



# GREATER ESSEX TRENDS

## June 2024

This document has been prepared by the **Essex County Council Policy Unit**.

The Policy Unit supports the Chief Executive, the Council's Cabinet and the whole organisation in the overarching strategic direction and leadership of the County Council. Its objectives are to:

- Work closely with the County Council's political leadership to set and influence policy direction and help the organisation to determine its key objectives;
- Generate insight – to underpin effective decision making and to ensure the Council is evidence led and learning orientated;
- Lead our equalities and levelling up work and responsible for our strategic relationships with partners;
- Lead on performance and evaluation for the whole Council; and
- Communicate with our key audiences to support the achievement of our objectives.

### **Information on data sources**

More detailed research, analysis and statistical information on Greater Essex, its component administrative areas and comparator areas can be found on the Essex Open Data Platform. This can be accessed at: <https://data.essex.gov.uk/>.

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# Foreword

Greater Essex Trends has been developed to describe and communicate some of the key challenges and drivers of change that are shaping the lives of people across our diverse communities. It describes some of the strengths of Greater Essex and the opportunities we will have to grow, learn, and prosper in the years ahead. By bringing these different threads together, the document provides a high-level summary of the context in which public service partners across Greater Essex, do business.

Greater Essex Trends is based on a synthesis of some of the research and analysis that has been used to inform our strategic plans and policy positions. Inevitably in this type of document, as soon as it is published 'the world moves on' and further analysis is required to keep it up to date. This document therefore represents a starting point for what will be ongoing work. We are continuing to build and develop an evidence base for policy and, as part of this, will provide online updates to this document to reflect more recent trends and developments.

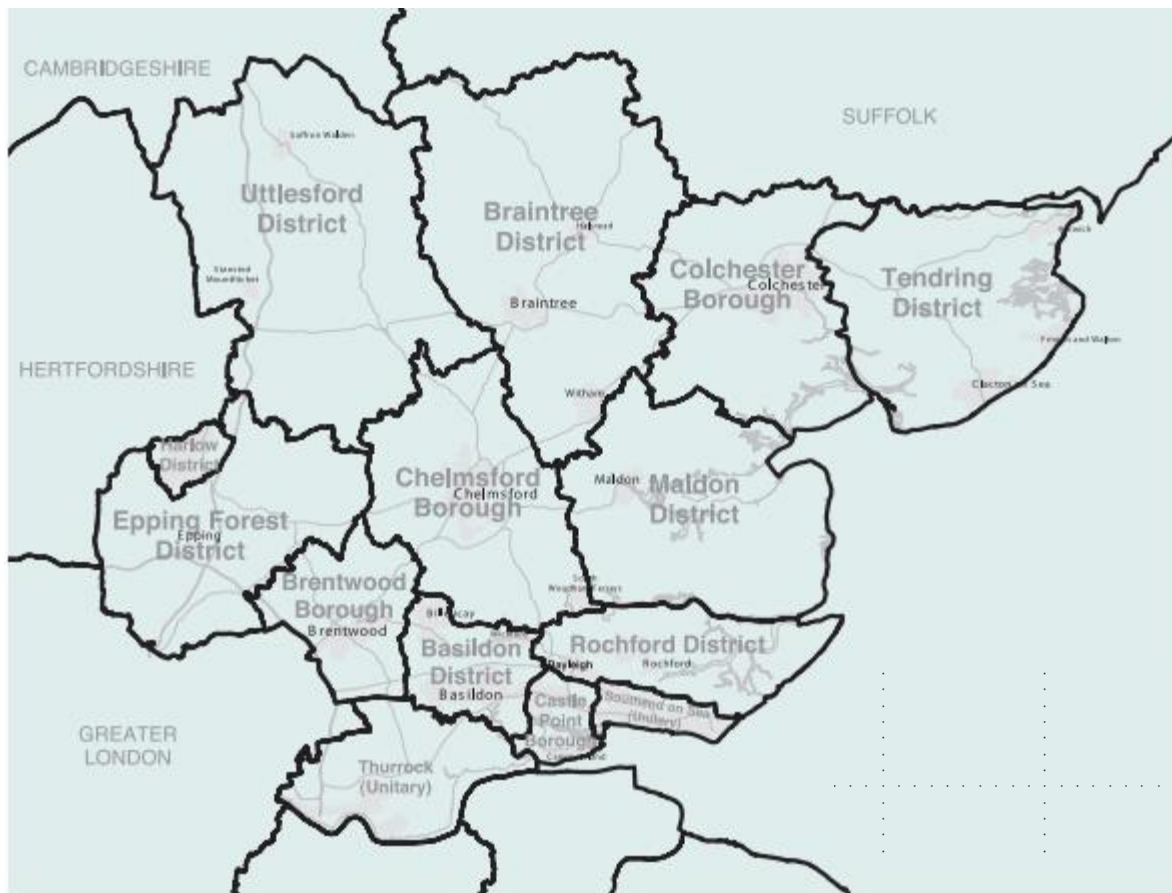
Greater Essex Trends is not a document about local government per se. It does not say how public service partners intend to address the challenges facing our region, what we have achieved so far, or how we will finance our ongoing work. Nor does it make specific recommendations for what specific partners and agencies ought to do.

Rather, Greater Essex Trends provides information at a more fundamental level. It presents the information that allows us to make these decisions. It paints a picture of our county's population profile, economy, environment, and infrastructure as it is today and how it might develop in the future. In preparing this document, we have let the evidence tell its own story.

We hope you will find this useful. If you would like to discuss or develop thinking on any of the issues raised in this paper, please do get in touch.

# Our Geography

Reference map: Greater Essex and its constituent areas



This map above provides an overview of Greater Essex’s geography and highlights the region’s administrative divisions. It shows the twelve local authority districts that make up the Essex County Council area, together with the neighbouring areas governed by the unitary authorities of Southend-on-Sea City Council and Thurrock Council.

The majority of statistics reported in this document relate to the Greater Essex area. There are, however, some exceptions which are noted throughout the document. In general, when we refer to “Greater Essex” within this document we refer to the area covered by Essex County Council, Southend-on-Sea Council and Thurrock Council.

In some cases, the document also makes reference to statistics gathered on the North Essex Councils (NEC) area (Braintree, Chelmsford, Colchester, Epping Forrest, Harlow, Maldon, Tendring and Uttlesford), and the South Essex Council (SEC) area (Basildon, Brentwood, Castle Point, Rochford, Southend-on-Sea and Thurrock).

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# POPULATION

# Population

## Summary

Over the past century, hundreds of thousands of people have come to Greater Essex to improve their lives. People have moved here to enjoy the quality of life offered in our villages, towns, and cities, and to grasp new economic opportunities. While there is no single Greater Essex character, most of the 1.9m people who live in the area are here because they or their parents saw opportunity and seized it.

As prosperity has increased more and more people have settled in Greater Essex. The last seventy years has seen unprecedented population growth in our county. This has been reflected in a surge in the number of homes built and the development of entirely new settlements.

Greater Essex in 2024 therefore looks very different to the Essex of the 1950s. The county's urban geography, economy, infrastructure, and diverse social networks are a product of its recent past.

Demographic shifts will continue to have a profound impact on Greater Essex in the decades ahead. The region's demographic profile means we can expect more residents to reach retirement age and fewer working-age residents will be available to support them. These shifts will also impact on key services as demand increases at a faster rate than the resources available to support and sustain them. We can expect the nature of the demands placed on local services may change too as our population grows more diverse.

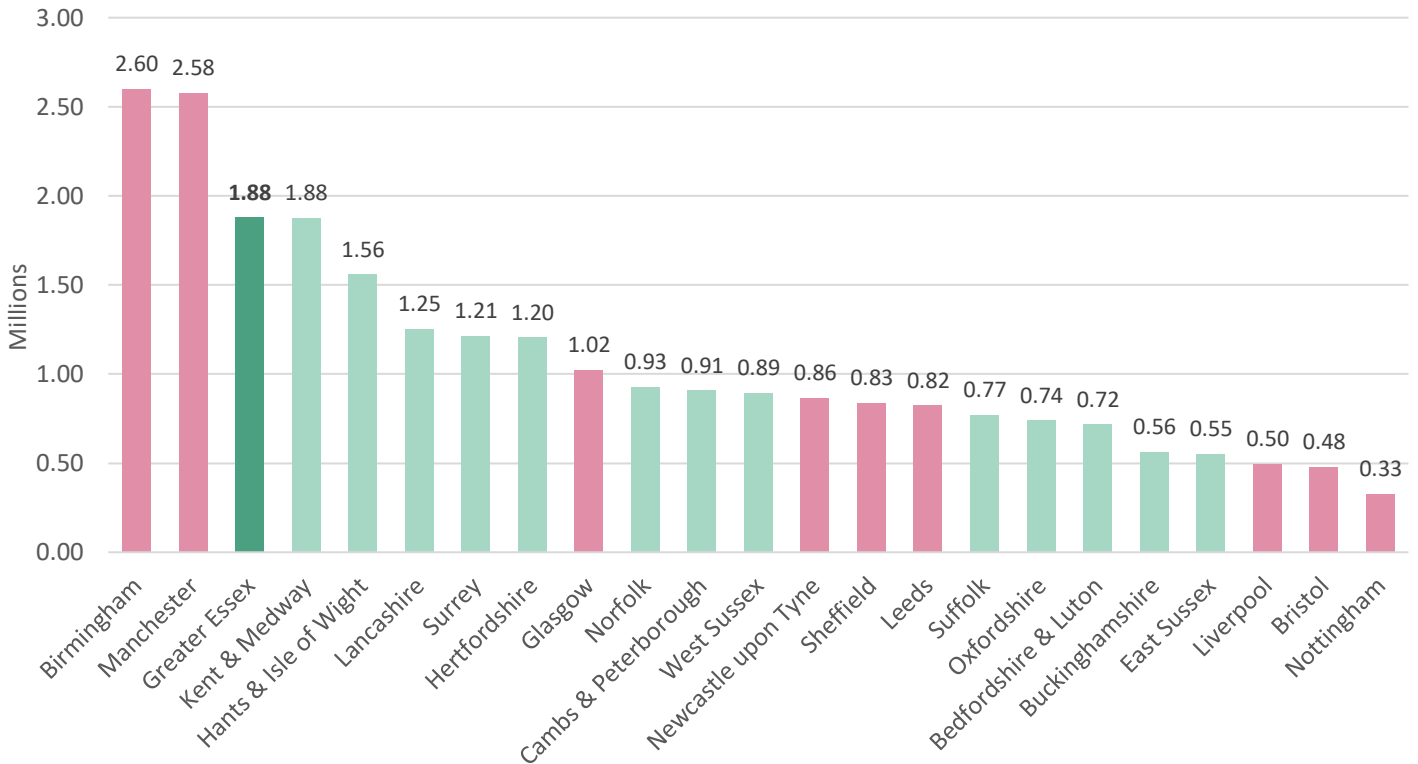
Demographic pressures will drive physical changes in towns and cities across Greater Essex too. We will, for example, need to build more homes. Local plans currently provide for c.197,000 new homes to meet the needs of a growing population to the mid-2030s (c.48,000 of these have already been built). This growth can bring opportunities – new jobs, new investment in infrastructure or new cultural and leisure opportunities; but it can also be uncomfortable for some established communities.

Partners across Greater Essex must work together to manage development and to shape future growth in a way that is socially, economically, and environmentally sustainable. Without joined-up policy and the right investment, our region's changing demographics could erode Greater Essex's natural and social capital, strain our physical and service infrastructure, and place the quality of life enjoyed in Greater Essex - the quality of life that has drawn people to our county – at risk.

## Our growing population

At the time of the 1951 census, Greater Essex had a population of little over 600,000 people. Today, the area has a population of some 1.9million – larger in scale than the majority of UK cities (only London, Birmingham and Manchester are more populous).

**Chart PD1: Population of Greater Essex and comparator areas (excluding London), 2022**

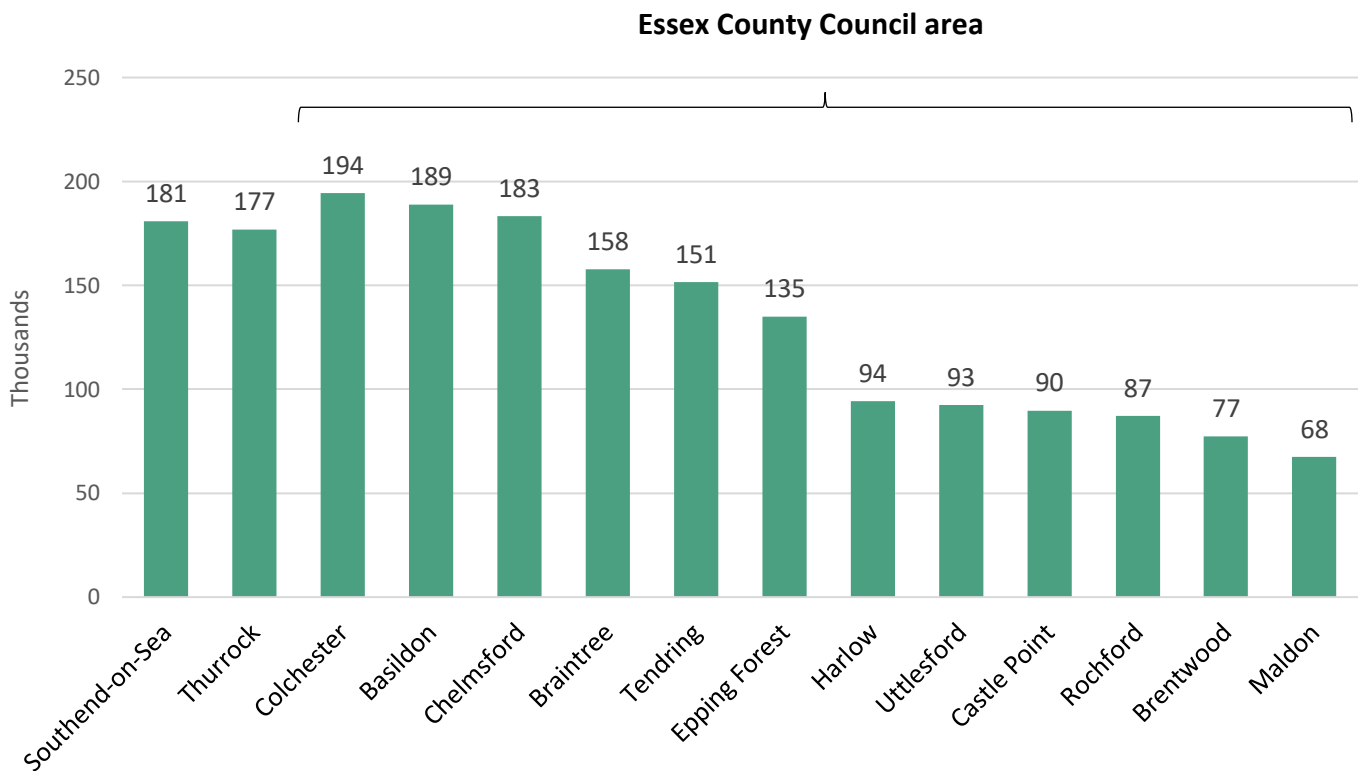


Source: Mid-year Population estimates 2022, National Statistics

Note: Definition of City Geography based on Centre For Cities online data tool

Greater Essex’s population more than doubled in the latter half of the twentieth century, with rates of growth mirroring those of China at some points. The 1950s saw the sharpest population increases, as Greater Essex became home to families and young people leaving post-war London. Following the Blitz, a massive housing shortage gripped the capital and the East End in particular. The government’s response was the organised movement of people out of the city and into purpose built ‘new towns’ and developments around existing towns. Construction started in Harlow in 1949 and in Basildon in 1950. Many existing Essex towns, including Witham and Braintree, also underwent extensive development. Today the towns of Basildon and Harlow are home to some 283,000 people, over 15% of all Greater Essex residents.

Chart PD2: Composition of Greater Essex population by borough, city and district council area, 2022

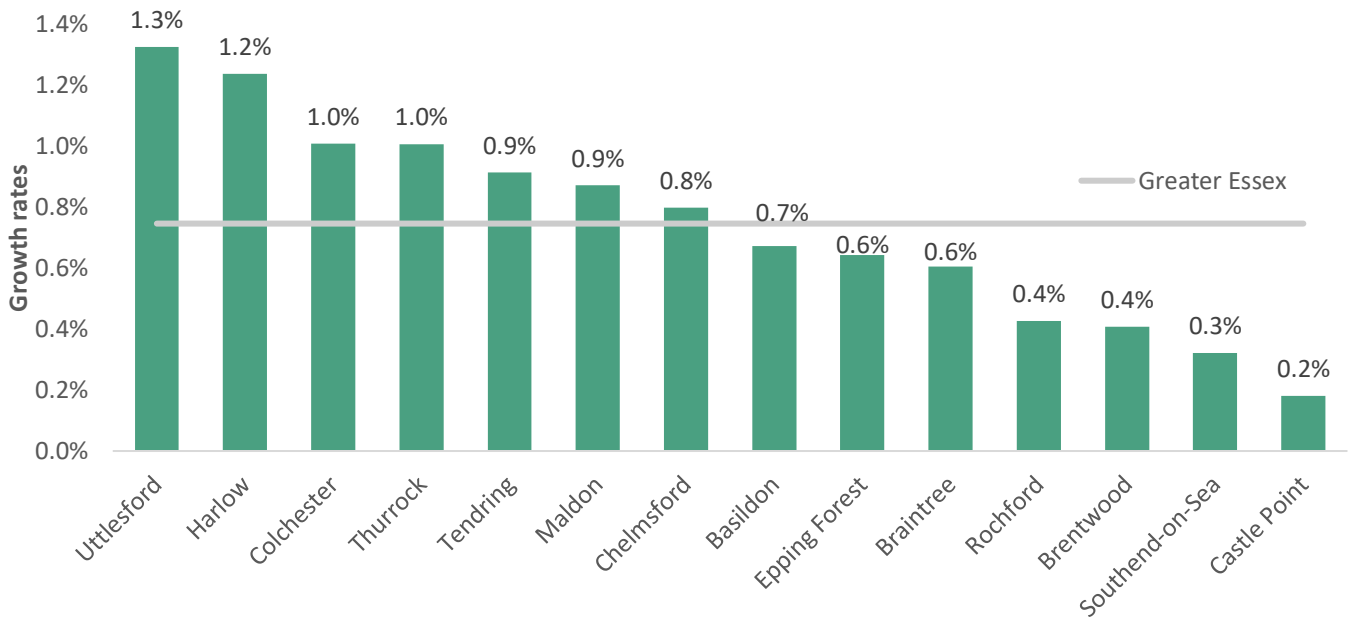


Source: Mid-year Population estimates 2022, National Statistics

High levels of inward migration accounted for around three-quarters of Essex's population growth across the 1950s and 1960s. This growth was magnified further by the post-war baby boom – new arrivals putting down roots and starting families. As a result, the Essex population grew almost five times as fast as the national population in the 1960s. Although the birth rate in Greater Essex today is much closer to national averages, the effect of these birth patterns could be seen as recently as the 1980s, when children of the 1950s and 1960s had children of their own. Inward migration, especially from London, continued to drive population growth in Greater Essex during the 1970s, 1980s and 1990s.

Over the last decade, the Greater Essex population has increased by an average of 13,400 people per year (0.7%). This is equivalent to over 250 people per week. This growth rate is in line with averages seen across the East and South East of England, but there have been significant concentrations of growth in Harlow, Colchester, Uttlesford and Thurrock. Although all parts of Greater Essex have experienced population growth, rates of change in Castle Point and Southend have been less than half the average for Greater Essex as a whole.

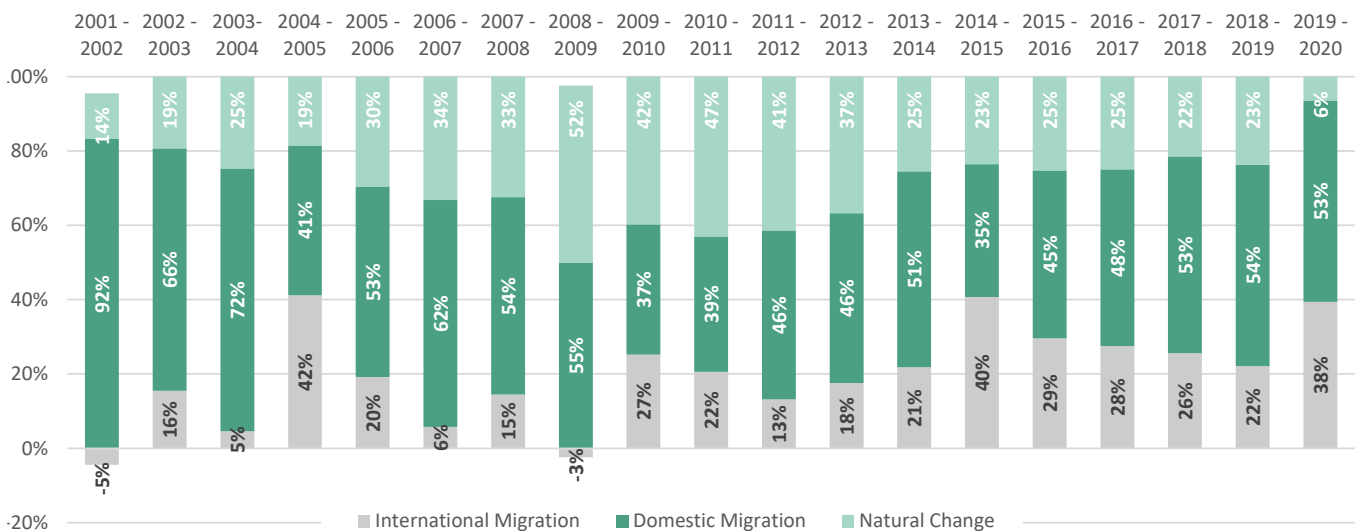
**Chart PD3: Average Annual Population Growth rates, Greater Essex and its constituent areas. 2012-2022**



Source: Mid-year population estimates 2012 and 2022, National Statistics

Recent growth in Greater Essex continues to reflect the fact that people living elsewhere in England, and especially London, see it as a place where they can better themselves and improve their quality of life. In the ten years to 2020, 74% of recent growth in the Greater Essex population was due to migration while only 26% could be accounted of by ‘natural growth’ (the excess of births over deaths). Of those who moved into the region, around two-thirds (65%) came from elsewhere in the UK with one third coming from overseas.

**Chart PD4: Components of Population change in Greater Essex 2001 - 2020**



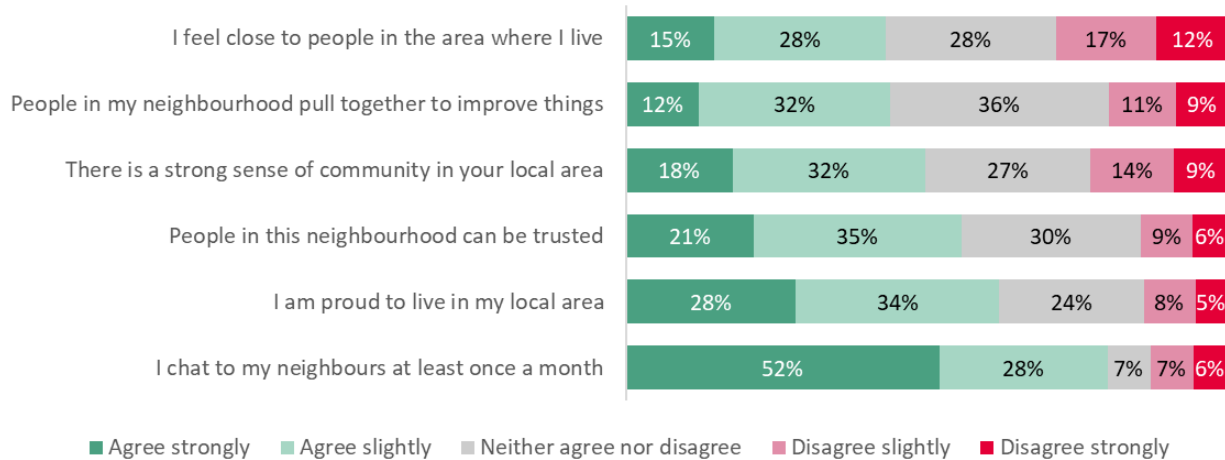
Source: Mid-year Population estimates 2001 - 2020, National Statistics

As well as driving growth in the population, the pattern of migration to Greater Essex has helped shape the identity of the region and its communities. The exodus from London to the ‘new towns’ has been particularly instrumental. Despite high levels of in-migration Greater

Essex residents generally trust their neighbours, have a strong sense of community, and feel proud to live in their local areas.

**Chart PD5: Residents view on their local community, 2023**

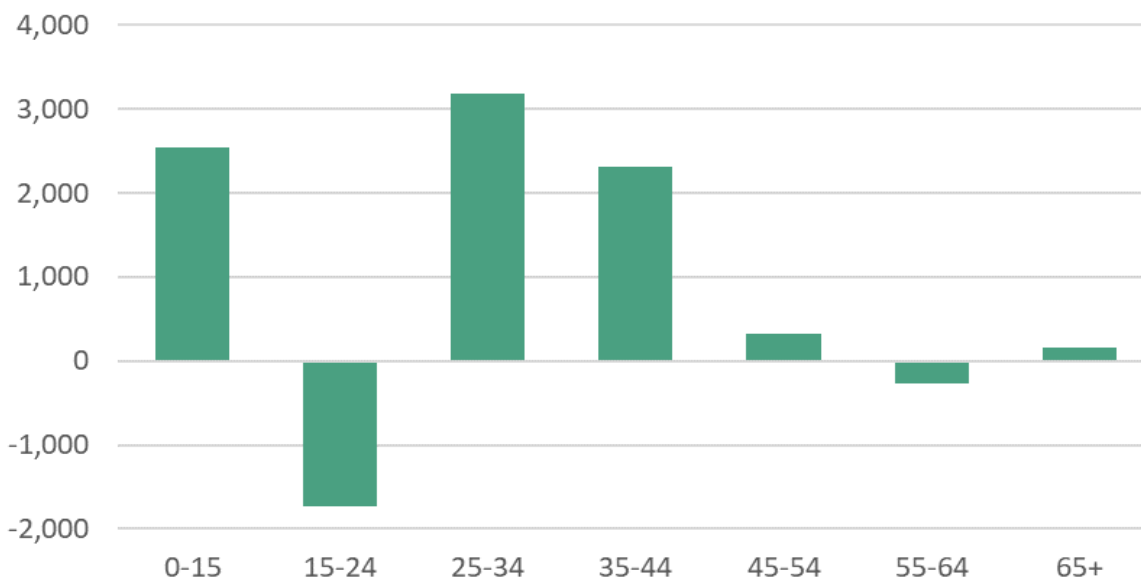
Residents were asked "How much do you agree or disagree with the following statements?"



Source: Essex Residents Survey 2023. Essex County Council

The age at which people move to Greater Essex, the places they come from, and the direction of their movement has influenced Greater Essex's character. Those moving into Greater Essex tend to be older than those moving out. Despite the fact that Greater Essex contains two universities with multiple campuses, the region loses c.1,700 more 16-24 year olds per year than it gains, with many leaving the county to work or study. Older migrants return, in many cases seeking space for growing families, or a place to retire in Greater Essex's coastal towns and villages.

**Chart PD6: Average annual net domestic migration to Greater Essex by age-group (2015 to 2020)**



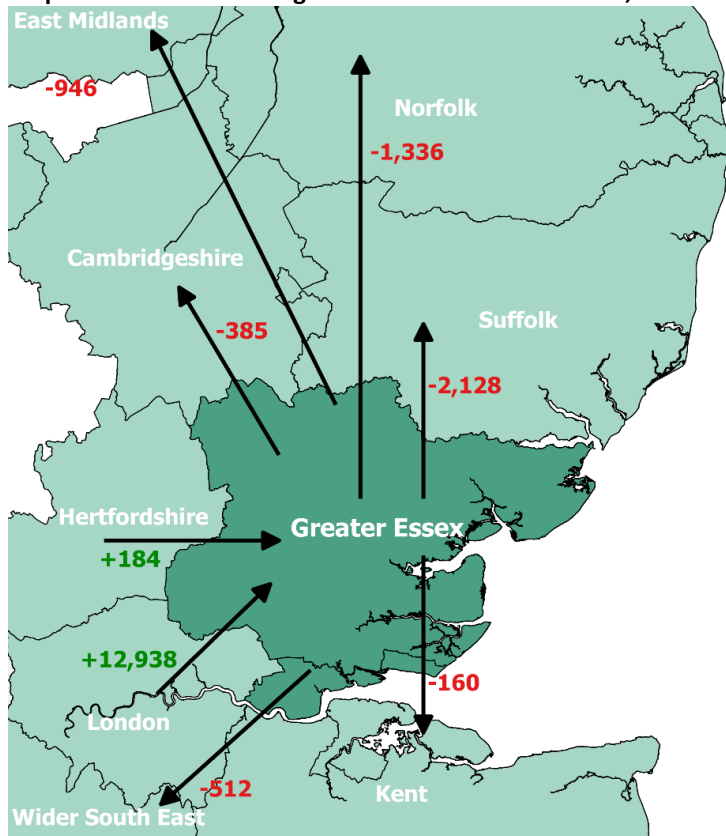
Source: Detailed internal migration statistics, year to June 2016-2020, ONS

Those leaving London, and particularly boroughs in the north and east of the capital, dominate migration to Greater Essex. Of the 75,300 people who moved to Greater Essex in

the year to June 2020, over 30% moved from London. It is the only region in England from which more people moved to Greater Essex than to which Greater Essex people moved. With so many migrants coming the short distance to escape the clamour of the city (and a large number continuing to work in the capital), it is hardly surprising that parts of Greater Essex are sometimes portrayed as having a London-fringe identity. Greater Essex may offer a better way of life - more affordable housing, lower crime rates, less pollution - but London remains firmly on the doorstep for those that want it for work or leisure.

