Economic and Social Value of the Anglian Coastal Salmon and Sea Trout Fishery

Report Version 4

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Executive Summary

We have compiled information on the current social and economic status of the salmon and sea trout fisheries on the Anglian coast. It will support our decisions on a new Net Limitation Order (NLO) to regulate the number of licences issued to fish with nets for salmon and/or sea trout on the Anglian coast from 2025.

The Environment Act (1995) requires the Environment Agency to have regard to the social and economic impacts of its decisions on rural communities. There is very little information relating to the social and economic impacts of net and rod fisheries on the Anglian Coast. The report draws on a variety of resources including published research. Local data has been used where possible.

The Anglian net fishery is relatively small and since 2019 targets sea trout only; all captured salmon must be released. Fishing occurs in the coastal areas of north Norfolk and around Lowestoft. In 2024, 60 fish were landed, which is typical of recent years. The number of people fishing or directly supporting the fishery is 31, although very few of these could be considered employed or profit from their involvement. The fishery provides some local chandlery business and there are associated running costs such as fuel and other consumables. Those fishers who sell their catch or indirectly benefit, as opposed to those where fish are for personal consumption, will gain some income that contributes in part to their livelihood.

The number of licences issued for net fishing for salmon and sea trout in the Anglian coastal fishery has fallen since the original NLO came into force. In 1995 there were 65 licence holders, when the order was renewed in 2005 there were 39 and in 2014 there were 22. The current split between drift and non-drift licensees is 7 and 3 respectively. The mean age of the licensees is 73.5 years, with the youngest being 62 and the oldest 85. With the continuing decline in licence holders there has been an associated decline in fishing activity (number of days fished).

The total first sale value of salmon and sea trout from the Anglian coastal net fishery has been estimated at no more than £865. Fish are either sold direct to retail outlets (pubs, restaurants, and small local fresh fish shops) or to fish merchants and wholesalers. Therefore the total supply chain value of the fish is likely to be several times larger than this figure.

The fishery maintains local traditions and a way of life, so the importance to individual's livelihoods is coupled with those that identify themselves as 'hobbyists' who wish to retain an activity undertaken by their ancestors.

Although there is some anecdotal evidence of a small and growing number of local rod and line anglers targeting the species, the salmon and sea trout stocks are thought to mainly move back into North East rivers where the majority (approximately 90%) of the stock originate and where rod fisheries are more established. There are no figures for direct expenditure from salmon and sea trout anglers fishing locally but in North East England it has been estimated at over £5.5 million per year and to support almost 200 jobs. Salmon and sea trout rod licence sales have plateaued in recent years and in 2023 the total was just over 22,000 for the whole country.

Figure 1 A drift netsman hauling his catch

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1. Introduction

This report summarises information on the current social and economic status of the salmon and sea trout fisheries on the Anglian coast. It includes detail of the cultural values derived from both net fisheries and rod fisheries considering both the commercial and recreational interests. It is provided to support decisions on a new Net Limitation Order (NLO) to regulate the number of licences issued to fish with nets for salmon and/or sea trout on the Anglian coast from 2025. The Environment Act (1995) requires the Environment Agency to have regard to the social and economic impacts of its decisions on rural communities.

When taking into account the whole of the east coast of England, salmon and sea trout fisheries contribute many millions of pounds to local economies and also have an associated social value. Relative to the North East coast however, the Anglian fishery is small in terms of fishing activity and fish landed.

Many people value the existence of salmon and sea trout in our rivers. The Environment Agency aims to balance the social and economic benefits that can come from the sustainable exploitation of the recreational and commercial fisheries as well as to further the conservation of these fish that represent an important part of our wildlife diversity.

We want to protect opportunities for people to fish for salmon and sea trout and maintain the number and diversity of people doing so. It is also important to recognise the cultural aspects of these fisheries. Any increased involvement in fishing should be achieved without increasing the risk to stocks (Environment Agency 2008).

Net fisheries in coastal waters provide an income for fishers and associated businesses they support, which in turn provide a potential boost to the economy of the local communities. Anglers targeting migratory salmonids are numerous on the established east coast river fisheries but there may be possibility for a growth of local benefits too.

The inherent value of salmon and sea trout takes several different forms. These fish are indicators of a high quality environment and part of our valued wildlife. Salmon are a feature of national and international conservation designations with the Habitats Directive requiring that we seek to achieve favourable conservation status for the species. Many people derive a sense of well being in knowing these fish live in local rivers and in seeing them. A survey found that the average willingness to pay to prevent 'a severe decline in all salmon populations across [England and Wales]; with 95 per cent of salmon being lost for at least 25 years' was £15.80 per household per year. Aggregated across all households in England and Wales, this amounts to a total of around £350 million per year (Environment Agency 2007).

This report provides an overview of the economic and social characteristics associated with the Anglian coastal fishery and also its role and relationship with other net and rod fisheries in England and is not intended to provide a detailed assessment.

2. Sources of information

This report draws on a variety of resources including published research. There is very little published information relating to the social and economic impacts of net fisheries, but more is available for rod fisheries. Local data has been used where possible, information derived from previous reports elsewhere provides an outline or indication of the social and economic characteristics of the Anglian coastal fishery.

Evidence has been drawn from the following sources:

– Catch and fishing effort returns to the Environment Agency from the net and rod fisheries

Everyone fishing for salmon and sea trout, whether by net or rod and line, are legally required to provide a catch return to the Environment Agency each year. These returns provide information on numbers, species and sizes of fish caught, how many are killed and how many released alive, when and where fishing took place and numbers of days fished.

Data and information from previous studies

– A survey of net licensees in 2014

A questionnaire was distributed to all 24 people who held a net licence in 2013. Licence holders were invited to provide information on the income they receive and expenditure they incur participating in the fishery on the basis that this would be confidential to the Environment Agency and that only summary information would be made public.

Of the 24 licensees approached for information, 11 (46%) returned a response.

– Informal responses to consultation on a previous Net Limitation Order

Views from all people with an interest were invited in the course of informal consultation between August and October 2014 on the proposal for a new NLO. This report makes reference to any contributions that relate to economic and social evidence provided.

We contacted 85 stakeholders (organisations or individuals) and received 21 responses (25%)

- A number of previously published studies are available. We have drawn heavily on the social and economic report prepared for the North East coast fishery as part of the preparation for their NLO. Other reports principally relate to inland (rod and line) salmon and sea trout fisheries. These measured existence, heritage and bequest values using survey techniques to estimate a "willingness to pay" to value rod fisheries, over and above the direct spend or economic input from that fishery. This work has not been done for net fisheries and so while reference is occasionally made to these wider values, they do not form a significant part of the report or its conclusions.

