



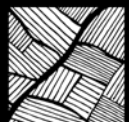
# Agricultural Shows in Wales Resilience Review

in response to the Covid-19 crisis

Summary Report (June, 2020)

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AR Y TIR  
ON THE LAND

Cover Photo: Ruth Rees Photography

# About this Report

This report aims to provide an initial assessment of the resilience of agricultural shows in Wales as a result of the Covid-19 pandemic.

This is a summary report of the review which was conducted in May 2020.

# Author

- This review has been undertaken by Aled Rhys Jones, Director of AR Y TIR / ON THE LAND – a rural business consultancy.
- Aled is a qualified Chartered Surveyor and Agricultural Valuer.
- He is also a Nuffield Farming Scholar having completed a major international study into the future of agricultural societies and shows in 2015.
- Aled holds many roles within the agricultural industry and previously worked as the Assistant Chief Executive of the Royal Welsh Agricultural Society (RWAS).



AR Y TIR  
ON THE LAND

# Why?

- As a result of the Covid-19 pandemic most, if not all, agricultural shows across Wales have been cancelled for 2020.
- These shows have a long and prestigious history and play an important role within our rural communities, both economically and socially.
- Whilst efforts are rightly focused on dealing with the immediate impacts of the pandemic, the Welsh Government wants to look ahead to a point when agricultural shows are reintroduced across Wales.
- Therefore, this review was commissioned to better understand the issues they are currently facing and to explore what support might be necessary to safeguard societies and shows going forward.

# The brief...

To establish:

- What are the issues facing agricultural societies and shows?
- What support might be necessary to help agricultural societies at this time?
- How can societies help each other and the wider agricultural community?
- What would help to reinstate the shows next season?
- What role, if any, is there for the Welsh Government?

# Overview of Consultees



- A list of consultees was drawn up in conjunction with the Welsh Government, with the aim of obtaining views from a cross-section of agricultural shows, varying in scale and geographic location across Wales.
- One-to-one consultations were held with 16 agricultural societies, responsible for organising 20 shows, and 2 umbrella organisations.
- Consultees ranged from small local village shows to large-scale one day shows, multi-day regional shows and national shows.
- The individual consultations were conducted in early May 2020.