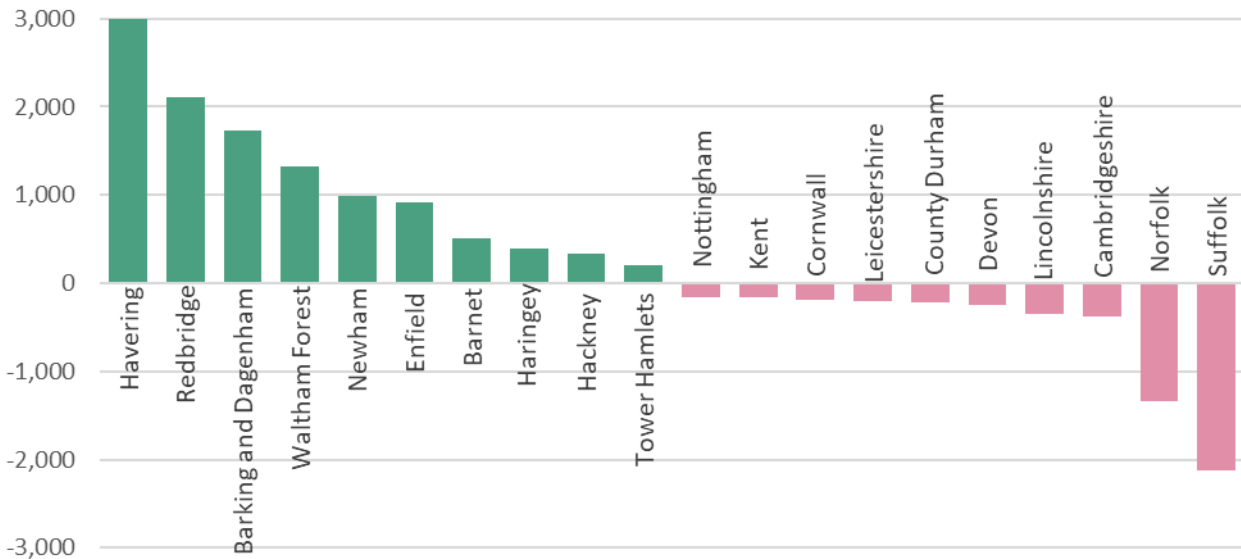
Northerly patterns of migration can be seen even within Greater Essex. Those moving within the county tend to move from the more urbanised south to the more rural north.

**Map PD7: Net Internal Migration flows to Greater Essex, 12 months to June 2020.**



Source: Detailed internal migration statistics, year to June 2020, ONS

**Chart PD8: Net migration to/from Greater Essex – largest net inflows and outflows in 12 months to June 2020**



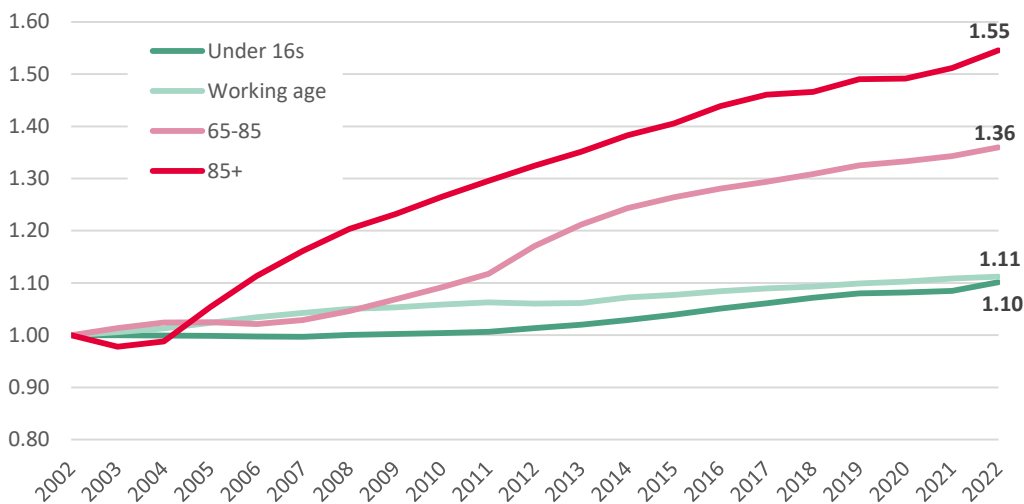
Source: Detailed internal migration statistics, year to June 2020, ONS

### Our changing population

As the Greater Essex population has grown, so too it has changed. Arguably the two most significant shifts in the region’s demography relate to the age of population, and its increasing diversity.

Over the past twenty years, the fastest rate of population growth in Greater Essex has been amongst those aged over 65. There were 375,400 people aged 65+ in Greater Essex in 2022, (the latest year for which estimates are available), this represents 20% of the total population compared to 18.5% in 2012 and only 16.7% in 2002. This includes some 103,000 people aged 80+ and around 19,000 who are at least 90 years of age. Over this same period, Greater Essex has seen relatively modest growth amongst younger age groups and amongst those of working-age.

**Chart PD9: Growth index - Greater Essex population by age (2002 = 1.00)**

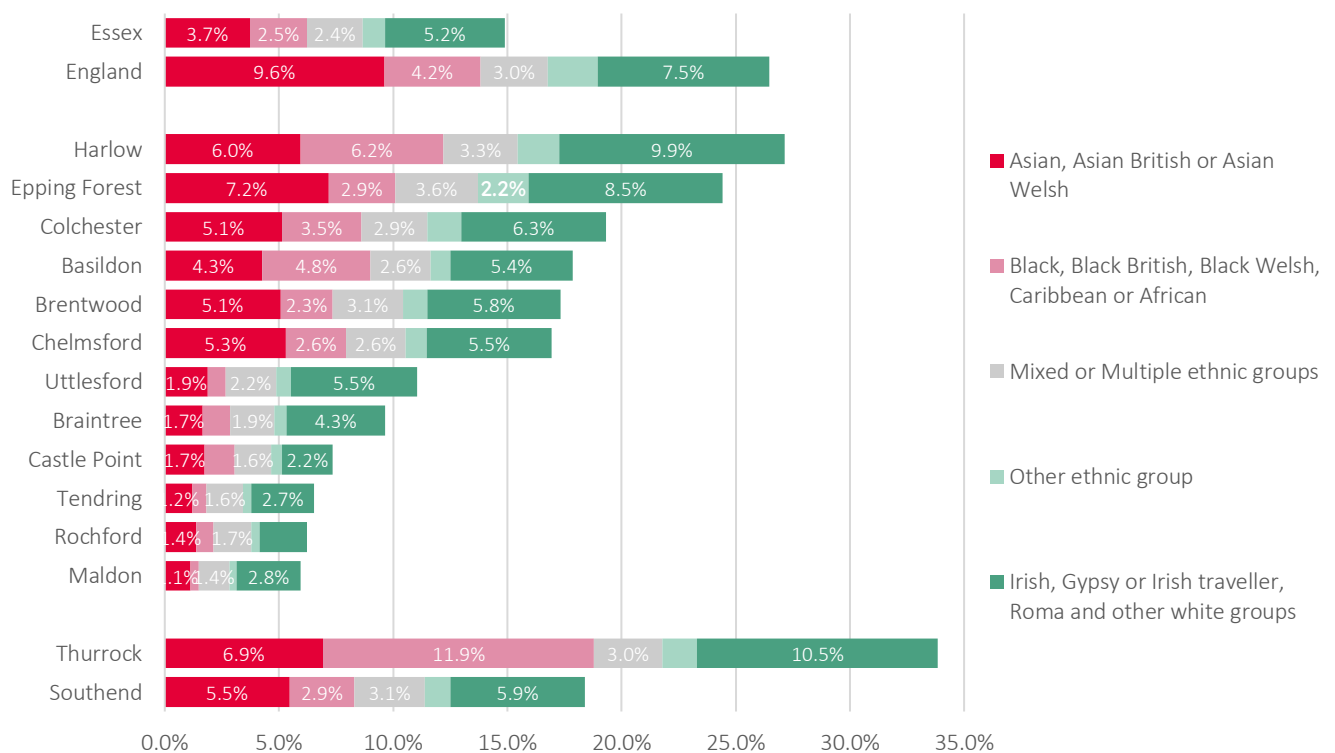


Source: Mid-year Population estimates 2002 - 2022, National Statistics

The past twenty years has also seen significant increase in the ethnic diversity of the Greater Essex population. In 2001, 5.8% of the Greater Essex population belonged to minority ethnic groups (i.e., groups other than “White British”). By 2011, minority ethnic groups accounted for 10.5% of the Greater Essex population and by 2021 this figure had increased to 17% (some 317,000 residents – more than two-thirds of whom were born in the UK). There were around 250,000 more people living in Greater Essex in 2021 than in 2001 – over 90% of this is due to the growth in the minority ethnic population.

Yet despite these increases Greater Essex remains less ethnically diverse than England as a whole, where the minority ethnic population accounts for over a quarter (26.5%) of the overall population. Even in Greater Essex’s most ethnically diverse districts – Harlow and Epping Forest – the size of the minority ethnic population is in line with national averages.

**Chart PD10: Population by ethnic group, Greater Essex and its constituent areas, 2021**



Source: Census 2021

Note: The White British population has been omitted from this chart for ease of interpretation

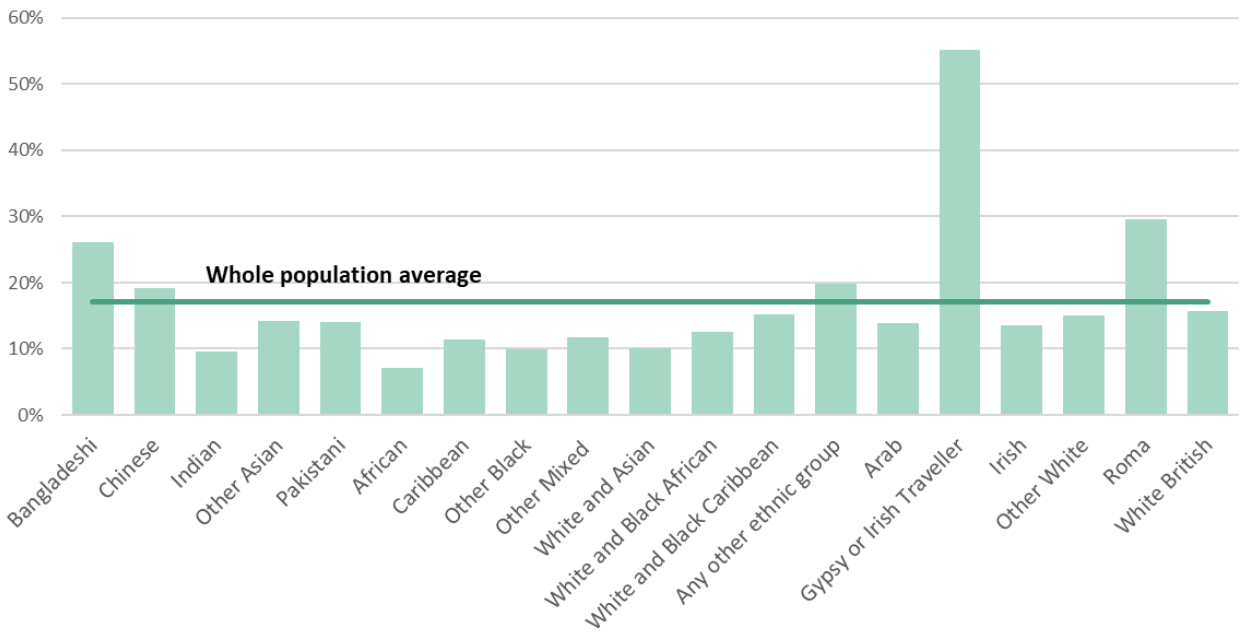
The composition of the ethnic minority population in Greater Essex is also different to that of the country as a whole. The “other white group” as recorded by the Census (including Irish, Gypsy and Irish traveller, Roma, and other white groups) is the largest minority ethnic group in Greater Essex, while the “Asian and Asian British” group is largest across England as a whole. Although the composition of the minority ethnic population varies across each city, district, and borough in Greater Essex, the ‘other white’ group is the largest in each locality.

Greater Essex’s minority populations in Essex are generally younger than the population as a whole. Because of this, headline data often suggests that they enjoy better outcomes. For

example, they are more likely to be in good health and free of disability, to hold qualifications, or to be successful in the labour market.

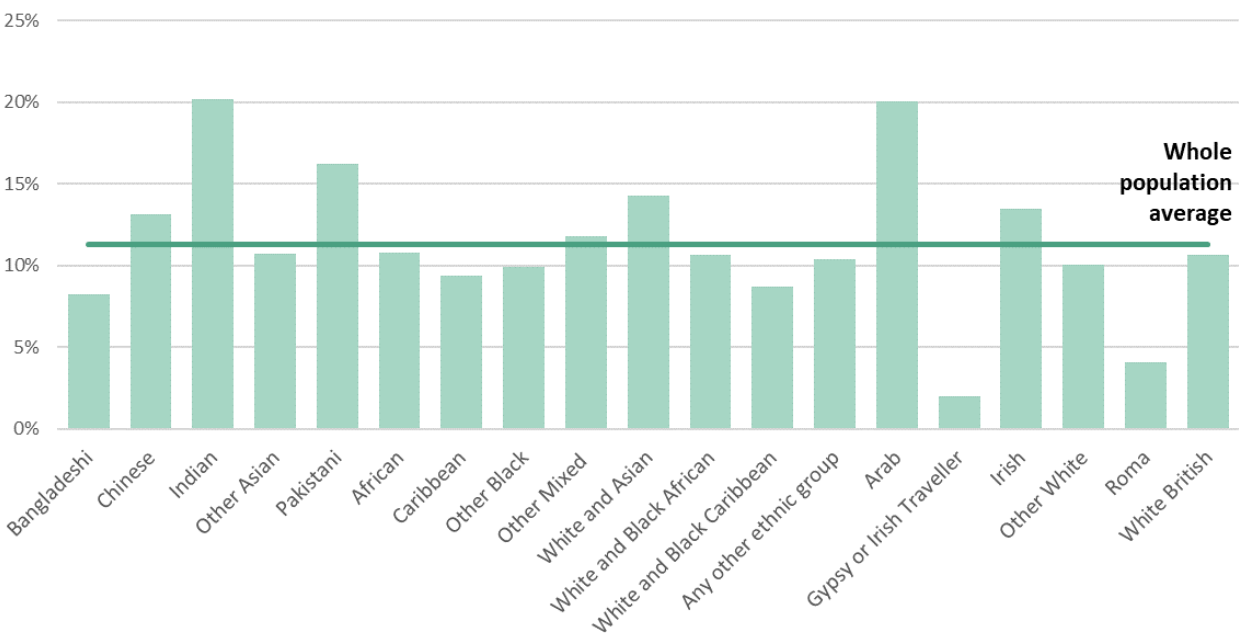
When we analyse the data, controlling for the effects of age, we can see that, while some minority ethnic populations do very well – exceeding population benchmarks on key measures of education, health, and labour market success – there are some minority ethnic groups in Greater Essex that fare much less well.

**Chart PD11: Age standardised rate – no qualifications by ethnic group, Greater Essex 2021**



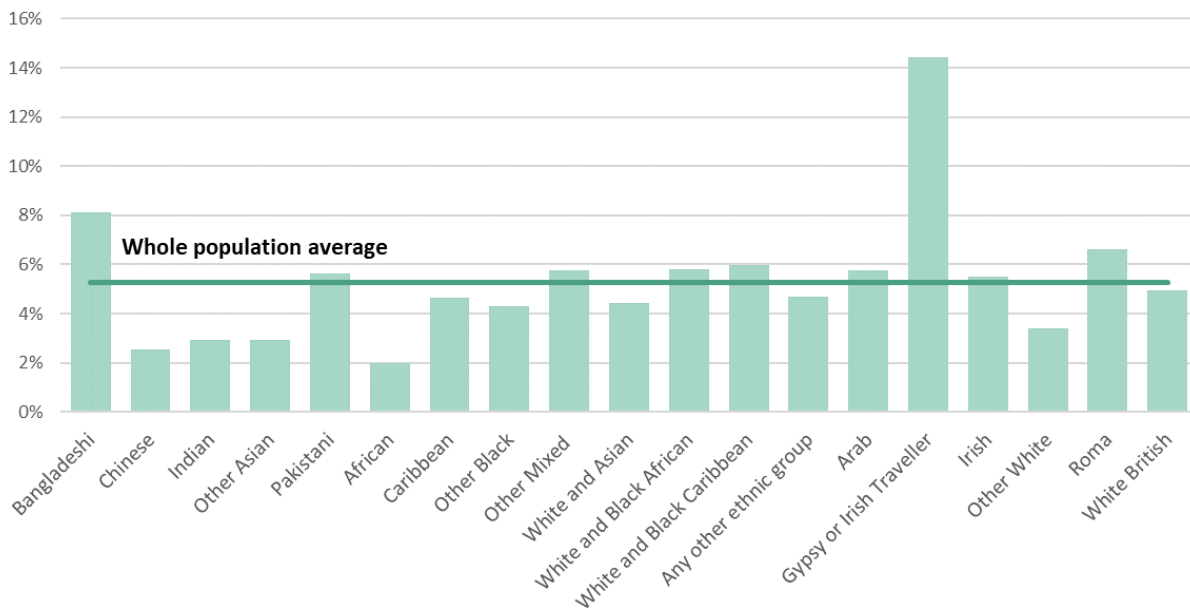
Source: Census 2021

**Chart PD12: Age standardised rate – percentage of residents holding professional jobs by ethnic group, Greater Essex 2021**



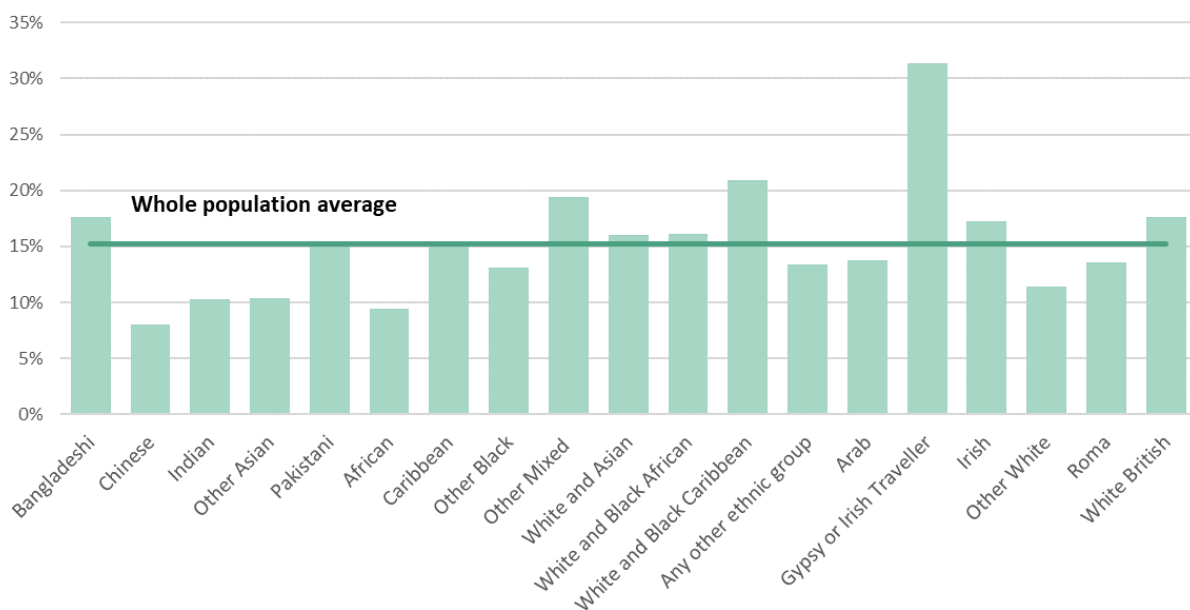
Source: Census 2021

**Chart PD13: Age standardised rate – percentage in poor health by ethnic group, Greater Essex 2021**



Source: Census 2021

**Chart PD14: Age standardised rate – percentage with a disability by ethnic group, Greater Essex 2021**



Source: Census 2021

There is no easy and straightforward answer as to why these groups experience consistently poorer outcomes – and we should be suspicious of simple explanations! Our analysis suggests that, although economic deprivation may influence poor outcomes for *some* of these ethnic groups, others are not disproportionately represented in Greater Essex’s deprived communities. Other factors, such as culture, engagement with education, length of time in the UK, language proficiency, and experience of discrimination will play a part. It is likely that the factors explaining poor outcomes will be different for different groups. Local decision-makers should therefore seek to understand more of the lived experience of these groups as they shape policy to tackle these apparent inequalities.

## **Other dimensions of diversity**

Trends affecting the age and ethnic diversity of Greater Essex have brought about major changes in the region's overall population, but the diversity of experience enjoyed by people living in Greater Essex is a function of a wider range of circumstances, contextual factors, and personal characteristics.

Living arrangements: the composition of households across Greater Essex is generally typical of England as a whole. Around 29% of households in Greater Essex are one-person households (compared to 30% nationally), while around 44% are households with either married or co-habiting couples (compared to 42%) and 11% are lone-parent households. Around three-in ten households in Greater Essex, and across England, have dependent children.

Where the experience of households in Greater Essex may differ from those in other areas is with respect to their household tenure. Across each household type (one person, couples, lone parents, with or without dependent children) households in Greater Essex are more likely to live in owner-occupied accommodation, and less likely to live in rented accommodation, than similar households across England. Amongst those households in Greater Essex who are in rented accommodation, they are less likely to be in social rented accommodation.

Disability: around 309,000 people across Greater Essex identify as having a physical or mental health condition or illnesses lasting 12 months or more, that reduces their ability to carry out day-to-day activities. This is consistent with the definition of disability set out in the Equality Act 2010.

Levels of disability within the Greater Essex population vary substantially across districts, with particular concentrations in some of our coastal communities. This reflects the strong link between levels of disability and age. One third of the Greater Essex disabled population is aged 70+. Above the ages of 50-54, more women in Greater Essex live with a limiting long-term illness/ disability than without. The equivalent age for men is 55-59.

The outcomes enjoyed by this group are, in part a reflection this age profile. The group is, for example, more likely to hold lower-level qualifications, and those who are in work are more likely to be in lower skilled jobs.

Religion: Around 980,000 people in Greater Essex identify as members of a faith or religion (52.7% compared to 57.3% nationally). There is a strong link between faith/religion and both age and ethnicity. More than half of those who are over 50 identify as members of a faith or religion, while those aged under 50 are far less likely to do so.

While the vast majority of those who identify as members of a faith are white British, there is a strong association between specific faiths and ethnic groups. For example, around 85% of residents who are Asian or Asian British, and over 90% of British and Black or Black British groups identify as members of a religion.

Sexuality: Our best source of information about the sexuality of the Greater Essex population comes from Census 2021. At the time of the Census, 34,500 people aged 16+ across Greater Essex identified as lesbian, gay, bisexual or another minority sexual orientation (LGB+). This equates to 2.3% of the population and is lower than the average for England as a whole.

Identifying as LGB+ is most common in the younger age groups (16-24), where c.5.5% of residents identify as LGB+. Again, this is slightly lower than England (6.9%). Less than 1% of Essex residents aged 75+ identifying as LGB+.

There is substantial variation across Greater Essex districts, with significantly greater numbers in Colchester (3.4%) and neighbouring Southend (3.2%). This may reflect the presence of large higher education campuses in these cities – around 15% of LGB+ residents are full-time students (compared to c.5% of the population overall).

Gender identity: Census 2021 also tell us about the people who identify as Trans in Greater Essex. Around 5,700 people of the over 16 population identified as trans (i.e., the gender they identify with is not the same as the sex assigned at birth). This is broadly in line with the England average (c. 0.5%).

Those aged under 24 are significantly more likely to identify as trans than any other age group and, although the majority are White British, a significant minority (35%) identify as members of minority ethnic groups. The vast majority of Essex's trans residents are not disabled but the trans population is more likely to be disabled than the population as a whole (c.28.9% - compared to 18.9%). Overall outcomes for trans residents are a reflection of the age-profile for this group. They are significantly more likely to be full time students, to never have worked or be in lower skilled roles; they are more likely to work part-time than the population as a whole; and they are less likely to hold qualifications.

Language spoken: Language diversity is increasing across Essex. 95% of Greater Essex residents have English as their main language, compared to 97% around a decade ago. Although Greater Essex residents are more likely to have English as their main language than across England as a whole (95% compared to 91%), this is not the case in Harlow (90%) or Thurrock (89%).

Languages from elsewhere in Europe are amongst the most common languages spoken aside from English. The table below shows the top 10 main languages (other than English) spoken in Essex.

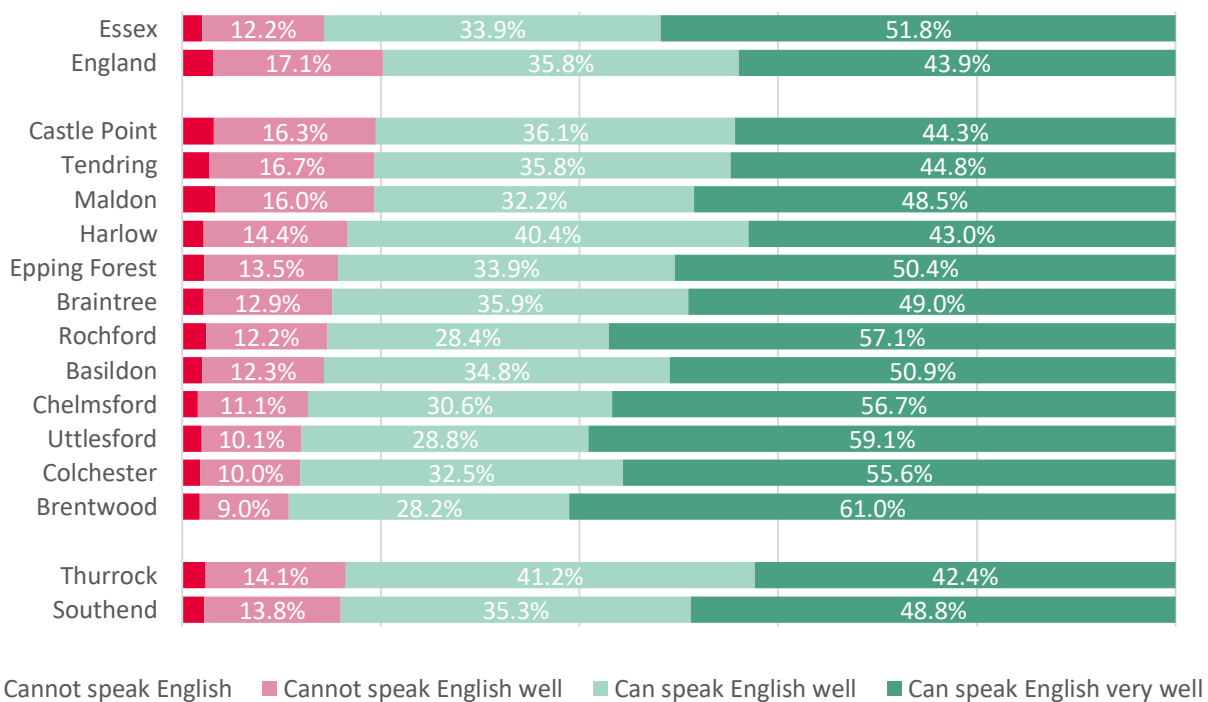
**Table PD15: Most common languages other than English, Greater Essex 2021**

Languages	Number of speakers	Percentage of residents (aged 3+)
Romanian	20,948	0.89%
Polish	16,043	0.68%
Lithuanian	7,630	0.32%
Bulgarian	3,457	0.15%
Malayalam	2,934	0.12%
Bengali (with Sylheti & Chatgaya)	2,877	0.12%
Hungarian	2,769	0.12%
Tamil	2,741	0.12%
Italian	2,529	0.11%

Source: Census 2021

Amongst residents for whom English is not their main language, levels of English proficiency are higher in Greater Essex than across England as a whole. However, there are significant pockets where residents do not speak English or do not speak it well. The areas with the highest absolute number of residents with low English proficiency are Thurrock (3,144 at the time of Census 2021), Southend (1,646), and Harlow (1,551).

**Chart PD16: English proficiency amongst residents for whom English is not their main language, 2021**



Source: Census 2021

# Population: Looking ahead

## Demographic Shifts

Ongoing demographic changes will significantly influence Greater Essex in the coming decades. Demographic shifts can shape economies, welfare states, health services, and infrastructure needs.

The latest projections prepared by the Office for National Statistics suggest that the population of Greater Essex could reach two million in ten years (2034) and increase further to almost 2.1 million by 2043. This represents an average annual population growth rate of 0.5% (c.10,000 people per year) – far in excess of the growth rate projected for the East of England and for England as a whole (0.39% per year).

Over the period to 2043 we expect the fastest levels of growth to be amongst those aged over 75 years old. This section of the population is expected to grow at a rate in excess of 2% per year – over seven times faster than the working age population (0.3% growth per year).

These shifts have far-reaching implications for local public services. A sustained rise in the older people's population, if not matched by significant improvements in health and economic prosperity, will place ever-greater pressure on public services and the systems through which they are funded. Put simply, a relatively smaller working-age population will need to support growing spending on the needs of the older population.

The direct impacts of this sustained demographic shift are likely to include:

- increased spending on pensions: well over half of all UK welfare spending is paid to pensioners, with the state pension by far the largest element of this.
- pressures on the health and care services: the prevalence of long-term health conditions increases with age (see our analysis of disability above), and estimates made by the Department of Health and Social Care suggest that care for people with long-term conditions accounts for about 70% of the money we spend on health and social care in England. This will compound pressures on social care departments stemming from the increasing cost of, and demand for, support for those with profound disabilities (and learning disabilities in particular). As advances in medical science and care support those with ever more profound needs to live longer into adulthood, the pressure on support services increases.
- reductions in tax revenues: In 2014 there were 3.2 people of working age for every person of pensionable age. This 'dependency ratio' is projected to fall to 2.4 by 2043. A lower proportion of people in work is likely to mean demand for services increasing at a faster rate than the resources available to support and sustain them.

Further indirect pressures are likely to be felt across the wider system, as the resources available to support other public service functions experience a continued long-term squeeze of resources.

