigma attached to it, the larger proportion of respondents appeared to be relatively well-informed regarding mental health issues in agriculture. Many talked openly about how perceptions, attitudes, and related stigmas appeared to be changing, especially among younger farmers who have grown up amid mental health awareness campaigns and general media coverage of the issue, as well as peer-to-peer acknowledgement and discussion of mental health issues. One auctioneer talked of a local celebrity farmer who had been very open about his own experiences of mental health issues, which might incline others to follow suit.

Individuals from both the farmer group and the auction staff group admitted having experienced mental health issues in their lives, with depression being the most common. Symptoms were referred to as being further exacerbated by the stigma associated with mental illness, preventing some individuals from seeking help until it was too late.

I would give my right arm for it to know that it would never come back [...] I battled depression for ten to twelve years (A14)

Respondents attributed their own mental health issues, or those of family, friends and colleagues, to financial burdens, social isolation, animal disease, regulatory practices and inspections, lack of or loss of confidence, disasters (such as flooding), easy access to firearms, and routine exposure to death. Other issues which arise, as reported by auction operators and auction staff, are often family-related, be it marriage or other family relationship breakdowns, succession issues, squabbles and disagreements. FMD emerged frequently as a topic during interviews, both prompted and unprompted, and some mental health issues experienced by farmers can still be attributed to those events. However, discussions around suicide revealed that anxieties attached to TB test results are also a significant contributing factor to anxiety, depression, stress, and even suicide, among livestock farmers. In fact, several suicide incidents were reported as probably having been directly linked to TB results.

The challenges associated with approaching personal mental health issues include inability to access the required services through the NHS, associated perceived stigma, long wait times for therapies, and the fear that peers might find out. It is crucial, therefore, that all attempts are made to overcome mental health barriers where possible in order to improve the wellbeing of those affected.

3.4.1 Suicide

High rates of farming suicide are found in many developed countries. The historically high rate of suicide amongst farmers is one of the most visible signs of mental distress within the farming population. For example, between 2011 and 2015 agricultural occupations had one of the highest elevated risks of suicide; second only to the building trade (Office for National Statistics, 2017). There has been some improvement in the suicide statistics over time but certain subgroups, including those rearing livestock, continue to be at elevated risk.

29 per cent of farmers interviewed reported knowing of at least one farming-related person within their region, auction mart community, or sometimes, within their own family, who had

committed suicide. It was also reported that suicides and suicide attempts had occurred amongst several auction mart staff. One auctioneer got in touch post-interview to report that one of their regular farmers had committed suicide between the fieldwork and writing of this report. Many tragic incidents were disclosed by farmers, support organisation individuals, and auction managers, describing a range of age profiles, multiple family suicides, and a variety of trajectories leading to the deaths.

Within 10 miles of me, I know 6 people have taken their own lives within the last 8 years [...] all farmers (FS1)

The thing is with the farming population that we know about, you know that they've got facilities to be able to do something quite serious to self-harm, quite seriously very quickly (FS11)

One of my neighbours hung himself [...] A farmer yes. He had had a lot of TB in his herd (F20)

Respondents recognised the need to identify the signs of potential suicide, but few admitted to knowing what these might be.

It's the quiet ones who go in the shadows. Those are the ones who you have got to be very wary of. I don't think we are as a community aware of, we haven't been taught, how to look for signs (F15)

Spotting it is the key I think, because you are the last person to hear about somebody who is stressed out. They can look alright but underneath all that they can be very worried (F12)

I've a list of the men who were suicidal, you know, and there is a huge case that when the farms, now permanently going on about mental health, this has been about for bloody years. It has always been about. It has not, not been about. It has just been hidden by a very sort of macho industry. 'What is wrong with you' type thing. But secretly we all have our own problems (A17)

The trouble is they'll carry on, and keep working, and keep going, because that's just the way they are. And that's the way their father was, and their grandfather was, and before then. So, in a sense, I think, while they're here [at the mart], while they're looking at cattle, while they're around other people, they're reasonably safe. It's when they stop... (FS12)

Mental health issues among livestock farmers are a common, recognised occurrence across the country. Many organisations are available regionally and nationally to support members of rural communities to deal with such issues. And the place and space of the mart holds the potential to act as a strategic interface at which these two groups can meet. While it is often external organisations who initiate such enterprises, it is also important to consider the role of the auction operator within the wider support network of the mart attendee.

3.4.2 Engagement of the auction operator

The level at which auctioneers or auction managers engage with their customers, with regards to going beyond the role of their 'job description', varied greatly according to respondents. Several market operators revealed that it was very common for farmers to approach them to discuss issues unrelated to the mart, often involving personal problems or financial worries.

Contrastingly, some respondents stated that this was either extremely rare or did not happen at all. One auction manager had completed a suicide awareness course and felt very responsible for the welfare of his auction community, believing that the undertaking of a suicide awareness course should be mandatory for at least one member of staff at each mart.

You don't realise the issues that some people have got until you sort of get on the farm, round the table and say look this is just between us, say what is happening and you find out. So I think there is still a big reserve in terms of what people will discuss or sort of let out until they have to (A12)

I get calls day in/day out from people and people who just want to call up and chat, even to an auctioneer, about everything. Actually half the time they don't talk about the stock they are selling. They talk about everything else (A17)

I've felt like the Samaritans a few times over the years, I can assure you (A19)

I think possibly more than any other market I have worked for, the staff are exceptionally friendly, and will not walk past anyone if they thought there was a problem (A5)

Such interactions are described as important to the establishment of good relationships between auctioneer and farmer, which often leads to a greater level of trust in the selling of their animals, and a greater likelihood that a) the farmer will continue to use that auction mart for business and social reasons but also that b) the mental health of that farmer is being supported.

At the same time, it seemed that the boundaries of individual staff members varied significantly. Some managers or workers at auctions seem to prefer not to become personally involved with non-business issues of customers, while others took it upon themselves to check in after-hours and offer limitless support. While it is not the place of the researchers to suggest how an individual should respond, it is important to recognise one's own limits.

Many individuals working at auction marts admitted not having a particular line of action in place, should they be alerted to potential suicide cases. Several operators acknowledged that they did not know which course of action would be best under such circumstances. Some suggested that talking to the individual might be enough to deter them, while others recognised that referring the individual to their general practitioner or to a suitably qualified farmer support organisation would be the appropriate course of action. Various means exist by which such support can be extended beyond that of trained staff, which allow for all ranges of mental health problems to be supported.

3.4.3 How to support the mental health of the mart community

Those who have experience of mental health or suicide in their family, friendship group, or vicinity tended to be much more open to acknowledging it, to talking about it, and to recognising the importance of having effective support systems in place to try and deal with it. And for many respondents, the livestock auction mart is recognised as an essential site for mental health support. At its most basic, the mart is perceived as a 'safe place' where farmers can share experiences, unload, seek consolation and benefit from social connections with their 'community'.

I think people still make the effort to come here for that social element, because they feel safe. It's a safe place (FS3)

In addition to the day-to-day benefits of mart attendance, the site itself can assist further through signposting useful farmer support networks and organisations (see The Prince's Countryside Fund National Directory of Farm and Rural Support Groups). But optimum support is provided by the mart facilitating the consistent presence of at least one individual whose purpose is to support the farmer and other mart attendees. Several means exist by which this can be achieved. Such options might include pursuing formal training for at least one auction worker in suicide awareness, liaising with the local church community to identify the availability/possibility of bringing in a rural chaplain to the mart, or organising the presence of another appropriately trained individual/organisation to regularly attend market days, which might include a nurse

employed for the purpose of the health hub. Due to the high levels of mental health issues in agriculture, it is recommended that all marts seek to have at least one member of staff trained in suicide awareness, as a bare minimum. The advantage of having the presence of such an individual on-site at all times allows for potential problems to be unearthed over the course of time, as experienced interviewees describe below:

Somebody quite early on – do you remember? – that was coming and talking to you and saying my friend this and my friend's feeling that, and my friend's a bit suicidal. And you talked to them for a week or two, but you decided that they were actually talking about themselves [...] It was themselves they were talking about, not a friend (FS13)

Sometimes they start talking to you week after week. And they'll just tell you a little bit, and then another week they'll tell you a little bit more, and then they'll tell you a little more until they build up confidence in ourselves and then they'll come and see us about something probably a bit more serious (FS13)

They'll just say 'I need to see the nurse'. And you get them in there, you give them the pad to fill in with the doctor's details and their address, telephone number, all that sort of thing. Then he comes in here. He can be in here for an hour – take an hour up. And you know then that this man is that close to committing suicide. For want of a better word. And so it's our job to try and spot them (FS14)

We have put on a 'mental health at work' first aid course, which I'm doing tomorrow and Friday. Because it's my worst fear that if somebody came in here and said 'I really don't... I'm not happy' what would I do if I was put in that situation? (FS Anonymous)

Due to the fact that many respondents revealed that the mart was often the only other place where time was spent socially, it makes it more likely that mental health issues can be picked up and dealt with more rapidly if spotted at the mart. The next section further explores the role of rural chaplains and other support organisations, in the pursuit of mental wellbeing in livestock farming.

3.4.4 The role of the rural chaplain

Don't do something, just stand there (FS12)

The power of the dog collar. At its most basic level, it's an identifying factor, for a start [...] there's still a general respect for that and, in particular, an acknowledgement of its independence, with no axe to grind (FS6)

The agricultural chaplain is one of the unsung heroes of the livestock mart. Their role at the mart is to be known, recognisable, present and available should an attendee (or auction worker) choose to talk about and share something about their life. For some farmers, it is enough just to know that the chaplain is present.

I think people want me hanging around here, and they, they don't necessarily want to talk to me, but they want to know I'm here (FS12)

Chaplains are offered support and advice for both personal and business resilience. They are usually allocated a particular mart or marts within a region and offer a consistent level of support at those marts. Some chaplains appear fairly understated, while others wear jackets emblazoned with their role so that, from every angle, it is known who they are and why they are there. Some chaplains are mental health awareness trained. Others have extensive experience working within agricultural communities. The chaplains involved in this study reported having received mental

health awareness training or expressed confidence in dealing with the challenges and conversations presented to them, including issues related to suicide.

It's about standing there until somebody calls you, until somebody needs you. Because if you don't stand there, you're not around (FS12 Rural Chaplain)

Mart attendees are reported to approach chaplains generally to share something about their lives, thoughts or worries. This might include anything from celebrating a good price on the day, talking about family issues at home, or unloading financial worries, political stresses, or more serious concerns.

The presence of a rural chaplain at livestock auction marts was, for some regions of the UK, a normal part of the fabric of a day at the auction. The chaplain and their purpose at the mart appeared to be well known to the mart attendees and chaplains reported feeling welcome, recognised, valued by the communities within which they operate, and as playing a crucial role in the wellbeing of the attending farmers.

We've had cases of the chaplains being introduced from the rostrum by the senior partner – you know, 'this is our chaplain, here to help, feel free to speak to him...' And providing notice boards and badges, and so on [...] I think the auction marts authorities themselves are experiencing, or feeling, the pain of some of the farming community, so I think they just welcome a third party to be able to provide some additional support (FS6)

I did have a farmer once who said to me 'do you realise, he [the rural chaplain] does more good than you think he does' (A12)

In every case the chaplains have been welcomed; in some cases very effusively. And indeed in some cases the chaplains are spending time with some of the staff at the auction mart as well as with farmers (FS6)

The benefits of involving rural chaplains in auction marts include the fact that they are completely impartial and have no 'alternative agenda', they are able to visit farms without an invite, they are externally funded, and they usually operate within a wider network ensuring that they receive sufficient training and are able to receive their own support for the work that they do. Agricultural chaplains appear to be very dedicated to their role, with one reporting having visited eight marts in only five days.

In marts where there was no presence of an agricultural chaplain, some reticence towards the concept was shown due to the possible 'lack of faith' of market attendees, or worry about chaplains pushing their own spiritual agenda. However, this did not appear to have been an issue at chaplain-visited marts. Instead, all stakeholders with experience of rural chaplains within auction marts spoke highly of them and recognised their value to the wellbeing of their communities.

Some people come, and they see the collar, and they don't see the jacket. Others just see the jacket. And some people say why the dot, dot, dot, are you here? And I say, well, if I waited in church for you to turn up, I'd be waiting forever so I thought I might as well come to where you are. And, well, fair enough, they say. And then they'll just start talking (FS12 Rural Chaplain)

If they were to regard me as being a part of the furniture, that's fine, because that's what it's about. Someone described it being like a safety valve (FS4 Rural Chaplain)

There is a hint of depression there, there's a sense of that. But actually just to be able to pour it all out and then go on. It's just like a safety valve for him. And if all I've done today is

allowed somebody that chance just to blurt it all out, let off steam, and then go back, that's a great job! (FS12 Rural Chaplain)

There's always the danger that when they move on, that [agricultural chaplaincy] doesn't happen anymore. If I have a legacy [...] it would be that embedded within each of the church communities in the local area [...] we need somebody to be chaplain at the livestock market (FS4 Rural Chaplain)

I'm the only person who is there to focus totally on those who go to market and those who are employed there (FS9 Rural Chaplain)

It's trusting and building a relationship. That's why it takes time. I think sometimes it helps to have agricultural knowledge, but I think actually genuinely somebody who really is interested in people will probably do the job just as well, because they'll ask the right questions, they'll find out what they need to know. And they won't come with pre-conceived ideas about how agriculture works (FS4 Rural Chaplain)

Trust, and the time to build that trust, again plays a crucial role in being able to engage effectively with the mart community. Auction managers and workers need to collaborate with farmer support workers in whichever guise in order to identify gaps where farmers are in need, but we believe rural chaplains have a particularly important role to play.