3. The Anglian coastal net fishery

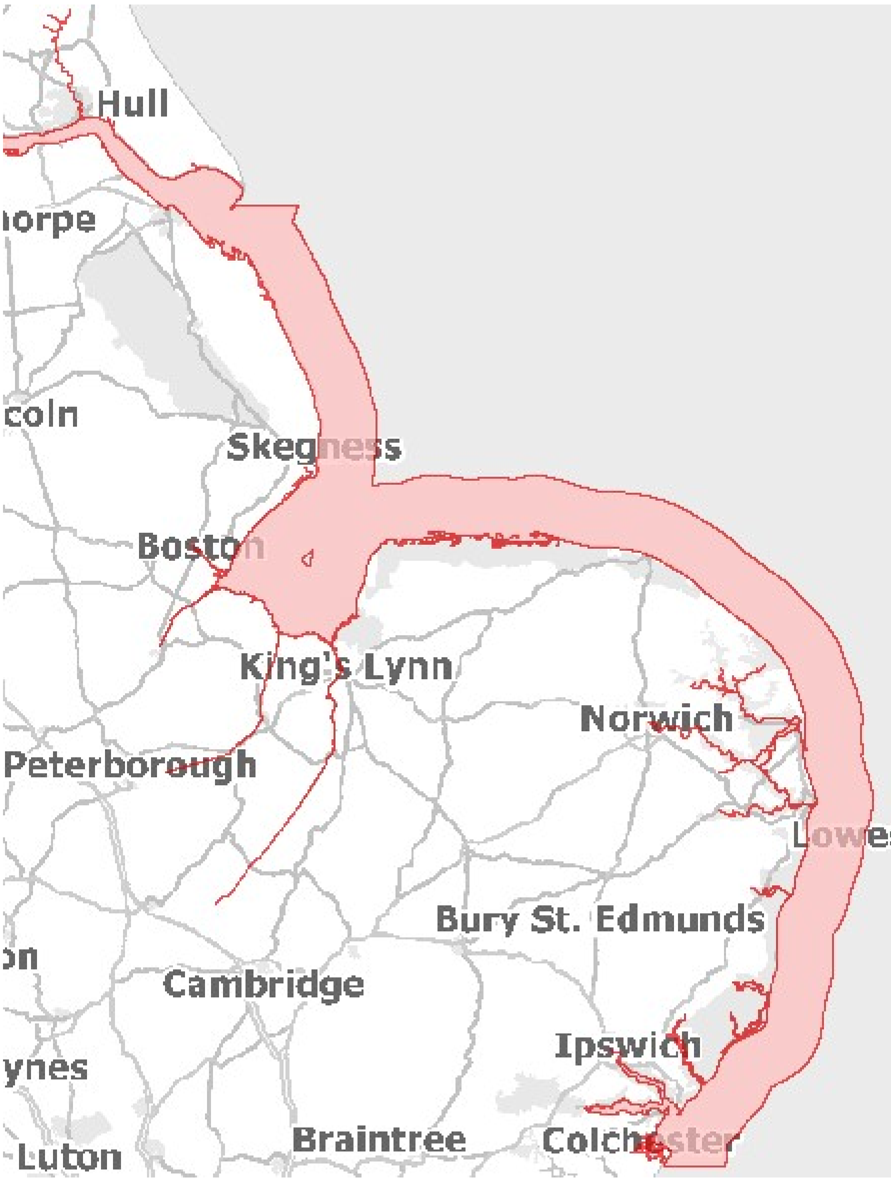

Figure 2 Map showing area of the Anglian coastal net fishery

Netting for salmon and sea trout has taken place on the east coast for more than 150 years. Drift netting is referred to in historical fisheries reports from the 1860’s and 1870’s and is believed to date back to the 1840’s. Whilst the fisheries in Northumberland and Yorkshire are larger and much more significant, the Anglian fishery has co-existed.

The fishers predominantly live and work along the north Norfolk coast, they operate out of several small towns and villages such as Blakeney and Wells-next-the-Sea. A number of licence holders are also centred around Lowestoft, targeting sea trout in the coastal waters to the north and south of the town.

A Government review of salmonid net fishing in North East England and the east coast of Scotland was published in October 1991. A key finding was that, although no evidence had been produced of an immediate threat to stocks and thus any immediate justification for depriving existing licensees of their licences, the management of individual east coast salmon and sea trout stocks would be aided and improved if the net fishery was to come to an end, but gradually so as not to cause unnecessary hardship.

Fishing for salmon and sea trout off the Anglian coast potentially exploits fish from all the North East and eastern coastal rivers. As a result its impact on any particular river's stock cannot readily be managed – this is termed a 'mixed stock fishery' (MSF).

This led to the National Rivers Authority (NRA) considering changes in regulation through the making of NLOs. An order for the North East Coast Net Fishery came into operation in January 1993, and a similar Order for the Anglian Fishery was subsequently developed.

The Anglian Coast (Limitation of Net Licences) Order 1994 was confirmed by the Minister in November 1995, following a Public Inquiry held in May 1995. The Order came into effect from 1 January 1996, with the following provisions:

– licences will only be issued to applicants who held a licence in the previous year of the same licence type being applied for in the current year;
– the Order is a 'reducing' NLO, which means that as existing licensees leave the fishery (for whatever reason) their licences will no longer be available. Licences are not available for new entrants.
– a key recommendation from the Public Inquiry, accepted by the Minister, was that licensees who are not dependent on fishing for their livelihood should be granted the same rights as those that are- hence all existing licence holders would be eligible regardless of status.

Following advice in 1998 from the North Atlantic Salmon Conservation Organisation (NASCO) concerning dangerously low levels of salmon stocks, the UK Government concluded that measures were needed to reduce exploitation, particularly of early-running, larger salmon. The Environment Agency was asked to prepare such measures.

When the new national Spring Salmon Byelaws (1999) came into operation these effectively delayed the start of the salmon netting season to 1st June; a few specified fisheries (including the Anglian Coastal) were permitted to net for sea trout before this date, although any salmon caught must be returned immediately.

The Review of Salmon and Freshwater Fisheries in 2000 endorsed the policy of phasing out net fisheries taking predominantly mixed stocks of salmon. The Anglian Coastal NLO was reviewed and renewed in 2006, and again in 2015. Under the Salmon and Sea Trout Protection Bylaws 2018, the landing of any salmon was prohibited in the Anglian Coast net fishery and drift nets were prohibited in the North East fishery.