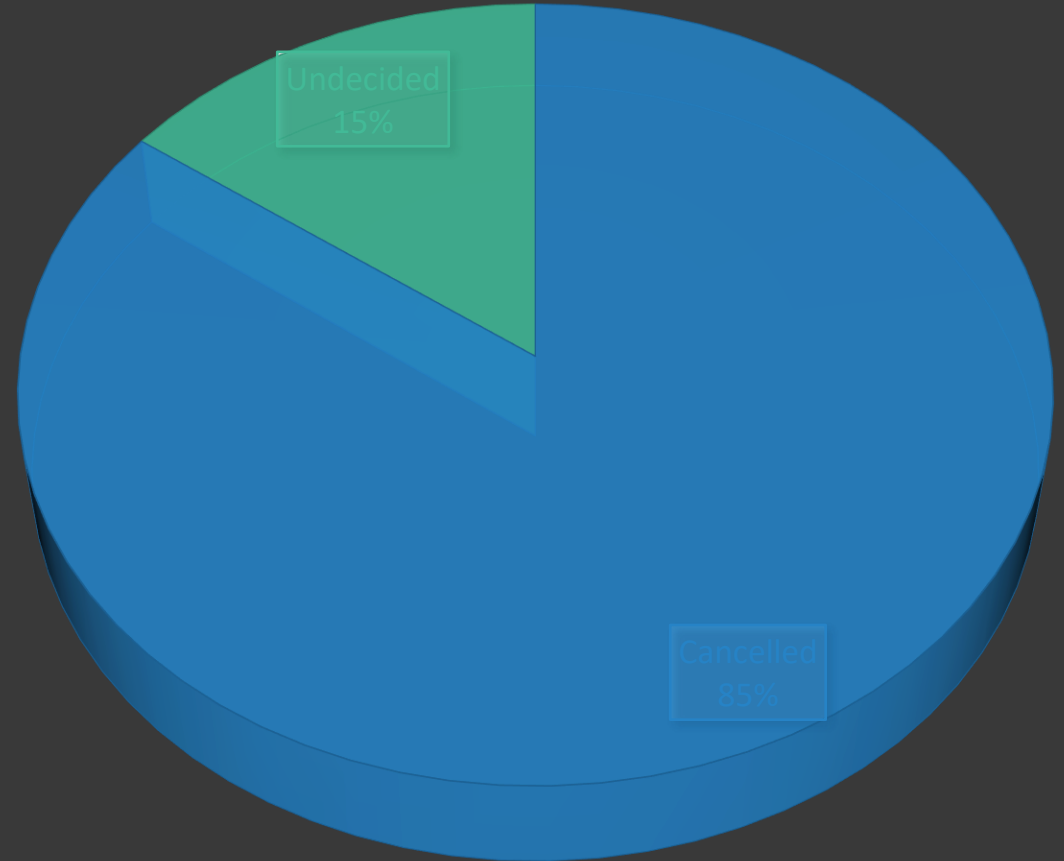


The consultees arranged  
agricultural shows spanning  
**28 days** attracting a combined  
**attendance of 560,700** with  
the support of over  
**3,600 volunteers**



# How many of the shows have been cancelled for 2020?

- The vast majority (85%) of shows had cancelled.
- Those which remained undecided at the time of the consultation were shows that would normally take place in Winter. Organisers were holding out until further information was known on the possible lifting of restrictions.





# Timing of the decision helped to mitigate some of the financial impacts

- Most shows had made the decision to cancel in late March/early April.
- For the majority, the decision to cancel early was driven by the need to minimise or avoid any show staging costs.
- Early cancellation meant that very little, if any, direct costs had been incurred which would be irrecoverable (e.g. deposits for tentage or printing of schedules etc.).
- Other than the one-day shows which would normally take place early in the show season in May, this helped to mitigate (and in some cases eliminate) the financial impact.
- However, the impact on the larger multi-day shows was much greater.

# What is the impact of cancellation?

- The cancellation of shows will have both economic and social impacts.
- Shows are an important part of cultural life bringing rural communities together, tackling issues around isolation and mental health and their loss will be felt throughout Wales.
- Shows also deliver a significant economic benefit to their local/regional economies with Pembrokeshire County Show estimated to deliver a £6m benefit and the Royal Welsh Show estimated at £40m. With both estimates conducted several years ago, the true economic benefit is thought to be much higher now.
- With regards to the financial impact on individual agricultural societies, this varied significantly depending on the scale and structure of the show.
- For small local volunteer-led shows with no permanent showground, the financial impact was minimal. Most of them had cancelled early enough to avoid incurring any show staging costs and had decided to roll forward their arrangements into next year.
- However, larger show societies with permanent showgrounds and significant overhead costs were facing far greater financial pressure. As they are reliant on generating income outside of the show from venue hire and third-party events etc., their income will be severely affected until the restrictions are lifted.

# What is the financial exposure?

- Responses varied widely, from very little financial exposure to one society forecasting a loss in the region of £1.2m.
- For most of the smaller shows, costs have been saved by the timing of the decision and most only had some insurance to pay.
- The larger one-day shows were predicting five figure losses, but some had reserves and investments to help them 'weather the storm'.
- The multi-day shows were predicting significant losses as their entire business had been effected. Most generate income from hiring out their permanent showgrounds and buildings and other out-of-show activities, which have all stopped in light of the virus.

# What is the situation with refunds?

- Any society which had already received bookings for their 2020 show has been faced with the added burden of dealing with refunds. These have mainly been for trade stand bookings, ticket sales and any sponsorship income already received.
- This has mainly been an issue for the larger one-day to multi-day shows - all of which have (more or less) adopted the same policy of offering full refunds or the option of rolling forward their booking for the 2021 show.
- Several companies have opted for the refund instead of rolling over to 2021, highlighting the concerns over how delicate some businesses might be financially.
- Whilst rolling forward the bookings into next year might ease immediate cashflow concerns for the current year, several consultees commented that it will lower income for next year.