It's very much about what happens outside the ring. And I think auction marts need to have that little bit of empathy and need to be able to spot the signs when perhaps a farmer's struggling a little bit (FS15)

You get to know the auctioneers, even have a quiet word with them. They come in very useful sometimes. They could tell you, 'oh, by the way, old Bill Bloggs over there he's not so good'. And I say, 'OK, fine, you know how we work', I'll go and have a chat with him (FS7 Rural Chaplain)

Farmer support organisations, such as those listed in The Prince's Countryside Fund National Directory of Farm and Rural Support Groups, will occasionally maintain some level of presence at local marts. This might be in the form of a stand, alerting farmers in need to the existence of the organisation and how to contact them. Some organisation members will carry out a role similar to that of the rural chaplain, mingling among mart attendees and making it known that they are available to talk. It is important that marts seek to facilitate this where possible regardless of the size of the mart, as many farmers when queried stated that they could not name either their local or a national farmer support organisation. Signposting, in the form of posters throughout the mart, as well as the placement of leaflets and brochures in easily seen areas of the mart, was carried out by a large proportion of the marts visited, with some displaying the Samaritans phone number, or that of a similar support organisation, on the walls around the sale ring. A minority appeared not to signpost at all, or leaflets were old, had run out, or were ineffectively displayed.

Critical challenges faced by interviewees working for farmer support organisations included maintaining a sufficient level of funding to keep running, maintaining own health and wellbeing or 'switching off' after a particularly burdensome day spent with farmers, accessing those in greatest need of their services (especially if they do not attend auction marts), succession of support workers, maintaining the trust of farmers, and identifying the most effective means by which to help those most in need as new challenges arise.

You've built up this wonderful thing and it's like 'hmm, we might not be here next year' (FS3)

It's always hard to reach the hard to reach (FS2)

It is extremely important to consider the mental wellbeing of those who are supporting the mental health and burdens of others, and ensure they in themselves receive adequate support. Equally, any mental health provision offered at marts should, preferably, not just be targeted at farmers themselves but also families, auction workers, and ancillary staff. This also extends to training. All of these individuals have the potential to require support, and it is often the families in particular who carry the heaviest burden.

3.4.5 Other services

In addition to support of both physical and mental health, other support services were mentioned during interviews which, although more business-focussed, might help with the overall wellbeing of farmers, due to the fact that they might assist in preventing stress and anxiety related to business matters. One response to the call for evidence suggested advice regarding retirement and legal advice would be useful to many farmers. Other mart attendees cited help with administration and paperwork, and being kept up to date with important agricultural news, as potentially being of use to their business or mental health. The strength of the auction market as a hub for the agricultural community means that the mart is well placed to act as a site from which strategic training, information and advice relating to all business needs of a farmer or farming-related individuals can be based. As opportunities around the use of information technology increase within the livestock industry, transitions in infrastructure, such as animal traceability systems, as well as the broader use of digital systems on and between farms, will also require the regular upskilling of farmers. And while many auctions are yet to provide such services, there is recognition by organisations that such support is essential to farmers.

Yeah, we probably ought to be providing something where somebody can come and look for assistance with their paperwork and documentation. We aren't there but maybe we should (A26)

So it could be, you know, we could make sure on a regular occasion there are the NHS there, so we can get nurses there doing physical health checks. And what we could do then is build in a programme of looking at putting business advice, legal advice, financial advice on regularly. So we've got themes running through them. So people can actually go there thinking that's quite handy, I'm going to go and see that. So we would be there to help coordinate that and make sure it happens and it runs smoothly [...] Say, well in two weeks' time we've got somebody coming talking about land management. Or we've got somebody talking about, if you're a tenant farmer, they can talk about your tenancy with you and what you need to do. And that might just give them the support and confidence to take it to the next stage (FS10)

3.5 Social responsibility of marts

Let me say it very, very bluntly, OK, it saves lives (FS1)

Provision of services relating to physical and mental health ranged across the marts visited. Several marts offered weekly health checks (from a purpose-built clinic or visiting nurses), weekly presence of at least one mental-health trained individual, well-marketed information and signposting regarding rural community and mental health support groups, and the delivery of health and safety training courses. Other marts might provide one or two of these services, while a small number of sites appeared to offer limited to no provision of wellbeing or support services.

The availability of such services appears not to be dependent upon the size or location of the mart, but upon the individuals and local organisations involved in setting up the service/s. Such amenities are usually developed as a result of the mart being approached by interested external parties who have identified the site as an appropriate location for accessing the agricultural community, although occasionally it is one of the mart operators who recognises the need to offer the farmer a service above and beyond simply that of a business.

Wellbeing initiatives are not always directed solely at farmers. Many support organisations recognise that other members of farming family, as well as contractors, workers, auction staff members and other individuals related to agriculture and the mart are also in need of such services.

Several auction managers recognised their role towards the local agricultural community as being one of responsibility, while other stakeholders also suggested that those running auction marts should do so with a 'social responsibility' in mind.

I think it should be something that they realise is part of their duty [...] I mean they haven't got to get people in to run things for it, nothing like that. Just make sure they have facilities on site where people can gather, where they can have a cup of coffee or a pint if that's their choice, and gather and talk [...] It's so important that they do it (F20)

You look after those that look after you. All these farmers and everyone are supporting [auction name] and in many ways, you've got to look at the bigger picture. Without them, we would be nothing (FS15)

Such responsibility was not limited to the provision of services directly impacting farmer wellbeing. As one individual from a farmer support organisation suggested, by providing farmers with other means of learning and support, it might be of benefit to the business itself in the longer term.

I think there's a real desire amongst young people to learn more about farming and I wonder if it's worth these auction marts, as part of their role in rural communities, is providing a place where discussion groups on livestock activities, livestock rearing could be based. Because I think young people are very keen to learn and meet with others and discuss how they're doing things. So, maybe rather than just be busy on market day, they look at activities which engage farmers at other times which are perhaps not directly profitable for the auction mart. I know it's quite difficult for some of them cos it's not an easy existence commercially for them either at the moment. They're under quite a lot of financial pressure as well. But, as part of the pay-back to the community, encourage the formation of discussion groups on all manner of subjects, but particularly on livestock rearing. Because I think that would get younger people more attuned to making that journey to that auction mart, and more engaged with the people that use it on a regular basis (FS8)

I'm really focused on the needs of the customer. Now, a good market will think of its stakeholders and work out what can we do for those stakeholders, principally to make money, but if we can help them at the same time, we might actually make more money because they will come to us for our services (FS9)

If you look at any of the successful corporates, they all have a corporate social responsibility budget [...] which may help their customers, which means that gives them their kind of friendly face. So, auction marts need to move into the 21st century and realise that customer care isn't just about selling things, it's about relating to the customer (FS9)

I'd love to see auctioneers being able to have the time to actually get somebody into the office, behind closed doors, and just have a chat. I see that as being a role of an auctioneer as much as being a role of somebody like me in the [farmer support organisation] - making time to have some empathy, to find out what the problem is (FS5)

This opinion was not held by all though, and while it was hoped that auction managers might choose to incorporate further services to assist the wellbeing of their farmers, several respondents felt that it was understandable for some to concentrate primarily on their business, due to the multiple challenges and pressures associated with running an action mart.

I think as individuals who run them, the auctioneers and the people who run them, I think the vast majority of them would welcome such a thing and embrace such a thing wholeheartedly. Is it their responsibility to make it happen? No [...] they are struggling along with everybody else. They are making tiny margins on decreasing sales along with everybody else. Corporate social responsibility shouldn't be too high a burden on a business (FS1)

Is it their responsibility? Or their duty? No, I don't think it is anybody's, in a sense. Apart from we're all in this together. Is there a role that they can play, a key strategic role they can play in this? Yes, there is. And I think it's about working in partnership with them and helping them to see that this is a really good thing (FS12)

I don't say I feel responsible; I don't think it is a market's role as such (A27)

Whether the provision of services is considered a 'social responsibility' or a matter of choice, a number of marts have extended their services beyond simply that of providing an arena for buying and selling (Figure 2). However, the proportion of marts engaging in such provision are still relatively low. This is partly due to limitations such as finances and space, but it also seems that a number of auction managers are simply not aware of either the existence of such schemes and opportunities, or do not have the time, experience or proper advice to be able to take them forward. Several auction operators appear reticent to pilot a primary healthcare scheme, believing that their farmers would be unlikely to welcome it at their mart.

A lot of people don't want to disclose to you because you are doing business with them and they don't want to be seen to be weak (A27)

Of the majority of those interviewed who do not currently operate any form of physical or mental health support facility, a high proportion demonstrated some level of interest in doing so at some point in the future.

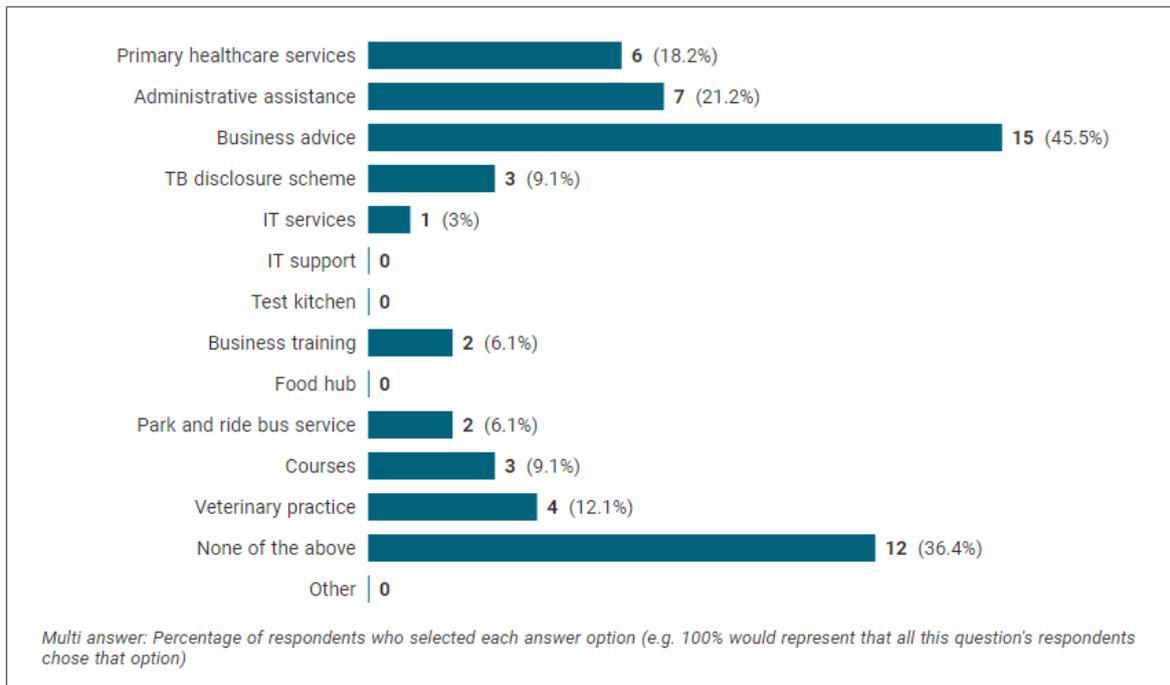


Figure 2. Proportion of surveyed marts offering extra services as part of the auction mart experience.

4. Women in farming

The role of women in the agricultural community emerged as a key theme, with regards to business health, community health, and physical and mental wellbeing. While the number of women represented at auction marts is proportionally lower than men, their role as farmers, family members, and workers in supportive roles should not be overlooked.

Female farmers at the mart

Historically, numbers of female farmers attending market day to buy or sell animals are likely to have been very low, and on observation, numbers are still limited in comparison to those of male farmers attending. However, approximately 17% of farmers are now reported to be women, an increase of 7% over ten years (Office for National Statistics 2018), suggesting that women need to be considered further in relation to the auction mart experience. Interview data revealed that some female farmers felt uncomfortable or lacked confidence at the thought of conducting business at auction marts. The level at which this is experienced was impossible to ascertain through this research, but several organisations based at marts across the country offer specialised support to women in farming, assisting them in overcoming such barriers, and encouraging outcomes which ultimately benefit both the farmer and the auction marts.