3.1. The number of people involved

The number of persons eligible for licences in the year preceding the NLO (1995) was 65, representing the number of nets operating at the inception of the Order. Licences issued for the fishery have decreased from the original qualifying number to 39 in 2005 and 22 licences in 2014 at the last NLO review. There are currently 10 license holders. While participation has reduced by 85% since 1995, the current number of licences is not in line with the original (NRA) prediction that the fishery would be phased out by 2024.

Numbers of licences issued each year in the fishery from 2014 to 2024 are shown in Figure 3 below.

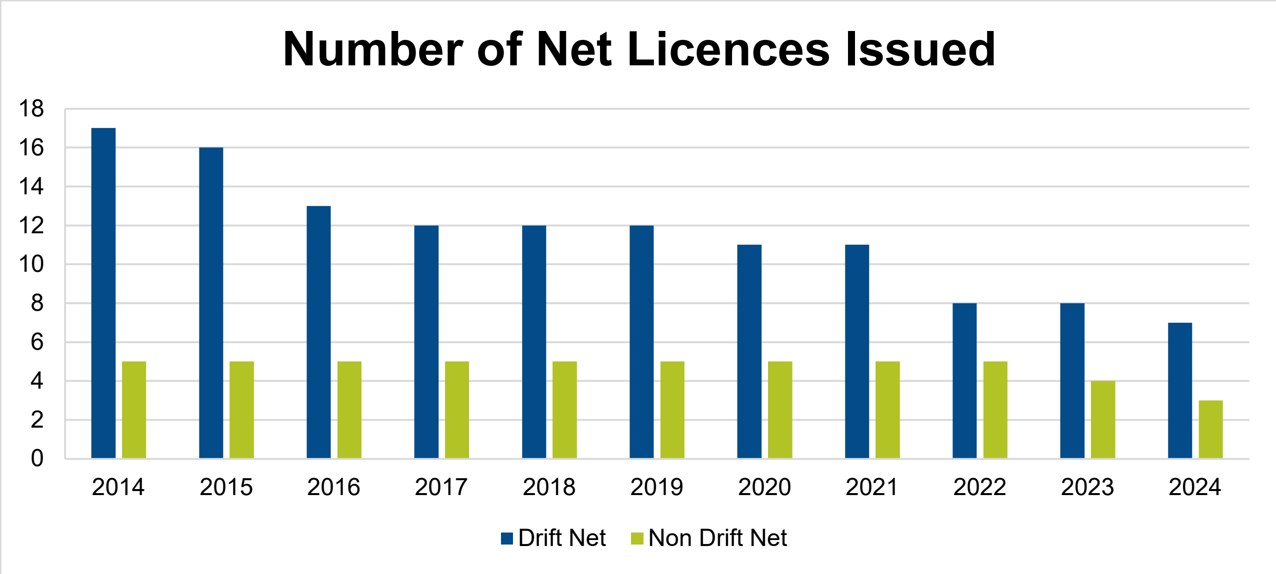

Figure 3 Numbers of drift and non-drift net licences issued in the Anglian Coast fishery 2014-2024

In 2024, 7 licences were issued for drift nets and 3 for non-drift nets. The Salmon and Freshwater Fisheries Act (1975) allows net licensees to employ additional people to assist in the setting and operation of nets. The Act refers to such people as endorsees and limits the number that may be employed under each licence. The number of endorsees registered on the 10 licences in 2024 was 21. Therefore, the total number of people involved within the net fishery is currently 31.

Other people may occasionally support this fishery at harbours and fish quays, for example to help load and unload stock from the boats and in selling and transportation. The number of such people is unknown and so has not been recorded here.

3.2. Demographics of the net fishery

Figure 4 below shows the age distribution of people holding net licences of either type in 2024. The 10 licensees occupied ages from 62 to 85 years, a range of 23 years with a mean age of 73.5 years.

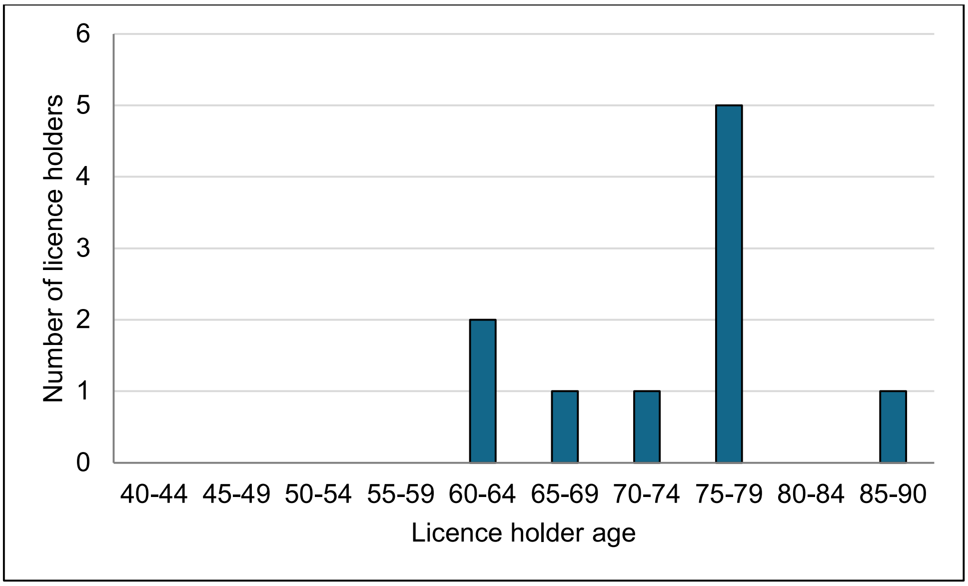

Figure 4 Age distribution of licensees in the fishery in 2024

Following the review of east coast salmon fisheries in 1991, which recommended to phase out the use of drift nets in the North East fishery, the NRA predicted the expected rate of decline in the number of these licence holders under a NLO, based on a projected average retirement age of 62 years. With reference to this estimation there are currently no fishers in the Anglian coastal fishery below this threshold, the continuation of others to actively fish could be explained by the presence of younger endorsees in the fishery and that comparatively the level fishing intensity (actual days fished) is low.