## Population Diversity

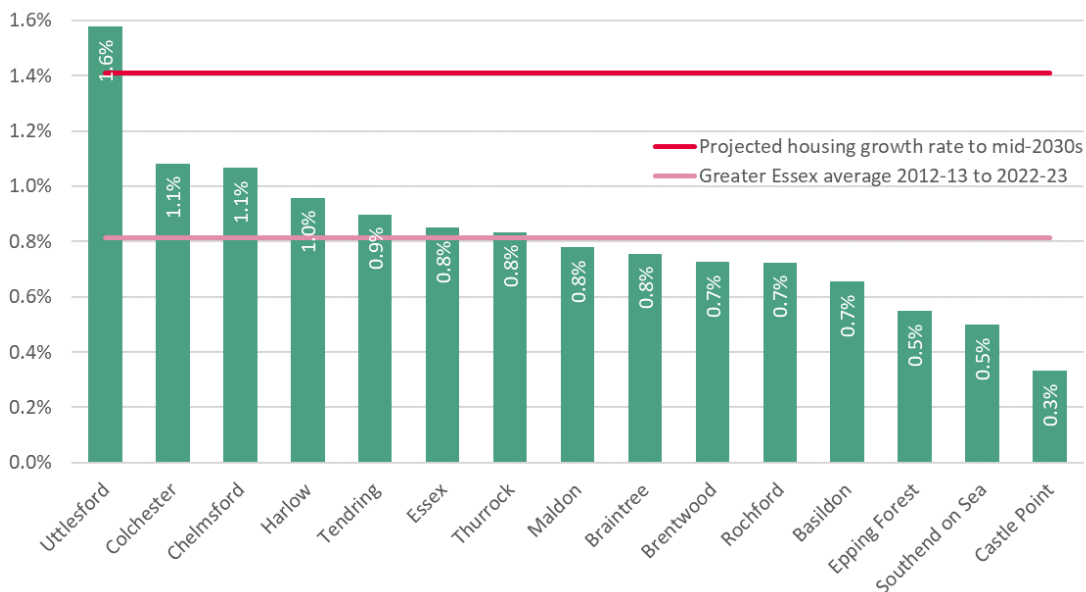
As the Greater Essex population grows, we can also expect it to become more diverse.

Greater Essex’s minority ethnic populations tend to be younger than the population average, and in 2021 there were significant concentrations of Asian/ Asian British, Black/Black British, other white, and other ethnic groups in the ages 25-40. This is the age range most associated with having children. We should therefore expect a higher proportion of new births to parents in these groups than we may have seen in the past, and a more diverse population in the future. If the rates of growth seen amongst Greater Essex’s minority ethnic population over the past twenty years are sustained, we can expect almost one in five residents to be members of a minority ethnic group by early 2030. This figure could be one in four by the early 2040s.

Other dimensions of diversity are also likely to become more significant – we know that younger people are more likely to identify as LGBTQ+. If we assume that young people remain as likely to identify in this way, then we would expect this section of the population to grow in scale, as today’s 16-24 year olds grow older, and as new generations reach adolescence and early adulthood.

Demographic growth will inevitably drive physical changes in villages, towns, and cities across Greater Essex. Local plans currently provide for c.197,000 new homes to meet the needs of a growing population to the mid-2030s (c.48,000 of these have already been built). Achieving this will require us to grow the region’s existing housing stock of c.815,000 homes by around 1.4% per year over this period. This represents a significant increase on current housing completion rates – annual growth in the Greater Essex housing stock averaged 0.8% in the period between 2012-13 and 2022-23. Only Uttlesford sustained a rate of housing growth in this period that would be sufficient to meet future needs.

**Chart PD17: Average annual increase in housing stock, Greater Essex, 2012-13 to 2022-23**

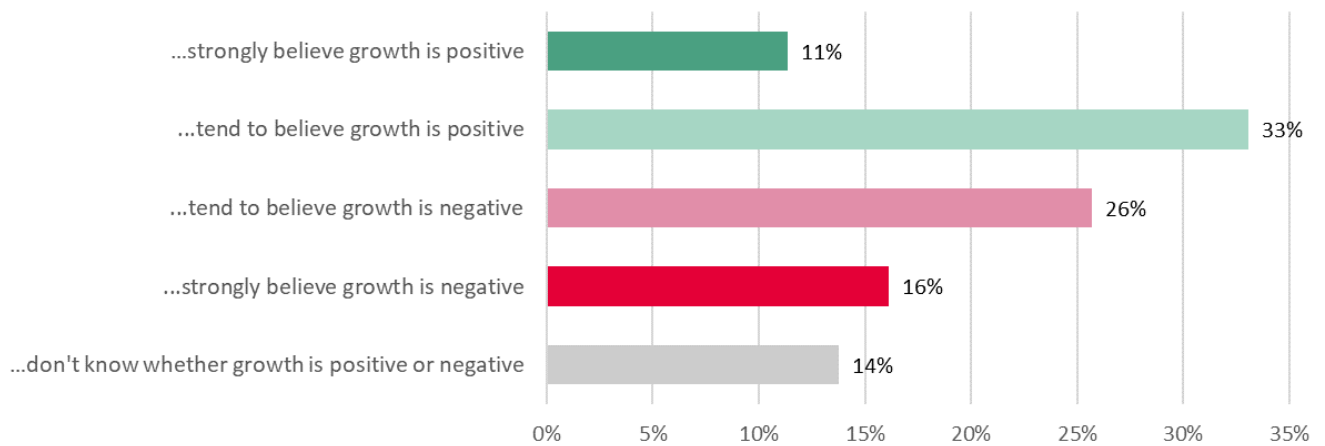


Source: ECC analysis of DLUHC live Table 122 (Net additional dwellings by LA district 2001-02 to 2022-23) and 110 (Dwellings by District and tenure in England, 2022).

We know from local research that residents and communities across Greater Essex are split in their views on the benefits and threats associated with future growth. Most recognise the value that new growth can bring. For example, with more people working and spending in the local area this brings opportunities to grow the local economy and support thriving town centres. Residents also recognise the wider opportunities such as the emergence of different types of job opportunities in the local area, or access to new cultural or leisure opportunities.

**Chart PD18: Attitudes to growth amongst Essex residents, 2024**

*Residents were asked "Thinking about your local area, please indicate whether you..."*



*Source: Survey of Essex Residents Panel, January 2024*

But we know that many people have concerns about growth too, often driven by worries about the loss of rural and peri-urban environments, short-term disruption, and the pressure that growth can place on existing infrastructure - and the challenges of delivering infrastructure improvements in support of new housing developments.

The challenge facing Greater Essex will therefore be to manage development, and to shape future growth, in a way that is socially, economically, and environmentally sustainable. This will be important if we are to preserve and enhance the factors that have made Greater Essex a destination for generations and somewhere that can continue to attract investment, talent, and visitors. The risk is that without joined-up policy and the right levels of investment in our region's physical and service infrastructure, changing demographics could erode Greater Essex's natural and social capital, place strain on infrastructure and reduce the quality of life enjoyed in Greater Essex by our residents.



**ECONOMY**

# Economy

## Summary

Greater Essex is a dynamic, thriving, entrepreneurial and creative region with the potential to outpace the economic growth of other parts of the country. Economic output in Greater Essex is similar in scale to that of Northern Ireland at c.£45 billion per year. The region is home to c.81,000 businesses, including some of the best known and most innovative companies in the world, employing more than 700,000 people. We have a history of low unemployment and average incomes that exceed national and regional benchmarks.

We are a gateway to trade and investment with two international airports (London Stansted Airport and London Southend Airport) and two emerging Freeports – Thames Freeport and Freeport East, building on the strengths of the Haven ports (Harwich and Felixstowe) and London Gateway and Port of Tilbury, as well as being well connected to London, Cambridge and the M11 corridor. We have the opportunity to build on our assets to accelerate the pace of growth in key sectors of our economy – construction and retrofit; clean energy; advanced manufacturing; digitech; life sciences – to the tune of 50,000 additional jobs by 2030.

We have world class businesses with whom partners and policy makers in Greater Essex have excellent relationships – including Manchester Airport Group (owners and operators of Stansted) and DP World on logistics; Ford, Raytheon, and Teledyne on advanced manufacturing; Cell and Gene Therapy Catapult for life sciences; Kao Data and Global Marine Systems on digitech.

Greater Essex is home to two universities: the University of Essex, and Anglia Ruskin University, both of which generate research with world-leading impact. As well as some of the most outstanding schools in the country – four of which, the girls' and boys' grammar schools in Chelmsford and Colchester, regularly feature amongst the top 20 schools in the whole country.

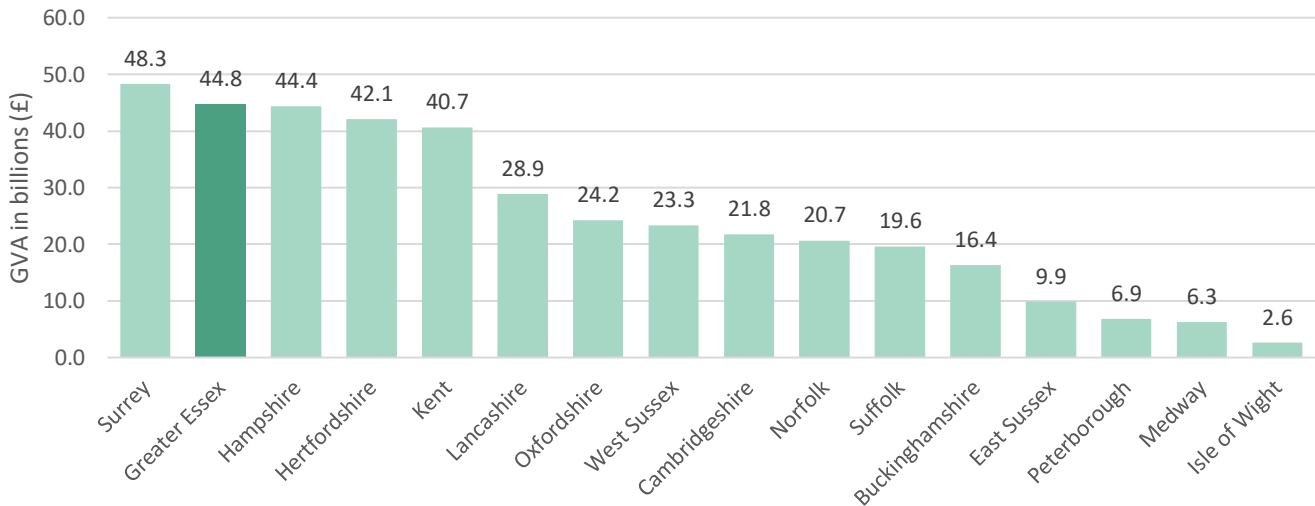
Despite these strengths and opportunities, in recent years we have seen Greater Essex fall behind its neighbours in the wider South East in terms of the pace of economic growth and levels of productivity. A growing population, combined with relatively slow growth in the number of jobs, and particularly high-value jobs, across some of our towns and cities has fuelled high levels of commuting, placing a strain on our local transport infrastructure, and driving high claimant counts in some parts of the region, leading to lower financial resilience and reliance on support services such as food banks and emergency funding schemes.

Around 188,000 Greater Essex residents now live in areas that are amongst the most deprived 20% in England, compared to only 106,000 in 2007. The COVID-19 pandemic, shocks to the global energy market and food supply chains, and the current cost of living crisis further exacerbates these pressures and amplifies inequalities, including gender inequalities.

## The Greater Essex Economy

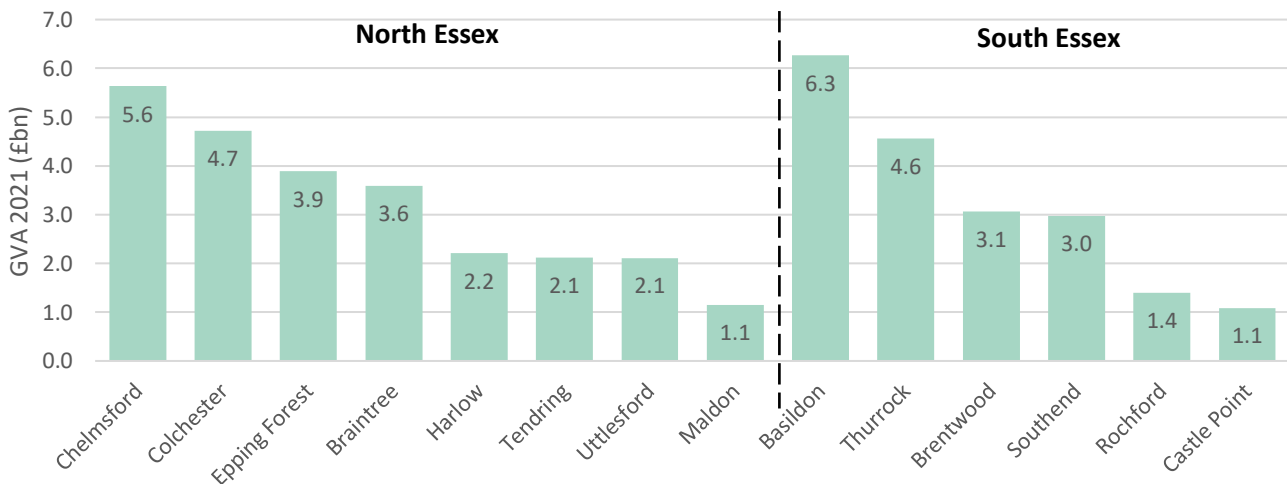
Greater Essex historically has a large and highly productive economy. The total value of the economy in 2021, measured as total Gross Value Added (GVA), was £44.8 billion. This is similar in scale to Northern Ireland and larger than several major UK cities. Total GVA for the North Essex Councils (NEC) area was £25.4 billion and for the South Essex Councils area (SEC) was £19.4 billion.

**Chart EC1: Total economic output (Gross Value Added – GVA), Greater Essex and comparators, 2021.**



Source: UK small area gross value-added estimates, NOMIS

**Chart EC2: Regional real GVA figures for Greater Essex districts, 2021**



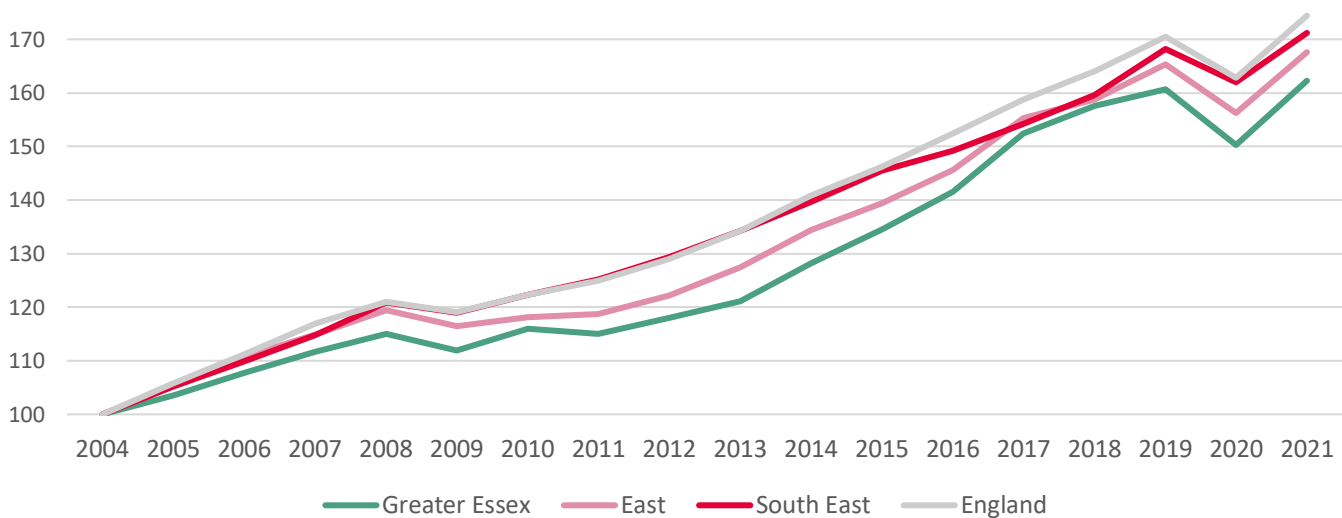
Source: UK small area gross value-added estimates, NOMIS

The value of economic output varies widely across the Greater Essex region. Basildon (£6.3 billion) and Chelmsford (£5.6 billion) continue to generate the largest economic outputs. By contrast Rochford, Maldon and Castle Point have the smallest economies, each around £1 billion per year, reflecting the wide variation between urban, rural, and coastal places in Greater Essex.

Looking back over the last 20 years, Greater Essex has experienced lower levels of economic growth, as measured by GVA, compared to all other comparator regions, behind the South East and East of England. Compounding this challenge, the COVID-19 pandemic presented a profound shock to the Greater Essex economy. In 2020, the value of output fell below 2018 and 2019 levels. In the same year, some business sectors experienced reductions in outputs of over 60%, with the air transport sector being even higher. We also saw increased economic uncertainty and decreased confidence, with high numbers of business closures and the largest spike in unemployment in almost 30 years.

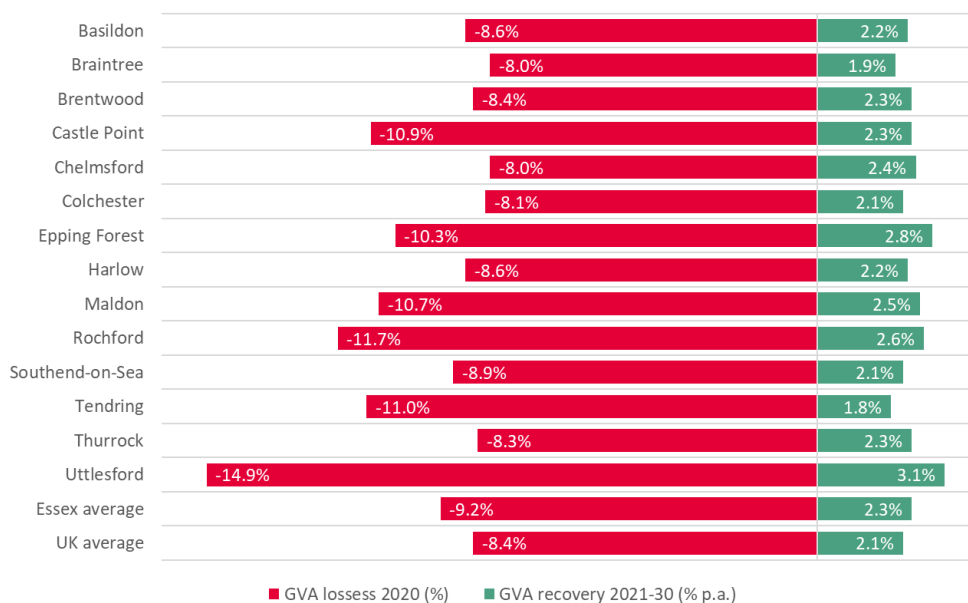
Along with post-pandemic increases in inflation and the cost of living, these economic impacts have the potential for lasting repercussions, with an increase in inequalities in income, wealth, education, and skills.

**Chart EC3: Economic growth of Greater Essex and comparators, 2004-2021 (Base rate=100 in 2004)**



Source: UK small area gross value-added estimates, NOMIS

**Chart EC4: Projected GVA impact and recovery from the Covid-19 pandemic, unitary and local authority area in Greater Essex, 2019-2030**

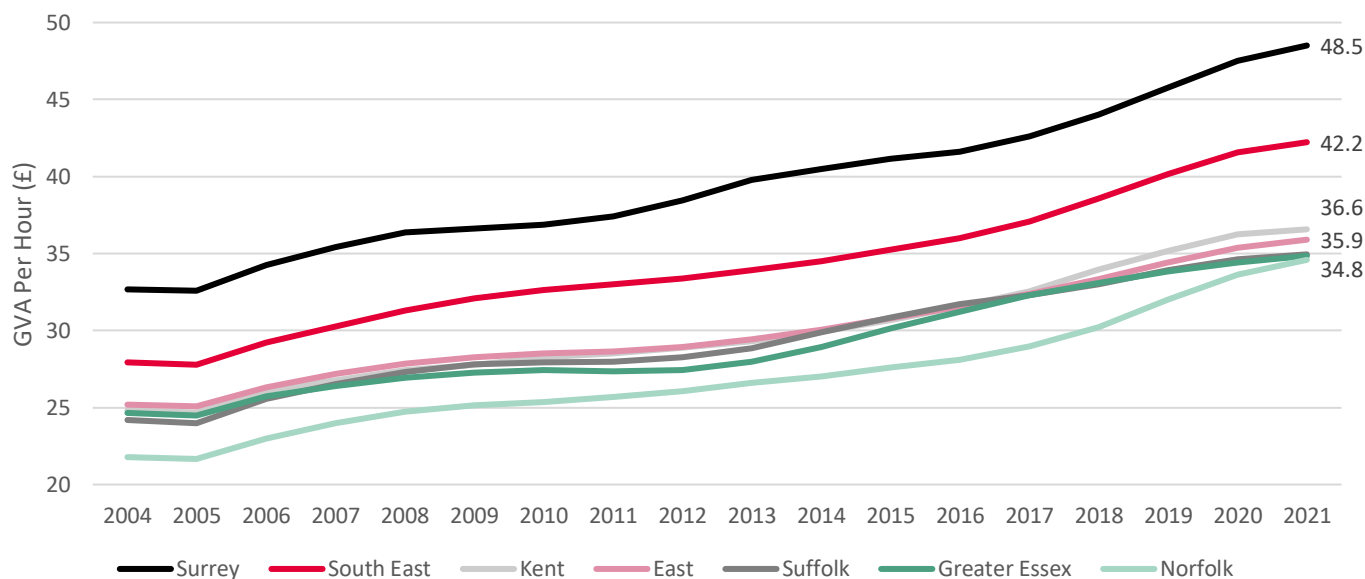


Source: Cambridge Econometrics Projections for Essex

## Local productivity

Even before the pandemic, levels of productivity in Greater Essex were well below those seen in similar areas across the South East. Based on productivity levels for each hour worked, Greater Essex ranks significantly lower than other, often smaller, economies in the South East and East of England. Lower productivity matters to the everyday lives of people across Greater Essex – it reflects that our businesses generate less value for the work they do, and means local workers typically earn less than counterparts in other areas. In 2021, Surrey had a GVA per hour worked of £48.5, compared to Greater Essex at £34.8. If Greater Essex had the same productivity rate as Surrey in 2021, the Greater Essex economy would be worth some £62.5bn.

Chart EC5: Local productivity and Gross Value Added per Hour, Greater Essex and comparators, 2004-2021



Source: Subregional productivity in the UK: June 2023, ONS

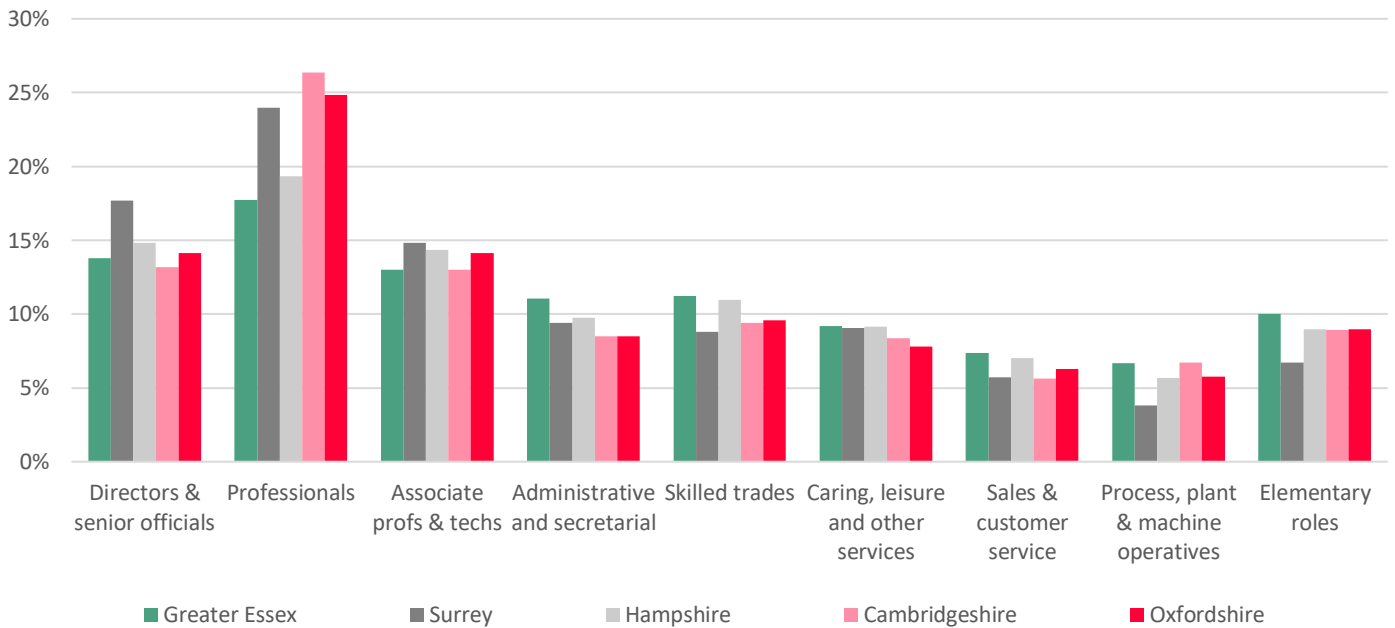
One of the key factors underlying lower levels of productivity in Greater Essex is the relative shortfall in local jobs. There are fewer jobs – and fewer high-value jobs – per head of working-age population in Greater Essex than in other areas. To bring Greater Essex into line with other counties across the East and South East regions, an additional 100,000+ jobs would need to be created, around 30,000 of which would need to be high value ‘professional’ roles.

The relative shortage of high-quality local jobs has implications for communities across Greater Essex. It lies behind the fact that the workforce tends to be less well qualified – less highly skilled – than comparator areas; that talented young people from Greater Essex too often leave the county to study and cannot find appropriate work to enable them to return. It is also reflected in the substantial difference in earnings between residents who work in Greater Essex and those who commute to neighbouring areas.

This shortage of high-quality local jobs also constrains opportunities and drives inequality within Greater Essex too. The places that are most affected tend to be our most isolated coastal communities. The people who are affected the most are those who cannot travel

significant distances for work. This can include vulnerable groups, people with disabilities and/or limiting health conditions, and those with family and/or caring responsibilities.

**Chart EC6: Occupational group of the workplace population for Greater Essex**



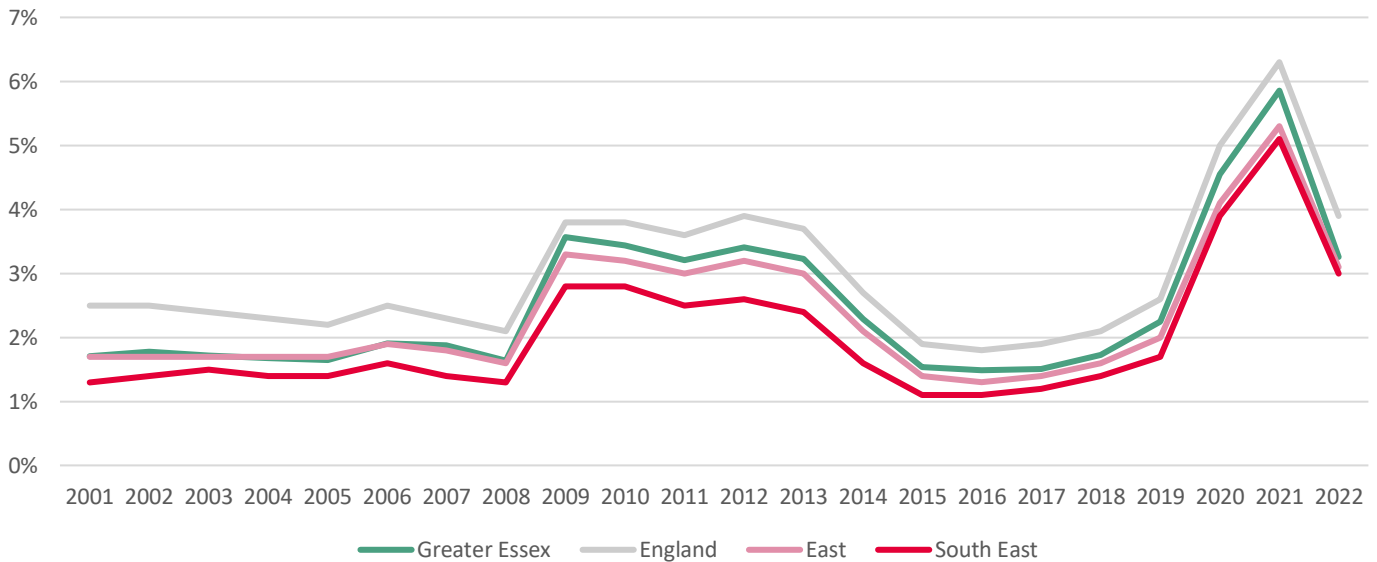
Source: Annual population survey - regional - occupation (SOC2020) by sex by employment type

Despite the challenges of historically slow growth and lower productivity than in comparator areas, Greater Essex maintains a level of relative prosperity. Communities across the region benefit from lower levels of unemployment and households benefit from incomes that exceed national and regional benchmarks.

There are, however, early signals to suggest that we cannot take this prosperity for granted.

Although the claimant count unemployment rate in Greater Essex has been lower than the England average for the last five years, the number of claimants remains high compared to regional benchmarks. The claimant rate also remains above pre-pandemic levels – broadly similar to levels experienced in the wake of the 2008 financial crisis and recession.

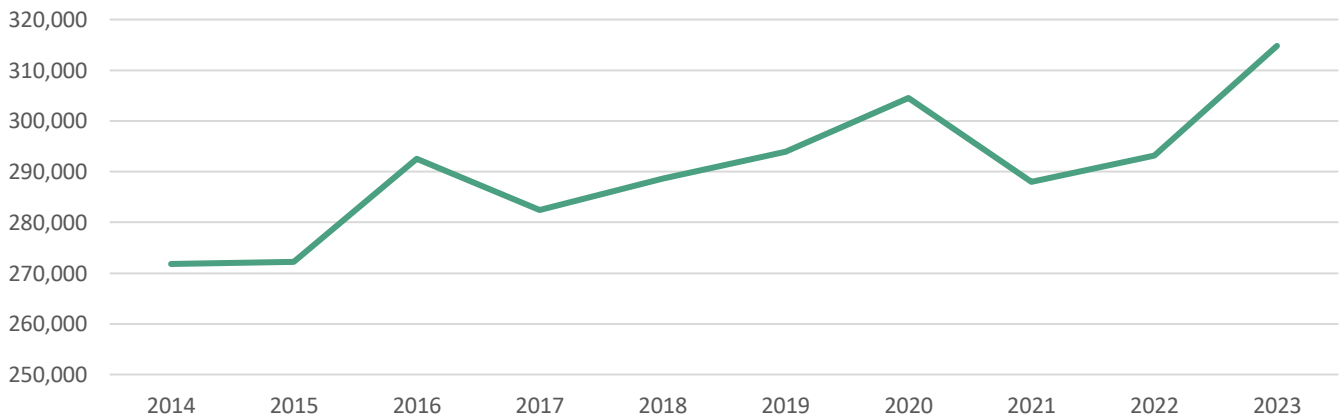
**Chart EC7: Claimant rate (working age population), Greater Essex and comparators, 2001-2022**



Source: Claimant count by sex and age, NOMIS

Furthermore, while unemployment rates in Greater Essex have remained low, the number of individuals aged 16+ who are economically inactive due to long-term sickness has increased by 16% from 271,800 in 2014 to 314,800 in 2023.