For myself, personally, it has been a huge boost. It has given me so much more confidence to do things and I do feel that I can talk to people, and sometimes it's easier to talk to people outside the family than it is inside the family (F18 - Female)

I think it's a little bit better now than when I first started coming here. I felt really isolated because there was hardly anybody I knew, like who were women, apart from myself (F13 - Female)

I reckon if I were to go [around this market] now, or at any market where there's female farmers from [this support organisation], I could probably tell you the ones who'd been to the women's network. Not cos they've told me, but because the difference it's made to them (FS4)

While extra support will not be necessary for all women attending market, the presence of women as farmers at a mart should be considered in the implementation of all initiatives in order to ensure absolute inclusivity. This might include ensuring that all female members of a farming family are made aware of support services operating at a mart and made to feel welcome to attend (physical, mental or business health) and ensuring that sufficient facilities are available for both men and women on-site. This also extends to the marketing practices of auction marts, some of whom are still guilty of marketing sales at men only, using gender-specific language such as 'boys', 'men' or 'lads' in their advertising.

Women in the farming family

For those women who are not working mainly on-farm, other women in farming will fall into one of three other categories: mainly off-farm, pluriactive (on- and off- farm) or mainly house wife (Chavda & Perry 2006). Whichever category they fall under, if they are not the principal farmer, it is likely that many will still play a significant role with regards to the farm work itself, administrative tasks, or support of a spouse or other family member. Several male farmers admitted that it was often female members of their family who would override their own reluctance to seek medical advice when unwell and strongly encourage them to act. This included those members of the family actually making appointments for them.

It is a gathering place and so forth for a lot of farmers, men and women, and there is more and more women involved in all this, and sort of at the forefront not just behind the scenes.

Because for every farmer thinks that's him doing it, there's a woman pretty much doing most of it behind the scenes, whether she gets seen or not is another matter (F18)

*[Are you one of these farmers that won't go to the doctor unless you absolutely have to?]
Well, you have a wife who tends to book you in, so you have to go (F29)*

I think sometimes you worry about the patient, or the person that's going through it, but sometimes you really need to look after the people that are right behind them. So, like, the women (FS3)

By contrast, in the older generation, the reticence of male farmers to seek medical assistance could have negative effects on their spouses, who might be dissuaded from seeking help for, sometimes, very serious conditions. By assisting in the normalisation of seeking medical help when sick through the mart's promotion, not only might the farmer benefit, but also those who are closest to him, those whose level of social and physical isolation might be even more extreme than the farmer.

You see some sad situations really because obviously a lot of the older women never learnt to drive. And so they're brought by the husband. And so for them to actually go to the doctor is difficult because the husband will have to take them 'well what the heck do you want to go there for?' You know, 'I need to do this today'. And... (FS13)

We do have a group of... still have a group of farmers who are very reluctant to ask for help of any sort. And whilst that might be seen as a strength, it can be a bit of a weakness as well because actually, well, personally, I think it's quite a selfish attitude because that can really affect the rest of the family and, very specifically, their wives. I have a vested interest in women in farming because I think there's a lot of women out there who have a very tough time (FS2)

It really does affect the whole family. Women can support in every way they can. Lots of them are helping on the farm. They're perhaps working off the farm to earn extra money. They're probably still doing all the farm admin and things late into the evening and at weekends. There was a very good letter in the Farmers Weekly last Friday from a farmers' wife who's basically saying 'I am exhausted and yet I am expected to provide a wonderful Christmas for my family' and she was working out on the farm 7 days a week and she was just physically exhausted and that's absolutely why we have actively tried to support the women on farms a little bit more, because they are the lynchpin often, that holds everything together and if they go down, well, heaven help quite a lot of families, to be honest (FS2)

Female members of the family were also mentioned for their support roles in terms of administration, and several people suggested that it was often the women who made the critical decision on the farm.

Women in farming are also at risk of serious mental health issues, including suicide, and these causes can be attributed to occupational and financial difficulties, as well as undertaking extraordinary burdens from farm and family (Chavda & Perry 2006).

Although the role of women might seem minor with regards to the viability of livestock auction marts into the future, indirectly their role is increasingly more significant both in terms of running or contributing to the farm business, and in terms of mental health and wellbeing. Regarding the lifecycle of the auction mart holistically, auction marts would do well to integrate the role of women in farming into any plans they have for the future. This might be achieved through support service design; working with local organisations such as Young Farmers' Club to encourage young women into the livestock industry (awards and competitions); being open to hosting programmes aimed at women (such as the Exmoor Women in Farming Group and

Yorkshire Agricultural Society's Women in Farming Network); and collaborating with other organisations such as the NFU or NFUS to facilitate more opportunities for women (e.g. bringing in female speakers at events or shows).

Sections Three and Four have demonstrated just how vital auction marts are to the social life, health and wellbeing of their attendees. They have highlighted how marts can support their communities and draw attention to a variety of associated themes that arose from the extensive data collected. There can be no doubt that the existence and continuity of livestock sales through the auction mart model should be maintained where possible in order to ensure the longevity of all such support mechanisms. The final section explores the business health of livestock auction marts in the UK, and seeks to determine how businesses can become more resilient into the future.

5. Business health

It is very, very high risk out there (A25)

5.1 Introduction

Each auction mart across the country is distinct and, apart from those which are run as groups under a multiple-site business model, many marts still run independently of one another. At the same time increasing pressures on farmers, competition, changes in meat demand, and disease crises, continue, to some extent, to make each and every mart economically vulnerable.

Such vulnerability necessitates new strategies to ensure business viability and survival into the future. While this report has so far emphasised the crucial role played by auction marts in the health and wellbeing of members of the agricultural community, it cannot be emphasised enough that the most critical role of the livestock auction mart is to offer a transparent, fair and competitive open market for the trade of livestock. The auction marts act as a pricing mechanism without which the value of livestock might well fall, detrimentally affecting producers and having a negative knock-on impact on rural communities and associated industries. Further economic benefits of auction marts are outlined by Rickard (2019).

There are currently between 136 and 148 livestock auction marts across the UK, but numbers continue to decline. Reports of auction marts closing across the country occur annually, often attracting media attention as agricultural communities try to find ways to keep their local marts in operation. Managers, auctioneers and farmer attendees of one particular mart in this study were unsure as to whether the business would be forced to close by the end of the year, while several respondents belonging to other marts commented on the lack of viability and likely closure of a number of different marts across the country.

5.2 Current state of marts

Many auction managers perceived the current state of their businesses positively but suggested that the next five years might not look as favourably upon them (Figure 3). Not one auctioneer or manager described their business as 'on the up' in interviews.

It's certainly not on the up. The golden years have been, which we will never get back, i.e., the 60s, 70s, 80s, when you turned over a lot more and your bills were less, so you made a very good living thank you very much. But because the overheads have gone up so much and you have got collection centres now that you didn't have years ago, some people selling them dead, everybody taking a little bit of the slice out of the cake, so there is less of the cake left, isn't there? (A15)

One auction operator in the survey did, however, state that their annual turnover had tripled since 2010.

Challenges currently faced by livestock auction mart businesses in the UK are numerous and these are, according to respondents, expected to worsen rather than improve in the near future.

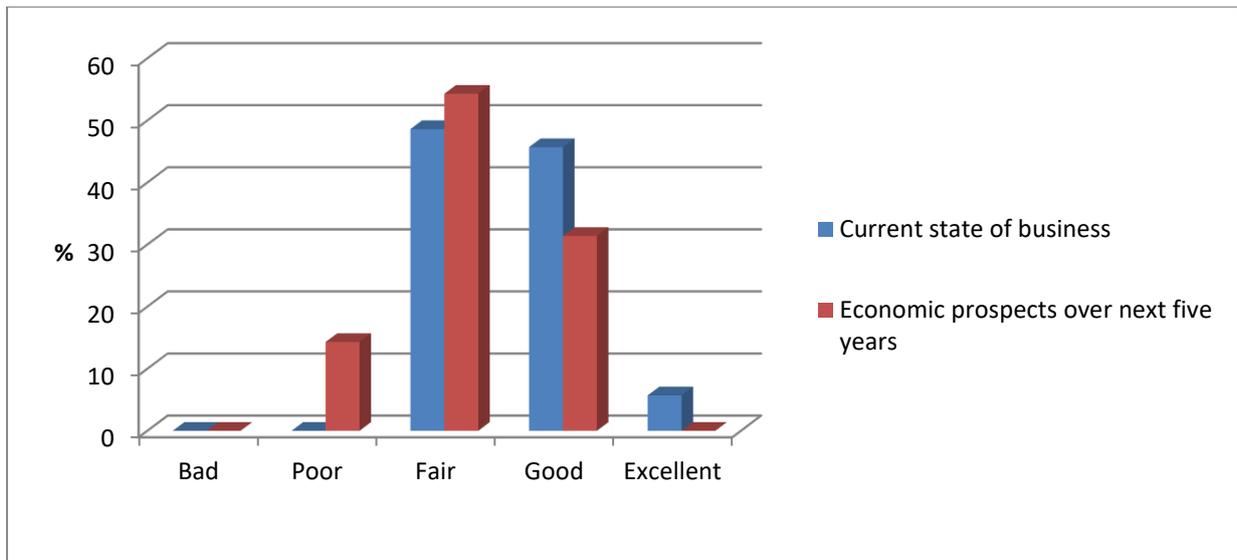


Figure 3. Economic prospects of business over next five years according to survey respondents

5.3 Main challenges faced by livestock auction marts

According to survey respondents (Figure 4), the most significant challenge currently faced by livestock marts in this country is the decline in livestock numbers and more specifically the decline in numbers passing through the mart.

The major challenges really are, you know, livestock numbers in the area (A26)

I think it is more the fact that there have been a difficult couple of years for beef and people that would have lost money aren't keeping as many stock (A22)

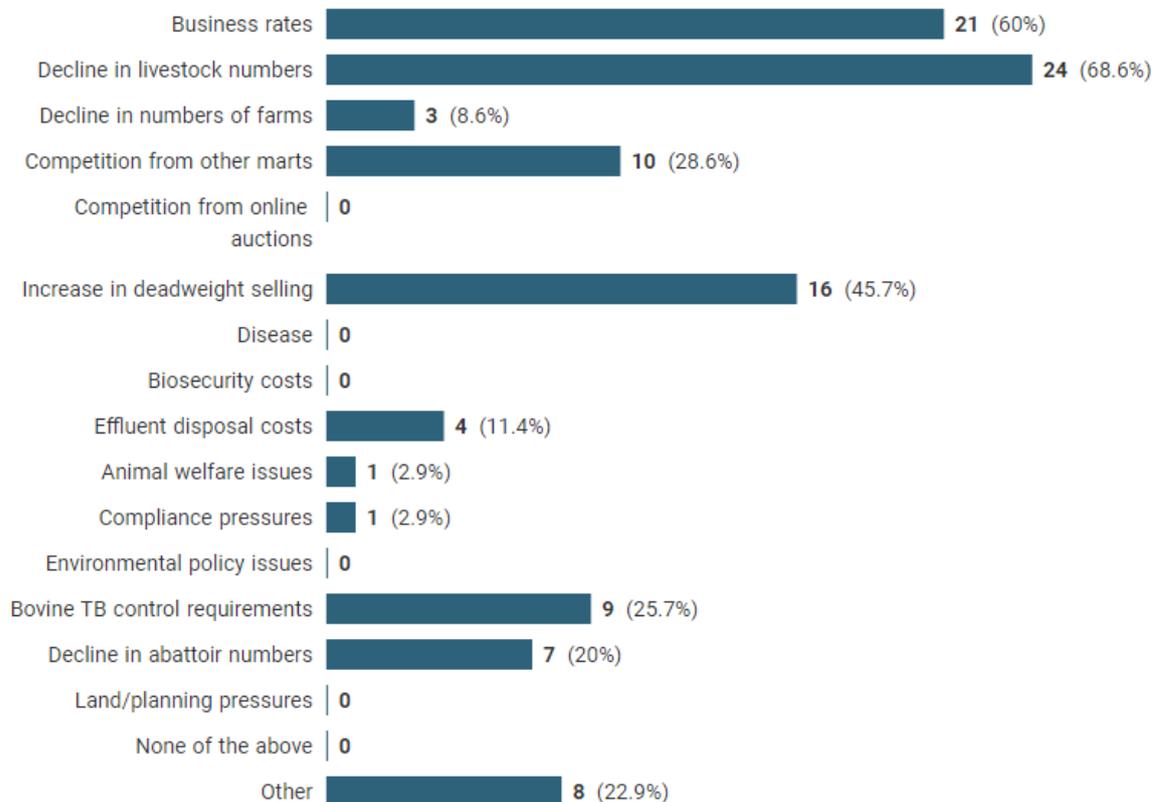


Figure 4. The most significant challenges currently faced by auction marts businesses

Several respondents attributed the decline in throughput to both a lack of succession and a lack of labour on farms, patterns which are leading to smaller farms being swallowed up by larger businesses⁷. Numerous other factors exist which also influence decisions around keeping livestock, such as changes in agricultural policy and terms of trade (ADHB 2017), but according to respondents, the replacement of numerous small farms with fewer large farms presents a challenge to the liveweight business due to the tendency for larger farms to sell most or all of their animals deadweight, and thus bypass the live auction system completely, sometimes due to contractual arrangements with supermarkets.