3.3. Summary of fishing activity

Figure 5 below shows the total number of days per year by licence type between 2014 and 2024. The decline in the period in drift netting effort exceeds the expected reduction due to the fall in numbers of licence holders. This becomes apparent when the average working days for the 30 drift net licence holders is calculated - in 2014 the figure was 12.1 compared to 20242 when 7 fishers fished on average 5.7 days per year.

The total effort by non drift licence holders declined in 2015 and now appears relatively stable; the average days fished in 2024 was 5.3.

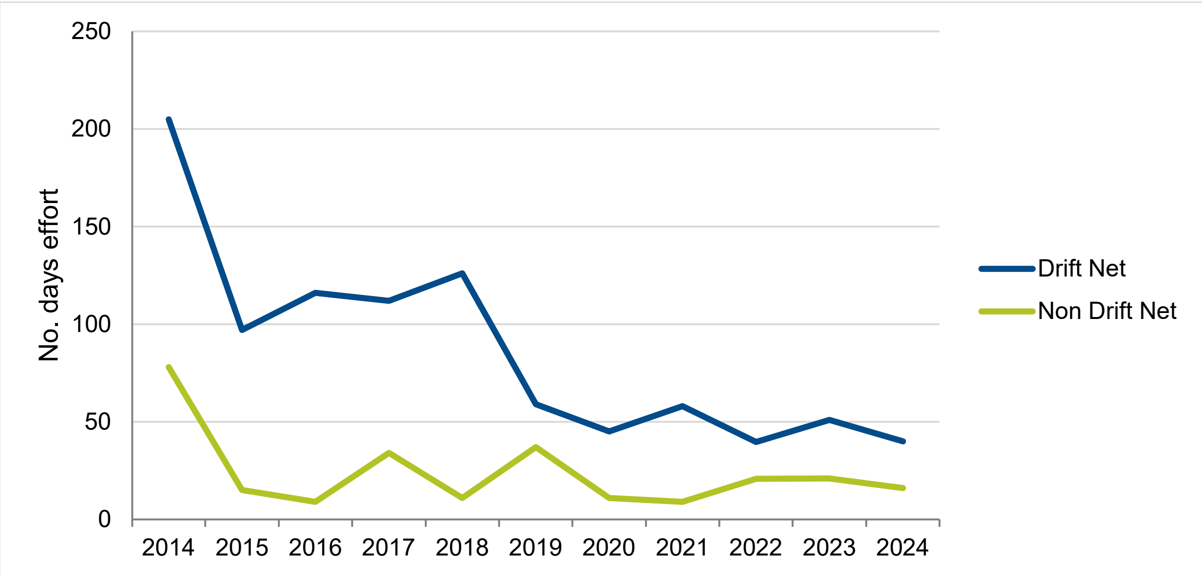

Figure 5 Total net fishing effort per year 2014-2024

It is worth scrutinising the efforts of individuals more closely. Since 2010 our catch returns have collected and collated data on the efforts of individuals (days/tides/hours fished), although this information is not always complete. Figure 6 shows frequency histograms of the number of tides fished per licence holder during the period from 2016 to 2021.

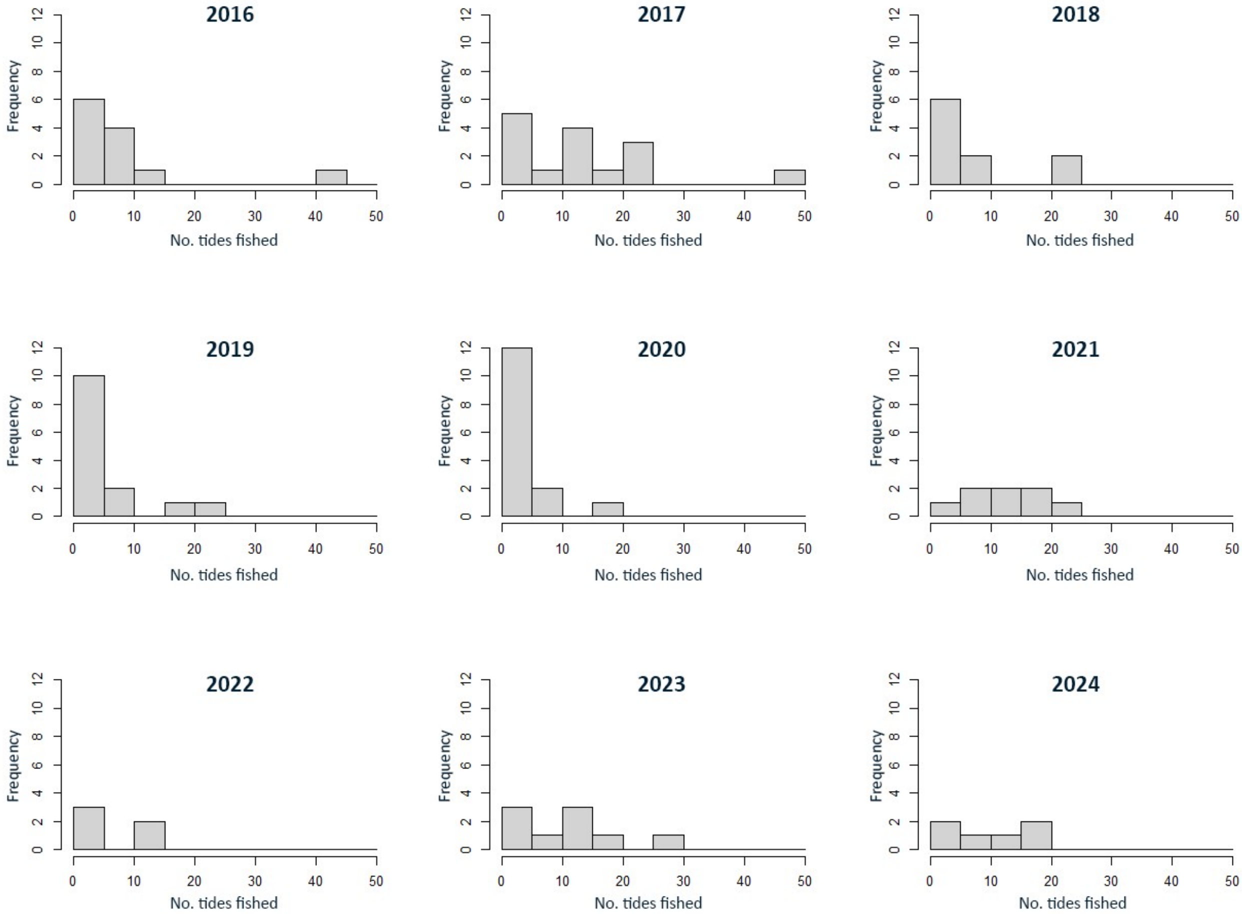

Figure 6 Frequency histograms of number of tides fished annually by licence holders 2016-2024

With the exception of one fisher in 2016 and 2017, licence holders fished for 30 tides or less annually during the period 2016 to 2024 with the annual median ranging from 2 to 13 tides. When taken into account that the fishery is open for 131 days per year, with two tides per day, the median value of 2 tides annually equates to fishing only 0.8% of the available tides while the median value of 13 tides equates to fishing only 4.9% of the available tides. The maximum effort saw an individual fishing for 18% of the tides during the available season.