**Chart EC8: Number of Economically inactive people with health conditions or illnesses lasting more than 12 months in Greater Essex (aged 16+)**

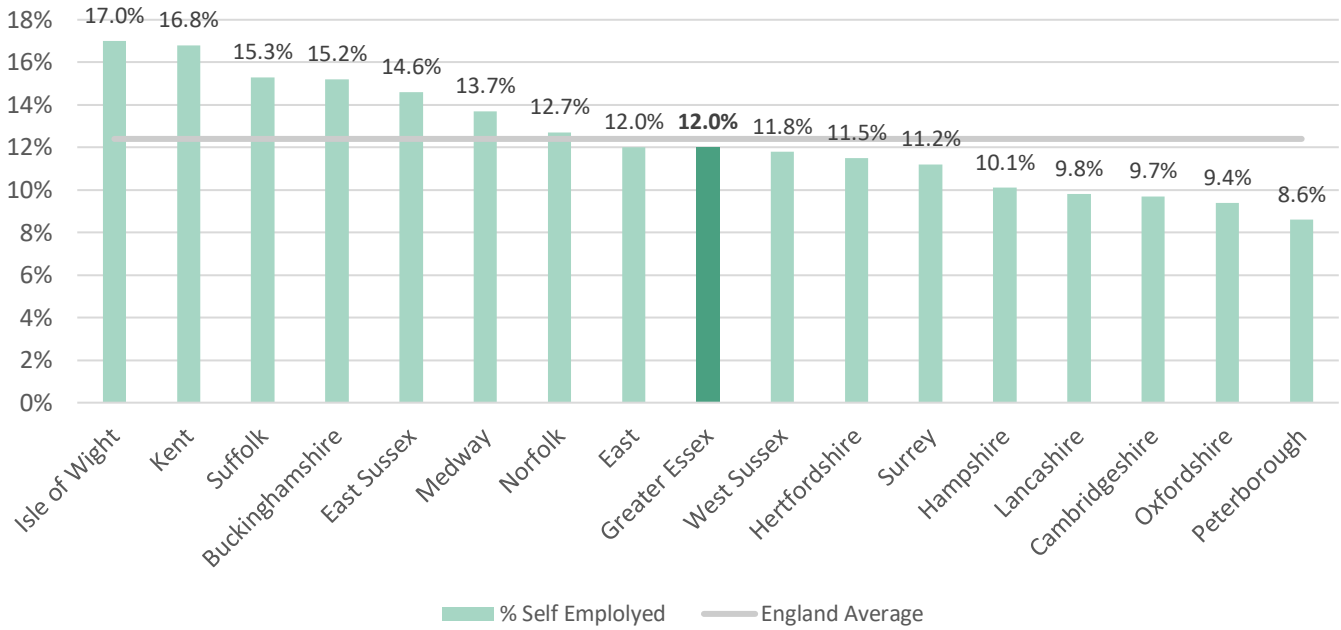


Source: Annual population survey, NOMIS

There are also signs of stress in Greater Essex’s business community. Traditionally, Greater Essex has a strong spirit of enterprise with a higher proportion of residents being self-employed than elsewhere. However, since the pandemic, the rate of self-employment in Greater Essex has reduced and has fallen behind England as a whole for only the second time in almost 20 years. The cost-of-living crisis has exposed vulnerabilities for new businesses. Rising interest rates have affected business loans and investment opportunities. Additionally, the pandemic and cost-of-living challenges have eroded consumer confidence, replacing optimism with pessimism among both consumers and entrepreneurs. However, the latest data suggests that levels of self-employment in Greater Essex are starting to recover, as the England average is falling. For the long-term, policymakers should focus on providing

targeted support, fostering collaboration, and adapting policies to the evolving business landscape, to avoid another dip in self-employment numbers.

**Chart EC9: Self-employed as a percentage of all in employment aged 16-64, Greater Essex and comparators, 2023**



Source: Annual population survey, NOMIS

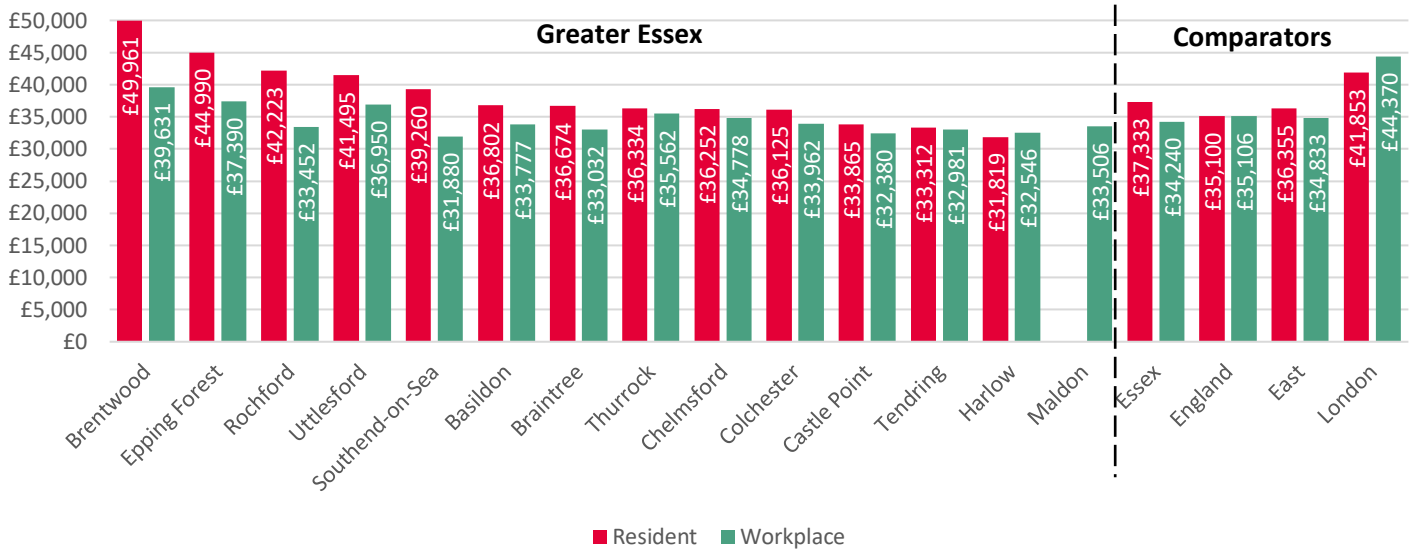
**Chart EC10: Self-employed as a percentage of all employment aged 16-64, Greater Essex and comparator areas, 2004/05-2022/23**



Source: Annual population survey, NOMIS

Greater Essex’s prosperity – reflected in higher incomes and lower levels of unemployment – is in large part a reflection of Greater Essex’s relationship with London, and its position within the London ‘city region’. Greater Essex’s economy and prosperity are directly interconnected with that of the capital city, which accounted for 28% of England’s total productivity in 2023. Nearly 100,000 Greater Essex residents travel to work in London (or have jobs that are based there), with similar numbers travelling into inner and outer London boroughs. Incomes of Greater Essex residents who work in London are around 40% higher than those working in Essex.

**Chart EC11: Workplace vs resident earnings: median gross annual pay for full time workers by Greater Essex district and comparators, 2023**



\*Data for Maldon’s resident annual income has been suppressed as statistically unreliable.  
 Source: Annual survey of hours and earnings – resident & workplace analysis, NOMIS

**Chart EC12: Number of Commuters travelling to and from Greater Essex by origin/destination, 2011**



Source: RF04AEW - Location of where people live when working and place of work, Census 2011

These higher salaries help support our local businesses. They generate demand for services and create local jobs. Historically, they have helped Greater Essex avoid large-scale deprivation and keep local benefit claims low, although levels of deprivation have increased in more recent years. Though it brings many benefits, our reliance on London does pose a risk, tying our prosperity to that of the capital and reducing the perceived need to invest in and improve Greater Essex’s own economic base.

The challenge for local policy makers is to help the Greater Essex economy to realise its full potential – creating the conditions for growth and increased prosperity by investing in the business base, developing the workforce, attracting investment in new growth sectors and providing the right infrastructure to enable growth.

# Economy: Looking Ahead

How can Greater Essex boost its productivity levels? How can we attract more inward investment and create more local jobs? The evidence suggests that Greater Essex can do more to play to its strengths, as the economy continues to reset post-pandemic and in the context of its performance in relation to its neighbours in the South East and London.

## Promoting Greater Essex enterprise

Greater Essex continues to have comparatively strong business start-up rates, higher than the South East and just ahead of the East of England. Before COVID-19, three-year survival rates for businesses in Greater Essex performed more strongly than national and regional comparators. However, in 2022, the national picture is that there has been a net loss of businesses in England with business closures exceeding the business birth rate for the first time since 2010 and the global financial crisis.

A traditionally strong enterprising streak is not enough in itself to guarantee high productivity, job growth or even commercial success. Local entrepreneurship is overwhelmingly focussed on small and microbusinesses. Of the 81,000 businesses in Greater Essex, 90 employed less than 9 people with a real scarcity of medium and large employers - less than 2% of businesses employed more than 50 people. These large businesses can bring an array of opportunity to the county, they tend to have more resources to invest in employees' skills and training, have a greater capacity to invest in innovation, and are able to employ more people on generally higher wages compared to smaller enterprises - all of which positively contributes to our local economy.

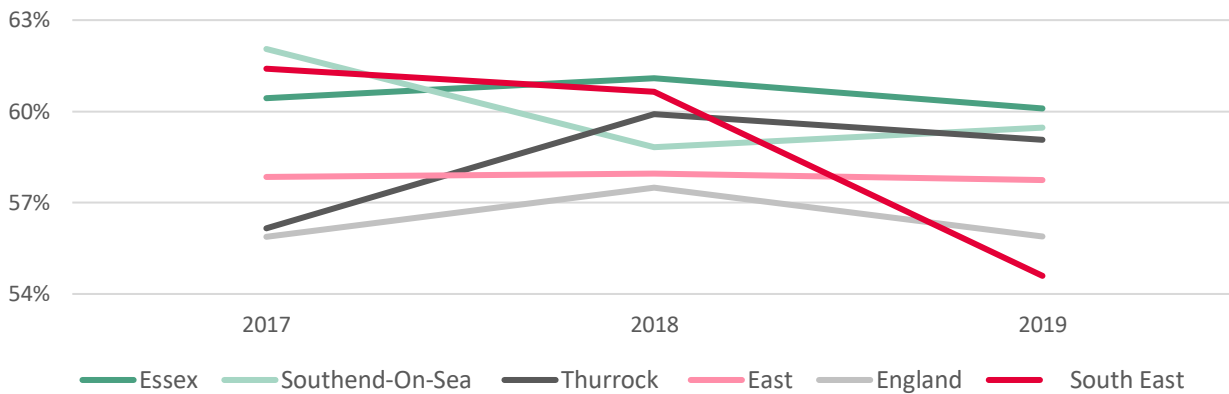
Yet, it is the smaller businesses which will provide the foundation for increasing prosperity in Greater Essex in the immediate term. The challenges facing them – staying competitive and continuing to grow in an extremely tough trading environment – are challenges for Greater Essex as a whole. Coordinated and effective business support, and capacity to support business scale ups and attract larger firms in strong growth sectors, are major opportunities.

**Chart EC13: New business as a proportion of total business stock, Greater Essex and comparator areas, 2022**



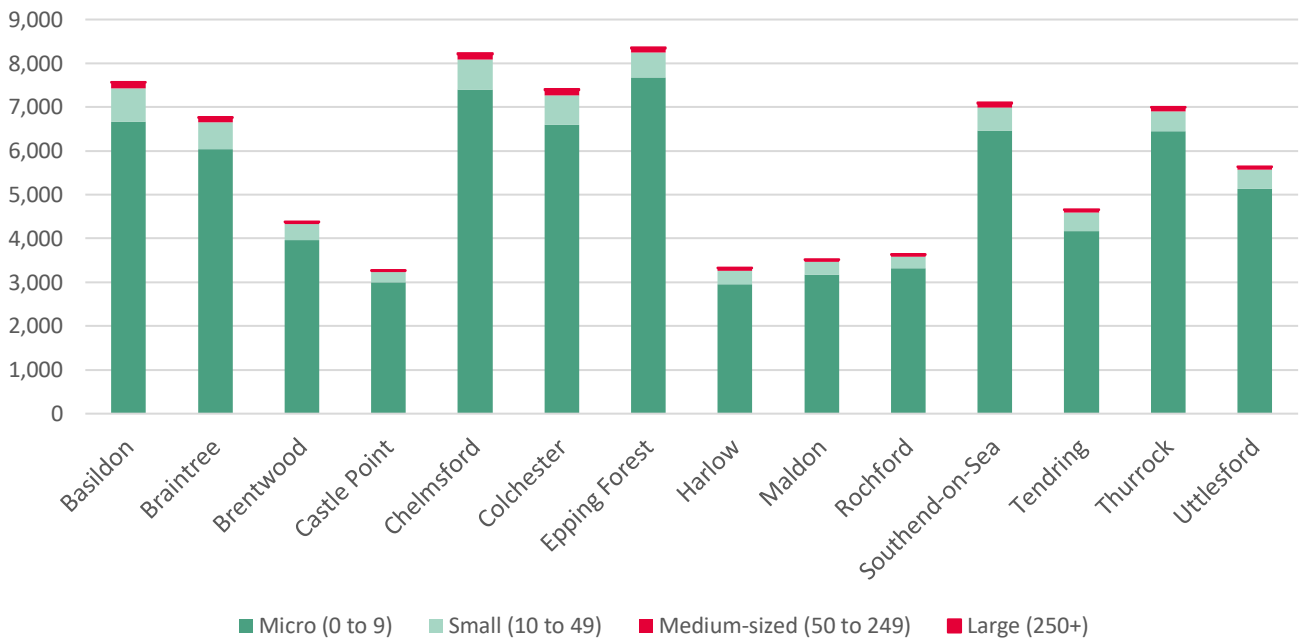
Source: Business demography, UK: 2022, ONS

**Chart EC14: Three-year business survival rates in Essex and comparator areas for firms starting up between 2017-2019**



Source: Business demography, UK: 2022, ONS

**Chart EC15: Number of Greater Essex employers by size, 2022**



Source: UK Business Counts - enterprises by industry and employment size band, NOMIS

## Developing our workforce

The Greater Essex workforce is one of our most valuable assets. There are close to 750,000 employees in Greater Essex, a number which continues to rise year on year. The employment and job market has recovered well, nationally and across Greater Essex, since the COVID-19 pandemic. There has been a rise in job vacancies, more women re-entering the workplace, residents feeling more secure in their employment and less unemployment than predicted. Although, the rate of self-employment in Greater Essex, which is traditionally higher than in many other areas, has not yet recovered.

Our workforce is employed across a range of sectors including: health and care; logistics; tourism; arts; culture and creative; professional services; retail; agriculture. They remain major employers and contributors in different parts of Greater Essex. The future of these sectors will be shaped by the impact of a multiple of factors, for example, DigiTech, with rapid developments in automation and AI, and the need to decarbonise all sectors of the economy to adapt to the impacts of climate change.

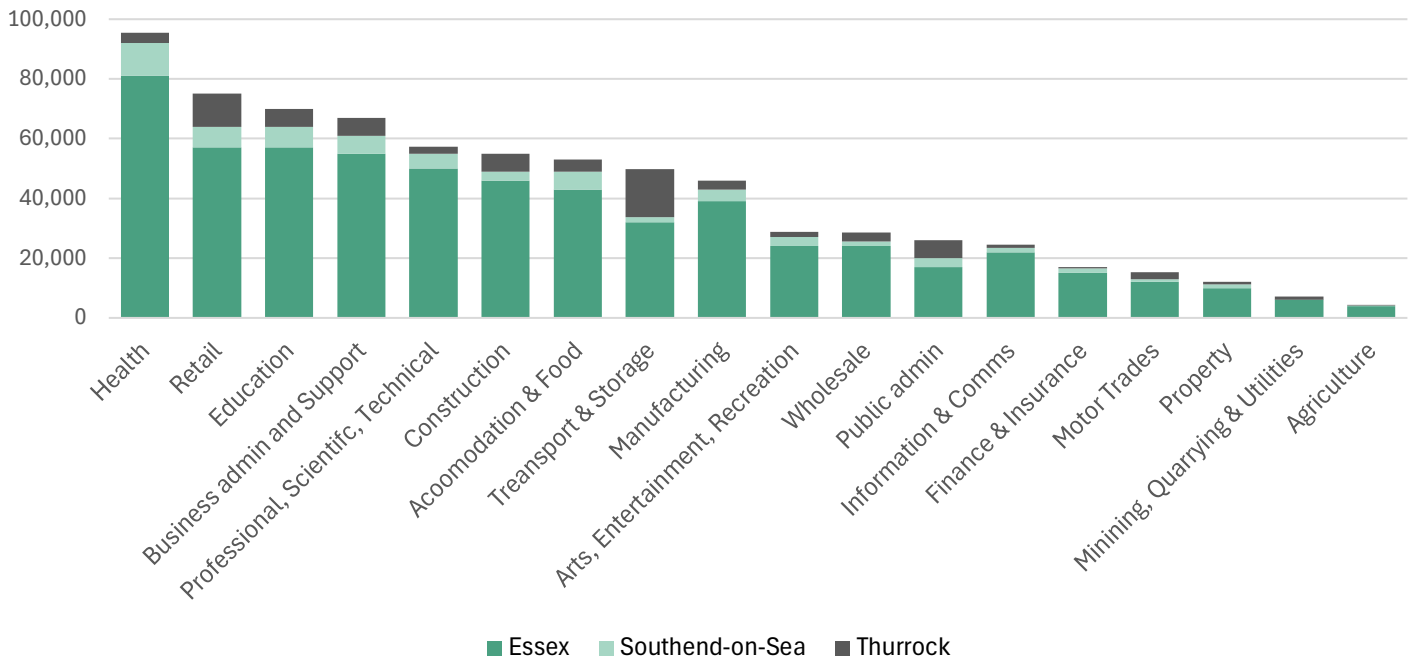
However, 42% of jobs in Greater Essex are within sectors identified by national government as 'vulnerable' – meaning they are more sensitive to long or short term economic shocks – these include manufacturing; construction; wholesale and retail trade; accommodation and food services. These sectors employed approximately 185,000 people in 2021. In the wake of the COVID-19 pandemic, periods of double-digit inflation have impacted businesses with many reporting increased costs and reduction in turnover while also adjusting to post-Brexit changes to EU trading arrangements.

Additionally, in 2022/23, around 50,000 job posts in Greater Essex were for the care sector, making it one of the region's largest employers. This number is expected to grow significantly due to increasing pressures from an aging population, which will drive demand for more care services. Despite this rising demand, care workers are likely to continue facing challenges related to low-value and low-paid roles. The sector's growth does not necessarily translate to better wages or improved working conditions for these essential workers, highlighting a critical issue that needs to be addressed to ensure the sustainability and attractiveness of care roles in the future.

Greater Essex has the opportunity to build on our assets to accelerate the pace of growth in key sectors of our economy, to the tune of 50,000 additional jobs by 2030. These growth sectors include green construction and retrofit; clean energy; advanced manufacturing; digitech; life sciences. It is vital that public service partners play their full part in supporting and facilitating growth in these sectors.

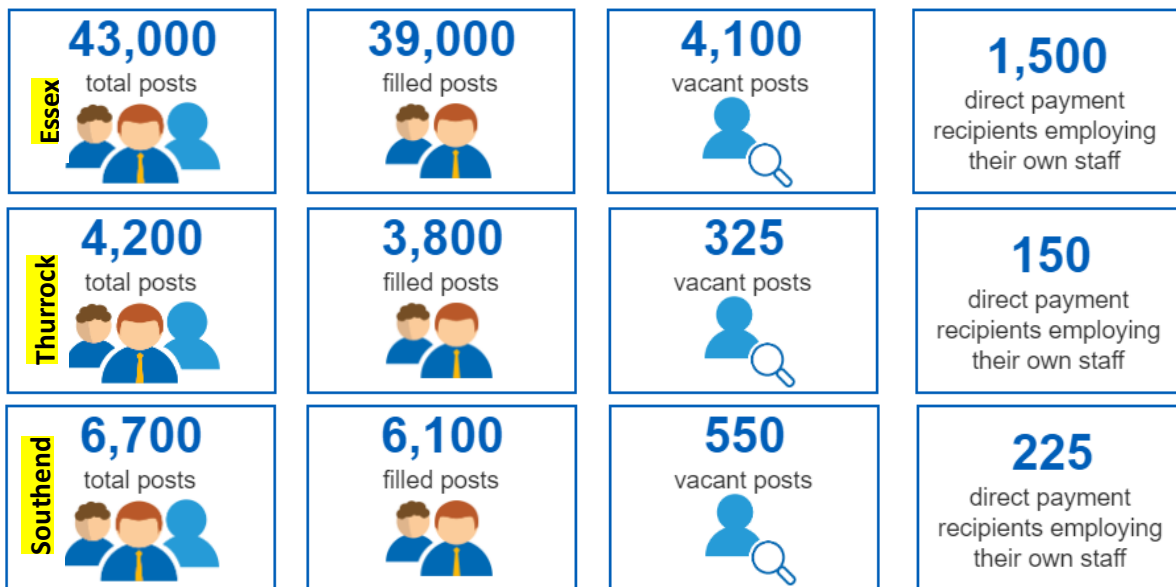
The Government's AI Opportunity Forum finds that the UK's AI sector already contributes £3.7 billion to the UK economy and employs 50,000 people across the country, with these figures set to grow. Google's UK Economic Impact Report highlighted the scale of this opportunity, with forecasts showing that AI-powered innovation could create over £400 billion in economic value for the UK economy by 2030.

**Chart EC16: Number of employees across Greater Essex, by industry, 2021**



Source: Annual population survey - workplace analysis, NOMIS

**Chart EC17: Adult Social Care Workforce in Essex, Thurrock, and Southend-on-Sea**



Source: Skills for Care Key Findings 2022/23

### Building our skills base

A key enabler of economic growth is a workforce with the skills to support the needs of the Greater Essex economy and our businesses into the future. Greater Essex has 101,000 fewer people skilled to NVQ4+ than it should have (35% of 16-64 year olds are qualified to NVQ4+, well below the Great Britain average of 43%). We are also 8% below the national average at NVQ3+. Greater Essex also has low levels of Traineeships and T-levels, meaning fewer progression routes into skills-based education and training. The skills gap for our most deprived areas is even more stark.

In addition to this historic deficit, the Covid-19 pandemic had a significant negative impact on learning and skills. The OECD estimates that pandemic lockdowns decreased workers' participation in learning by an average of 18%, and in informal learning by 25%, and will have prevented unemployed adults from accessing upskilling and training opportunities. This 'lost learning', along with historically relatively low skills, is a drag on productivity and an impediment to growth.

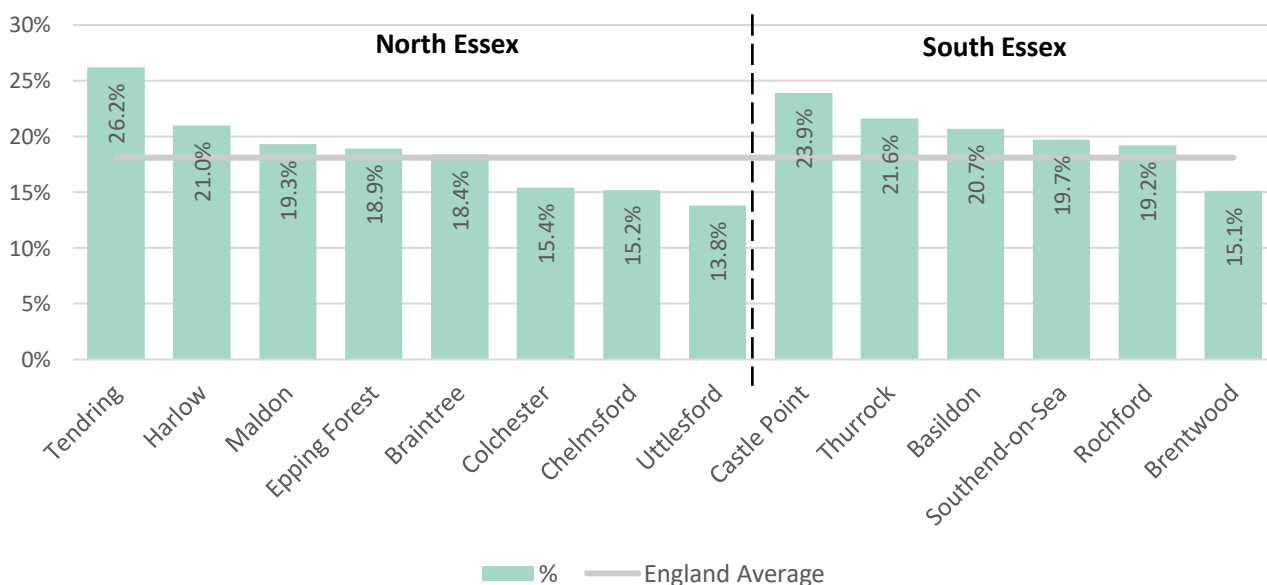
Currently our workforce is over-represented in lower skilled occupations and under-represented in managerial and professional occupations – leading to lower workplace earnings than both regional and national averages. This is in spite of having some of the largest global businesses in Greater Essex. All sectors will require new skills to unlock the opportunities in the transition to a low carbon, sustainable economy.

The challenge facing local policy makers is to steer the skills system to ensure that local learning provision is shaped in dialogues with local businesses with provision shaped to meet current and future skills needs. This will require more joined-up and co-ordinated working but has the potential to accelerate progress towards becoming a high wage, high skill, high productivity, net zero economy.

This has the opportunity to help young people to gain the skills they need to prosper in the modern workplace; enable businesses to find employees with the right skills to support their ambitions; and support UK plc by adding to the productivity, growth and sustainability of the economy.

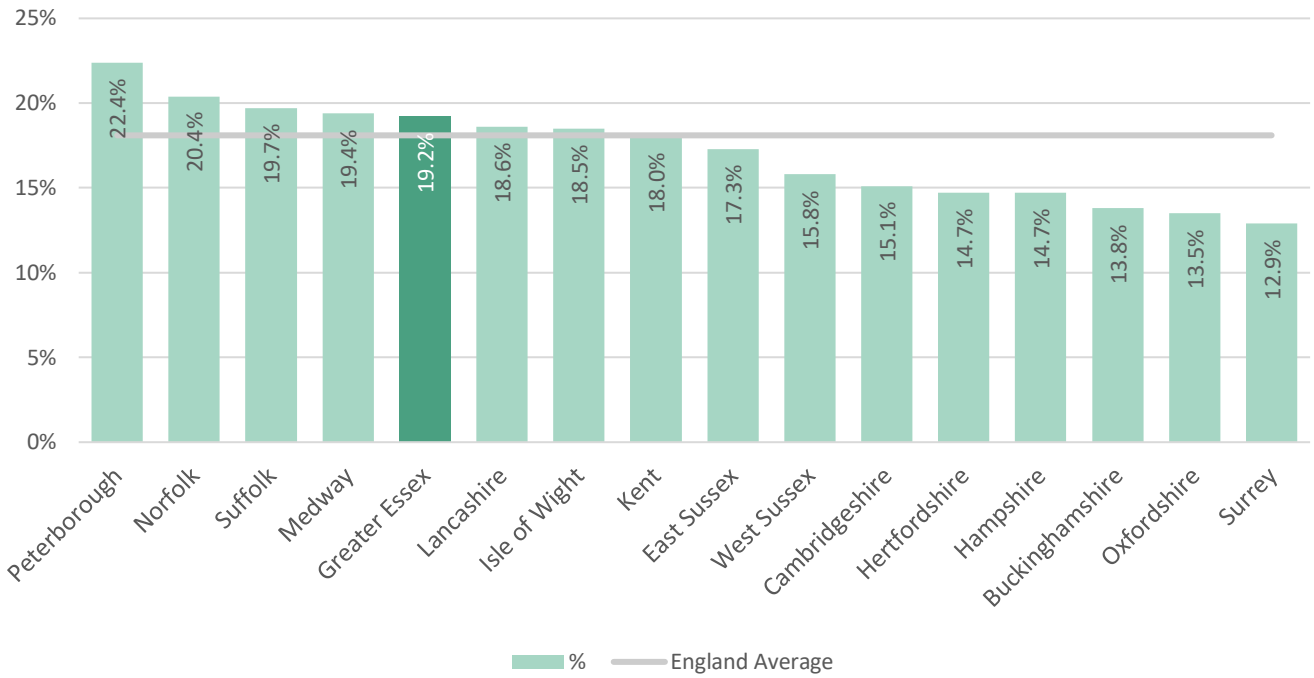
Importantly skills and wider economic prosperity should not only be seen as goods in their own right, but also as important in a range of other key strategic agendas for which a strong economy is foundational. Not least the health challenges faced in certain parts of Greater Essex.