Demand for meat products can fluctuate at any given time according to temporary variables, such as season, the import/export market, and regional/national/international crises. But longer-term cultural changes, such as transitions in dietary choice, were seen as a concern by respondents due to the potential lasting impact on demand. Findings reveal a fear that overall demand for livestock will continue to dwindle due to societal changes around dietary decisions, such as the movement from meat-supplemented diets towards vegetarianism, veganism, or flexitarianism. The vegan movement was one of the most frequently referred to livestock industry issues amongst all types of respondent and while some referred to it as a 'fad', many regarded it as a significant threat to both their farming business and the long-term viability of their local auction mart.

I can see demand for red meat falling as a result of (dietary changes) (A5)

The second greatest challenge, according to survey respondents, was reported as being business rates, one of many costs referred to by auction mart operators.

Our rates have gone up here and we used to benefit from some discretionary rate relief but that's beginning to vanish (A12)

It was suggested by some call for evidence respondents that business rates for auction marts be reduced in order to ensure their survival.

Business rates are a significant cost faced by livestock auction marts, alleviation of this cost could allow marts to invest and provide a broader service to rural communities (Anonymous – Call for evidence)

The third biggest challenge, according to the survey, is an increase in deadweight selling and the use of collection centres. This is a trend which has been driven by supermarkets from the 1990s, whose power to dictate prices and trends associated with the livestock industry has resulted in significant obstacles for the livestock auction market (Rickard 2019). Both farmers and auction operators expressed frustration over this fact, with the main reason cited being that livestock markets set the price, and without them, nobody would receive a fair trade. Many referred to a 'use it or lose it' principle, referring to the fact that prices achieved via other routes to market for sheep and cattle are still largely driven and kept fair by the continuation of sales through market, which will affect all sellers, not only market attendees. As stated by Rickard (2019):

"Auction marts are not only intuitive and transparent but also as neither buyers nor sellers can unfairly influence the price, they ensure that the price achieved is 'fair', i.e., it accurately reflects current demand based on the available information" (ibid: 1)

According to our respondents:

⁷ Reported to be less of a threat in Northern Ireland

There is not a livestock farmer that, that doesn't rely on an auction market for something. They may not trade directly with an auction market you know. I have had it before at national sheep events where sheep farmers come to me, 'I am selling deadweight, we don't need a market'. Well, hang on a minute! Did you sell sheep at £120 last spring when they got very, very dear? 'Yeah, I did thank you very much, but they all went deadweight'. Why did they go to that price? 'Well, because there was a national shortage'. Yeah, but would abattoirs have paid that money? 'Oh no, probably not'. No, well you know, thank your livestock market for having that, for pushing the [...] deadweight price up (A11)

My dad always tells a story about meeting a dairy farmer at a dinner he was at and my dad said he owned the livestock market. And he said; oh well look you are in a bit of a dying business aren't you? And dad sort of took a wee bit of offence and said; can I ask what you do with your 'fat cows' and your 'cull cows' you don't use any more? And he goes; well there is a dealer who will come to the yard or I take them direct to an abattoir or a dealer will come and buy them off me. And dad goes; okay well how do you know how much they are worth? Sorry, what do you mean? And he goes 'if a dealer offers you this price how do you know he is not offering you too little or too much; how do you know he is right?'; ' Well, I listen to your market report on the radio every week'. And dad goes, 'and if that market report wasn't there how would you know?' And he had no answer for him (A Anonymous)

This detail was repeatedly referred to by interview, survey and call for evidence respondents, and while many individuals understood those farmers who might alternate between live and deadweight sales according to price, those who were particularly loyal to the mart and its selling model felt that such selling behaviour was not worth jeopardising the future of their local and other auction marts over.

It's important to have these markets and get the good stuff going through the markets to keep the prices up (A15)

Other challenges, in order of importance, include competition from other marts, bovine TB control requirements, a decline in abattoir numbers, effluent disposal costs, bad debt, a decline in the number of farms, animal welfare issues, compliance pressures, health and safety legislation and what was described as an 'anti-auction agenda' from supermarket chains and large abattoirs. Some of these challenges are explored in further detail below.

5.3.1 Competition

Respondents had little to say about competition from other markets, except to comment on how some regions of the UK saw little competition in comparison with other regions where the frequency of markets was still relatively high. Competition from other markets is largely regarded as healthy. A number of farmers expressed dissatisfaction at the mergers that had occurred in their local area, where one auction business operated multiple auction sites.

They've attempted a take over the bid for the whole of the area and it's not good for anybody to have a monopoly (F20)

However, many auction operators saw such operations as 'the future'

Aside from that presented by other markets in the surrounding areas, competition was also referred to with regards to deadweight sales and collection centres. Some regulations, such as movement rules, were described as being anti-competitive, as were some supply chain limitations on sourcing livestock such as customers only buying farm-assured animals, non-market sourced animals, or contractual limitations imposed on sellers by supermarkets. One auction operator described how such monopolisation of the market is affecting the throughput of fat cattle through the market.

Buyers are so few in terms of the big abattoirs because they are highly regulated naturally in what they are doing so they are few and far between. And the control of that market is in the hands of very few and they then change a policy and say, 'we are not going to buy from livestock markets any more for welfare reasons' [...] So they cut us out and they don't want us in the marketplace for the sole purpose that they can control the industry which they have pretty much done. The lucky thing is that we are very important on the store side and they can't control that and they are going to struggle to [...] I honestly think that in ten years' time you won't see a fat cattle market. I think they will all be gone (A24)

5.3.2 Disease

Diseases such as TB and FMD were referred to as posing challenges to business resilience, in terms of the broad effect disease outbreaks can have on the livestock industry and auction mart businesses, but also more specifically with regards to limitations imposed by control requirements.

The one point that I would make that is affecting us very badly is TB and I am sure that you have heard that in other places. The TB situation is deteriorating around here [...] So many of our clients are tied up with restrictions that they can't come and see us. They can't sell in the market. We have done some private trading on their behalf but it's not particularly satisfactory (Anonymous auction operator)

Disease outbreaks tend to force transitions in buying and selling patterns and practices, often temporarily, and as has been seen with the COVID-19 outbreak, this extends to human disease (see section 6). They also require rapid transitions to be made by marts themselves in order to try and accommodate new ways of looking after their customer.

Of those respondents interviewed, concern regarding potential future outbreaks of animal disease was expressed by several.

Disease would be the biggest concern to me. If we had an outbreak we would all be out of a job tomorrow (A17)

5.3.3 Costs

Other costs mentioned, aside from business rates and effluent disposal, which act as a hindrance to auction mart businesses include staff, marketing, cash flow (see bad debt section 5.3.5), and increasing insurance costs arising from incident claims.

We can't really absorb a lot more if insurance starts to skyrocket, you can't really absorb, you know, too big an increase in that (A22)

Cost of advertising was mentioned several times, although many auctions have reduced paper advertising in favour of online platforms.

5.3.4 Staff

While staff overall appeared to be highly valued and very well treated at all marts visited, staffing also presented a variety of challenges for many. The most challenging issue associated with staff appeared to be cost. However, one particular challenge that seems pertinent to some marts only, is the succession of new auctioneers. Attracting new auctioneers or auction managers who are right for the job has proven to be 'tremendously difficult' for some marts. And for those markets who are able to recruit auctioneers, time pressures can impede the efficient training of new recruits.

We try and employ all our auctioneers so if we need them we get first pick, but trying to bring on a young auctioneer is difficult even though we have five sales a week. Trying to give someone the time and the training to get stuck in is difficult. We have had three young fellows who have given it a go and have got on fine but maybe it is our fault as well, because maybe they aren't getting that real exposure to really push on with their craft (A20)

Auctioneers themselves reported being attracted to work at a mart not just for the job itself but for what the mart offers. One auctioneer was attracted by the 'vision' of the market operator and smaller, more remote auction mart operators admitted that the position of the mart might act as a deterrent to potential new staff. Several operators also require their auctioneers to be experienced or qualified in the practice of chartered surveying, estate agency etc.

Another auction operator believed that because some auctioneers, once established at a mart, could end up staying at that site for their entire working life, then little room was available for new entrants.

We have to move on and let the young ones come into the industry (A4)

Others believed that good auctioneers were headhunted by bigger companies offering better conditions. Workload, long hours and having to deal with difficult customers were cited as possible reasons for the difficulty in attaining new staff.

However, other marts reported no problems in finding workers.

There is a queue of auctioneers, but it is very hard to find good auctioneers (A22)

Here, specifically, there is a queue of people who want to come and work here and we couldn't take on all the people who have approached us. Where some of the outlying markets, where we have had to look for people to come in, its more difficult. Everybody wants to be where it's all happening (A5)

The life of an auctioneer usually begins at an early age, and some marts demonstrated a 'grow your own' preference for bringing people in at a young age and training them to fit the auction mart in question.

I always wanted to be an auctioneer but it is so hard to get into. There's not many opportunities in terms of, well there is not many livestock auctions if you think about it across the country. There's not that many positions (A6)

Few factors was discussed regarding other members of staff apart from how important they are overall. But many marts take recruitment of staff very seriously. Drivers need to be well-trained and other staff members play an important role in the development of trust and reputation. No auction operator works 'alone' and one respondent described all workers, including himself, as cogs in a giant machine.

We're one team. There are no individuals. We are a team (A4)

Interviews with farmers revealed that the reputation and qualities of an auction operator/ auctioneer and staff are of vital importance to the auction experience. While the majority were generally happy with how they were treated, some acknowledged that they had been known to, or would, move their business from one auction to another due to an unsatisfactory experience with a member of staff. At the same time, some auctioneers proved to be so popular among customers that some farmers revealed they would be willing to move auctions if an auctioneer took a job elsewhere. The need for farmers to be made welcome, recognised, respected and treated fairly should not be disregarded.

It is all down to the staff, as I said. It is all down to the staff and the pleasantness of staff. How you are treated. That is the main thing. [...] Some markets have made it very, very well. Others maybe not so much. That is where you would be more loyal to the ones you are welcome in (F35)

A few years ago certain auctioneers all they done was have a cup of tea and have something to eat with a dealer, and now they mix with the farmers because unless they've got the farmers they've got nobody (F21)

A particular challenge acknowledged by a number of respondents belonging to both the auctioneer and farmer categories was the treatment of staff by customers. Some reported high stress levels associated with farmer interactions. Such interactions ranged from mild 'stick' to 'abuse' and several staff members were reported to have quit due not only to the high pressure environment but lack of boundaries shown by customers, who might call at inappropriate, out-of-hours times to aggressively complain about the day's trading.

The abuse that he got was just to be too much (F Anonymous)

[You need] to be thick skinned as well because you do get abuse as an auctioneer (A6)

It's a stressful job. You get... With anybody doing selling to the public, and if somebody gets a poor price for their cattle, they get blamed for it (F29)

Folk talk about bullying at work, and things like that. But sometimes there's far more bullying goes on, a different sort of bullying (F34)

There existed a sense of occasionally being taken for granted by farmers among individuals working at auction marts, and while some farmers recognised this, it was usually because a friend or family member had worked at a mart and revealed the discomfort that could arise from the occupation. It is important to state that this treatment or experience was not reported at all marts or by all mart workers, and where it was the case, auction workers were extremely understanding as to the pressures farmers are under.

5.3.5 Bad debt

Livestock markets for better or for worse are the surrogate banking system for the rural community. And so we get intimate knowledge of farm economics and the financial wellbeing of farms and farmers because essentially the first signal tends to be that they are not paying their bills. And we are used as an easier recourse to finance than the traditional banking sector and often that is just a couple of weeks of interest free credit. But sometimes that becomes, 'can I buy some 'stores' and fatten them and bring them back to you and will you finance me through that period?' Or, 'I am short of a bit of cash flow at the moment so can you finance me for that so that I can buy some stock off you?' (A16)

We realize that we need to finance our business because going right back in history when the butcher came to the market to buy a fat beast he wouldn't be able to sell the steaks for five weeks afterwards. So the professional upstanding agent in town would say, 'don't worry Mr. Jones the butcher, we will allow you to pay once you are paid by your customers and I know you and I knew your father and I knew your father's father so that is all alright isn't it? We are all part of this little local town'. Unfortunately with the globalization, nationalization of the whole thing it is now not Mr. Jones the butcher it is Mr. [Supermarket] who takes ninety to one hundred and twenty days to pay their suppliers who then would take ninety to one hundred and twenty if they could to pay their suppliers. And it all ripples down the chain from the original, for very good reason - providing credit. The

supermarkets have no kind of compelling business need to have those terms with their suppliers. They just do it to make more money which is a compelling business reason. But it ripples through the chain and causes problems down to people who can't afford to provide that level of credit. And it really is not getting paid for three months, it's how am I going to pay my bills? And less secure people than at the supermarkets then go bankrupt in the chain and that then ripples through causing problems for everyone else. So credit is a huge problem in the industry. And it will continue to be so probably until there is significantly more consolidation because at the moment if I say to someone, 'I won't sell to you on those terms you have got to pay your bills within a week' and they will go, 'well I will just go up the road then'. And so competition on credit oughtn't to be a way that non-banking sector operates but unfortunately it does (A16)

Bad debt is self-inflicted (A26)

Bad debt is one potential contributing factor to a market failing or at least, struggling. Bad debt is accrued by a business through the provision of credit to buyers who then delay, or fail to make, payment. Auction managers with substantial bad debt tended to assume that all markets suffered similarly, although several managers stated that bad debt was either not a problem for their business or they did not have any at all. Of those for whom bad debt appeared to be less of an issue for the business, this was due to either stringent methods of control, such as strict credit control (credit limits), restricting buyers from purchasing again until paid, or because sufficient insurance was in place as a cover, in the form of specific credit insurance or what was described as an unofficial 'healthy kitty to absorb it' (A15). One auction manager revealed how the business had moved from an unofficial financial buffer to credit insurance on certain types of stock, and although extremely costly, felt it worth it due to the number of creditors who had subsequently gone bankrupt. Several mart managers discussed one to two week credit limit rules, with special arrangements involving longer terms for customers with whom they had a long-term history. Some marts charge interest on credit, while others do not (the latter often applies to the smaller marts).