## How does this compare with Foot & Mouth?

- The only crisis which is comparable to the current situation is the Foot & Mouth outbreak of 2001, where shows across the country were forced to cancel in similar numbers.
- Whilst the majority of shows re-emerged afterwards, it proved to be a watershed moment for the agricultural events industry, introducing new biosecurity controls and licensing for animal gatherings.
- Shows also lost significant income with visitors, sponsors and traders finding other places to go.
- Potentially, the effects of Covid-19 is far greater with the entire economy being effected, not just agricultural events. One consultee said *"Foot and mouth has got nothing on this!"*.



# How resilient is your society/show?

- All consultees were asked to rate how resilient they thought their society was to pull through the current crisis.
- All small local shows and large one-day shows up to an attendance of approximately 20,000 rated themselves as **fairly resilient to very resilient**.
- The multi-day regional and national shows rated themselves as **fairly resilient to potentially weak**.

# Could we lose some shows as a result of Covid-19?

- Most consultees feared that some shows might not return post-Covid.
- Some shows decided to cancel last year due to the equine flu and cancelling for a second consecutive year will make it very hard to re-establish.
- Losing a year or two can result in a loss of momentum and enthusiasm.
- Those with limited or no cash reserves and a lack of volunteers were believed to be most at risk.



Photo: Ruth Rees Photography

# Looking ahead to 2021...

- All societies were intending to hold their show next year, although some have started to think about the possibility that their 2021 show might be under threat if no vaccine is found or exit strategy implemented.
- Restrictions on large gatherings were thought to be the last thing to be relaxed, so there remains considerable uncertainty over 2021.

# So, what are the main issues and challenges?



THE LARGER MULTI-DAY SHOWS ARE FACING SIGNIFICANT AND IMMEDIATE FINANCIAL DIFFICULTIES AND SHOWS IN GENERAL ARE WORRIED ABOUT THE MEDIUM TO LONG TERM IMPACTS. IT MIGHT TAKE UP TO TWO YEARS BEFORE THEY CAN START TO GET BACK TO NORMAL.



THERE ARE ALSO CONCERNS ABOUT FEWER TRADE STANDS AND SPONSORS AT NEXT YEAR'S SHOWS DUE TO FINANCIAL PRESSURE ON THEIR BUSINESSES.



SOME SOCIETIES WERE CONCERNED OVER WHETHER THEIR CONTRACTORS AND SUPPLIERS (TENTAGE AND OTHER EQUIPMENT) WILL STILL BE TRADING NEXT YEAR. IF FEWER COMPANIES ARE AROUND NEXT YEAR, COMPETITION WILL BE REDUCED AND COSTS WILL RISE.



THERE IS A POTENTIAL LOSS OF SOME LIVESTOCK EXHIBITORS WITH PRESSURES ON FARMING BUSINESS MAKING FARMERS DECIDE THAT THE SHOWING OF ANIMALS IS NOT A PRIORITY.



FOR SHOWS WITH PAID STAFF - THERE IS ALSO CONCERN OVER POTENTIAL LAY OFFS OR REDUNDANCIES AS THE FURLOUGH SCHEME IS SCALED DOWN AND COMES TO AN END.



UNCERTAINTIES OVER PUBLIC PERCEPTION, CONFIDENCE AND ATTITUDES TOWARDS ATTENDING LARGE GATHERINGS IN FUTURE - WILL PEOPLE BE CAUTIOUS AND TOO NERVOUS TO ATTEND?

Will we see scenes like  
this again anytime  
soon?...









## Issues and challenges

Will there be new public health regulations for event organisers, i.e. more hand washing facilities required and social distancing measures to control etc.?

Could this add even greater cost pressure on shows?

What's the public  
perception about  
returning to live events?

# Return to Live Events Survey

- Following discussions with the International Association of Fairs & Expositions (IAFE), they shared a survey they jointly commissioned to capture the expectations of North American attendees about returning to live events.
- The survey was conducted by Enigma Research.
- They had over 2,000 respondents from all 50 U.S. states and 10 Canadian provinces.
- Here are some of the findings....