**Charts EC18: Percentage of adult population with *no qualifications*, Greater Essex, 2021**



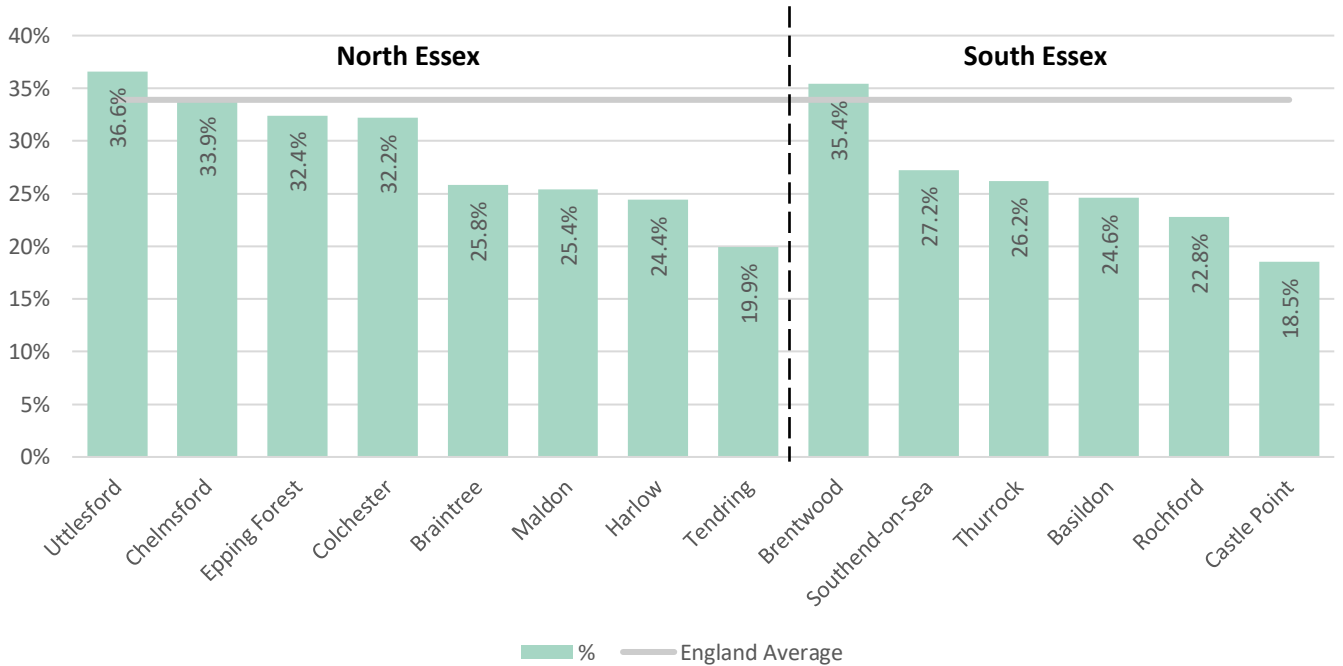
Source: TS067 - Highest level of qualification, Census 2021, NOMIS

**Charts EC19: Percentage of adult population with *no qualifications*, Greater Essex and comparators, 2021**



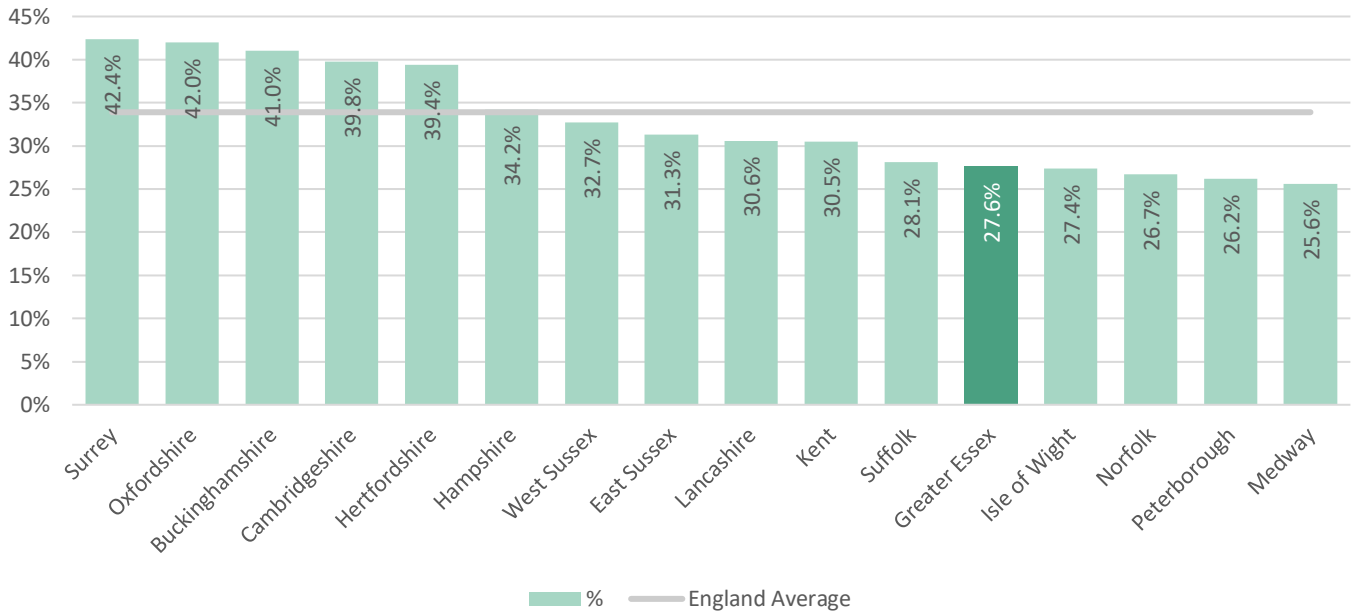
Source: TS067 - Highest level of qualification, Census 2021, NOMIS

**Charts EC20: Percentage of adult population with *higher qualifications*, North Essex and South Essex, 2021**



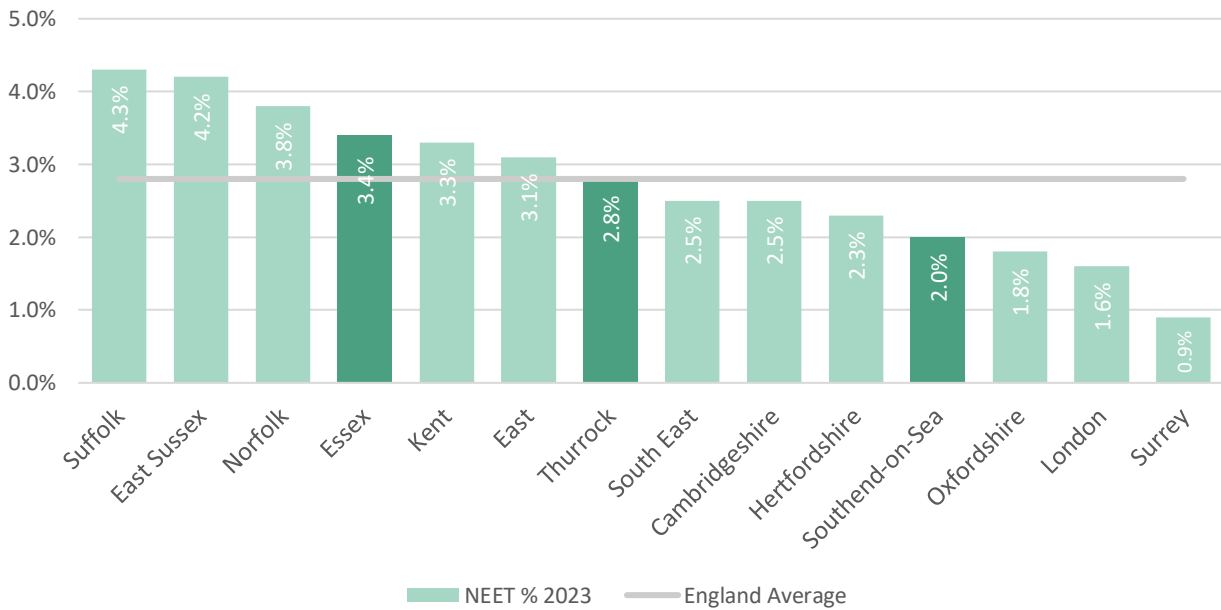
Source: TS067 - Highest level of qualification, Census 2021, NOMIS

**Charts EC21 Percentage of adult population with *higher qualifications*, Greater Essex and comparators, 2021**



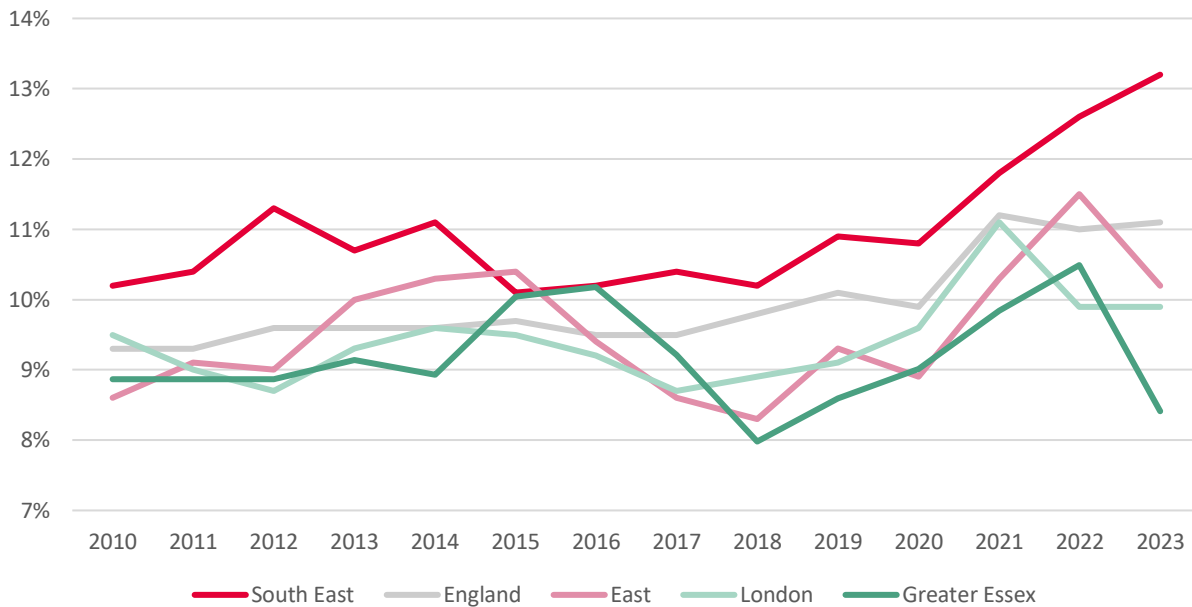
Source: TS067 - Highest level of qualification, Census 2021, NOMIS

**Chart EC22: Participation: 16- and 17-year-olds not in education or work-based learning (NEET), 2023**



Source: Participation in education, training and NEET age 16 to 17 by local authority, Gov.uk Education statistics

**Chart EC23: Percentage of working-age people receiving job-related training in the last 4 weeks, Essex and comparator areas 2010 to 2023**



Source: Annual population survey – Job-related training, NOMIS

### Gaining a competitive edge

There are shared ambitions across Greater Essex to exploit the sector strengths and maximise returns from our economic assets and the transition to net zero. Greater Essex has strengths in the MedTech and life sciences sectors and digital clusters in key cities.

The growth of advanced manufacturing (particularly in South Essex), and in logistics (focused around our two freeports and airports) represents a major opportunity. There are also major opportunities in clean energy generation through hydrogen, solar farms, and offshore wind, facilitated by our location on the energy coast.

Across Greater Essex there is an opportunity to create c.19,000 green jobs by 2030, transitioning the workforce into growing sectors of the economy and reducing Greater Essex’s environmental impact. There are also significant opportunities to reduce energy consumption, ease financial pressures on residents and improve their health while generating income through the development of smart local energy systems, and the roll out of retrofit programmes. An estimated 400,000 homes across Greater Essex are currently in need of retrofitting.

Taking advantage of the power of data and digital technology, digital skills and technology should be a key strength of an inclusive Greater Essex economy. Central to this is the roll out of digital connectivity, including remote and rural areas. This is a vital platform for future growth and improved productivity, and an essential element in promoting access to services, education and to social connections, while reducing pressures on transport systems. Currently, Essex, Thurrock, and Southend-on-Sea have Superfast Broadband coverage of 98.7%, 98.5%, and 99.5% respectively. This means that the majority of Greater Essex residents are receiving internet speeds of more than 30Mbps. On average, only around 6 in 10 homes and business in Greater Essex had access to Superfast Broadband in 2010.

It is also vital to help close the digital divide, equipping residents with the skills and tools they need for the digital age and to harness the power of data and digital technology to transform our public services, so they are faster, better, and cheaper.

Tackling these structural issues will require investment in the sustainable growth of Greater Essex's towns and cities. It will mean investing in infrastructure to unlock the development of new homes and employment space, but it will also require the regeneration of our town centres, and improvements in local schools and the local living environment to ensure that Essex can attract inward investment, retain growing local firms, protect businesses and residents from increasing climate risks, and ensure that the benefits of growth reach all parts of the county.



# INEQUALITY IN GREATER ESSEX

# Inequality in Greater Essex

## Summary

Overall Greater Essex appears to be a prosperous place. The region has a £44.8bn economy, average incomes exceed national benchmarks and unemployment is generally low. The region also supports some 750,000 jobs and is home to nearly 81,000 businesses. But this high-level picture masks significant and stark economic and social inequalities – there are major disparities in the experience of, and the opportunities available to, different people across the region.

Inequality in Greater Essex is complex. Inequality affects different neighbourhoods, towns and cities, different groups and populations and different generations in different ways. There are clear geographical inequalities across the region: while some places thrive and prosper, others experience significant poverty and deprivation. There are inequalities that affect specific groups and population segments regardless of where they live within the region. Then there are entrenched inequalities, where the opportunities available to those from wealthier backgrounds outstrip those available to their less well-off counterparts, reducing opportunity and limiting social mobility.

Levels of inequality have increased markedly in Greater Essex since the turn of the century. Structural changes in the economy, the 2008 financial crash, periods of ‘austerity’ in public spending and the COVID-19 pandemic have variously highlighted and accentuated inequalities in income, education, and health.

It is vital that local partners across Greater Essex work collectively to halt further increases in inequality and to reverse recent trends. Public service partners have a moral imperative to act – it is simply not right that public services stand by while parts of our population do not experience the outcomes and quality of life that many others take for granted. But there are also economic and sustainability imperatives. In a highly competitive national and global economy, success will go to those places that are most productive – this means making the most of the talents of all local people. Finally, inequality increases pressure on public services through increased welfare spending, increased demand for services, and through the need for crisis-based intervention and support. Public services will not be able to sustain their performance, in a climate of tight financial constraints and demographic pressures, if they have to absorb demand pressures linked to widening inequalities.

Local public services can have a profound impact on local inequality. Between them, they have a shared mandate to lead on development of the local economy, infrastructure, education and skills provision, and population health and wellbeing. Although welfare and tax policy may be controlled at the national level, many of the policy and operational levers that can effect change are held by local partners. The challenge will be for local partners to work together to build sustainable change for people and places – enabling aspiration, enterprise, and opportunity, and taking action to tackle the root causes of inequality, rather than merely addressing its symptoms in the short-term.

## **Understanding inequality in Greater Essex**

There are stark inequalities across Greater Essex. The region is home to some of the most affluent communities in England and also to some of its poorest. While many residents enjoy stable work, high salaries and send their children to some of the best schools in the country, others struggle to make ends meet and find their choices and opportunities limited as a result of where they live, their personal circumstances or their family background.

Examining inequalities in Greater Essex is complex. There is a geographical dimension to inequality. There are towns and neighbourhoods across Greater Essex where residents are more likely to experience extreme deprivation and poverty than those living a short distance away. These differentials have a profound effect on residents' opportunities, their quality of life and on their health. Residents in Thurrock, Southend-on-Sea, Tendring, Basildon and Harlow are more likely to die prematurely and to live in poorer health than those in more affluent areas, such as Uttlesford or Brentwood. Those living in more deprived areas are also more likely to experience unemployment, challenges in access to transport, digital exclusion, lower educational attainment, poorer housing conditions, and be more exposed to climate risks such as flooding and overheating whilst having the least ability to recover from climate shocks, which puts them at an automatic disadvantage compared to those in more affluent areas.

There are also particular groups and cohorts who experience poorer outcomes in education, in the workplace and with respect to their health irrespective of where they live. There are also deep disparities in the opportunities available, particularly to young people, with those living in deprived communities most likely to see their life chances limited. The resulting impacts on social mobility risk perpetuating patterns of inequality across the generations.

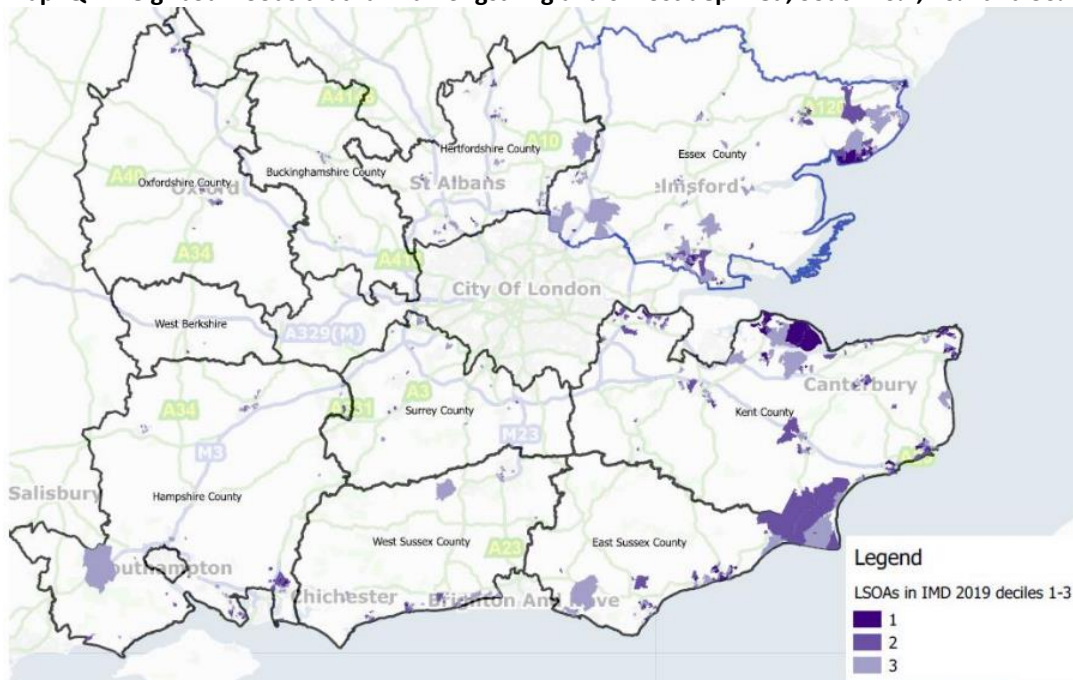
These different dimensions of inequality in Greater Essex – geographical deprivation, populations and cohorts who face specific challenges, and social mobility – are explored further below.

### **Geographical patterns of deprivation**

Although Greater Essex generally compares well against England as a whole in measures that assess local deprivation, it compares less favourably against other regions in the wider South East. When the last national Index of Multiple Deprivation was published (2019), some 10.1% of the region's population were living in areas that rank among the most deprived 20% in England – only Kent and East Sussex had a higher percentage of residents in this group.

There is also a large and growing gap between the most and least deprived city, borough, and district areas within Greater Essex. Castle Point and Tendring districts have seen marked declines in their relative position compared to other local authorities across the country.

### Map IQ1: Neighbourhoods that rank amongst England's most deprived, South 10%, 20% and 30%



Source: *Index of Multiple Deprivation, 2019*

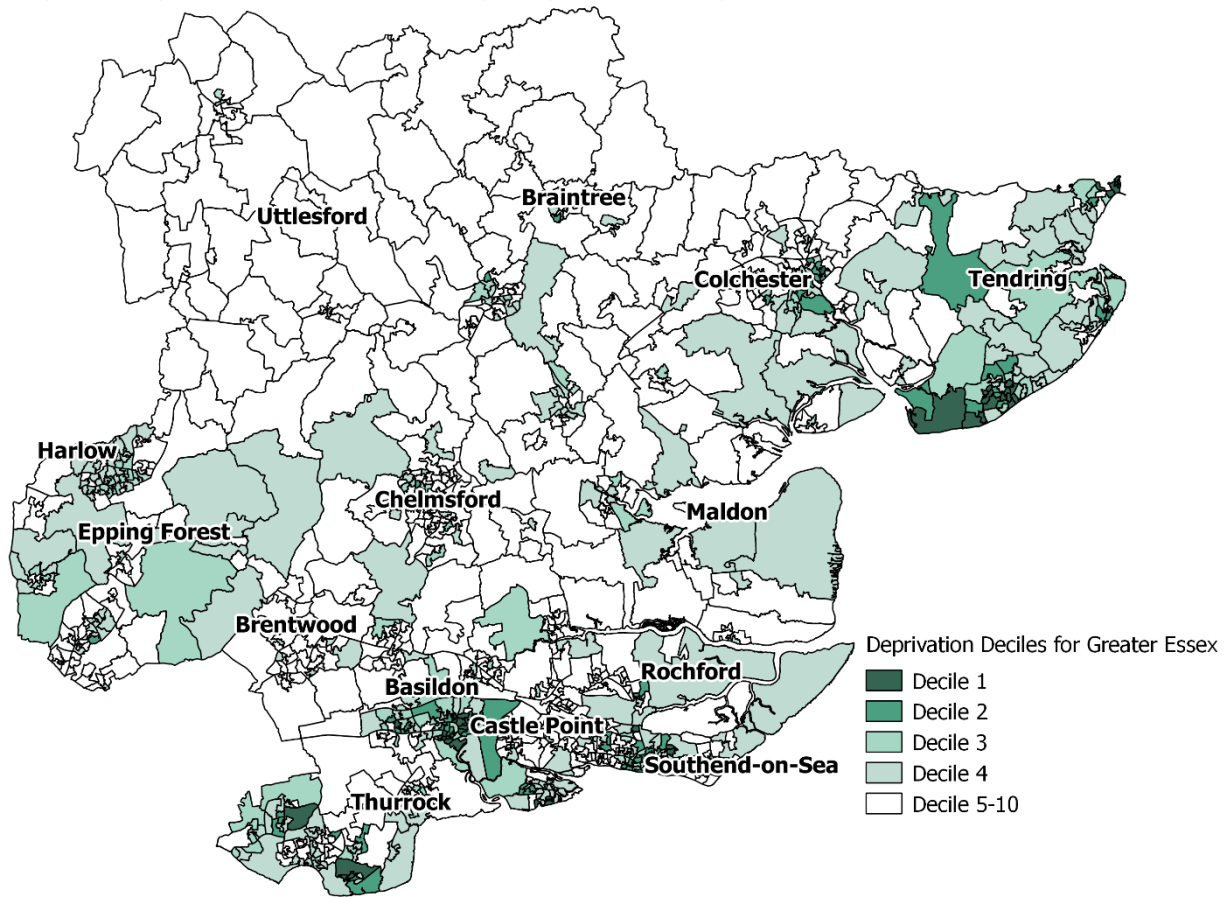
Definitions: LSOAs are Lower Super Output Areas – units of England's statistical geography with a typical population of between 1,000 and 3,000 people

In absolute terms, there were around 188,000 people across Greater Essex living in the most deprived 20% of areas. Of this group, some 49,000 were children. This signals a significant increase in levels of relative deprivation across Greater Essex over the preceding 12 years. In 2007, approximately 110,000 residents lived in similarly deprived communities. In 2019, just over 75,000 lived in the most deprived 10% of areas, compared to around 32,000 in 2007.

The scale of this increase in relative levels of deprivation has not been felt evenly across all parts of Greater Essex. The latest data suggest that there are no neighbourhoods in Brentwood, Maldon or Uttlesford that rank amongst England's most deprived – nor have there been at any point of measurement since at least 2007. The greatest shifts, and as a result, the most acute deprivation, can be found in:

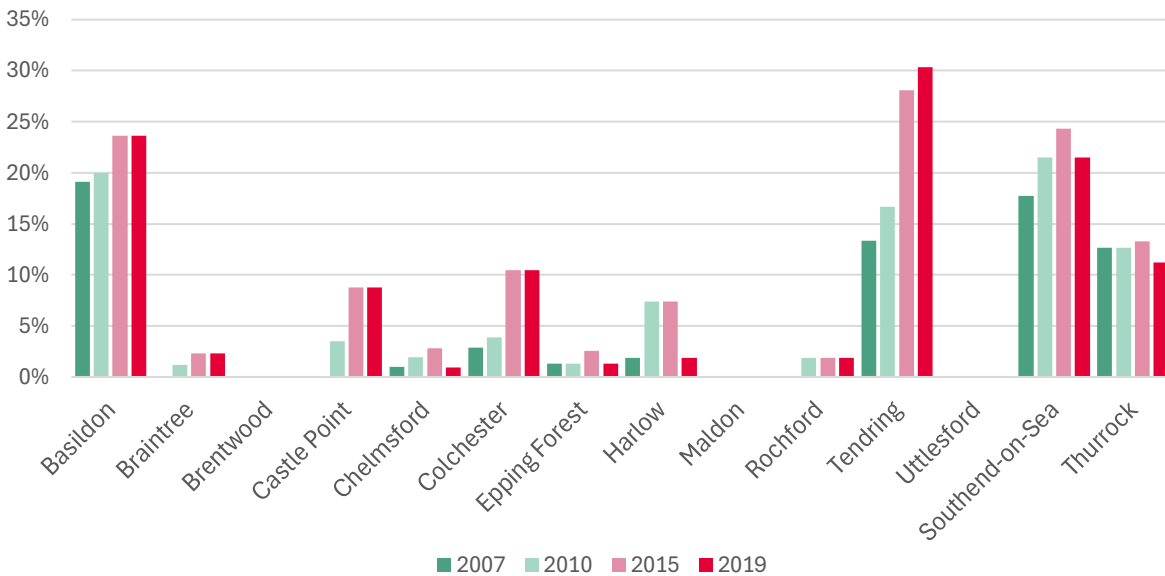
- a. coastal towns such as Southend-on-Sea, where 23% of the population (40,800 residents) live in areas among the most deprived 20% in England; Canvey Island, or Harwich and Clacton, where 31% (44,000 residents) live in areas of acute deprivation;
- b. larger towns such as Colchester and Tilbury, with 18,700 (10%) and 16,400 (12%) residents, respectively, living in areas of acute deprivation; and
- c. purpose built new towns of the 1950s such as Basildon and Harlow where over 45,000 residents live in areas of acute deprivation.

**Map IQ2: Neighbourhoods that rank amongst England's most deprived**



Source: Indices of Deprivation 2019, (DLUHC)

**Chart IQ1: Proportion of residents living in neighbourhoods ranked within the most deprived 20% in England**



Source: Indices of Deprivation 2019, (DLUHC)

The inequalities in outcomes, opportunity and experience that exist between places in Greater Essex are, in large part, a reflection of differences in levels of poverty and material

deprivation across these places. But it is also a reflection of the resilience of our places and communities.

The crucial factors in examining the resilience of communities are not merely related to the material wealth of the population – although clearly this contributes to the reliance of specific individuals and households. Rather, they are reflected in the shared spaces and social infrastructure that are available to the community; the social and physical connections that exist within the community and with others beyond; the health of the local voluntary and community sector, and the engagement of citizens.

Places that are rich in assets, connections and engagement have an underlying ‘strength’, enabling them to bear many of the challenges associated with economic downturns and to absorb the impacts of external shocks, areas that are less well-equipped exhibit higher levels of *Community Need*.

Objectively quantifying levels of *Community Need* is complex. However, measures developed for use in Essex by independent researchers suggest that, on average, communities across Essex have higher levels of ‘community need’ than communities in comparable regions and across England as a whole. Table IQ1 below shows the average rank for wards in Essex, and comparator areas, on the ‘Essex Community Needs Index.’ It suggests that, overall, Essex ranks above other counties, the East of England region and England as a whole on key dimensions of community need. It suggests that many areas of Essex experience significant levels of community need, with 22% of wards in Essex ranking amongst the highest 10% nationally on key measures of community need.

**Table IQ1: Essex Community Needs Index**

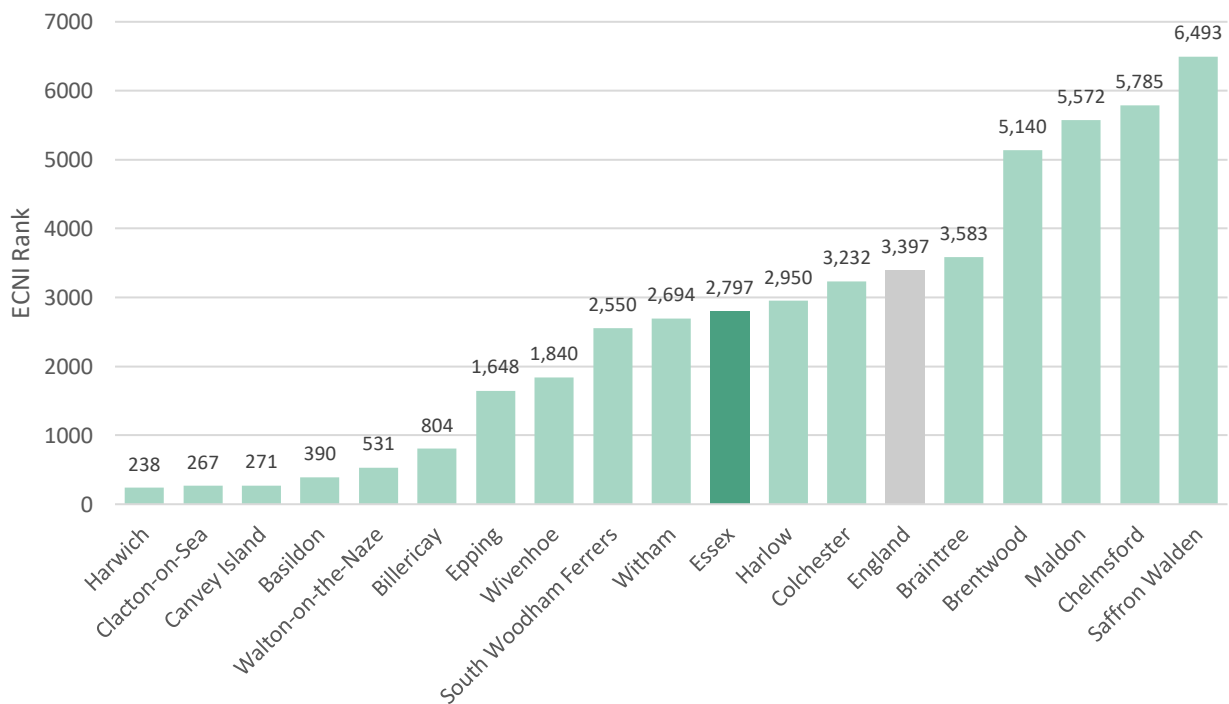
Area	Average ward rank	% of wards within the most acute 10% nationally
<b>Essex</b>	2,797	22%
Buckinghamshire	4,337	2%
Cambridgeshire	4,644	6%
East Sussex	2,748	11%
Hertfordshire	4,627	2%
Kent	3,171	12%
Norfolk	2,613	26%
Oxfordshire	5,087	<1%
Suffolk	3,742	11%
Surrey	5,484	0%
West Sussex	3,943	5%
<b>East of England</b>	3,527	14%
<b>England</b>	3,397	10%

Source: Essex Community Needs Index, OCSI/ Local Trust, 2021

Note: A Rank of 1 is assigned to the ward with the highest level of community need in England as measured by the index. A rank of 7,190 is applied to the ward with the lowest. Average ward ranks are weighted by population to give a indication of relative levels of community need that is not distorted by the large difference in ward size.