We have an insurance policy through a company on, you know, the highest risk people, and we have got everybody inside that credit insurance which is just fantastic (O3)

I go to meetings within the LAA and you get all those boys up there talking about bad debt and I just say well just hit them harder. Stop them. Take a harder line and you will be better off for it (A11)

From our point of view now it is more important that we manage the credit and it allows us to be harder on credit control, because if someone doesn't pay fast enough we are comfortable with our supply of stock that we can just say; sorry you are not coming this week. Without the worry that they are going to piddle off to another market twenty miles up the road and make a flying trade up there because someone else is prepared to give them more credit (A26)

For other marts, bad debt was a consistent concern.

We are in a vulnerable position in that somebody can come in, wave their finger in the air, and buy something. And then it's our job to persuade them to pay us, and we guarantee the farmers the money we pay on the day or we BACS it in later in the same week if that's how they want to receive it. It is a constant struggle to keep the buyers up-to-date. Some of them are very good. Some of them are very bad. The majority are somewhere in between. But we tend to try and deal with everybody on an individual basis. We don't have the sort of blanket system, and if people are in a pickle or they need a bit of help, we've always been prepared to listen (A1)

Some of them will take too long pay, either because they are to the hilt at the bank, and the bank won't give them anymore in which case they are trying to use the auctioneers as a bank interest free bank. And delaying payment, but because the commission rate isn't great you see, you have got to get the money in, otherwise if you are not careful we are just bank rolling the industry and you know, we have got costs and the money has got to come into us. We can't pass it on, because we pay out in a week (A15)

Any difference between themselves and other markets declaring greater control over debt was, according to some respondents, due to differences in types of sale, types of stock sold, and differences in terms dictated by such differences, as well as potential competition from other marts in the surrounding area. The supply chain and payment delays from end-of-chain buyers influence the level of bad debt for many marts.

One auction manager suggested that cheques, as they no longer come with a guarantee, should be scrapped entirely from the buying process and all transactions moved to direct bank transfers, at the same time as recognising that restricting the means by which customers are able to pay becomes an inherent challenge to the business.

It is a very strange, well meant, well-constructed business model which worked a hundred years ago, absolutely fantastic but I think the community benefits and the competitive benefits far outweigh the alternatives and give me every sense that we've got to carry on (A25)

One call for evidence respondent remarked that one role of marts is to shield farmers from risk by acting as a 'safety net', and so to:

Manage the problem of bad debt auction marts [need to] try to stay abreast of difficulties with companies and select buyers that have a good payment track records. Some marts use fatstock insurance policies. 'Payment on day' discounts are often offered to buyers to reduce the amount of exposure, and whether some insurance held or not it is best practice for auction mart companies to retain some profit annually to build a reserve to cover bad debts (Anonymous – Call for evidence)

The biggest point that I would like to get across is that markets put a financial control into the system and help to grease the wheels with a bit of credit on occasion to facilitate trade. And also guarantee payment so that when someone sells something he knows he is going to get paid (A27)

Bad debt, where it was reported as existing, was reported at being anywhere between one million and four million pounds per auction mart.

5.3.6 The loss of small and local abattoirs

Numbers of red meat abattoirs in the UK have declined dramatically since the early twentieth century, from approximately 30,000 in the 1930s to 249 in 2018 (Kennard & Young 2018). This has led to significant changes in the overall slaughtering infrastructure across the country. Such a transition impacts not only upon those businesses directly affected by industry changes, but also local producers, consumers, animal welfare, local communities, and the environment. As the UK public moves increasingly towards greater demand for locally produced meat, and increased calls for improved animal welfare and environmental consideration in the food production system, the waning number of small, local abattoirs creates a number of barriers to the achievement of these goals. The loss of local slaughterhouses was recognised as a loss by most respondents, due to the negative impact on animal welfare, the carbon footprint of businesses, transportation, and fuel costs. With regards to livestock auction marts, fewer abattoirs means

fewer buyers and many of the larger companies are more reluctant to procure animals through livestock auctions.

Our sheep have to go [to another county] to be slaughtered. There's no one else will do small numbers for people to sell box scheme [...] so the situation for small farmers is very dire, very dire indeed (F19)

We've got to be very-very careful that we are not led down this route which is an increasingly industrialised system which is solely about zero competition and supply chain management because I think you will see less people farming under those circumstances (A25)

We had an abattoir here. It was a brilliant success, but it became small... more isolated and couldn't compete with the big boys, and it was a very sad day it closed. We've no killing... we're one of the most densely populated counties in Europe for livestock and we have no killing facility (F33)

What is the biggest link, the biggest weakness within the food industry? The meat industry? The biggest weakness in my view is the lack of abattoirs (O6)

I think the fact that so many hundreds of thousands of sheep go out of Cumbria to be slaughtered in Wales or Devon, to be brought as carcasses, to be brought back to supermarkets in Cumbria, I don't think anybody's going to stand that anymore. Not only in terms of animal welfare, although I would argue that the welfare conditions on wagons is second to none. But also that the food miles and the carbon footprint of that trading. So I can see significant changed in the future where we might have a drive back to local animals being slaughtered locally and sold into local markets (Anonymous)

There's been a real rationalisation on the abattoir system [...] and that's very much affected the livestock market (A3)

5.3.7 The ageing profile of the market attendee

If you go out there, you won't see too many young fellas out there (F8)

It is widely acknowledged among participants that the larger proportion of market attendees tend to be in the 'older' bracket and for many, this is perceived as yet another challenge faced by the marts. Overall, the age profile of the auction mart attendee at visited marts was in the over fifty category, although several marts saw a good range of ages across all farmers. While the former pattern of attendance is the norm, many respondents expressed concern at the disproportionate numbers of young farmers attending market, stating it necessary to encourage greater levels of attendance from those under fifty.

The reasons for such a skewed age profile at marts were discussed by various interviewees. It was frequently cited that the older members of the farm (usually farmers) are those who attend the auctions, and younger workers, if there are any, tend to stay at home to do the work.

My son likes coming to market but he's busy working and it's just the fact it's not as hard work for me to bring the livestock in so he stays at home [...] He's only 22, but he hasn't got a partner or anything so I think probably if he doesn't find a partner, he might find it a bit isolating (F1)

This pattern is partially attributed to either the physical capabilities of the older member or their desire to maintain control, and partially to the perception that younger farmers are less interested in the auction experience. At what point this 'cross over' from older generation to younger generation occurs, it is impossible to define. One younger farmer described how in his family it

had skipped a generation entirely. But it was suggested on multiple occasions that it is this division of labour according to age that could be perpetuating a decline in auction mart attendees.

A lot of young people don't come because they're at home working and then their dads come and it's a shame really. Parents need to like maybe hand over a bit more of the responsibility but everyone's so busy and there's no time. It's really a lot of pressure on people these days. It's hard to make money in agriculture now (F25)

The need to hand-over was recognised by some of the older farmers.

I've nearly handed over all the buying to my son. I've got to 80, I don't want to be doing this. He ought to be in control of it (F23)

A lot of the older people don't let go of the reins (F28)

Equally, some respondents attributed the fact that there were so few younger people attending the mart to the general lack of young farmers moving into agriculture. Multiple barriers to farming are perceived as being in place to prevent young people entering the industry.

The younger ones, I think they have got that much work at home they haven't really got the time to come [...] There isn't that many young ones getting into the industry, as a small farm is gobbled up by a bigger one (F10)

Farmers now generally tend to be older [and it] certainly doesn't make any economic sense for a young person to go out and buy a farm, buy machinery, stock their farm. It just can't be done (A22)

For those who showed concern regarding the low numbers of younger farmers coming to the market, a need was expressed to encourage younger farmers to attend the mart, not only for the purpose of gaining selling experience and integrating into the business community but also to prevent them from becoming vulnerable to social isolation. Ideas on how to encourage younger farmers to the mart site included training events, sporting events, competitions and shows which involve a prize element (this could be extended to a longer term competition involving a loan from the mart itself).

So generally younger people are farming part-time. So they are getting jobs, working in an office or they are driving a lorry. Or they are doing something else, building work, and then they are keeping a few cattle and so in that sense, they can do with less (A22)

Having spoken to people who attend other markets they seem to be of the view that we have a younger crowd than can be found in certain other places and I think that's because we have got quite a lot of small farms, which are essentially family farms. The people who we have got, a strong young farmers in the area, and livestock farming is much easier to get into on a small scale than arable for instance, so you can start off with a few sheep even if you have got to keep an eye on Uncle Herbert's croft (A1)

A large number of respondents also showed concern for the 'gap' between being able to attend Young Farmers Club (where maximum age of attendance is 26 years old) and reaching farm-handover time when younger farmers might be more likely to attend market. The assumption is that at 26 a farmer might be marrying and having a family, but this is not necessarily always the case, thereby resulting in a vacuum of social opportunities for young farmers and opening up the possibility for social isolation and mental health issues. Bearing in mind a recent report where 84% of farmers under the age of 40 cited mental health issues as the greatest invisible challenge

to farming (Farm Safety Foundation 2020), both the auction mart and the older people who attend are well placed to help bridge the gap.

I think the challenges are [...] keeping the younger generation involved in markets (A4)

I think sometimes there isn't enough permission by the older generation to let the younger generation carry on (A12)

It's their future at the end of the day, if they don't use the market, they will lose them and it will be like Ireland. The farmers will be dictated to what the price will be they will just have to take it (A9)

How we engage with the next generation that spend most of the time doing business on their smart phone? (A5)

At that time they might be starting young families, which then adds extra pressure. So, they become more isolated from their friends, perhaps even from their family. The farming pressures are increasing because they might well have taken on a farm, or a partnership. They've got a new marriage, kids... you know, a lot of pressure points starting to build together. So, in that 26 to 40 age group, there's a lot of additional pressures, in addition to farming pressures, that they're having to contend with (FS8)

5.3.8 Animal welfare and animal welfare groups

We are food producers. We have a responsibility to look after our animals, and then I think animal welfare will be a top priority and quite rightly so. And there is absolutely no reason why markets can't be part of that. If you have got good facilities and you can move your animals in and out easily, and you can load your lorries easily, [and have a] place to load your lorries there, animal welfare should not be compromised at all in these places [...] You can use your markets to improve animal welfare (O5)

Five mart operators reported difficulties with animal welfare groups during interviews, and while auction operators stated that they tried to engage as positively as possible with protestors, one was keen to move from a public site to a private location in order to have more jurisdiction over who could visit the site.

Animal welfare proved to be of great importance to the vast majority of respondents, and often new marts are designed to ensure minimal stress on animals passing through. Some respondents described a variation in trading standards between regions, expressing a sense of unfairness at the varying levels of stringency enforced across regional borders. But overall, farmers tended to equate a sense of pride with good animal welfare. Additional to regulatory obligations, further pressure is felt by a number of auction operators as a result of animal welfare groups visiting their mart or picketing outside. While it was generally recognised that animals are open to experiencing stress through being sold at an auction mart, due to the fact that fewer local abattoirs exist, a number of respondents stated that the more common practice of sending animals using hauliers might prove more stressful due to the length of time that an animal might be travelling. Also, the practice of using collection centres can sometimes mean that animals are kept in lairage overnight which might also prove stressful. One farmer described how they might get a better price for their animals at a market further away but in principle, preferred not to travel so far with their animals on the basis of welfare.

I do not agree or do not see the necessity of carting animals all over the countryside (F18)

Our cattle sales are sold with a catalogue, people's names on the catalogue. They stand there when their stock is sold so they like to present something that is correct and good

and got no problems. We sell our sheep through the sale ring, at both markets and I think perhaps 20 years ago you'd get a farmer put a lame sheep at the back of the pen under the auctioneers walkway and he wouldn't come out until the end of the day. That can't happen anymore because they all come through the ring, so they all get seen (A21)

Also, a greater level of surveillance is in place, with more inspections, peer-to-peer observation, and the rapidity with which videos and images can now be shared via social media.

Some debate exists as to whether it is less stressful to sell animals direct from the pen rather than run them through the ring. Examples were given of some of the smaller, more traditional markets in the country, as well as markets in France and New Zealand.