## 1. Event attendees have greatly missed live events

- 94% claimed they “very much” or “somewhat” missed attending live events
- Results were consistent across all event types, geographic regions, and age groups

## 2. Strong majority likely to return

- 76% are “extremely” or “very” likely to return once large gatherings resume
- Only 8% indicated they would be unlikely to return

## 3. Those unlikely to return provided reasons

- Among the 8% who would not return, nearly all were concerned about the virus
- Many also felt distancing rules and other measures would make returning to events unpleasant

## 4. Many will return quickly while others prefer to wait

- Nearly half would return within one or two weeks of live events resuming
- Remainder would wait longer, with 20% waiting more than 3 months

## 5. Safety precautions would make event attendees more likely to return

- Three-quarters would be more likely to return if sanitation precautions were taken
- Masks for workers and contactless systems would also encourage many to return

## 6. Some extreme safety implementations would be well-received

- Two-fifths are more likely to attend if events perform body temperature checks upon entry
- Smaller events and extended hours to increase social distancing also popular solutions



## 7. Various safety precautions would deter some event-goer

- 27% would be less likely to return if required to wear masks
- 23% less likely to return if social distancing among attendees was enforce

## 8. Promotions and incentives would also encourage return to live event

- Most claimed that discounted admission would increase likelihood to return

## 9. Many have strong views regarding the return to live events

- 70% are very motivated to return and 25% would pay more even if attendance was limited
- By contrast, 18% will not attend any live event until there is a vaccine for the virus

## 10. Event-goers highly appreciate brands that support cancelled or postponed events

- Typically, 38% of event-goers feel “very favourable” towards sponsors and brands supporting live events
- By comparison, 58% feel the same way regarding sponsors that support cancelled or postponed events.

Whilst this is not a UK-based survey, it nevertheless reveals some interesting insights into potential visitor behaviour as shows return post Covid-19

# Other long-standing challenges

- The two other long-standing challenges faced by several shows are:
  - The need to attract **volunteers** and youth on show committees, and
  - The need to encourage more **livestock exhibitors**
- Whilst these challenges pre-exist the Covid-19 pandemic, societies were concerned that some volunteers and livestock exhibitors might not return after this year's cancellation.
- Reference was also made to the Quarantine Units by two consultees and the need to relax certain regulation to encourage more exhibiting of livestock in future.
- Whilst there was concern over the lack of volunteers, some consultees believed that the pandemic has re-kindled community spirit and social solidarity. On the back of this, some thought that people will be more willing to help show societies to re-establish next year. There have been several examples of YFC clubs throughout Wales volunteering to help the community over recent months and it is hoped this will spirit will continue.

# What support might be necessary?

- The larger societies which are facing significant six figure losses (or more) requested financial aid, preferably in the form of an emergency rescue grant and not a loan.
- Most other shows (small to medium in scale) did not think that financial aid for their show was necessary provided they can hold their show next year as normal. Those with adequate reserves also noted that public money should be prioritised elsewhere towards public health and helping businesses recover etc. during this time.
- Other than small grants to purchase equipment, most shows believed other forms of support would be valuable, in particular support with practical guidance over any future public health measures for shows, support with marketing when the shows are reintroduced (possibly a coordinated campaign) and support with holding virtual competitions/activities.

# Can shows help each other?

- Yes! All societies saw a value in greater collaboration and sharing of information/best practice between shows.
- Some believed that shows could use the same IT systems, share equipment and explore opportunities for collaborative procurement.
- An example of collaboration was found in Montgomeryshire where a group of five small local shows create a joint leaflet each year to publicise their show dates and key information.
- Several references were made to the Association of Shows and Agricultural Organisations (ASAO) – the UK umbrella organisation for shows and their role in facilitating guidance and support. The suggestion was made that a virtual Welsh ASAO event would be useful when more information is known about the lifting of restrictions.