There are also stark differences in the strength and resilience of local communities within Greater Essex. While communities in Saffron Walden, Chelmsford, Maldon, and Brentwood are among the best equipped, the majority of towns have more acute levels of community need than England as a whole. Four of the five towns with the most acute needs are in coastal communities – Harwich, Clacton, Canvey, and Walton, but the levels of need highlighted in Billericay, Epping and Wivenhoe present a challenge to the view that acute challenges are focused exclusively in coastal areas.

**Chart IQ2: Essex Community Needs Index, Rank of Essex towns (population 10,000+) and comparable areas, 2021**



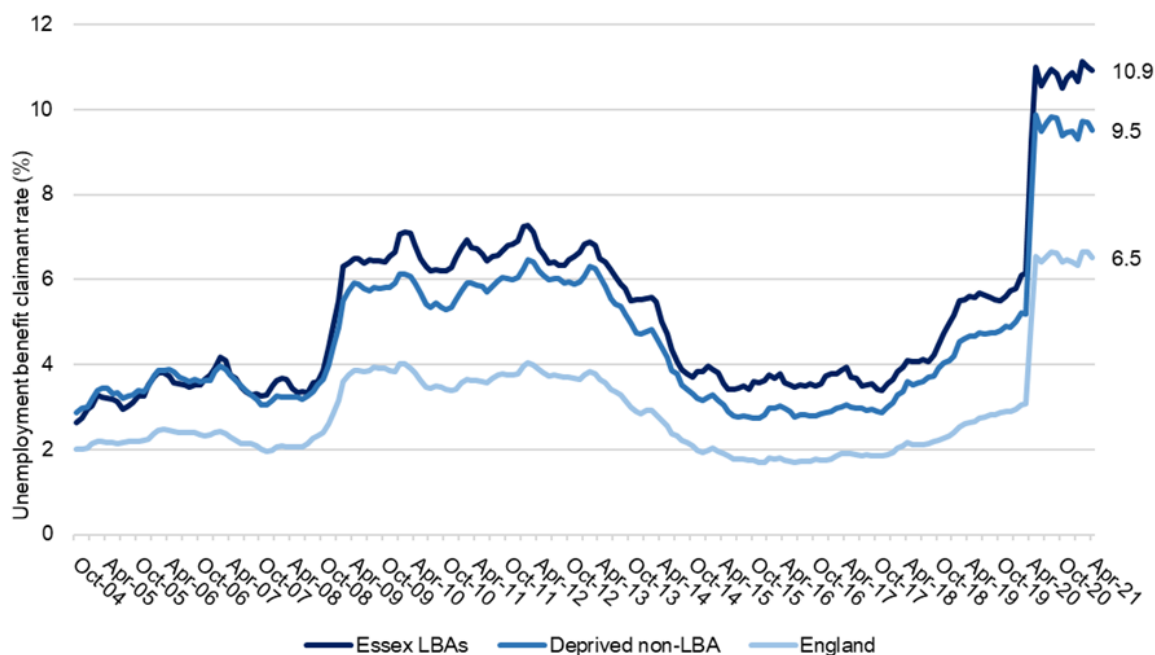
Source: Essex Community Needs Index, OCSI/ Local Trust, 2021

There is good evidence to suggest that levels of community need have a significant influence on the outcomes enjoyed by local communities. This influence is particularly clear in areas that experience high levels of poverty and deprivation, and where higher individual and household incomes cannot mask the effects of poor community and civic infrastructure, relative isolation, and low levels of participation. These areas often lack the resources to weather short-term economic challenges, and bounce-back from external shocks. They are at greater risk of being ‘left behind’ – with markedly worse outcomes on a range of socio-economic measures than areas that are similarly deprived, but which have lower levels of community need.

A clear example of this can be seen in patterns of unemployment. Chart IQ3 compares the percentage of working-age residents receiving unemployment benefits in Essex’s ‘left-behind areas,’ Essex’s wider deprived areas, and across England at various points over the past twenty years. In 2008, in the wake of the global financial crisis, unemployment benefit claims increased nationally. They increased by substantially more in Essex’s deprived communities, and to an even greater level in those deprived communities that have the most acute community need. The data show that, while claimant levels returned to pre-

crisis levels in most deprived communities from mid-2013, those areas with limited community assets, relative isolation and lower levels of engagement have yet to fully recover.

**Chart IQ3: Percentage receiving unemployment benefits (JSA and Universal credit) 2004-21, in Essex's deprived and 'left behind' communities**



Source: Department for Work and Pensions

### Populations and cohorts experiencing inequality

The geographical distribution of poverty and deprivation can help us understand these issues within Greater Essex, but they do not tell the full story. While many who experience inequality and disadvantage will live in deprived communities, there are significant populations, groups and cohorts who are at risk of experiencing poor outcomes regardless of where they live. For these residents, their experience of inequality has its root in specific economic, family, and personal circumstances rather than in their address or postcode.

While the challenges facing specific individuals and families will often be unique and personal, these groups will often face common barriers: to education; to labour market opportunities; in accessing public services; and to good health and wellbeing.

### Children with special educational needs

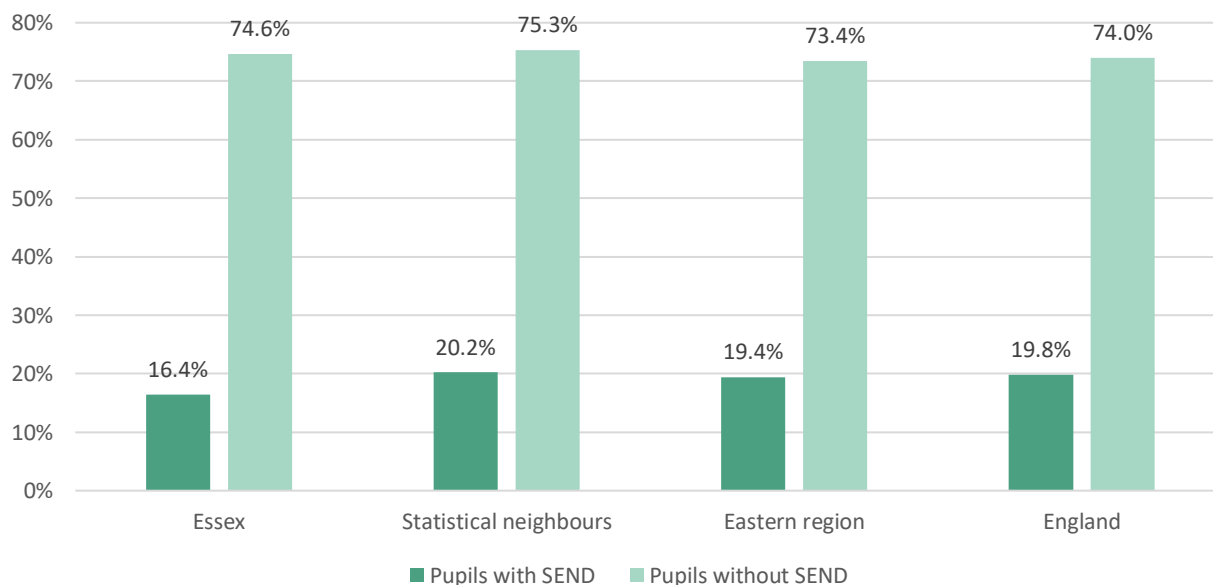
There are around 44,000 pupils in Greater Essex who have been assessed as having Special Education Needs or Disabilities (SEND). This equates to c.16% of all pupils (below the national average of 17%). The full number with SEND is likely to be slightly higher as some children and young people may not yet have received an assessment or be known to services.

Proportions of pupils with a learning disability across Greater Essex have also been steadily increasing year on year since 2018/19, rising from 13.5% in Essex, 15% in Thurrock, and 11.6% in Southend-on-Sea.

The needs of children with SEND can be complex and unique to the individual. Nevertheless, local data indicate that some 17.5% of children with SEND in the Essex area have profound and multiple learning difficulties, 13.9% have physical disabilities, while 13.8% have needs relating to their social emotional and mental health. Of this final group five out of every six are boys.

In common with national patterns, outcomes of children with SEND in Greater Essex are generally poor compared to outcomes for those without SEND. Around 16% of children with SEND achieve a Good Level of Development (GLD) at age 5 compared to almost three-quarters of those without SEND. The proportion of children with SEND in Essex achieving a GLD at age 5 is slightly below the national average, statistical neighbours, and the Eastern region.

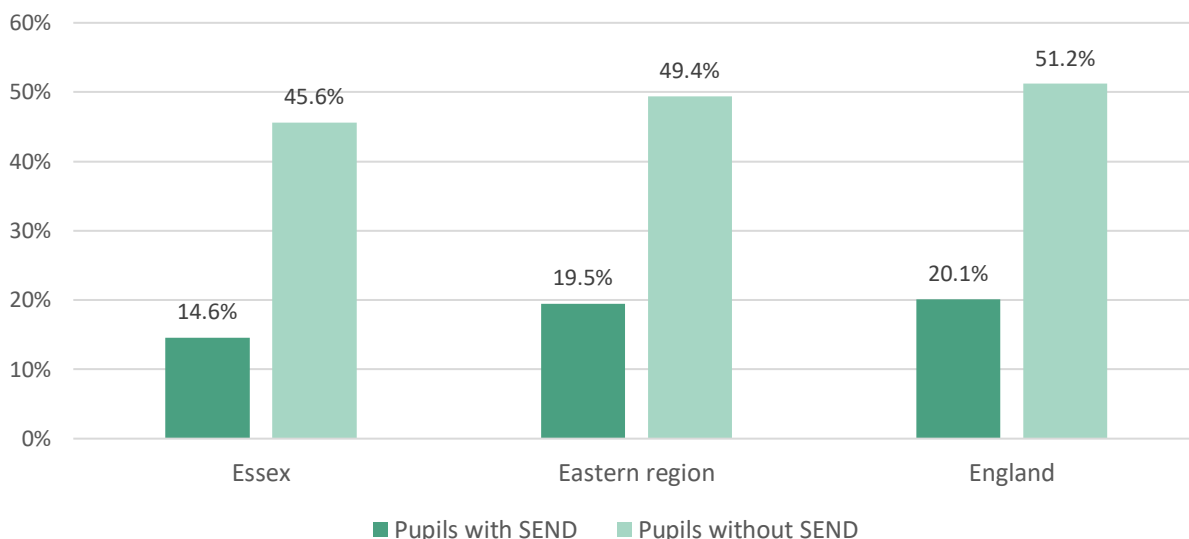
**Chart IQ4: Percentage of pupils with and without SEND achieving a Good Level of Development (GLD) at age 5, 2023/23**



Source: Essex County Council (2024) 'SEND JSNA dashboard'

This pattern is replicated at all key education milestones between age 5 and up to higher education. A student with no SEN is around three times as likely to progress to higher education than a student with SEN in Essex (45.6% compared to 14.6% respectively). The proportions of pupils progressing to higher education for both those with and without SEN are lower within Essex compared to the wider Eastern region and national average.

**Chart IQ5: Percentage of pupils with and without SEND progressing to higher education, 2021/22**



Source: Essex County Council (2024) 'SEND JSNA dashboard'

### Adults with learning disabilities

There are around 10,000 adults in Greater Essex with a learning disability who are known to services. This includes 7,935 adults in Essex, 1,253 in Southend and 815 in Thurrock. As with children and young people, this relates to those who are known to services, and figures may be higher when considering adults with learning disabilities who may not have received a formal assessment.

We know that adults with learning disabilities can experience challenges and barriers to achieving the same life outcomes as their peers. People with learning disability and autism are more likely to have been excluded from school, to have received poor healthcare to be underemployed and to be poorly served by the criminal justice system. Many are less independent than they would like to be. These factors, together contribute to reduced wellbeing, increased suicide risk and lower life expectancy.

Securing employment can be an important lifeline for adults with learning disabilities, particularly when it comes to accessing employment. Those who secure and sustain employment value the opportunity and impact it has on their lives – developing self-worth and independence. Employers too, identify a number of benefits to employing someone with a learning disability, most notably loyalty, dedication, and a strong work ethic.

Yet, many adults with learning disabilities struggle to access employment and take up these opportunities. At a national level, pupils with special educational needs are 25% less likely to be in sustained employment at age 27 when compared to their peers, with only 17.6% of adults with a learning disability were in employment nationally in 2022/23.

In the same year, of those known to local authorities this figure drops to 5% who are in paid employment nationally, whilst Essex is slightly below the national average at 4.5%. Thurrock

is slightly above the average with 5.3% in paid employment, and Southend-on-Sea performs significantly better with 9.6% of adults with learning disabilities in paid employment.

The principal barriers to employment - identified through local research into the lived experience of adults with learning disabilities and autism – include a lack of support services, lack of information about available employment opportunities, challenges with typical application processes, fear of failure, and lack of understanding from employers around necessary adjustments required.

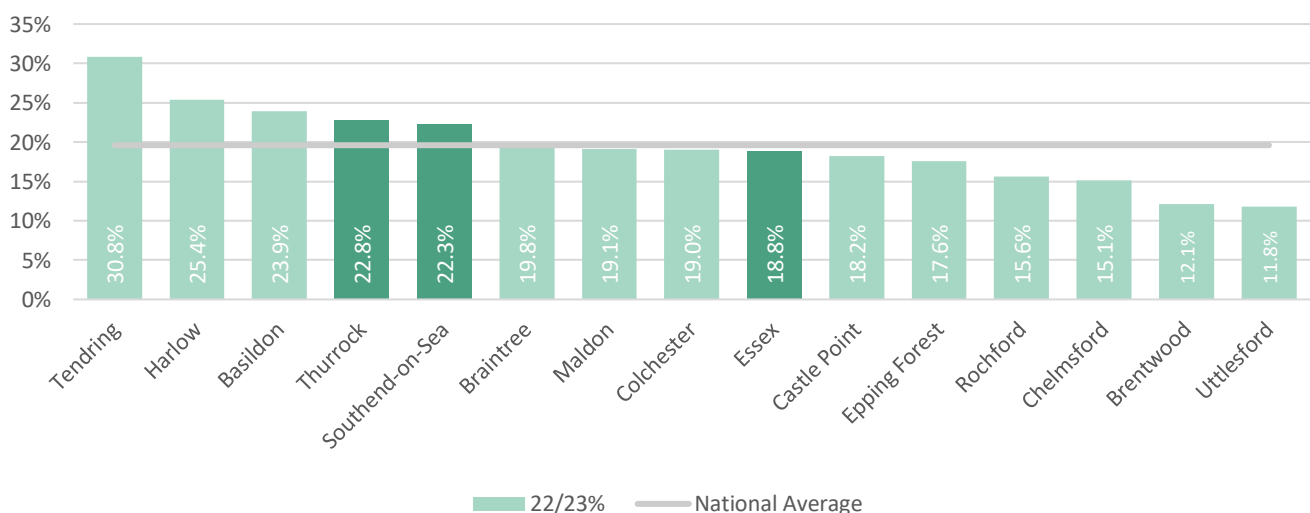
Nevertheless, there are opportunities which can be considered to help lower these barriers and to support adults with learning disabilities to take up new opportunities. The challenge will be for education and care providers to work with families to discuss employment opportunities, and with schools and colleges to build greater careers support and advice, encouraging raising aspirations beyond education. The provision of volunteering and work experience roles across a range of sectors, as well as support with application processes, work with employers to adopt alternative hiring processes, and the development of peer support between families could be important in securing progress.

### Children on free school meals

There are around 35,000 children in Greater Essex eligible for free school meals (FSM), accounting for 18.8% of all pupils in Essex, 22.3% in Thurrock, and 22.8% in Southend-on-Sea in 2022/23. The national average in 2022/23 was 19.6%, meaning Essex is slightly lower than average whereas Thurrock and Southend-on-Sea are above average.

There is also significant variation within the county, with Tendring, Harlow and Basildon experiencing the highest proportions of children eligible for FSM, and Brentwood and Uttlesford among the lowest. This aligns closely with the geographic areas of disadvantage across the county.

**Chart IQ6: Percentage of all pupils known to be eligible for free school meals in Greater Essex, 2022/23**



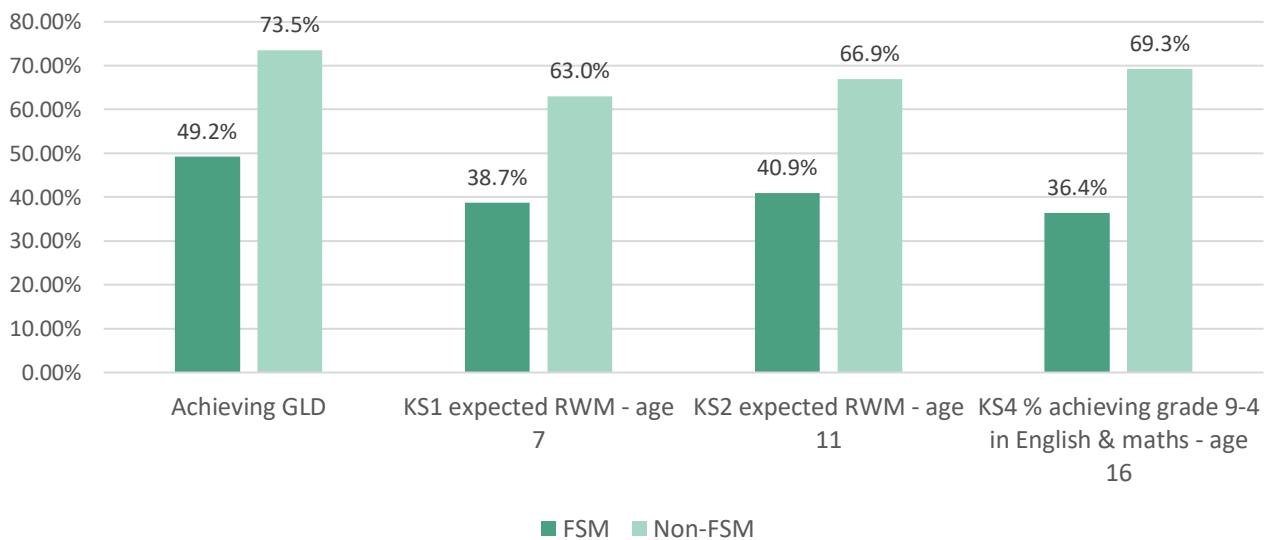
Source: Department for Education (DoE), Statistics: school and pupil numbers

The proportion of children in Greater Essex eligible for FSM has steadily increased between the academic years of 2018/19 and 2022/23, rising from 11.5% in Essex, 13.4% in Thurrock, and 13.8% in Southend-on-Sea in 2018/19. The national average also increased from 11.7% in 2018/19, meaning rates of increase are broadly similar.

Whilst not a perfect measure, eligibility of free school meals can provide a good indicator of socioeconomic status, and data suggest that those eligible for FSM experience inequalities in terms of the outcomes they achieve throughout their education and into adulthood.

When it comes to educational attainment, there is a significant gap in the attainment levels of children eligible for FSM compared to their peers. In Essex, 49.2% of pupils on FSM achieved a Good Level of Development (GLD) at age 5, compared to 73.3% of pupils not receiving FSM (2023). This gap persists throughout education, with fewer pupils eligible for FSM achieving expected standards in reading, writing and maths (RWM) in KS1 and KS2, and fewer achieving grades 9-4 in English and maths at GCSE level.

**Chart IQ7: Outcomes at different stages of education – children who receive free-school meals and children who do not**



Source: Essex County Council (2024) 'FSM dashboard'

There is also a significant gap between pupils on FSM entering Higher Education (HE) compared to non-FSM pupils. Within Greater Essex, 21.8% of pupils on FSM enter HE compared to 44.4% of non-FSM pupils. Whilst a larger proportion of both FSM and non-FSM pupils enter HE nationally, the gap between FSM and non-FSM pupils entering HE within Greater Essex is slightly larger than the national average (22.6% compared to 20.2% nationally). However, the gap within Greater Essex is smaller than within both the East of England (24.6%) and South East (27.4%).

**Chart IQ8: Percentage of FSM and non-FSM pupils entering Higher Education**



Source: Department for Education (2023) 'Widening participation in higher education'

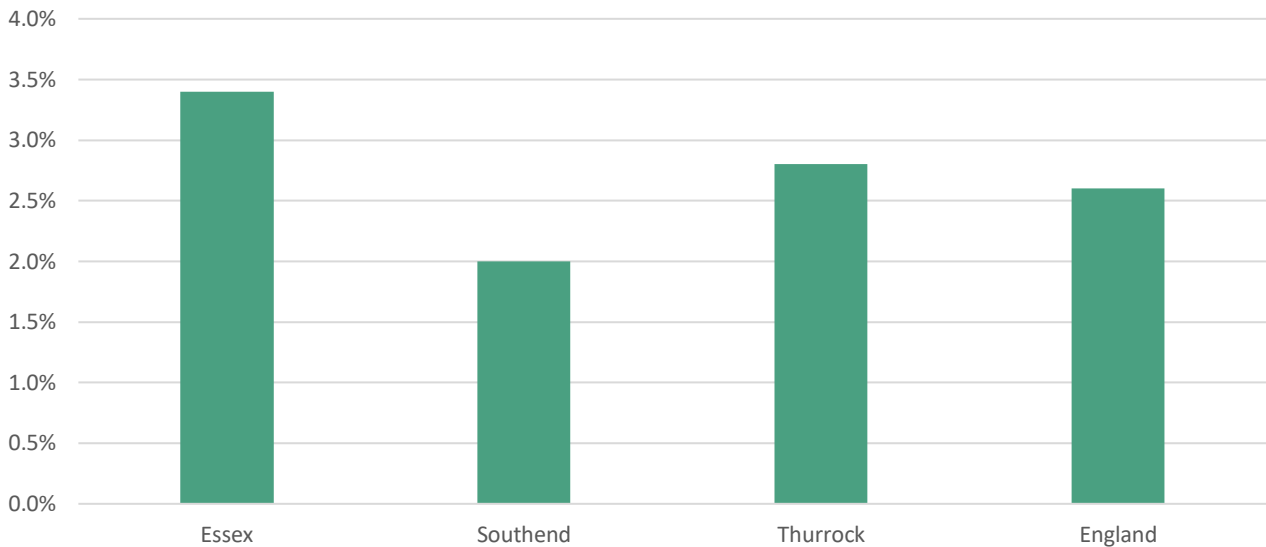
This gap between FSM-eligible pupils and their peers also persists into adulthood. Nationally, FSM-eligible pupils are 23% less likely to be in sustained employment aged 27 when compared to their peers, and will experience a gap in earnings at age 30. At the age of 30 the top 10% from independent schools were earning upwards of £71,000 a year, while the top 1% were earning more than £180,000. In contrast, the top 1% of non-FSM state school pupils were earning more than £85,000, while the top 1% of FSM pupils were on £63,000.

Variations in educational attainment may account for part of this, however it does not explain the persistent employment and earnings gap as data show that even when adults who received FSM as children achieve the same level of qualifications and similar attainment in secondary school, they will still go on to earn less than their more affluent peers.

### **Young adults who are not in education, training, or employment (NEET)**

In Greater Essex, there are around 174,000 young people aged between 16-24 years old. Of the 97,500 actively seeking work, 11.7% are unemployed. Within Essex, 3.4% of 16–17-year-olds are not in education, employment, or training (NEET), which is slightly higher than the national average of 2.8%, according to the Department of Education. In Thurrock, 2.8% of 16-17 year olds are NEET, and 2% in Southend-on-Sea.

**Chart IQ9: Proportion of 16-17 year olds not in education, employment, or training (NEET)**



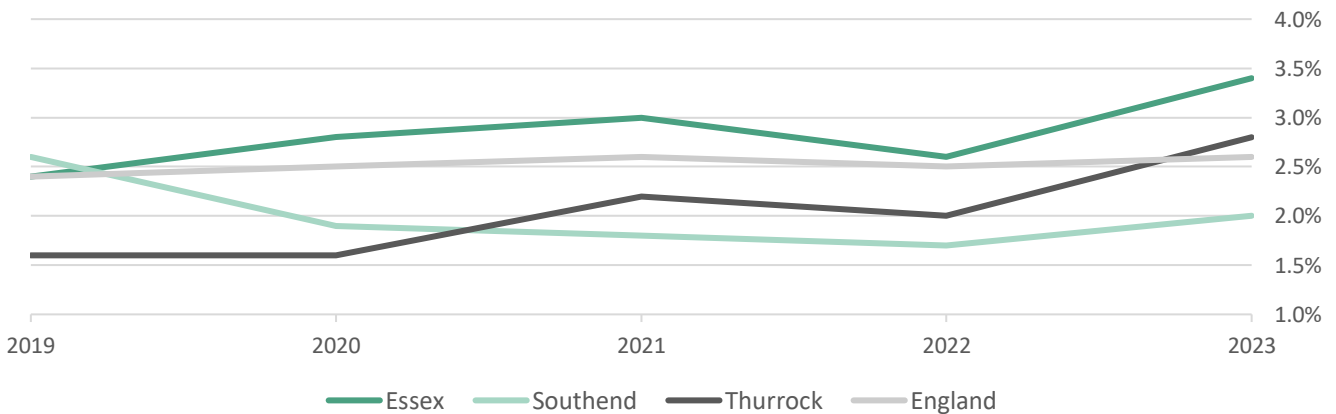
Source: Department for Education (2023) 'NEET and participation'

This is a cohort of young people who are experiencing reduced opportunities and are at increased risk of challenges in adulthood, including lasting impacts on future employment outcomes and earnings, and on physical and mental health.

There are a number of risk factors which have been identified as influencing a young person's chance of being NEET, which are strongly linked with inequalities and socioeconomic disadvantage. This includes low family income, living in social housing and living in a single parent household, caring responsibilities, teenage pregnancy, having a special educational need or health condition, and low educational attainment among other factors.

The number of 16-17 year olds who are NEET within Essex has steadily increased between 2019-2023, rising from 2.4% in 2019 to 3.4% in 2023. A steady increase can also be observed for Thurrock, rising from 1.6% in 2019, whilst Southend-on-Sea experienced fluctuations but has decreased overall from 2.6% in 2019.

**Chart IQ10: Proportion of 16-17 year olds who are not in education, employment or training (NEET), from 2019-2023**



Source: Department for Education (2023) 'NEET and participation'

The future outlook is therefore uncertain; however, we may expect to see a continued increase in the proportions of NEET young people as a whole. This trajectory is indicative of wider socioeconomic trends at both a local and national level, however there are a range of interventions which may help to shift the dial and increase numbers of young people into education, employment, and training. A range of Essex wide activity is already underway that support NEETs objectives and interventions, and a new £516k delivery plan to support NEETs aged 16-25 aims to support wider education and skills interventions to support employment opportunities for young people in Essex into 2026.

### **Low income working families**

There are 205,490 households in Greater Essex on relative low incomes (under £30k per year), representing 27.7% of all households (2023). Data suggest that those with household incomes under £30k per year are likely to experience greater financial challenges.

Although many of these households will not meet the threshold required for financial support and may not be experiencing the most acute forms of deprivation, they may be struggling to make ends meet and vulnerable to taking on debt.

Rising costs of living have squeezed levels of discretionary income across the income spectrum. An estimated 234,000 households in Greater Essex have a discretionary income of less than £125 per month (c.32% of households). Discretionary income is the amount of net income remaining after all basic necessities are covered. Again, this provides an indication of households' ability to achieve a good standard of living, with those having below £125 per month likely to experience challenges.

Local analysis suggests that those who are most vulnerable to pressures on their income are likely to be living in households with children (particularly single parent households); older women living alone (aged 65+); and households from black and minority ethnic backgrounds. Increases in low income households have also been felt more in Harlow, Colchester, Braintree and Tendring.

**Chart IQ11: Proportion of Households earning less than £30k annually and with Discretionary Income less than £125, by district and Greater Essex**

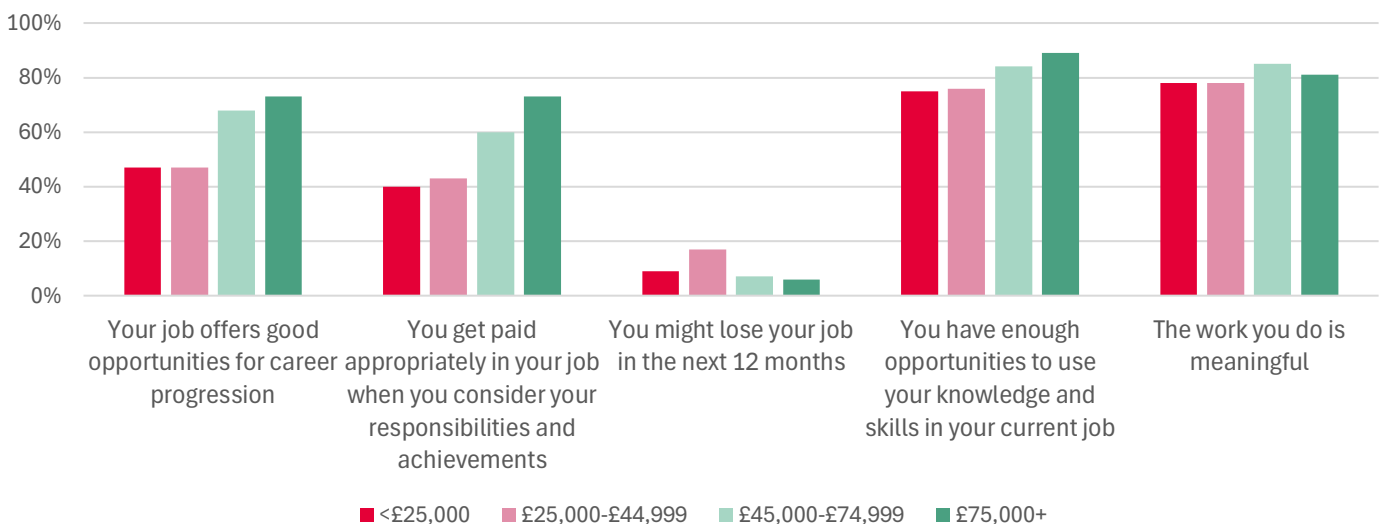


Source: Consumer View Data Jan 2024, Mosaic Experian

Low income families report that the challenges they face include lack of financial stability and resilience to deal with unexpected costs. The experiences of low income families were also characterised by persistent worries about finances which takes considerable time and mental energy, leaving limited ‘bandwidth’ to think beyond the here and now or plan for the future. The basic need to ‘get by’ from month to month crowds out any focus on self-improvement and income progression. Many are also reporting being in low paid jobs with limited opportunities to progress, and travel costs also present barriers to seeking higher paid work further afield.