I like the way they do it in New Zealand. I was over in New Zealand 3, 4 years ago and it's a lot easier on the livestock. They walk along the top of the pens and sell them. It's so much less stress (F28)

It is still common for this to occur for sheep in this country, but less common for larger stock.

5.3.9 Other challenges

Auction operators referred to numerous other factors with which they had to contend or which they perceived as potential challenges in attempting to maintain a viable business. Such other challenges were reported as i) gaining and maintaining the trust of farmers and 'keeping them on side to still support this, 'the live sector' ii) the cessation of the BPS payment and how the withdrawal of subsidy payments might affect the sustainability of some of the more vulnerable farming businesses and iii) Brexit and the repercussions of import/export regulations. The latter proved a particular worry for markets operating in Northern Ireland.

Many of the challenges to the livestock industry as a whole are inextricably linked to those challenges already mentioned as being faced by livestock auction mart businesses more specifically. Where businesses trading in livestock become vulnerable, that in turn creates a more fragile situation for the markets they use. Interviewed farmers reported rising costs, changes in dietary patterns, disease, regulations, demand, competition from cheap imports and lab produced meat, and changes in policy regarding land management requirements, such as a move away from production towards conservation, as some of the challenges currently facing their businesses. And significantly, across all respondents, the perceptions of the general British public towards farming arose frequently as an issue. A high proportion of respondents reported feeling poorly perceived by the general public, and misrepresented by both mainstream media and social media. They expressed a sensation of bias being demonstrated against the livestock industry in particular and referred to programmes which distorted the reality of the British meat industry by portraying it as mirroring livestock industries of other countries.

If you're outside agriculture, I don't know what importance people would put on it. They probably wouldn't understand it, wouldn't know. And they wouldn't be interested, because the media nowadays seems desperate to turn the public against us. Whatever reason I don't know. We're polluting the atmosphere, we're not good animal husbandry, we're... meat's bad for you... I think it's sad the negative reporting we get because there's not really any scientific evidence to back up most of those comments. And I would say the [media] were extremely biased against agriculture (F33)

5.3.10 Business resilience in the face of crises

Livestock auction marts have proved to be particularly vulnerable to the impact of unprecedented crises. Disease outbreaks in animals, such as foot-and-mouth in 2001 and Bovine Tuberculosis more generally, can prevent large numbers of animals from being sold at market. Due to the

necessity to continue selling animals wherever possible, many farmers who usually support their local mart are either forced to go direct to slaughter or sell their animals online or through private buyers. Findings suggest that shifting between buying and selling formats can either positively or negatively affect the use of auction marts, but the overriding danger exists that once a seller moves from live market to deadweight selling, it might be more difficult for them to shift back. Many respondents reported having been forced to sell their animals direct to slaughterhouses during the FMD crisis. Some auction managers stated that this caused a significant change in selling patterns, following which a proportion of farmers did not return to live sales. However, many respondents also revealed that loyalties to auction marts were further fortified by the way that they were treated by the slaughterhouses during the crisis, stating that 'abattoirs just drove the price right down' (A11).

In theory one would have thought markets would never have opened after the foot-and-mouth emergency of 2001 but the buyers collectively treated the farmers so badly that the opportunity of going back into the live auction was very rapidly rekindled. The trade prices went up, and the abattoirs' field day came to an end (A1)

Many respondents expressed distrust of abattoirs, especially in regard to their relationships with large supermarkets, as a result of the above.

They knock you for this and they knock you for that, it's too fat, it's too thin, it's too this, it's too that. Once it's on the hook, it's got to meet exactly their criteria otherwise you get penalised and the price per kilo is down, or like I say, if it's too much weight they won't pay you for the extra weight. You're totally in their hands (F18)

5.3.11 Why do markets fail?

Some of the reasons given by respondents for markets having failed include internal problems, such as bad debt, poor management, or a disinterested family successor, and external problems, such as the local authority requiring the land for building houses or car parks. But the amalgamation of any of the aforementioned challenges might contribute to a livestock auction market ceasing to continue. The ramifications of such closures can have a significant impact not only on those closely associated with the mart businesses themselves, but as demonstrated in section 3, the livestock auction mart is not just a place to sell animals. It is important, therefore, that those wishing to become more resilient acknowledge, identify and act upon all opportunities which might enable them to survive.

5.4 Business opportunities and the path to a more resilient market

This section will briefly outline a number of factors to be considered in the building of a more resilient business, as well as the creation of a more appealing market experience for those attending. Aspects of diversification and marketing activities will be briefly touched upon as some insight has already been offered into other factors which improve the market experience for the customer. While price and proximity appear to be paramount, farmers revealed that a number of other factors feed into their decision-making process around which market to attend and why. Some services are already highly valued by some auction mart attendees, while for others, the character and history of a mart might dominate as a reason to attend.

5.4.1 Ensuring the survival of a mart

Survey respondents, when probed regarding measures which could be taken to ensure the survival of their mart should livestock numbers decline significantly, claimed the following routes would be taken i) reduce costs, such as implement staff redundancies ii) increase commission rates iii) reduce number of sales iv) amalgamate with another mart/s and v) diversify.

One mart operator in particular identified the need to approach such an issue from a bottom-up level, integrating the customer into business decisions.

After holding a customer meeting to ask what the customers want, and explain that you use it or lose it, it was agreed to change the time of the sale, and this strategy has so far been successful (Anonymous – Survey)

5.4.2 Diversification

Among the many significant changes which have occurred in the evolution of auction marts is the addition of diversification activities (See Figures 5 and 6). Diversification allows a business to become more resilient in the face of changing market forces and the inevitable fluctuations in turnover in response to multiple variables occurring throughout the year. Such diversification activities might take the form of an insurance business, estate agency, land agency, print business, finance business, income from unit rentals, and the hiring out of spaces for weddings, parties, sporting events, theatre events, conferences, exhibitions and so forth. Surveyed marts varied greatly with regards to the proportion of their income which came directly from livestock sales. One auction business stated that only 30% of its turnover came from livestock sales, while 64% of all surveyed businesses stated that livestock sales still made up over 90% of the turnover. Other non-livestock sales made up the larger proportion of the remaining income. So while diversification might remain low on the agenda for some market businesses, others have recognised their need to expand beyond simply the selling of livestock. While the principal reason for this is likely to be economic, the result is usually a mart that is more appealing to members of the agricultural community, and in some cases, also attracts the general public.

[So why do you think you are still going? Because 80% of markets have shut since the 60's across England and Wales [What is it that you think is keeping you guys alive?] It's because we have diversified [And if you hadn't diversified?] We wouldn't be in existence. We are providing a service. We don't make money selling the livestock. It's the other things that we do (A6)

A mart's ability to diversify will depend upon a number of factors, such as ownership/rental status, availability of space, attractiveness to ancillary businesses, customer demand, knowledge and skill-set of the operator, creativity and vision of the operator, and sufficient funds for any initial outlay which may be required for a particular activity. Operators of larger or newer marts frequently identified the risk associated with a single-business model and therefore diversification activities are commonly incorporated into the design of new markets.

We are in a bit of a state of unknown, aren't we? Spending £8 million on a brand new facility in an industry that's well, some might, say is slow to decreasing, that's a bit of a worry, but it's not going to be all about livestock. So we have got internal units for people who have some form of relationship with the agricultural industry, so there is an income stream from them. We've also got planning, outline planning for areas around the site as well from letting units as well. Also they have to be agricultural based as well so there is an income stream incoming from them as well, so we are diversifying into and spreading the risk (O3)

We try and do as much other work, diversification in land agency as we can do because that gives us a little bit of a cushion in a good year or bad year to have some other income coming in (A12)

By offering any of the above-mentioned diversification activities, or the below-mentioned facilities, a mart is usually increasing its value not only as a business but also as a hub to the customer, which increases its attraction in the face of competition. And where extra

services/trade/retail opportunities also attract the general public, the mart is also assisting in the bridging the gap between the farmer and the consumer.

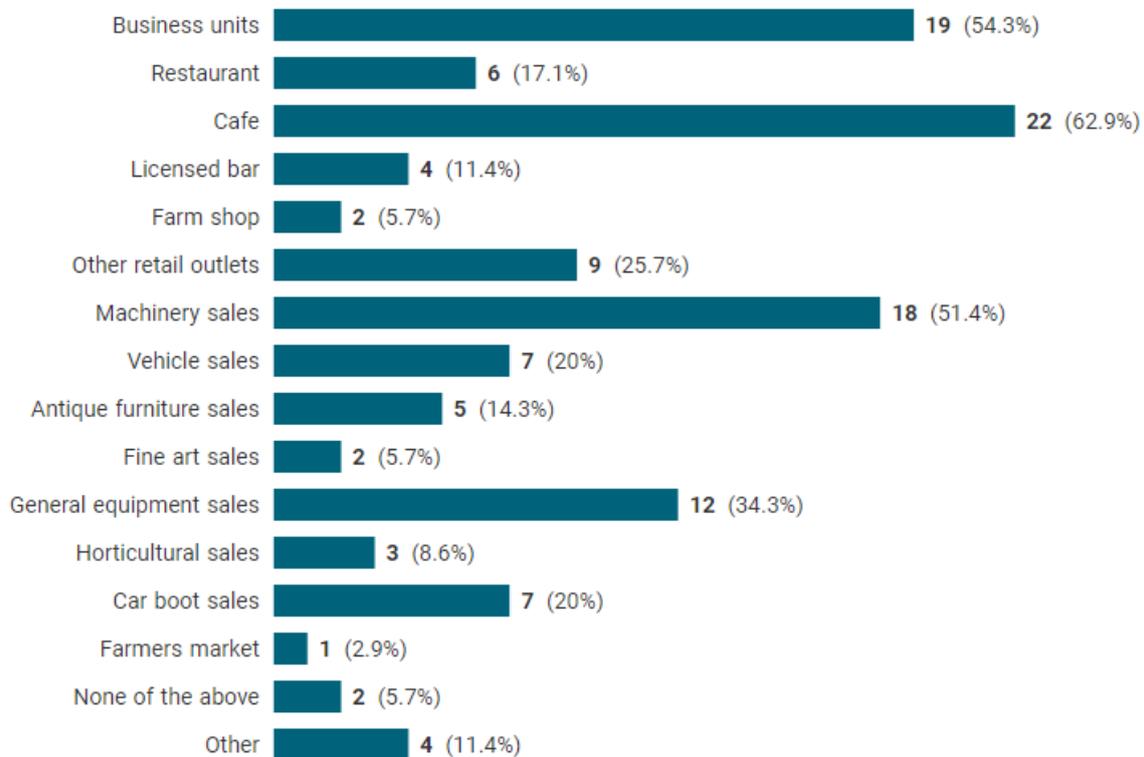


Figure 5. Proportion of marts engaging in trade/rental activities contributing to the auction mart business revenue or being located on-site

The rental of business units was a source of income for some auction mart businesses. These units were usually home to agricultural supply stores, feed stores, veterinary practitioners, machinery dealers, butchers, accountants, solicitors, insurance companies, hairdressers, ironmongers, technology service providers, land agents, timber merchants, surveyors, meat processing plants, colleges, equine supplies retailers, and vehicle dealerships, among others.

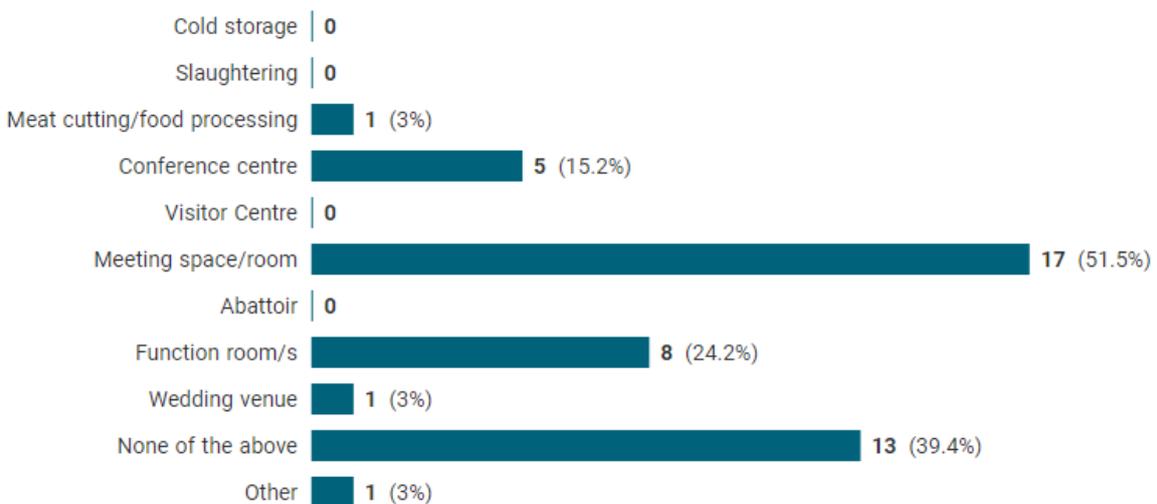


Figure 6. Proportion of marts surveyed offering facilities as part of the auction mart experience

In terms of facilities, half of all marts surveyed offered a meeting room of some sort, with a quarter offering a function room, but few offered anything beyond this.