# Are there any positives to come from this?

- According to some of the consultees, the pandemic will force shows to innovate, think of new ideas and 'raise the bar'.
- There are examples of virtual competitions and shows being held online, opening up new opportunities. One show secretary remarked that online cattle competitions might be a way to involve farmers and herds which are currently under TB movement restrictions and cannot attend shows.
- The pandemic has highlighted the importance of food security and the vital role played by farmers. Many saw this as a positive with the role of shows in bridging the gap between the producer and the consumer, the urban and the rural, being ever more important.
- Several examples were seen of shows introducing new virtual activities and educational initiatives, some of which might become a part of their core work post-Covid.
- Some of the showgrounds are providing facilities as testing centres and actively offering their sites to help with the effort.
- Some show organisers saw this as a useful 'year out' – providing time to reflect and think and put in place new systems and procedures which might have been on the 'back burner' for some years.



# Is there a role for Government?

- Consultees in general were complimentary of the Welsh Government's proactive interest in the survival of shows.
- Other than supporting shows through financial aid and other initiatives, a key question in the review was – is it the role of government to co-ordinate greater collaboration between shows or is it for the sector? Whilst, in the author's view, this is something the sector should take a lead on, there may be need for help and encouragement from Government to establish a more formal structure that could help make shows across Wales more resilient.

# Conclusions (1)

- All agricultural shows across Wales will be effected by the Covid-19 crisis.
- 85% of the consultees had already cancelled their events planned for this summer and significant doubt was held over the ability to hold any winter shows this year.
- Small local shows appear to be the most resilient (financially) having cancelled early to avoid costs and are planning to roll forward arrangements for next year.
- The larger county and multi-day shows appear to be the most vulnerable and are facing significant financial challenges, in particular those with the overheads of maintaining permanent showgrounds.

# Conclusions (2)

- Irrespective of size, structure or location, all shows were concerned about what will next year look like.
- Challenges exist around the availability of infrastructure suppliers to how willing traders, sponsors, volunteers and livestock exhibitors will be to support shows in future.
- Possible regulations around public health might require shows to re-structure for next year or render some events impossible to hold.
- Guidance over any future public health measures for event organisers is essential.

# Conclusions (3)

- Whilst small local shows appear resilient in the short term and some of the larger shows have reserves to help them 'weather the storm', the possibility of cancelling 2021 shows will make it an even greater mountain to climb.
- Losing momentum for two years or more will make it increasingly difficult for shows to be re-introduced.
- There is a strong likelihood that the Covid-19 crisis will have much greater impact on the show industry than the Foot & Mouth outbreak of 2001.
- All consultees agreed that some shows will be lost on the back of the pandemic and might not return.
- However, consultees recognised the positives, which included the opportunity to re-assess, put in place changes to improve the show, introduce new innovative virtual competitions/activities and take advantage of the growing appreciation of farmers as food producers.

# Recommendations (1)

It is recommended that the Welsh Government...

1. Considers whether financial aid, in the form of sponsorship or other means, should be offered to the RWAS to help them through this unprecedented period of difficulty. Such consideration to be made on a detailed analysis of their financial situation, something which has been outside the scope of this review.
2. Explores some financial support to ensure the survival of county shows (particularly those with permanent showgrounds). Again, this would be dependent on an analysis of their financial position.
3. Prepares and circulates guidance to show organisers over the arrangements for staging events in 2021 in line with any public health measures or restrictions in place. Such guidance to be made available as early as practicable, by December 2020/January 2021 if possible.

# Recommendations (2)

It is recommended that the Welsh Government...

4. Considers establishing an 'Innovation Fund' whereby shows of all sizes could pitch ideas for support. Now is an opportunity to innovate and a fund could help societies experiment with new ideas, hold virtual competitions or seek ways to improve their carbon footprint, for example. Such a fund could potentially be administered by the umbrella organisation for shows - the ASAO or a society with a national coverage such as the RWAS.
5. Encourages greater collaboration between shows in Wales and work with the ASAO to support this ambition, urging them to hold events (virtually or otherwise) to support the industry as we come out of the restrictions.
6. Works alongside Visit Wales to establish how the return of agricultural shows in 2021 can be promoted. This could be done within the theme for 2021 - "Year of Outdoors".
7. Explores the possibility of introducing some structured training through Lantra or other partners, offering individuals who work in the show industry with some accredited CPD or formal qualification. Furthermore, could volunteering with a show committee count towards some form of recognition within existing or future agricultural support schemes?



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