**Chart IQ12: Job quality responses by household income in Essex**

To what extent do you agree or disagree that...(% strongly/slightly agree)



Source: Essex Residents survey, 2023. Please note, data for Southend-on-Sea and Thurrock is unavailable.

Areas which were particularly challenging included juggling work and childcare, with many being heavily reliant on informal networks due to formal childcare costs being prohibitive. Challenges around childcare also mean many working parents, particularly mothers, have to limit their hours of employment when caring for younger children. The pressures for single parents are even greater. With recent increases in the cost of living, cohorts already struggling are likely to feel the impacts more keenly than others, with disparities between higher and lower income households likely to increase.

### **Experiences of digital exclusion**

Many people have come to rely on the internet and digital devices for many daily services, and this reliance has undoubtedly increased since the pandemic. Fewer people are living entirely offline, digital engagement is increasing, and people are becoming more digitally capable than ever before. The majority of Essex residents are well connected to the internet, with nearly all having access to the internet at home. In a 2023 survey, 91% reported having access via a fixed broadband connection, however this is less likely for those living in more deprived areas, and digital access is an issue for some.

Those who have internet access through routes other than fixed broadband are more likely to be younger, female, from an ethnic minority background, a single person household or single parent family, and living on a relatively low income. They are more likely to be living in Chelmsford, Harlow and Tendring.

For the 2% of Essex residents reporting no internet access at home, they are most likely to be female, aged 75+, with a disability or health condition and living in social housing and receiving a household income under £25k per year. They are most likely to be living in Tendring, in the most deprived IMD quintile. Those living in the most deprived areas are also less likely to say they use the internet on a regular basis, and more likely to say they lack confidence using the internet.

Lacking digital access presents a host of challenges for participating in daily life, including limiting access to employment opportunities, health services, as well as accessing the most cost effective products and services. This means that those who are already experiencing financial challenges face additional barriers. Whilst there are some physical infrastructure challenges to access within particularly rural communities in Essex, those who experience digital exclusion are more likely to struggle with affordability of broadband connectivity, access to devices and a lack of skills.

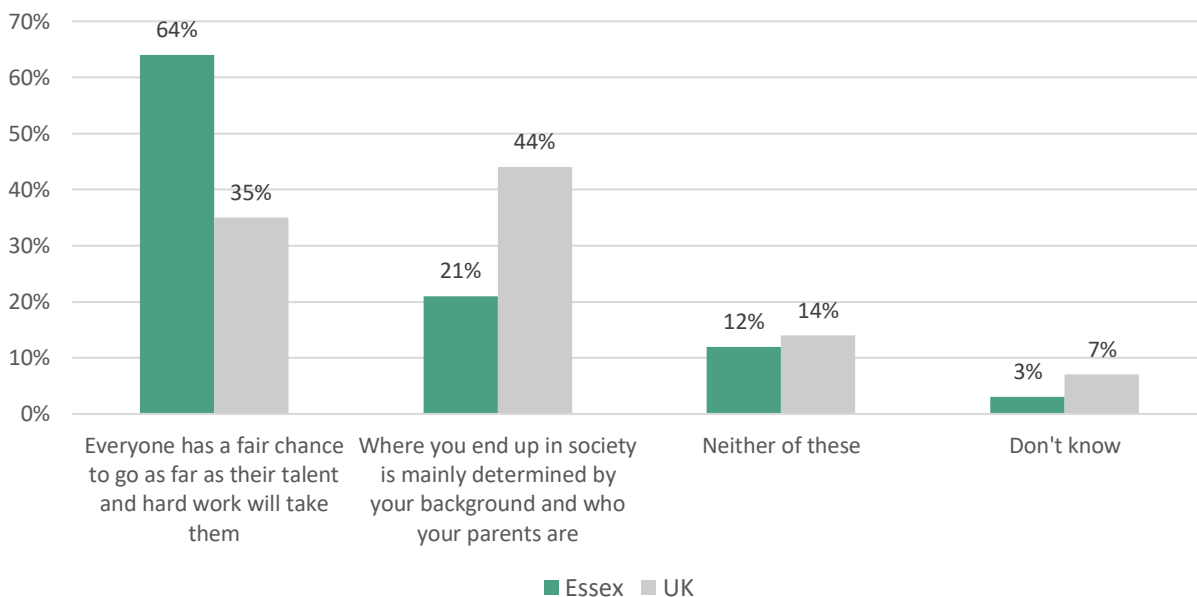
# Inequalities in Greater Essex: looking ahead

There is a risk that patterns of inequality between different places, and between different groups and populations in Greater Essex, persist across generations. There is a risk that children born into deprived or low-income households themselves go on to experience poor outcomes in education, low incomes in their adult lives, and limited opportunities to build financial security for their own families.

Breaking these persistent, intergenerational patterns of inequality requires a focus on social mobility. But the evidence suggests that, across the UK as a whole, rates of social mobility lag behind much of the developed world. In too many cases, a child's life chances are determined by where they live and their parents' socio-economic background, rather than their abilities and their willingness to work hard.

Despite these trends at national level, Essex residents have a firm belief in social mobility and are generally optimistic about their chances to succeed. Almost two thirds believe that an individual's success reflects talent and hard work, compared to only 35% across the UK as a whole, although younger generations are less optimistic.

**Chart IQ13: Residents' attitudes towards securing social mobility, Essex vs UK, 2020**



Source: Essex Residents survey (2020), Social Mobility Barometer (2020. Please note, data for Southend-on-Sea and Thurrock is unavailable.)

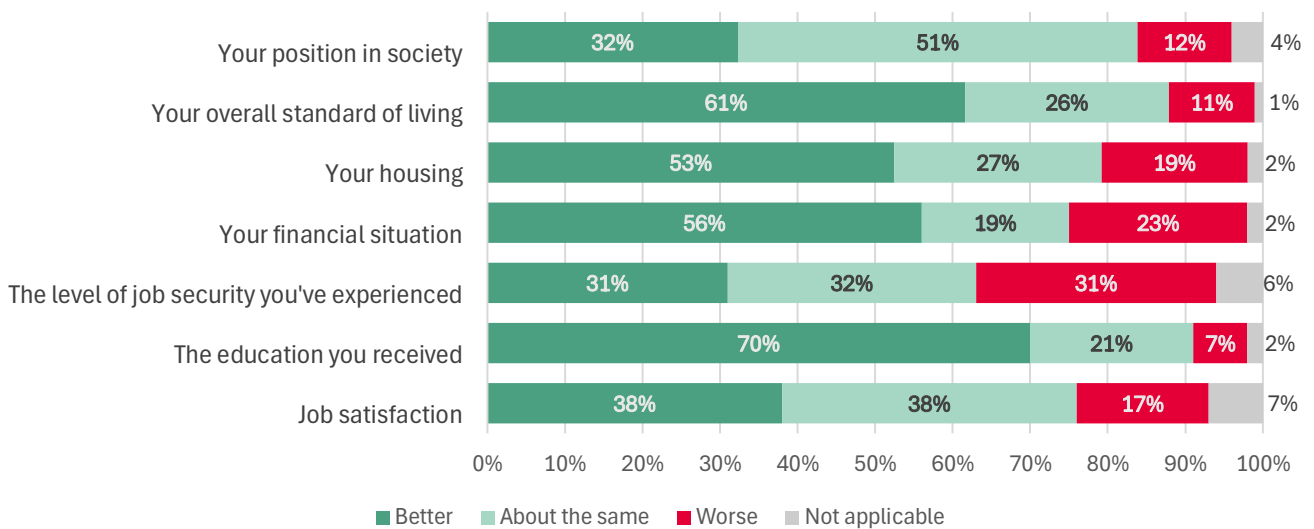
Chart IQ14: Residents' attitudes towards securing social mobility by generations, 2020



Source: Essex Residents survey, 2020. Please note, data for Southend-on-Sea and Thurrock is unavailable.

People in Essex also recognise that they have benefited from social mobility and improved opportunities in their own lives. Essex residents across generations and age groups recognise that they are better off than their parents across a range of areas.

Chart IQ15: Percentage of residents who believe they are better or worse off than their parents, in terms of...'



Source: Essex Residents Survey Dashboard 2020. Please note, data for Southend-on-Sea and Thurrock is unavailable.

Despite optimism and support for the idea of social mobility across Essex communities, there are signs that it is becoming harder for younger generations to secure success.

National research suggests that social mobility may be becoming more difficult for younger generations to achieve, and that millennials (those born between 1981-2000) may become the first generation to fare worse economically than their parents. The evidence suggests that younger generations are struggling to meet lifecycle milestones, like job security and home ownership, at the same age as their parents, and that household-income progress has stalled.

Millennials at age 30 typically earn c.8% less than their Generation X counterparts at the same age. This decline in earnings is significant as it suggests that millennials are not only starting their careers on a weaker economic footing but may also face long-term repercussions in terms of wealth accumulation and financial stability.

A consequence of this decline in economic mobility is stalling and declining living standards. This is likely to be a defining challenge for policy makers in Greater Essex, and at national level, over the next decade. With lower earnings, many find it difficult to afford homeownership, a key factor in wealth building – particularly as house price growth has remained consistently higher than wage growth, over the last 10 years. The decrease in homeownership rates among millennials further highlights the generational wealth gap, as owning a home is often associated with increased financial security and capital accumulation over time.

Stalling and declining living standards are likely to lead to increased pressure on public services in the long-term as the resources required to support social safety nets are squeezed, and as a generation that has enjoyed reduced financial security, progresses through the labour market and into retirement.

**Chart IQ16: Annual Growth Rates of Real average weekly earnings, and annual house prices in the UK, 2013-2023**



Source: ONS, Real earnings shows a positive annual growth rate for October 2023 & Annual house price rates of change for all dwellings, UK, January 2006 to January 2023



**HEALTH AND WELLBEING**

# Health & Wellbeing

## Summary

Historically, Greater Essex has enjoyed good health and wellbeing. Life expectancy and healthy life expectancy for both men and women are generally higher for Essex compared to the England average. Amongst the adult population, premature mortality is also lower compared to England. The data on children's health suggest that rates of infant mortality are relatively low as are levels of childhood obesity. Residents tend to make positive choices about their health and wellbeing; smoking prevalence is lower than national average, as is the number of alcohol related hospital admissions. In addition, levels of physical activity tend to be higher than the England average.

Yet, Greater Essex is not free from health challenges. Levels of obesity have been increasing amongst adults and children. There has been a rise in preventable mortality driven by cancer and liver conditions, and environmental factors, such as air pollution. Despite lower than England rates of alcohol related hospital admissions, this has still been on the rise across Greater Essex which is a cause for concern. The county is experiencing increasing mental wellbeing challenges and tragically high suicide rates, particularly within more deprived areas.

The most important challenge affecting the health and wellbeing of residents across Greater Essex is the prevalence of inequalities that persistently exists between communities. On average, there is a 17-year difference in life expectancy for males, and 14 years for females depending on location across Greater Essex. Those living in the most deprived areas – Thurrock, Southend-on-Sea, Tendring, Basildon and Harlow – are more likely to die prematurely and live in poorer health than those in affluent areas. Identifying the causes of health inequalities is complex. The influences go further than access to and the quality of health and care available or health behaviours. Socio-economic and environmental factors, referred to as the 'wider determinants of health' have a large part to play. The inequalities in employment, education, support networks, safety, and the built environment all lead to inequalities in health outcomes and life expectancy.

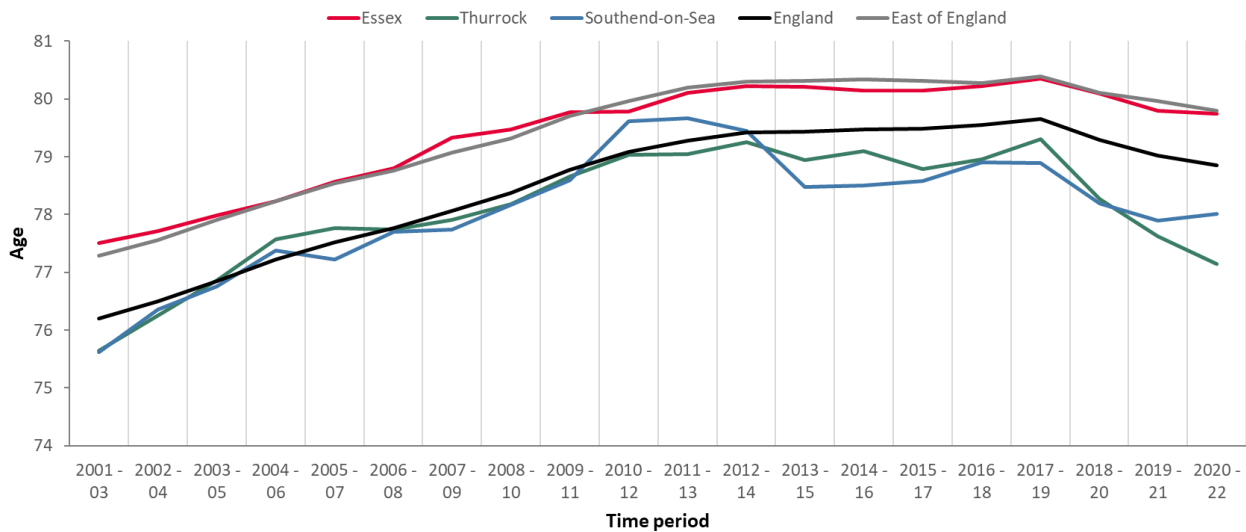
Driving out these persistent inequalities across our communities is required to protect health, wellbeing, and services in the future. Yet, these challenges need addressing while also navigating the additional pressures of keeping up with need, the rapid growth in frail older people, younger people with disabilities and a growing population. Social and health care provision is key, yet in the face of continued pressure, there is a risk that resources are driven towards the most acute, complex, and expensive services rather than investing in earlier interventions that secure better health outcomes in the long run.

## The health of our population

Over the course of the last two decades, the Greater Essex population has benefitted from steady improvements in health and wellbeing amongst both men and women. A good indication of this is the increase in life expectancy of between 1.7% to 3.1% across Greater

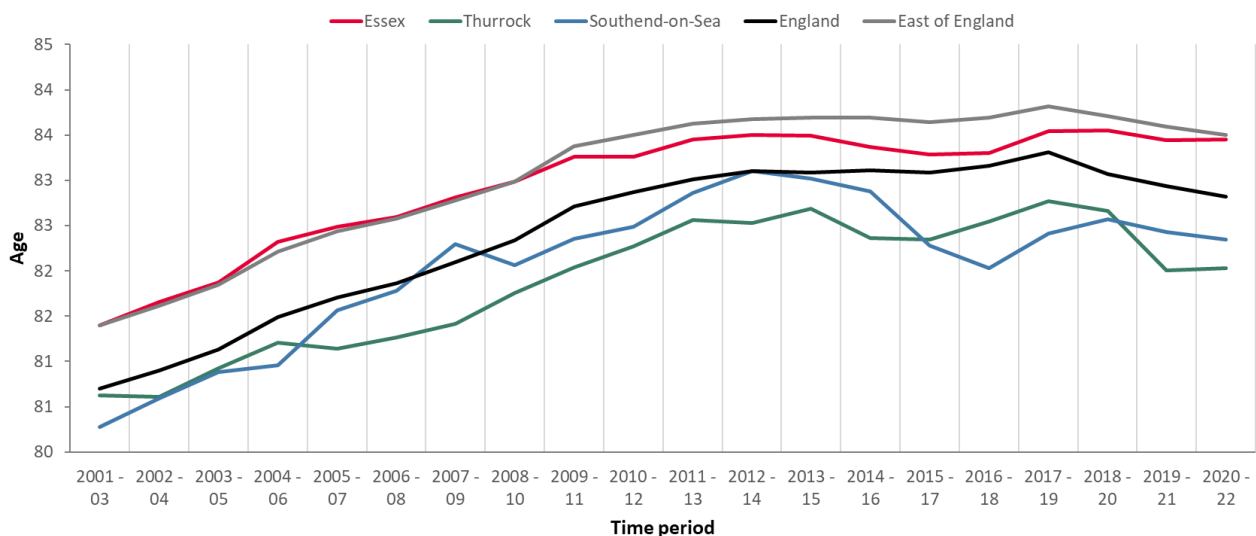
Essex between 2001-2003 and 2020-2022. As a result, life expectancy for males is now 79.8 in Essex, though slightly lower in Thurrock (77.1) and Southend-on-Sea (78.0). Females are still more likely to have a longer life expectancy at 83.5 in Essex, 82.0 in Thurrock and 82.4 in Southend-on-Sea.

**Chart HW1: Life Expectancy at birth trend 2001-2003 to 2020-2022 (Male)**



Source: Fingertips – Life expectancy at Birth (Indicator ID: 90366) – data available to 2022

**Chart HW2: Life Expectancy at birth trend 2001-2003 to 2020-2022 (Female)**

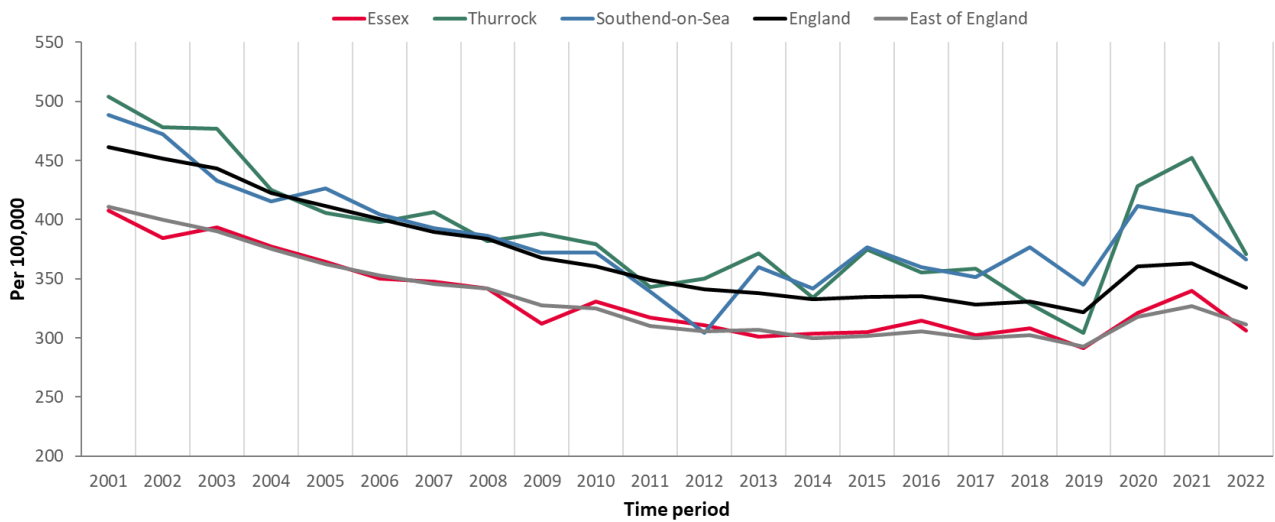


Source: Fingertips – Life expectancy at Birth (Indicator ID: 90366) – data available to 2022

There are disparities in the patterns of premature deaths across Greater Essex. In 2022, Essex districts generally experienced a lower level of premature deaths compared to England, at 306 per 100,000 population vs. 342. Whereas Thurrock (371) and Southend-on-Sea (366) and Tendring (407) all see much higher levels of premature death compared to England. In general, premature mortality has been in decline over the course of the last 20 years, with the exception of peaks during 2020 due to the Covid-19 pandemic. Yet, there is a concerning rise in some preventable mortality. This is mainly due to increases in cancer, and liver-related deaths. While cancer related preventable deaths saw a steady decline since the early 2000s, there has been an increase in recent years which requires monitoring. Liver

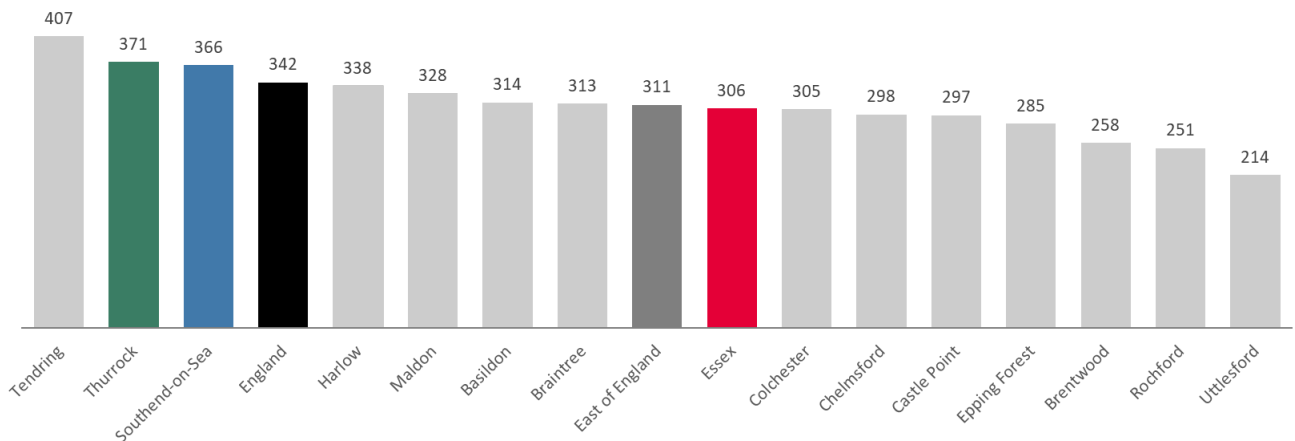
related preventable deaths have seen a steady increase since 2000, with higher rates for males than females.

**Chart HW3: Under 75 mortality rate from all causes (persons)**



Source: Fingertips – Under 75 mortality rate (Indicator ID: 108) – data only available to 2022

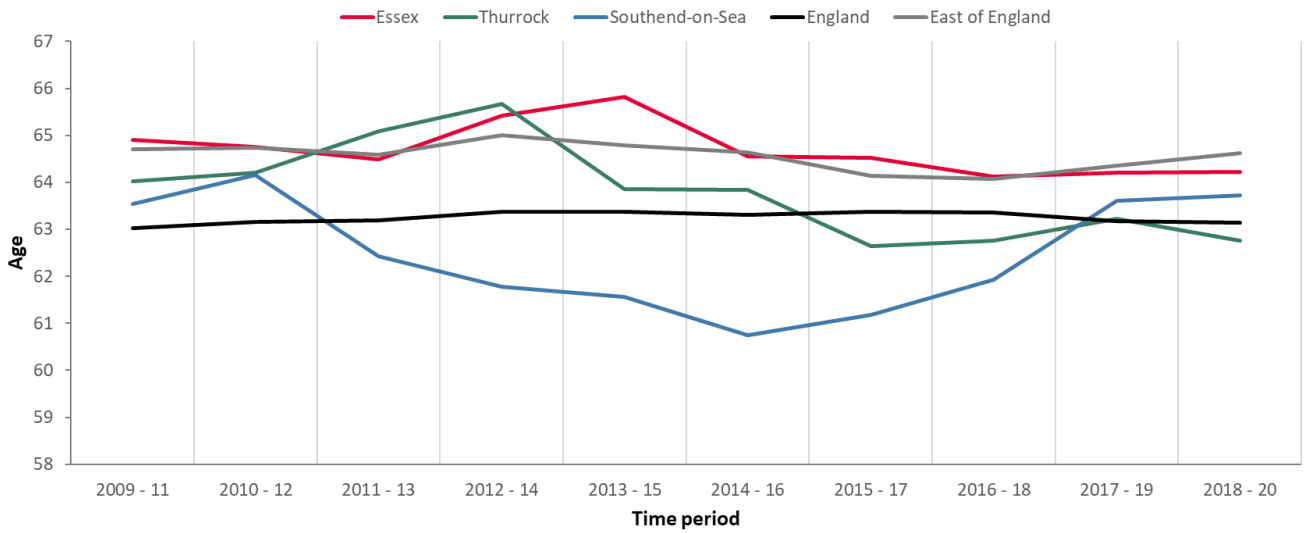
**Chart HW4: Under 75 mortality rate from all causes, by District and Unitary (per 100,000 persons)**



Source: Fingertips – Under 75 mortality rate (Indicator ID: 108) – 2022

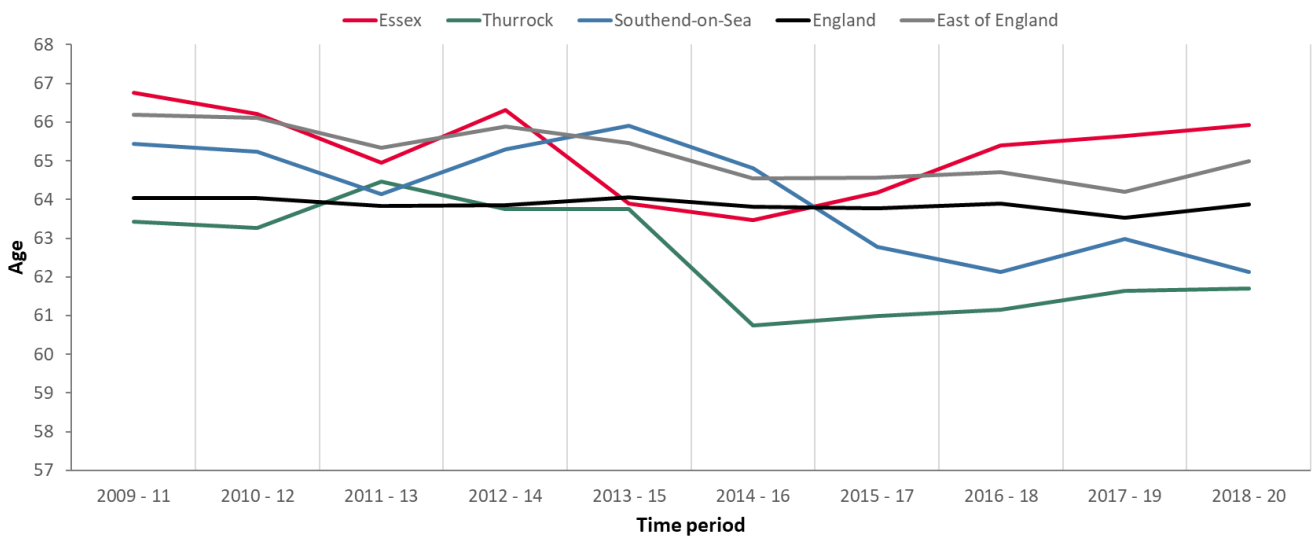
Despite living for longer, the quality of health residents can expect across Greater Essex varies greatly and has not improved at the same rate as life expectancy. Essex residents generally experience a better quality of health compared to England. Yet, those living in Southend-on-Sea and Thurrock experience a much lower healthy life expectancy, particularly amongst females. There have been some improvements at a local level over the last decade, yet the continued variations across Greater Essex are largely driven by factors out of individuals’ control. For example, deprivation, which links to employment and education opportunities, can limit access to resources and services necessary for maintaining health opportunities, as well as impacting healthy behaviours.