While many auction marts have diversified, few would like to see the diversified activities take over the livestock auction activities, which continue to make up the greatest proportion of business for the majority of marts involved in the study.

This market revolves around livestock. The machinery is becoming more and more important to our income but if we hadn't got livestock here on a [market day], we only operate one day a week, and if we don't have livestock here on a [market day], we might just as well shut the door (A26)

5.4.3 The importance of good marketing

Livestock auctions have, historically, always used paper media to advertise their sales. This might have taken the form of local posters and local and regional newspapers in the past, and more recently, would have included national farming magazines and journals also. While many still use some form of paper advertising, especially for the publicity of special sales, numerous operators stated that advertising in national media has become prohibitively costly. One operator stated that his two biggest costs were staff and advertising. Consequently, and with the advent of the internet and social media which have created affordable platforms for auction marts to showcase their businesses, many marts are moving away from paper advertising. One mart operator stated how a total of nine paper advertising outlets were utilised by the mart previously, but due to opportunities presented online, only one of these continues to be used. Another mart operator stated that they run two Facebook pages out of the mart, as well as an Instagram and a Snapchat account.

We are not so reliant on paper as we used to be and I think in time I think we will probably end up not using paper and it will be all website and Facebook, but we are not there yet (A27)

Having tried things in the past they didn't work, now if I have something, we fire it up on Facebook and I can get pretty much an instant response to it (A25)

The extent to which each mart uses a website or social media varies enormously as does the use of platforms such as Facebook by each farmer. Many older respondents reported not being familiar with social media or the internet. However, younger farmers generally regarded their preferred auction marts Facebook page as being important or very important.

[Do you think it's quite useful?] Very useful. Like tonight, it'll be the first thing I do after I've had my tea. I'll go on and they put all the prices up. You can see me neighbour, the weight of his cattle and what price he's gotten (F31)

While some auction operators did not attribute an increase in business to the use of social media, others viewed their social media pages as important marketing tools, posting frequently and creatively to increase followers and views.

We had a gentleman came to the last [...] sheep sale, came all the way from [120 miles away] who had seen it on Facebook the night before and had never knew there was a store sale [here] Now he's going to come next year now and buy lambs regular so he will be an extra buyer (F7)

Marketing is still, therefore, of extreme importance to all livestock auction markets and opportunities and creativity offer the potential to increase publicity and therefore business, as well as to attract younger farmers to engage with and use the mart.

The change is really in prime stock sales. Take [auction name], we've changed that side dramatically and how we deal with it. Where there were weekly prime stock sales going back 10, 20, 30 years, that's now just a collection once a week (A3)

6. Livestock marts in the time of Coronavirus

I think what Coronavirus has shown to them most importantly as [auction] operators, but also to the wider industry and beyond agriculture actually, is that they can do the difficult stuff, and they can [...] help keep rural economies moving when the chips are really down. It has shown [...] that actually auction marts are professionally run, safe places both for animals and for people [...] I just hope that in the future we can get it back to being that sort of social, noisy, businessy, exciting, fun hub, and that farmers jump in their pick-up in the morning with a trailer on the back and look forward to their day (Anonymous)

Initial fieldwork for this study was completed two months prior to the COVID-19 outbreak in early 2020 with the report being written during the crisis. Due to the novelty of the situation, the authors felt it apt to explore the impact of COVID-19 on auction marts in the UK where possible and launched a new call for evidence alongside some secondary research.

Despite initial concerns, disease crises are, as previously mentioned, not a new experience for the livestock industry, although this is likely to be the first human-transmission crisis to affect the sale of livestock on such a significant level for decades. The industry was, therefore, likely better prepared than others at transitioning to an adapted way of functioning. While the initial few weeks of the virus saw uncertainty and some financial loss for many marts, they quickly adapted to the new situation and were identified by the government as a vital part of the food chain. New measures were introduced by the authorising bodies such as Defra, stating that only buyers could attend market, with sellers dropping off their animals and leaving the site prior to sales. It is reported that these requests were willingly accepted and adhered to by both buyers and sellers. Hauliers were allowed to stay on site, but mixed reports were received regarding health and safety, with one respondent stating that sellers needed to unload their animals personally, while another reported that sellers were not allowed to leave their vehicle at any time.

Attendees over the age of 70 and pregnant women were asked to stay away from auctions, as well as anybody displaying symptoms of the virus. Interestingly, due to shielding being in place for the more vulnerable, one call for evidence respondent reported that the number of young people attending market had increased substantially to prevent older family members from being potentially exposed to the virus, bucking the usual trend of older farmers attending market. However, there were also reports of buyer numbers dropping, of demand for certain meats drying up due to the closure of restaurant and food service outlets, as well as some international markets for UK meat being negatively impacted by the virus. Some sectors, such as prime lambs and store cattle, although impacted initially, were reported to have recovered well several months into the pandemic.

Farmers agreed a minimum price with the auctioneer in order to maintain some control over the sale, or conditional sales were agreed whereby the sale continued as normal but before closing the sale, the seller would approve the winning bid. Some marts did live streaming of auctions, while others set up online auctions, with varying success. Several marts already had a live-bidding service set up, so sellers could see their livestock going through the ring as long as they had sufficient internet connection, which many in rural areas with poor internet connection did not. One site reportedly had so many complaints from farmers due to poor connection in the area that they did not try it again. Other sites reportedly had a 10-20 second delay on the online bidding system. However, many online auctions went ahead successfully and future investment in such a service should be considered by those who have the capacity to provide it, as long as the service is fit for purpose for customers. This responsibility will rest not only with the auction mart businesses, but also with government and phone companies, to provide improved

broadband connections in rural areas. In this respect, marts can only evolve with external assistance. But the COVID-19 crisis demonstrated that markets are not scared of technological advance, even though the use of live rings is still preferred. Such a transition to electronic auctions will naturally be harder for smaller marts, as some are only seasonal markets and are not really set up for online sales in terms of either equipment or bandwidth.

The effects of the pandemic felt by mart personnel included challenges such as adapting organisation skills to manage staff in a different way, keep staff to a minimum, and ask many older workers who were potentially vulnerable to stay away. Communication required ratcheting up as buyers had to book in, unable to simply turn up as usual, and sellers were instructed to arrive before a certain time or between certain times which added extra time and management to staff workloads. One call for evidence respondent stated that the pandemic situation had caught them by surprise in terms of how much extra work was required, but it was still 'better than not operating'.

All of the above created extraordinary amounts of work for auction operators and staff, as they tried to keep their customers safe, maintain high standards of animal welfare, and offer an efficient service.

Concerns were demonstrated via call for evidence responses regarding the community impact of markets being closed to sellers. For islanders, closing small markets and transporting animals to mainland markets could cut off social contact for some islanders, and ancillary businesses dependent upon sellers would also be negatively affected. This brought with it extra challenges in terms of time and costs, as well as farmers being isolated from their usual activity.

The social impact of coronavirus is unknown at this point. It is likely that maintaining the routine of buying and selling animals helped to some extent with social isolation issues, but as with FMD, the inability to spend time with friends socially on market day is likely to have impacted negatively upon many individuals reliant upon livestock auctions marts for their social activity. There was a suggestion that during coronavirus more farmers reported not feeling 'kept up to date' with all things agricultural, possibility meaning that by not meeting at market, informal knowledge exchange and news gathering was no longer occurring within the community. Many markets increased their use of social media during this time, maintaining a connection with their customers, filming auctions, creating short videos, and/or generally trying to keep farmers up to date with general farming news.

7. The impact of market closures

Many livestock auction marts have closed already. Others face imminent closure, while a number of other mart operators expressed uncertainty as to the future of their business. Such closures can have an enormous impact upon the farmers who use them, the communities who support them, and the local economy of the towns and villages where they are based. For this reason, it is common for groups to form to try and save or resurrect closed markets. On occasion, such efforts are successful, but frequently funding or lack of local authority support acts as a barrier to these efforts.

Several stakeholders discussed towns and villages where markets had closed. Sometimes the market may merely have moved to the outskirts of the town, but on many occasions, the closure of a market meant that farmers would have to travel much longer distances in order to attend an open market. While for many proprietors of large farms, driving further to attend another market, although an inconvenience, was still an option, for some smaller farmers it signified an end to their market attendance. For some, this was due to cost. For others, it came down to the fact that their vehicle, although sufficiently roadworthy to travel several miles with livestock, was not suitable for motorways or long distances, and the cost of upgrading was too prohibitive to be a viable option.

I don't know but the older generation, they would probably have to hire a lorry. They wouldn't drive these days on busy motorways with livestock. It's a responsible job, especially with cattle, as cattle move about in the lorry more so than sheep [...] That would probably put a lot of elderly people off (F7)

Undoubtedly, losing a market in any area is a huge pressure and often an enormous blow for multiple reasons; smaller producers might struggle to get a competitive price for their stock or go out of business altogether; it might force sellers to choose alternative routes to market; local businesses reliant on the mart would be negatively impacted; it would create job losses; and the loss of a market is also reported to knock the morale of farmers who already feel disenfranchised.

When [market] closed the whole livestock production business in that area changed and quite a lot of people went out of livestock because a lot of the farms were mixed – sheep/beef/arable and quite a few farmers didn't have the livestock market on their doorstep anymore and didn't fancy travelling [...] and the whole make-up of the area changed (A5)

I would be very upset and disappointed because there aren't any other markets now within close proximity really. I mean the next one you would be talking about from where I am about 40-50 miles away so I wouldn't fancy travelling all that way. You wouldn't have the, like, community spirit, would you? I've grown up in this area knowing all the people. I know everybody. You'd just lose everything wouldn't you? You'd just lose all your community (F1)

Several respondents referred to a phenomenon whereby if a rumour occurred that a market might be likely to close, some regular attendees began to move prematurely to other markets. While this might, in some cases, be for economic reasons only, it is likely some aspect of the transition arises from trying to avoid any shock arising from a closure.

Quite a lot of farmers have said 'look, if it's going to close, I want to be in a position that I am already going [to the other market] now' (A8)

The effect on the social lives and wellbeing of the farmers was frequently referred to in discussions regarding market closures. One respondent who had witnessed several market closures confirmed the feared repercussions anticipated by other respondents.

Being at [the closing market] on the last day was like a bereavement (FS4)

It wasn't the same because the social group had been blown apart (FS4)

The possibility of closure is very real for many markets, and due to the consequences of market closures, where possible, intervention from within and without the business is sometimes necessary to ensure survival.

I find it painful to think that potential bad debt and increased financial pressure could cause many of these business to close. If this happened and the UK were to maintain the present level of livestock production this would result in more larger intensive units which may be cost effective, but do little for either the small family farm and the communities they form, nor animal health and husbandry (Anonymous – Call for evidence)

"It would be a major blow to the area"

"It would be catastrophic for this community and for the area"

"Catastrophic"

"For the community, it would be a disaster"

"Absolute disaster"

"A great shame"

"I would be quite gutted"

"I think it would be one of the worst things that ever happened for the farming community"

"We'd feel very disappointed. It would make a huge difference for the local community"

"It would be absolute hell"

"I would cry"

"it would be disastrous for the town. It would be disastrous for the way we sell things. It would be disastrous environmentally"

"It would be horrific"

"It would be very very serious [...] We really couldn't farm any longer"

"It would be a negative effect on the local community"

"I don't know what the hell I'd do. I'd be lost on a Friday, and I'd be lost on a Monday"

"Farmers here would be devastated"

"It would be absolutely devastating, especially for some of the older farmers"

Figure 7. Examples of responses to the question, 'what would be the impact if this market were to close?', from auction operators, farmer support individuals and farmers.

8. The future of selling livestock in the UK

I hope it will be here for another hundred years at least (F17)

The future of the livestock market is as uncertain as the industry itself and participants' perception of what might be ahead was varied. Some smaller livestock auctions are considered to be vulnerable and a number of auctioneers anticipate fewer markets in ten years' time, with one suggesting that 'there are too many livestock market operators and probably too many physical sites as well'. However, overall even the smallest local markets are regarded as always having something to offer its local customer and are considered essential for niche markets. Many of these smaller markets have proven a continued demand, a consistent throughput, and a determined resilience. Several farmers discussed the strength of both the small family farm and the small livestock auction as due to fewer overheads compared to larger farms and marts, they can 'batten down the hatches' in a crisis. But for now, at least, it appears that the future holds a place for both small, medium and large livestock markets as long as the livestock industry itself remains stable. Without the livestock, it is unlikely that all the other benefits outlined in this report would continue to be available to the local agricultural community.

In terms of the sale mechanism itself, electronic auctions were trialled in 1990s to sell sheep and cattle but with limited success (Rickard 2019), and re-surfaced following the FMD crisis but diminished once again as markets returned to 'normal'. This need to be adaptable has arisen again during the Coronavirus crisis but it is anticipated that post-COVID-19, the preferred way to buy and sell will be ringside once again.