It was found with the analysis undertaken for the North East fishery that fishing was concentrated in 3 months (June- August). In the Anglian coastal fishery, fish were caught consistently from June to September, with slightly fewer fish captured in May and very few in April.

3.4. Income from net fishing

From the available information about the Anglian coastal fishery, it appears that the licence holders are not dependant on catches as a significant source of income. It is less clear how important the contribution is to overall livelihoods. Many of the fishers term their activity as a hobby and do not sell fish caught (the feedback from the licensee questionnaire most commonly cited personal consumption as the purpose of fishing). Therefore, compared to the North East fishery, the Anglian fishery is of minor economic value. We will look at the relative size and value of the two fisheries in more detail later.

It is also clear from the survey that the Anglian fishers, especially those which sell on all, or some of their catch, tend not to solely target salmonids. These fishers are either targeting different species at different times of year or their netting is catching multiple species. Therefore, it becomes problematic to clearly and accurately, differentiate income (and expenditure) of the licence holders purely associated with sea trout catches. We have little information on other species caught and this aspect of the fishery has not been evaluated.

Assessment of the value associated with the sea trout net fishery requires the cautious averaging of figures provided by licence holders, fish merchants and others. Values and prices will vary considerably both between and during fishing seasons reflecting the abundance of fish and market demand. Values in this report have not been corroborated but are considered reasonable estimates.

It should be noted that only fish caught by licence holders can be offered for sale on the open market. Such fish are carcass tagged for enforcement purposes. Also it is illegal in England and Wales to sell salmon or sea trout taken by rod and line.

3.4.1. Catch statistics & first point of sale value

The total catches are recorded from annual returns provided by the licence holders. The total sea trout and salmon catches, over the last 10 years, in the Anglian coastal fishery divided by drift and non drift fishers, is displayed in Figure 7.

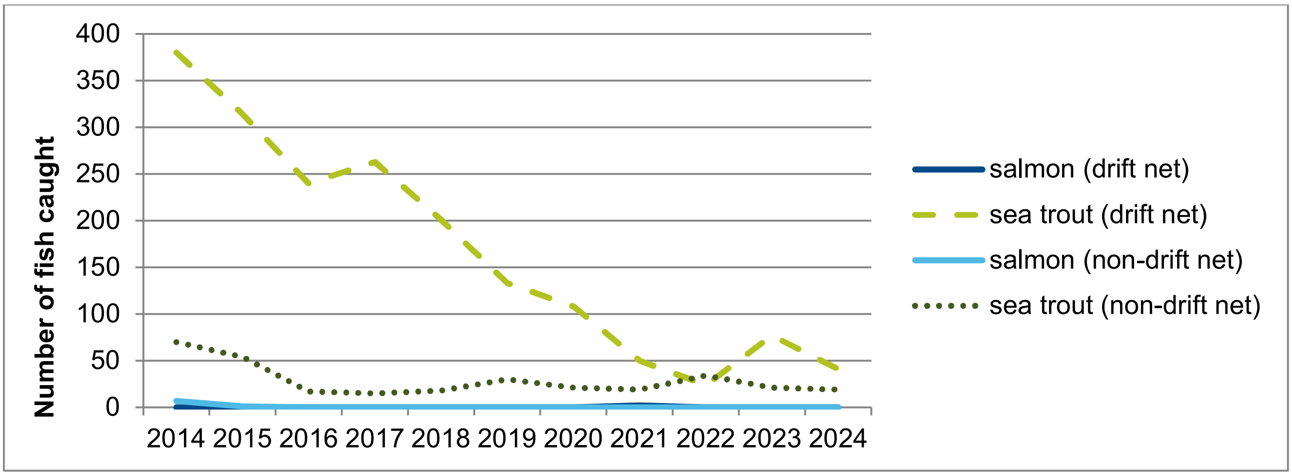

Figure 7 Salmon and sea trout caught in the fishery 2014-2024

Since the NLO was last renewed in 2015, catches have more than halved. The 2024 returns were 41 sea trout caught by drift net and 19 by non-drift net.

It is possible to review the catches of individual fishers, the 17 licence holders who reported their efforts over the period 2019-2024 are displayed in Figure 8. Two drift net fishers ('Drift 1' & 'Drift 8') were the most successful, catching 278 sea trout during the period; only one other had a total catch exceeding 50 fish.

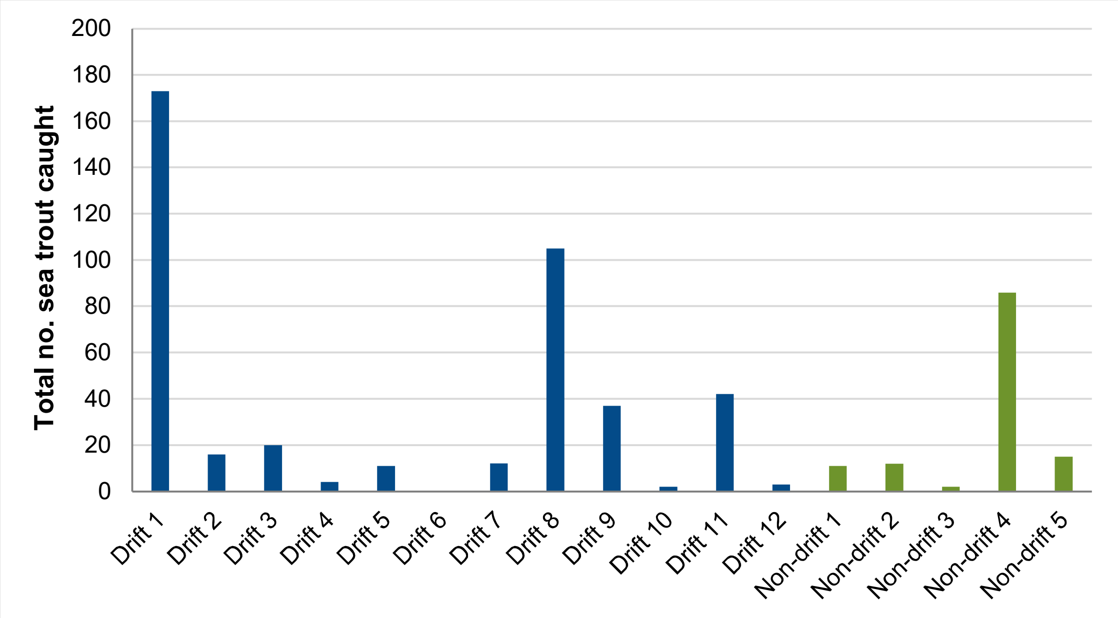

Figure 8 Total number of sea trout caught by licence holders 2019-2024

From completed questionnaires received from 11 fishers (46% return) about the income raised from their catch; 6 claimed they did not sell any fish caught- 'personal consumption only'. Of the others, three fishers responded 'very little' or that the 'few fish caught did not cover the licence fee. Another quoted '£500' and the last said 'up to 2009 he generated an income of £2,000 but since then poor catches and last year only received £150'.

When the data were last compiled in 2014, fishers were asked how much they received for the fish caught. The first sale value ranged from £4-15/kg (due to some selling to wholesalers such as Lowestoft fish market, whilst other licence holders were going direct to local restaurants and pubs). The average value was estimated to be £8/kg. Allowing for inflation, this equates to an estimated value of £10.50/kg in today's terms.

In the absence of information on the current proportion of fishers selling their catch, a maximum value calculation can be made on the assumption of all captured fish being sold. Using this information, the total first point of sale value for the Anglian coastal fishery was £864.30 (60 fish x mean mass of 1.3 kg x £10.71). Even this overestimate represents an 84% decline in value since the last valuation in 2014.

3.4.2. Earnings deductions

As part of the 2014 survey of fishers we asked them to provide details of their outgoings. The returns suggest relatively minor costs but it was virtually impossible to disassociate the direct costs associated with fishing for salmon and sea trout and their other fishing activities.

A selection of the comments received: '£100 chandlery, £150 fuel, £50 boat maintenance', '£2,500 mooring, £1,500 chandlery, £1,500-2,500 fuel, £1,000 boat maintenance', 'approx £500', '£200 beach hut rent', '£400 maintenance and running a small boat and net repairs', 'purchase of new net when required'.

There is a fixed cost for all the licence holders for an Environment Agency licence which is currently £103, but at the time of the 2014 survey was £79.

For comparison it is worth noting that for North East coast fishers the quoted costs they incurred (in 2011) to operating in this fishery were between £2000 and £8,000, averaging £5,900. Their licence costs were significantly higher ranging from £1,206 to use a Northumbria drift net in 2011 to £842 to use a Yorkshire T&J net licence. This shows the difference with fishers operating on a more commercial basis.

We received no information that suggested the Anglian fishers made payments to employees or endorsees (all 9 respondents indicated they did not pay other people to assist with their fishing activities).

3.4.3. Other fishing income

It is likely that the sea trout net licensees also fish for other sea fish species. Fisher's feedback indicated they are also catching whitefish and bass. No one was forthcoming with details of the proportion of income from other species.

The mainstay of the north Norfolk coast fishers is shellfish. Operators out of Wells, Cromer and several smaller villages set pots for lobster and crabs. They also actively cultivate mussels and oysters and hand pick whelks.

It is not wise to extrapolate from the North East fishery, but to merely note that in 2011 the income from salmon and sea trout fishing for the majority of fishers contributed approximately 55% of their total annual income and that this figure was consistent with the National Federation of Fishermen’s Organisations estimate.

3.4.4. Wider economic impact

The economic influence of the fishery is mainly limited to the local communities due to the limited number of fish caught. This is especially the case for those landed on the north Norfolk coast which are mostly thought to go directly to local retail outlets. The fishery of south Norfolk and north Suffolk involves some selling onto fish merchants and wholesalers based in Lowestoft. As a result this could extend the supply chain to consumers outside of the immediate area and so increase the economic worth of the fishery.

Figure 9 below shows the potential steps for salmon caught in the North East coast fishery (2011), ending with some fish being served in restaurants at £23/4oz portion. This clearly has the potential to greatly inflate the overall value of the fish as fish move up through the supply chain. At each step, money will be spent on local services and will influence the wider local economy through support industries and discretionary spend from individuals.

The figures were derived from discussions with netsmen, fish merchants and internet searches; they vary considerably and so are intended to be indicative only.

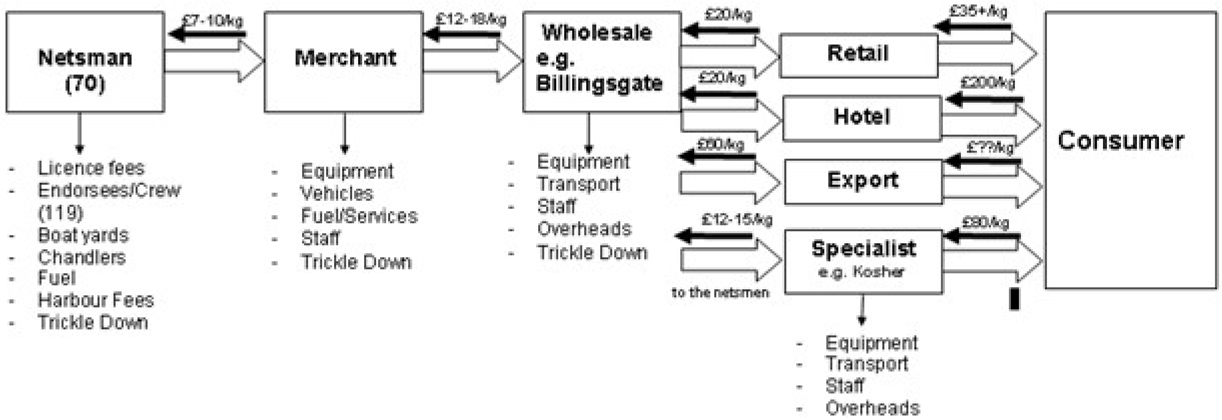

Figure 9 Example of a supply chain for wild caught salmon fishery

The fate of sea trout caught in the Anglian coast fishery is not simple to determine however it is easy to see how the initial value of first sale (estimated to be a maximum of around £800) could be multiplied several times in order to obtain an overall value for the fishery. Sea trout do not perhaps have the same significance as wild salmon nevertheless they are sought after delicacy and several establishments in the area promote the sale and consumption of 'local caught wild sea trout'.