I've tried to reinvent it on numerous occasions as the competition declined. I've spent time trying to sell animals on the phone. I've tried to sell them virtually. I've sold them in markets that we just use as collection centres. Tried to sort them to a different spec to sell to different customers. Every time I've done it the customers have always been glad to get back round a live ring and buy exactly what they want (A25)

Multiple factors feed into the viability of these businesses, as outlined throughout the study, but ultimately it will be the continued support of farmers, the community *and* the government which will determine the future of livestock auction marts in the UK.

9. Conclusion

Auction marts have their own culture. They are each their own community. They are not merely sites where trade takes place but intricate assemblages of people, animals and networks. As different as each livestock market may seem, they are all operating using a traditional system that is deeply entrenched within the lives of their customers, and as they evolve and transform, they are still somehow linked to the generations that have come before them. Few other trading experiences can be compared to a day at the market, and while locations and technology and society have all transformed, the actual experience of the sale itself has changed little.

The livestock auction mart is well-placed to act as a hub for business health, community health, and the physical and mental wellbeing of all of the stakeholders who use it. As other possibilities for social activity and networking among the farming community have gradually diminished, the mart has come into its own. By acting as a crucial platform for the livestock industry not only to buy and sell animals, but also to support those who are the backbone of that industry in as many ways as possible, auction marts can encourage not only their own survival into the future but also that of the livestock industry.

The mart is a place which can create positivity in the life of a farmer, be it through the pride achieved through showing an animal, meeting up with friends, or learning something new. It is a space for networking, getting a meal, and receiving updates on all of the news.

No set auction model exists to ensure business success. The simplest of town centre marts seeing minimal change over many years might be as popular as the newest mart, purpose-built for both business and customer in modern times. But all businesses should seek to be as versatile as possible by diversifying their business where there is potential, as well as collaborating with key organisations and individuals to deliver a variety of services which will serve the local community. There has never been a greater need to bring the livestock industry back into public view in as positive way possible, an opportunity best harnessed by the livestock auction mart and the communities to whom they belong.

10. Recommendations

For The Prince's Countryside Fund

- Through The Prince's Countryside Fund farm support coordinator, continue to encourage close working relationships between farm support groups and auction marts, strengthening the position of auction marts as trusted places of advice.
- Disseminate findings from this research through a best practice/how to guide.

For central and local government

- Make use of auction marts as essential centres of learning to engage with the farming community on, for example, agri-environment schemes and other policy changes.

For auction mart operators

- UK auction marts should implement best practice and pursue business diversification.
- Auction marts in England should engage with their Local Enterprise Partnership to ensure that they are part of local initiatives which will benefit from the Prosperity Fund.
- Engage with existing industry events to showcase how mart activities can benefit the local community.
- Look to bring younger farmers into auction marts through targeted activity.
- Proactively seek relationships with town councils, local authorities and other similar bodies, as well as farm support organisations in your local area.
- Ensure staff are supported to deal with mental health challenges, both their own and for mart attendees, through appropriate training such as suicide awareness or mental health first aid schemes.

For livestock farmers

- Engage with support services and social activities at your mart.
- Take advantage of events, training, discussion groups, networks and other business support offered by livestock markets to better inform both personal and business decisions.

For farmer support organisations

- Proactively work with your local auction marts to offer support to the farming community

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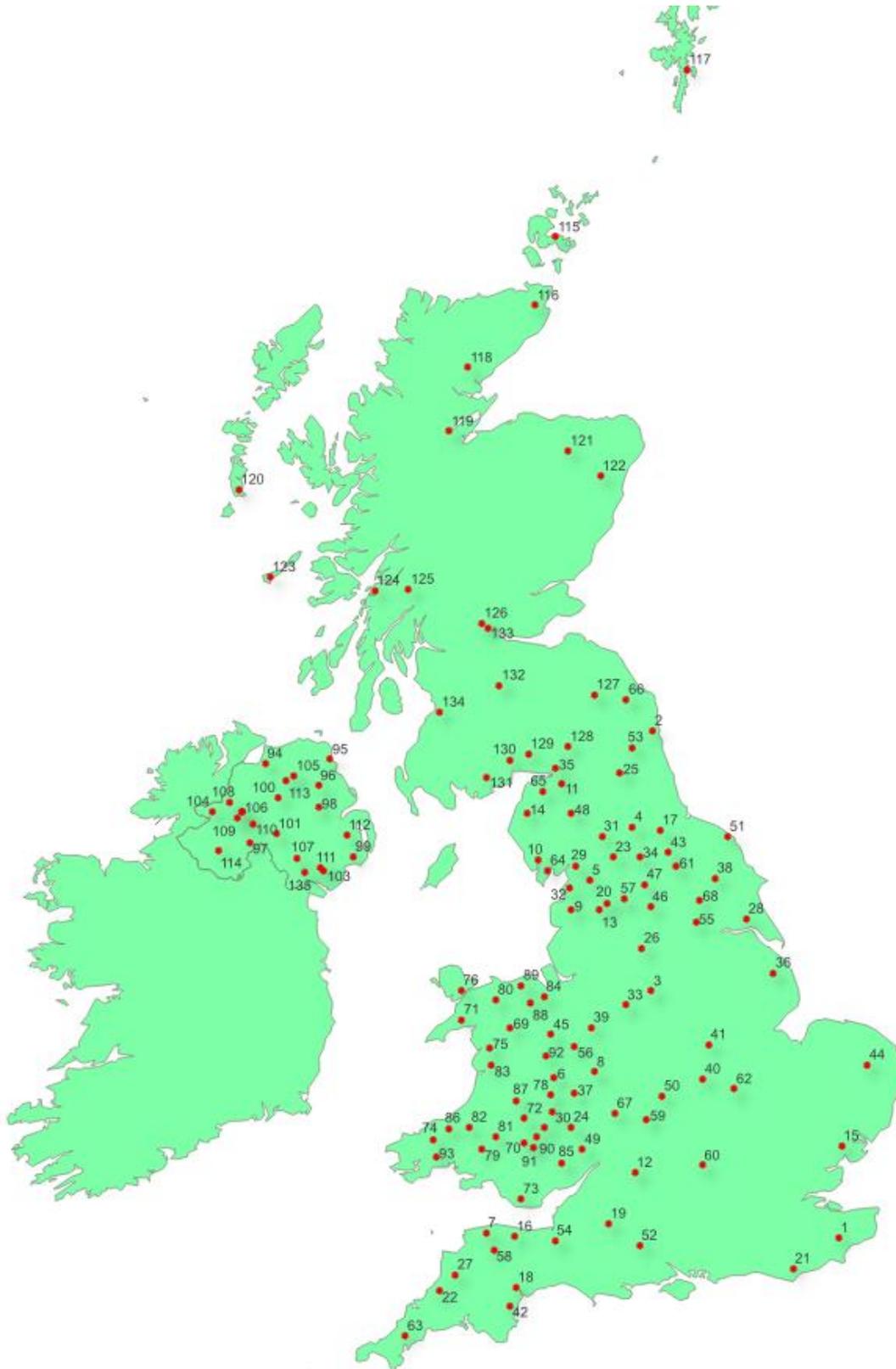
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Appendix A – Map of UK Auction Marts



Source: QGIS 3.10/apps/qgis-ltr/resources/data/world_map.

1. The Ashford Cattle Market Co Ltd
2. Acklington Auction Mart
3. Bakewell Auction Market
4. Barnard Castle Auction Mart
5. Bentham Auction Mart
6. Bishops Castle Livestock Auction
7. Blackmoor Gate Market - Exmoor Farmers Livestock Auctions
8. Bridgnorth Livestock Market - Nock Deighton Agricultural LLP
9. Brockholes Arms Auction Mart
10. Broughton In Furness Auction Mart - Harrison & Hetherington
11. Borderway Mart - Harrison & Hetherington
12. Cirencester Livestock Market - Voyce Pullin Markets & Commercial Auctions
13. Clitheroe Auction Mart
14. Mitchells Livestock Auctioneers and Valuers - Cockermonth
15. Stanfords - Colchester livestock and general auction markets
16. Cutcombe Market - Exmoor Farmers Livestock Auctions
17. Darlington Farmers Auction Mart
18. Exeter Livestock Centre - Kivells
19. Frome Livestock Auctioneers Ltd
20. Gisburn Auction Mart
21. South East Marts and Hailsham Market
22. Hallworthy Stockyard - Kivells
23. Hawes Auction Mart
24. Hereford Market Auctioneers Ltd
25. Hexham and Northern Marts
26. Holmfirth Mart
27. Holsworthy Auction Mart - Kivells
28. Hull Livestock market - Hill Frank & Son
29. J36 Rural Auction Centre
30. Kington Livestock Market - McCartneys
31. Kirkby Stephen Auction Mart
32. North West Auctions Ltd - Lancaster
33. Leek Auctions Ltd
34. Leyburn Livestock Auction Mart
35. Longtown Mart - C & D Auction Marts Ltd
36. Louth Livestock Market
37. Ludlow Livestock Market - McCartneys
38. Malton Livestock Auctioneers
39. Market Drayton - Barbers Auctions
40. Market Harborough Auctions
41. Melton Mowbray Market
42. Newton Abbot - The Cattle Market
43. Northallerton Auctions
44. Norwich Livestock Market
45. Oswestry Livestock Auctions
46. Otley - Wharfedale Farmers Auction Mart
47. Pateley Bridge Auction Centre
48. Penrith & District Farmers Mart
49. Ross-On-Wye - Ross Auction Centre
50. Rugby Farmers Mart
51. Ruswarp Mart
52. Salisbury Auction Centre - Southern Counties Auctioneers
53. Scots Gap Auction Mart
54. Sedgemoor Auction Centre
55. Selby Livestock Auction Mart
56. Shrewsbury Auction centre
57. CCM Auctions - Skipton Auction Mart
58. South Molton Livestock Market
59. Stratford Livestock Market
60. Thame Farmers Mart
61. Thirsk Auction Mart
62. Thrapston Livestock Auction
63. Truro Auction Centre
64. Ulverston Auction Mart
65. Hope's Auction Co Ltd - Wigton
66. H&H Wooler Auction Mart
67. Worcester Livestock Market - McCartneys
68. York Auction Centre
69. Bala Auction Mart
70. Brecon Livestock Market
71. Mart Bryncir Auction Centre
72. Builth Wells Livestock Market
73. Cowbridge Market
74. Crymych Mart
75. Dolgellau Farmers Marts Ltd
76. Gaerwen Auction Centre - Morgan Evans
77. Hay-On-Wye Livestock Market
78. Knighton Livestock Market
79. Llandeilo Mart
80. Llanrwst Mart - Bradburne Price
81. Llandovery Market
82. Llanybydder Mart - Evans Bros
83. Machynlleth - Farmers Marts Ltd
84. Mold Mart - Bradburne Price
85. Monmouthshire Livestock centre
86. Newcastle Emlyn Livestock Market
87. Rhayader Livestock Market
88. Ruthin Farmers Auction Co Ltd
89. St Asaph Livestock Market
90. Talgarth Livestock Market
91. Talybont-On-Usk Market - Clee Tompkinson Francis
92. Welshpool Livestock Sales
93. Whitland Auctions - JJ Morris
94. Aghanloo Field Sales
95. Armoyn Livestock Market
96. Ballymena Livestock Mart
97. Clogher Valley Livestock Mart
98. Crumlin Livestock Mart
99. Downpatrick Co-op Marketing Ltd
100. Draperstown Market (Beatties and Lauri O'Kane)
101. Dungannon Farmers Market
102. Gortin Livestock Market (Richard Beattie)
103. Hilltown Farmers Attested Sales Ltd
104. Killeter Livestock Sales Ltd
105. Kilrea Livestock Market C/o H A McIlrath & Sons Ltd
106. Lisahally Livestock Market
107. Markethill Livestock and Farm Sales.
108. Newtown Stewart Livestock Market
109. Omagh Auction Mart Ltd
110. Plumbridge Livestock Market
111. "Rathfriland Farmers Co-op Society Ltd
112. Saintfield Livestock Mart
113. Sperrin and Bann Valley Mart
114. Ulster Farmers Market
115. Orkney Auctions
116. Aberdeen and Northern Marts - Quoybrae
117. Shetland Livestock Marketing Group
118. United Auctions - Lairg
119. Dingwall and Highland Marts
120. United Auctions - Lochboisdale
121. United Auctions - Huntley
122. Aberdeen and Northern Marts - Thainstone
123. United Auctions - Tiree
124. United Auctions - Oban

- 125. United Auctions - Dalmally Auction Mart
- 126. United Auctions - Stirling Agriculture Centre
- 127. United Auctions - Border Union Agricultural Society
- 128. Harris and Hetherington - Newcastleton
- 129. Harrison and Hetherington - Lockerbie Mart
- 130. Dumfries Mart
- 131. Walleys Marts Castle Douglas Ltd
- 132. Lawrie & Symington Ltd
- 133. Caledonian Marts Ltd
- 134. Craig Wilson Ltd Livestock Auction Mart
- 135. South Armagh Farming Enterprises (SAFE) - Camlough and Keady