Since the NLO came into force in 1996 the fishery has reduced substantially in scale. In 2024 there were 10 licence holders, compared to 65 in 1995, the fact that there is less activity and less fish are now landed will impact on local businesses and the overall value.

A telling example of this effect is that North East fishers reported that they now have to look overseas to find suitable nets as the local and UK net making industry has reduced.

3.5. The social and historic importance of the net fishery

The Anglian fishing industry is relatively small and in decline but has a uniqueness and strong traditions. Families who still fish today have done so for many generations, fishing from local beaches with small boats. In north Norfolk in particular the activity is centred around small settlements, with quays and harbours providing access to the braided estuaries and coastal waters. These fisheries typically target shellfish and finfish at different times of the year and the relatively small catches are sold on directly to local retail outlets with little processing and limited involvement of fish merchant or wholesalers.

It is accepted as a hard way to earn a living and those involved are increasingly under pressure from rising costs and additional regulation. Further challenges have come to the fore in recent years though the off shore wind farm development that although satisfying the required environmental assessment add to the difficulties experienced by local fishers (from Portrait of North Norfolk Fisheries 2011).

The waters around our coast are changing; sea level rise and the warming of the marine environment when considered with other cumulative factors are changing local ecosystems. A good example is that in the recent fisher's survey several respondents commented that it is now more difficult to catch sea trout 'water is clearer' and there are 'many more seals nowadays that predate on small sea trout and regularly take fish directly caught in nets'.

All of these pressures faced by fishers make it difficult for them financially (sea trout provide at best a small direct contribution to income). There is a sense that individuals are proud of their occupation and fiercely protective of its continuation.

Fishing does contribute to tourism in coastal communities, either from the pleasure people derive from watching the boats and the unloading of the catch or the fact that fresh fish and shellfish can be bought locally and enjoyment of eating locally caught produce. This strong fishing heritage and the resulting attraction to tourists is impossible to value but is without a doubt a recognised benefit.

There is likely a proportion of the current licence holders who do not sell on the few fish they catch. These individuals will keep the fish for personal consumption by their immediate family. Therefore they receive no income from their netting of sea trout but probably pursue the activity as a hobby or because it has been done by their predecessors. The fisher's comments in their response to the questionnaire included that 'I am not a professional fisherman... present circumstances have prevented me going to see...I must make an effort in September even if it is for only one excursion.' And 'Since my uncle died a few years ago we have not fished as much...we now have new young crew in the family so it's nice to have the option to go, weather permitting'.

These low intensity fishers, with low catches, should be duly considered in regulating the fishery moving forward.

In response to our informal consultation undertaken over 2 months in the summer of 2014, four responses cited the traditional values that this small historic fishery brings, and that the low levels of exploitation are not having an impact, and so there was a demonstrable local benefit in retaining this activity at, or around, current levels.

Henry Bellingham MP wrote ‘...it is very much my view that the current licences should remain in place. I have taken a close interest in the netting carried out...this is a fishery worked on a very sporadic basis...netting as a hobby and none of them are catching excessive numbers. They are very definitely not in my opinion having a detrimental impact on stocks.’

Sharron Bosley the project manager for the Wash and North Norfolk European Marine Site reminded us that 'fishing for salmon and sea trout is an acknowledged and accepted activity in the Site Management Scheme'.

4. The salmon and sea trout rod fisheries in Anglian and North East England

In addition to the benefits from the operation of the net fishery, further economic and social benefits accrue through the rod and line fishing (angling). There is a limited, but increasing, interest in fishing for sea trout in local Anglian rivers and significant fishing for both salmon and sea trout in rivers in the North East.

Rod fishing for salmon and sea trout was undoubtedly widely practiced for centuries but was curtailed from the early 1900’s when the impacts of industrialisation, increasing population and other changes reduced stocks of fish in many rivers to levels close to extinction. Changes in the pattern of industry, reductions in polluting discharges, improvements in sewage treatment, work to remove or overcome barriers to fish migration and efforts to enhance river habitats have supported resurgence in salmon and sea trout numbers returning to notably the North East rivers in recent decades.

Anglers’ catch returns show that rod fishing is widely practiced and salmon and/or sea trout are now reported taken from rivers including the Aln, Coquet, Wansbeck, Tyne, Wear, Tees, Yorkshire Esk and rivers in the Yorkshire Ouse system (including the Ure, Swale and Derwent). Catches of salmon from the river Tyne have been consistently the highest of any river in England and Wales..

More local Anglian rivers are known to be frequented by sea trout- this will be picked up and described in much more detail in the Fisheries Assessment Report.

Anecdotal evidence suggests that anglers are targeting wild brown trout, and in all likelihood migrating sea trout in rivers such as the Welland in Lincolnshire the Nar and Wissey in west Norfolk, the Waveney in east Norfolk and a number of small north Norfolk rivers and coastal creeks/estuarine areas.

4.1. The numbers of people involved in rod fishing

Anyone aged 12 years and over fishing with rod and line for salmon or sea trout in England and Wales is required to hold an Environment Agency salmon and sea trout rod licence (a full adult licence currently costs £90.40).

For the whole of England in 2023 we sold 931,443 of all licence types, of which 22,077 were to fish for salmon and migratory trout. The number of sold in Anglian Region was 747 salmon and sea trout licences. In comparison Yorkshire and North East sales were 4,621.

In general rod licence sales of all types have declined from a peak in 2009, especially coarse fish licences and to a lesser degree salmon and sea trout. The variation in sales can be attributed to not one single factor; trends in stock levels, in particular the number of returning migratory salmon and sea trout may be a factor, but clearly weather has an effect and general economic state of the country.

The work of the Environment Agency is thought to influence licence buying through maintaining an enforcement presence on the positive side but the restriction on our marketing abilities makes it difficult to attract more people into angling.

4.2. Demographics of the rod fisheries

There are a variety of different types of salmon and sea trout rod licences that can be purchased. In 2023 we sold 7,696 full licences (35%) 7,278 concessionary licences (33%), 2,861 junior licences (13%) and 4,242 short-term licences (19%) across the country. In Anglian there was a higher proportion of temporary licences sold than elsewhere; this may be explained because anglers resident in this part of the country are travelling elsewhere for holidays and buying a day or week long licence before going.

A survey in 2007 (Environment Agency 2007) estimated that salmon and sea trout anglers spent around 400,000 days fishing in the UK each year. By comparison 2.4 million days were estimated spent angling for coarse fish and 3.4 million for trout. In the east of England there 2.3 million fishing days; 98% targeted coarse fish and 2% trout- there was no figure for salmon or sea trout fishing. However there was an acknowledgement that there were anglers who lived in this area who travelled elsewhere to catch salmon and sea trout.

4.3. The economic contribution of rod fisheries

The economic contributions of rod fisheries have been assessed in different ways. Investigations have considered what anglers spend in a locality when going out or visiting to fish – their direct expenditure. Other studies have explored how salmon and sea trout in rod fisheries add value locally.

4.3.1. Direct angler expenditure

The 2007 report estimated that the gross expenditure for salmon and sea trout anglers was £37M per annum and that this sector of the sport support 1,179 jobs across England and Wales but in the East of England it reported zero expenditure and zero jobs.

4.3.2. Salmon and sea trout river fishery values

Earlier studies have estimated an average value of each salmon caught in a region. These figures are based on willingness to pay surveys. These surveys ask households to indicate the amount of money they would theoretically be prepared to pay to see salmon stocks stay at current levels or improve. The average values from these surveys are then multiplied up over the number of households in the region and divided by the number of declared salmon.

For example, Radford et al (1991) ascribed an average value per salmon for Northumbria as £5,495 and for Yorkshire as £15,833. As part of the North East NLO review the 2011 declared rod catch data gave a value of £44,701,825 for salmon in Northumbria and £3,024,103 in Yorkshire. There are many variables that come into play for the production of these figures meaning that they should be treated with caution. For example, changes in stock levels and different rivers are at potentially differing stages of recovery.

No similar sea trout estimates are available; often it is the same rivers which support runs of both species. However in Anglian it should be noted that any rivers are supporting only sea trout runs (albeit considered at present to low numbers of fish), in time these rivers may begin to be considered and marketed as a venue to potentially catch sea trout by rod and line.

The Angling Trust and other organisations representing anglers' interests cited the value of fishing by rod and line:-

Mark Lloyd the CEO of the Trust commented 'we believe that the economic, social and environmental benefit of allowing fish to return to rivers, where they can be fished for by rod and line, far exceeds the equivalent benefits of allowing them to be netted. This is borne out by every economic study into fisheries.'

4.4. Social benefits of rod fisheries

Angling offers social as well as economic benefits. Research has shown that, as well as offering a chance to relax and enjoy the natural environment, many people use clubs or associations to pursue angling (Environment Agency 2007). As a consequence the sport is generally well structured and organised. These arrangements allow for people to come together, for clubs to draw in new participants from schools and communities and to promote the health and physiological benefits of the sport.

Generally speaking coarse fishing has more of a club scene, with organised matches, whereas river fishing for salmon and sea trout is more of an individual pursuit. Landowners with fishing rights allow only small numbers of anglers to target migrating fish at any one time.

Table 1 below gives an indication of the reasons given by salmon and sea trout anglers as to their motivation for fishing which indicates some of the social benefits arising.

Table 1 Importance of different motivations for salmon and sea trout angling

Motivations	% Respondents
Relaxation	98
Wildlife	95
Landscape	95
Seeing the fish	86
Being with friends	68
Something to do	68
Getting away	66
Variety of fish	65
Size of fish	45
Number of fish	40
Keeping the fish	36
Joining competitions	11

Studies have also highlighted positive feelings that people gained from involvement in angling suggesting connections to mental wellbeing. This is evidenced by the recent success of initiatives such as 'Fishing for Heroes' that has enabled servicemen with a range of physical and mental challenges to enjoy the benefits that angling can provide.

5. Summary and conclusions

Salmon and sea trout provide economic and social benefits in the east of England and more notably coastal areas of north Norfolk and around Lowestoft. The licence holders are direct beneficiaries through their exploitation in the coastal net fishery, although it is difficult to quantify. There are supporting industries and for those fisherman who sell their catch a resulting supply chain.

Although there is some anecdotal evidence of a small number of local rod and line anglers targeting the species, the majority of North Sea salmon and sea trout stocks move back into North East rivers where rod fisheries are more established.

The net fisheries are part of long standing coastal fishing communities that make a contribution in supporting tourism in the region. These fisheries although small have an existence value, supporting a sense of wellbeing as indicators of a clean environment and by being appreciated as a component of the local natural world and heritage.

The total first sale value of salmon and sea trout from the Anglian coast net fishery has been estimated at no more than £800. Fish are either sold direct to retail outlets (pubs, restaurants, and small local fresh fish shops) or to fish merchants and wholesalers. Therefore the total value of the fish is likely to be several times larger than this figure.

The net fishery has a wider economic value. For those fishers trying to make a living from the sea, the salmon and sea trout caught are likely to be only a small component of their income. In the North East fishery it was estimated the contribution was in the order of 50% to 75% of licensees' earnings the Anglian proportion is likely to be a lot less. The number of people fishing or directly supporting the fishery is 31, although very few of these could be considered employed or to profit from their involvement. The fishery provides some local chandlery business and there are associated running costs such as fuel and other consumables.

The number of licences issued for net fishing for salmon and sea trout in the Anglian coastal fishery has fallen since the NLO original came into force. In 1995 there were 65 licence holders, when the order was last renewed in 2014 there are now only 10. The current split between drift and non-drift fishers is 7 and 3 respectively.

The average age of the fishers is 73.5, with the youngest being 62 and the oldest 85. With the continuing decline in licence holders there has been an associated decline in fishing activity (number of days fished) and also the numbers of fish caught. This has been steadily reducing over many years; in 2024 the total days fished was only 56 with 57 fish caught.

There are no figures for direct expenditure from salmon and sea trout anglers fishing locally but in North East England it has been estimated at over £5.5 million per year and to support almost 200 jobs. Salmon and sea trout rod licence sales have declined in recent years and in 2023 the total was just over 22,000 for the whole country.

The Anglian net fishery compared to the North East coast is very small, the numbers of fish caught annually are in the hundreds; between 1 and 2% of the total caught further north. Most of the fishers are currently thought to only to keep their catch for their own consumption and consider themselves 'hobbyists'. Of the 10 or less 'commercial' fishers the catching of salmon and sea trout is thought to make up only a small part of their fishing activities. However, the importance of any earnings should not be discounted when considering individual's livelihoods.

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