**Chart HW5: Healthy life Expectancy at birth trend 2009-2011 to 2018-2020 (Male)**



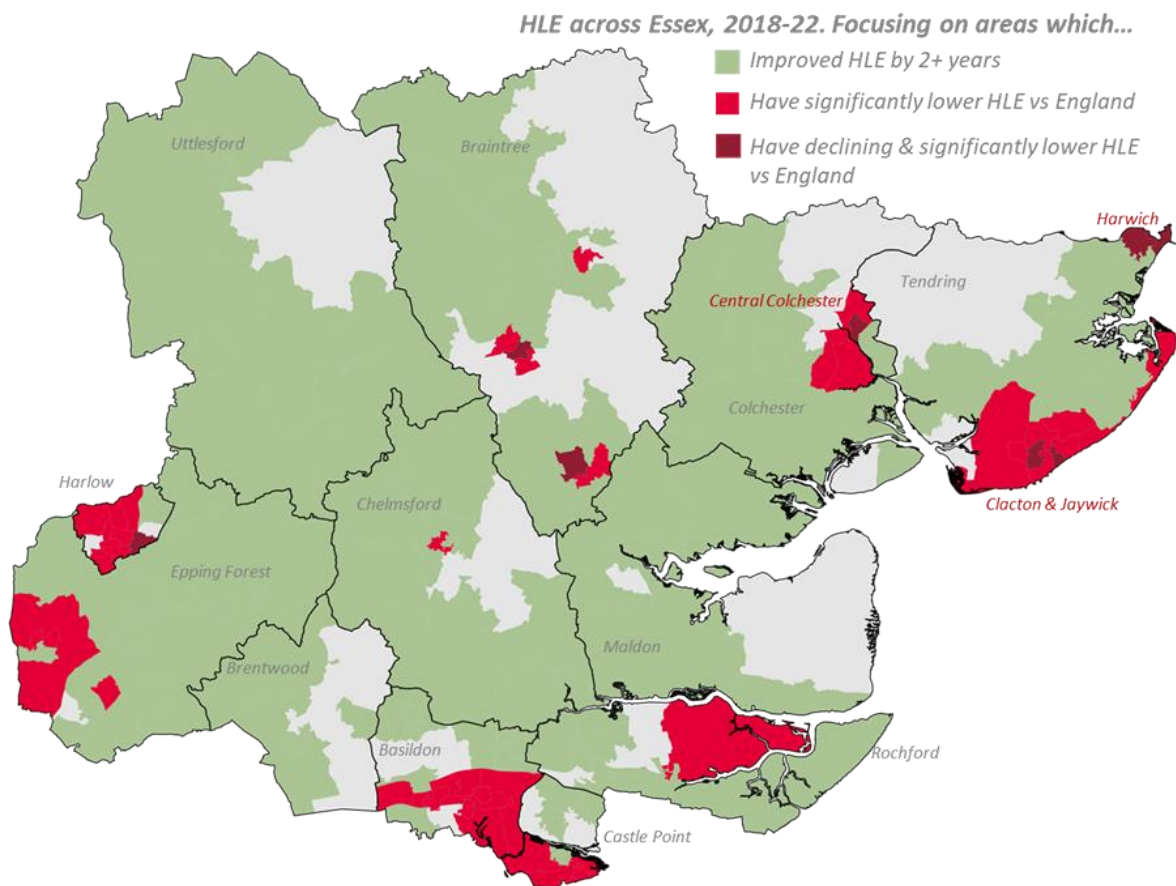
Source: Fingertips - Healthy Life Expectancy at Birth (Indicator ID: 90362) – data only available to 2020

**Chart HW6: Healthy life Expectancy at birth trend 2009-2011 to 2018-2020 (Female)**



Source: Fingertips - Healthy Life Expectancy at Birth (Indicator ID: 90362) – data only available to 2020

**Chart HW7: Change in Healthy Life Expectancy across Essex, 2018-2022.**

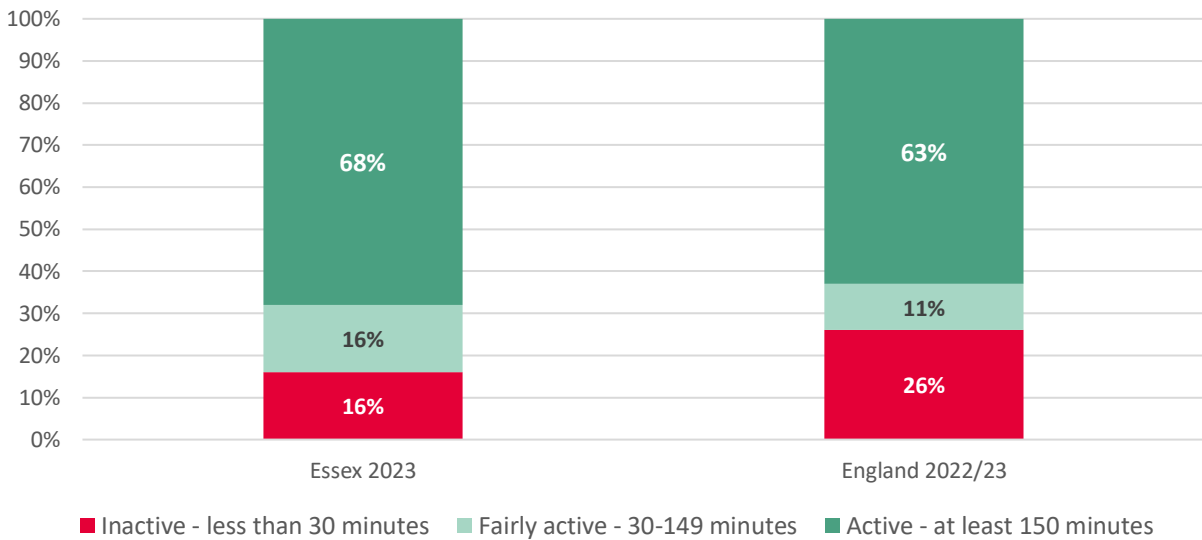


Source: Essex County Council (2024) 'Healthy Life Expectancy – small area estimates & inequalities. Please note: analysis is based on census 2021 combined with ECC mortality data. Thus, information is not available for 2022 in Southend-on-Sea and Thurrock.

With an increasingly ageing population it is vital to improve healthy life expectancy in line with life expectancy, to ease pressure on health and social services as residents experience somewhat inevitable associated health needs which often come with older age. It is generally accepted that services should focus strategies and interventions on maintaining good health in the young and improving health in the older ages, in order to protect our health and social care services in the future.

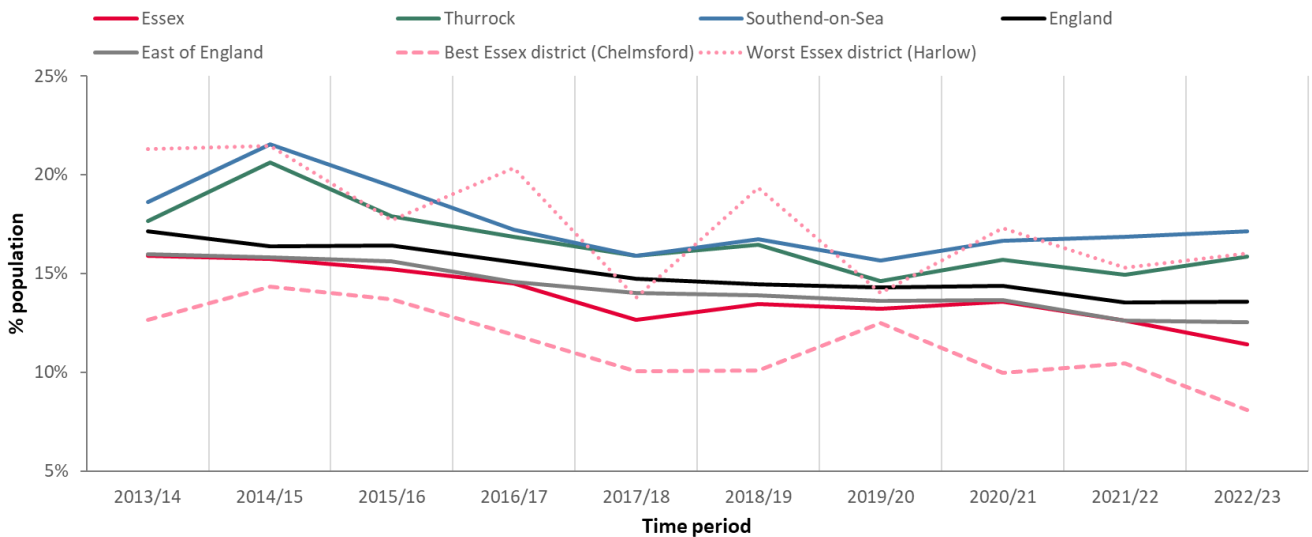
Greater Essex residents make some positive health decisions to support a healthier life. For example, residents within Essex districts report higher levels of physical activity compared to the latest England average. In 2023, 68% of Essex residents reported being 'active' (do at least 150 minutes of at least moderate-intensity activity a week). Levels of 'inactivity' (doing less than 30 minutes of physical activity per week) are also comparatively lower vs. England at 16%. Rates of smoking in Greater Essex have declined in recent years, though prevalence is still much higher in areas such as Thurrock, Southend-on-Sea, and Harlow. This indicates progress in reducing tobacco use and promoting healthier lifestyles.

**Chart HW8: Levels of Physical Activity a week**



Source: Essex Residents Survey 2023; Active Lives Survey Nov '22- '23. Please note that data for Thurrock and Southend-on-Sea is not available.

**Chart HW9: Smoking prevalence in adults (18+)**



Source: Fingertips indicators, Smoking prevalence in adults (18+) - current smokers (GPPS) (92304)

However, there are challenges and concerning disparities in health and wellbeing across Greater Essex communities, which directly impacts life expectancy and healthy life expectancy. To improve the well-being of all residents across Greater Essex, it is important to understand health in terms of prevalence of diseases, access, and quality of healthcare, as well as socio-economic and environmental factors, referred to as the ‘wider determinants of health’, which have a large part to play.

**Diagram HW1: Wider Determinants of Health**



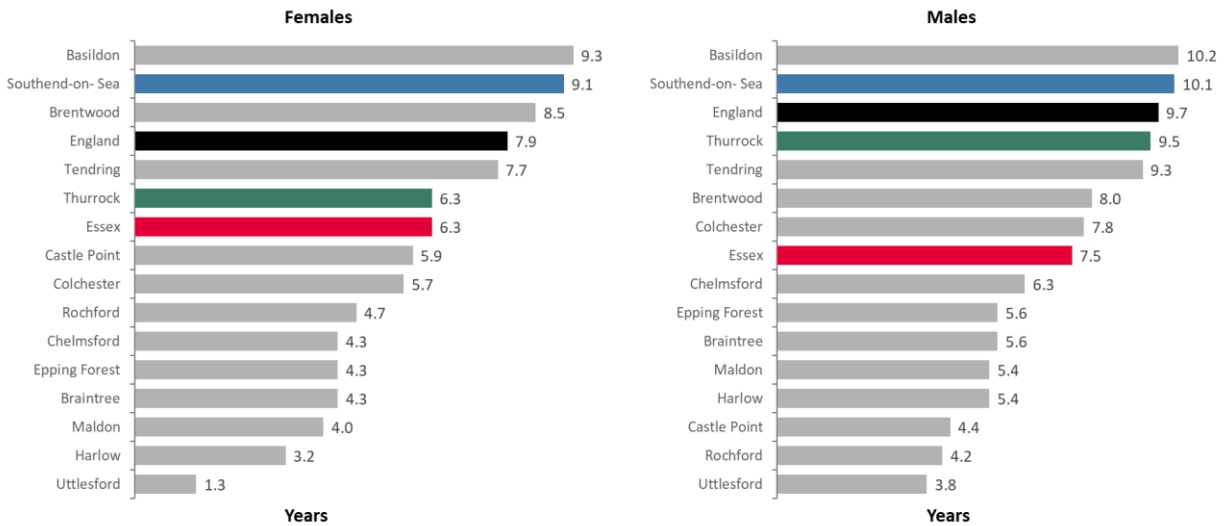
Source: Robert Wood Johnson Foundation and University of Wisconsin Population Health Institute in US to rank countries by health status

### Challenges and disparities in health outcomes

Levels of deprivation across the county sit at the heart of health inequalities felt across Greater Essex communities. Those living in more deprived communities not only experience lower levels of life expectancy, but the gap between the least and most deprived communities has widened within all areas in Greater Essex. The starkest differences are seen in Basildon, Southend-on-Sea, Thurrock, Tendring and Brentwood. These areas also experience higher prevalence of diseases that cause premature deaths, such as circulatory disease, cancer, respiratory conditions, and digestive disorders which account for 55%-90% of the differential in life expectancy. Those from deprived areas are also less likely to live their lives in ‘full health’. Recent analysis using Essex MSOA level data indicates that healthy life expectancy is comparatively shorter in Tendring, Harlow and Basildon, where higher levels of deprivation are experienced, compared to more affluent areas such Uttlesford or Brentwood (see Chart HW10).

These communities tend to face additional challenges related to deprivation that impact health and wellbeing, such as deep-rooted inequalities in socio-economic and environmental factors. There are clear links between level of deprivation and ability to access services and ability to embed healthy behaviours which lead to positive health outcomes. The more deprived Greater Essex communities exhibit greater levels of unhealthy behaviours which have the potential to not only impact future health, but also future earning and employment potential if quality of health is not maintained.

**Chart HW10: Inequality in life expectancy at birth (2018-2020)**



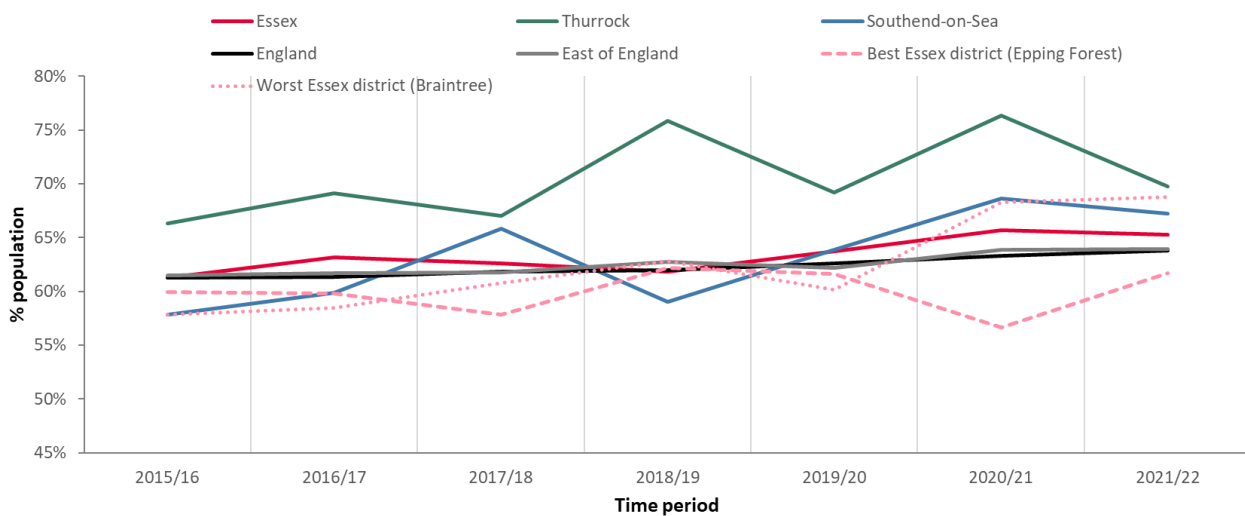
Source: Essex JSNA 2022. Please note the data reflects the slope index of inequality (SII), which indicates how much life expectancy varies with deprivation.

### Health behaviours

There are six common risk factors which are responsible for higher death rates and higher number of years living in ill-health or with disease / disability: smoking; high systolic blood pressure; high fasting blood glucose; high body mass index; high LDL cholesterol and alcohol use. The prevalence of which can, to a certain extent, be addressed by focusing on reducing unhealthy behaviours.

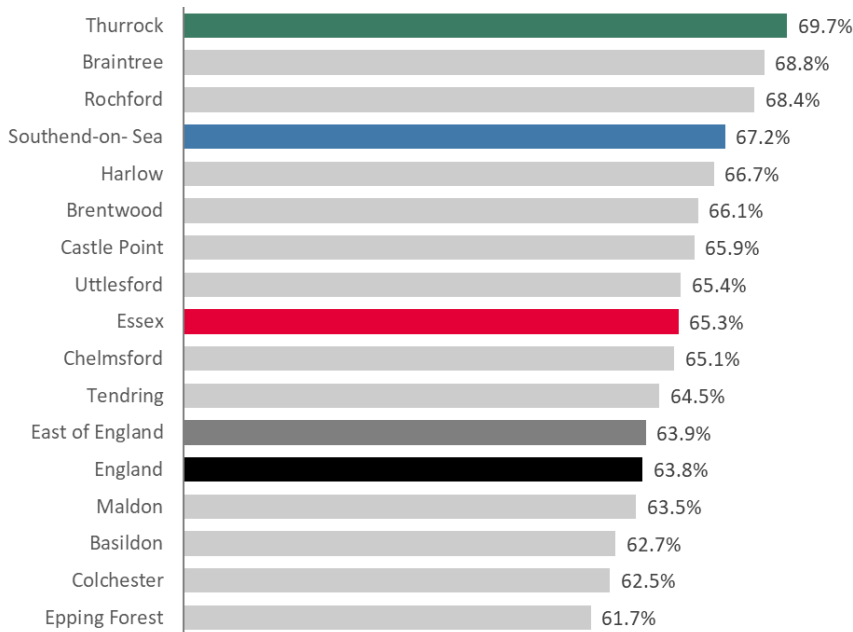
The levels of adult obesity across Greater Essex have now edged higher compared to England (63.8%) and East of England (63.9%) picture. Despite a period of consistency pre-2020, in the last 2 years obesity levels have seen a worrying increase across Greater Essex – over the last 7 years obesity has increased by +6% in Essex, +5% in Thurrock and +14% in Southend-on-Sea. This post pandemic rise demonstrates a worrying future trajectory if not addressed.

**Chart HW11: Adults (18+) classified as overweight or obese**



Source: Fingertips indicators, Percentage of adults (aged 18+) classified as overweight or obese (93088)

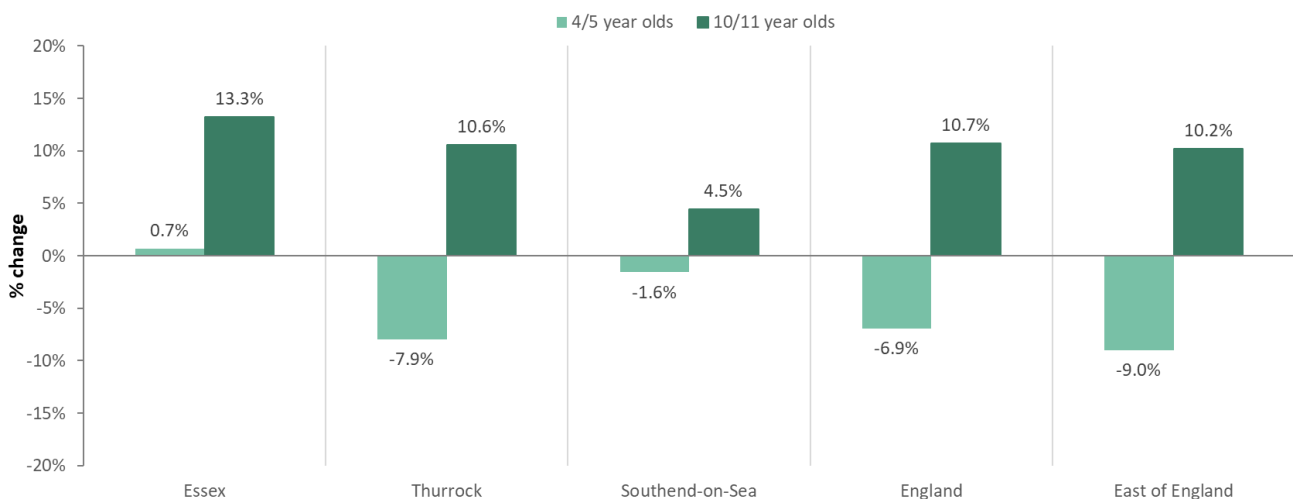
**Chart HW12: Adults (18+) classified as overweight or obese by district (2021/2022)**



Source: Fingertips indicators, Percentage of adults (aged 18+) classified as overweight or obese (93088)

In 2022/23 21% of children aged 4/5 years old in Essex, 24% in Thurrock and 22% in Southend-on-Sea were classified as overweight, which increases for children aged 10-11 years old to over a third (Essex, 34.2%; Thurrock 38.7%; Southend-on-Sea, 35.4%). The trend for younger people is slowly getting worse. Over the course of the last 15 years, the proportion of 10/11 years olds classified as overweight and obese has increased by +13.3% in Essex, +10.6% in Thurrock, and +4.5% in Southend-on-Sea. This reflects a worrying proportion of children and young people exhibiting behaviours that will likely follow through to adulthood.

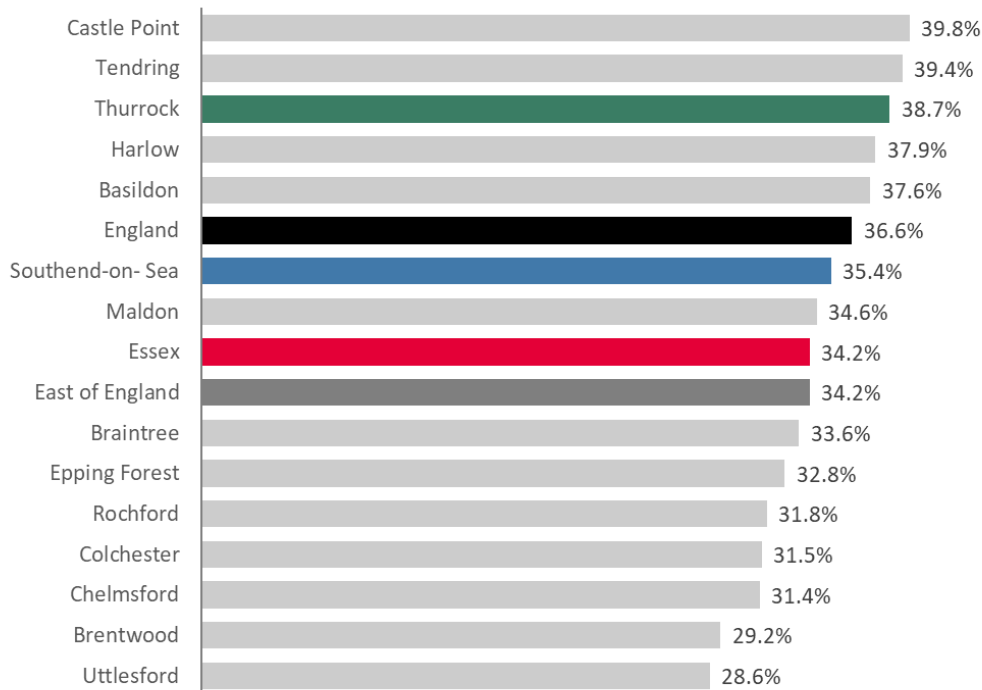
**Chart HW13: % Change in prevalence of overweight and obese children: 2008/09 -2022/23**



Source: Fingertips indicators, YR and Y6 prevalence of overweight (including obesity) (20601/20602). Please note there was no Essex or district level data available between 2020/2021

In addition, districts with more deprived areas across Greater Essex – Thurrock, Basildon, Castle Point, Harlow, Tendring - have higher rates of overweight children compared to more affluent areas - Brentwood and Uttlesford. Poor diet and lack of access to nutritious food for these families, may be contributing to the greater health disparities across Greater Essex communities.

**Chart HW14: Prevalence of overweight children (including obesity) (10-11 yrs) by district: 2022/2023**

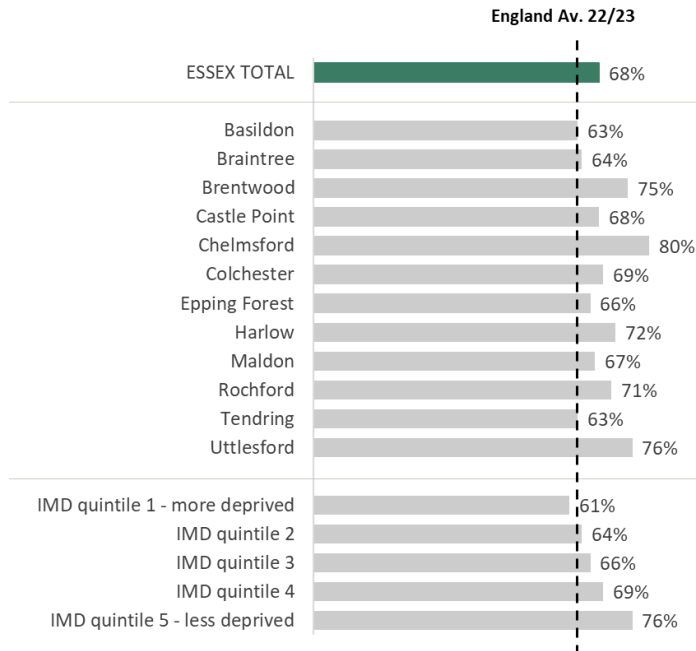


Source: Fingertips indicators, Y6 prevalence of overweight (including obesity) (20602).

While Essex district data shows higher physical activity levels compared to the England average, deprivation plays a role in activity levels. Levels of inactivity are highest in Basildon (22%) and Tendring (21%) compared to the Essex average. This increases once more within the most deprived areas within these districts – most deprived areas in Basildon (24%), Colchester (27%) and Tendring (24%). Females also tend to be less physically active compared to males (65% females are active vs. 74% males).

Research shows that barriers to physical activity include lack of health, funds, enjoyment, energy, and life commitments reducing opportunity. These barriers can in turn restrict access to services or opportunities that may help to encourage greater physical activity and contribute to better health outcomes.

**Chart HW15: Levels of Physical Activity a week: % 'active' (at least 150 minutes per week)**



Source: Essex Residents Survey 2023; Sport England Active Lives Adult Survey (Nov 2023). Please note, Thurrock and Southend-on-Sea data is not available.

It is vital to focus on promoting healthier weight through diet and exercise as it helps to reduce risk of chronic conditions, improves mental health, and alleviates pressure on public services by reducing strain on health systems, minimises absenteeism from work and lessens demand for medical interventions. Yet, where socio-economic inequalities persist there is a risk of increasing disparities in health and life expectancy across communities.

While rates of smoking and drug misuse in Greater Essex have levelled off in recent years and track below England, there are wide inequalities across the county. Harlow (20.5%) and Tendring (15.2%) report higher smoking rates and proportion of smokers than the Greater Essex average, and those living in Tendring have also seen a rise in tragic deaths from drug misuse over the last 20 years.

**Chart HW16: Proportion of current smokers by Local Authority**

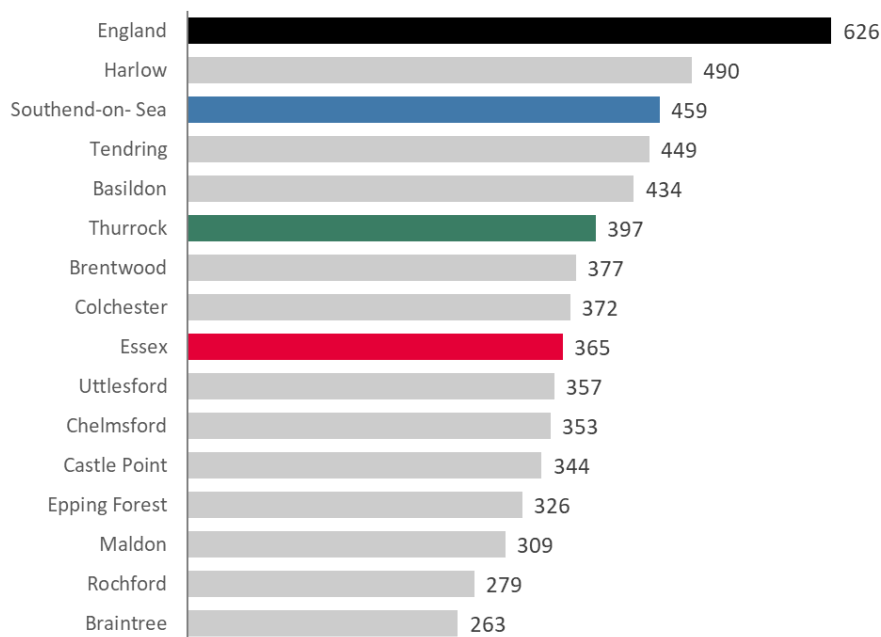


Source: ONS Annual Population Survey: Please note data is only available to 2021

Alcohol-related hospital admissions in Greater Essex have been a matter of concern. These admissions are linked to conditions, injuries, and diseases, that can be attributed to alcohol consumption. In England, there were almost 1.3 million estimated admissions where alcohol played a role - an 8% increase compared to the previous year (2017/18). With the exception of Southend-on-Sea, from 2016 to 2022, alcohol related mortality is lower in Greater Essex than England. However, figures have remained consistent, with alcohol mortality only falling by 0.3 per 100,000 since 2016 (33.2 per 100,000 in 2022).

While volume of alcohol consumption tends to rise with gross weekly income, those with lower socio-economic status or from more deprived areas are more likely to exhibit problematic drinking patterns and dependency. In this case, higher levels of hospital admissions tend to be associated with higher levels of deprivation. This is reflected across Greater Essex where higher levels of admission episodes for alcohol related conditions are seen in Harlow, Southend-on-Sea, Tendring, and Basildon. This once again indicates the inequality of health need and pressure on health services across more deprived and least deprived areas.

**Chart HW17: Admission episodes for alcohol-specific conditions (2021/2022)**



*Source: Essex JSNA 2022. Data reflects admissions to hospital where the primary or secondary diagnosis is an alcohol attributed condition. Directly age standardised rate per 100,000 population*

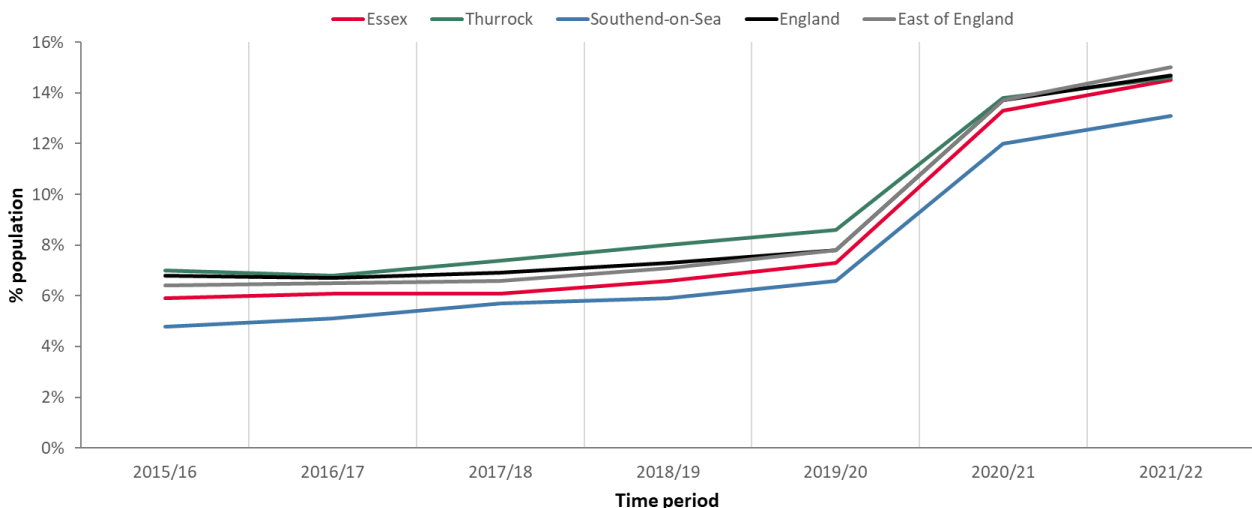
Recognising and understanding the impact of deprivation on health and life expectancy is crucial. By addressing social inequalities, promoting a healthy lifestyle, and providing targeted interventions, we can work towards improving the well-being of all residents in Greater Essex and bridging the health inequalities gap between communities.

## Mental health and wellbeing

The whole of the UK faces a mental health crisis, which has been exacerbated by the pandemic, and the recent economic challenges. While exploring the health and wellbeing of Greater Essex, mental health is a particular concern due to the disproportionate impact on groups that are more at risk of inequalities in social, economic, and environmental circumstances.

Over the course of the last 5 years, our residents have had to endure the social isolation and economic uncertainty that came with the Covid-19 pandemic and the subsequent cost of living crisis. As a result, there are major concerns over worsening mental ill-health. Young people in particular are at risk. Since 2015, the prevalence of school children with social, emotional, and mental health needs has increased rapidly. Impact was particularly felt during the pandemic, where it was reported nationally that 80% of young people with pre-existing mental health needs experienced exacerbated or new issues as a result. Mental wellbeing of older girls, under 18s, and secondary school pupils due to sit exams have been most affected.

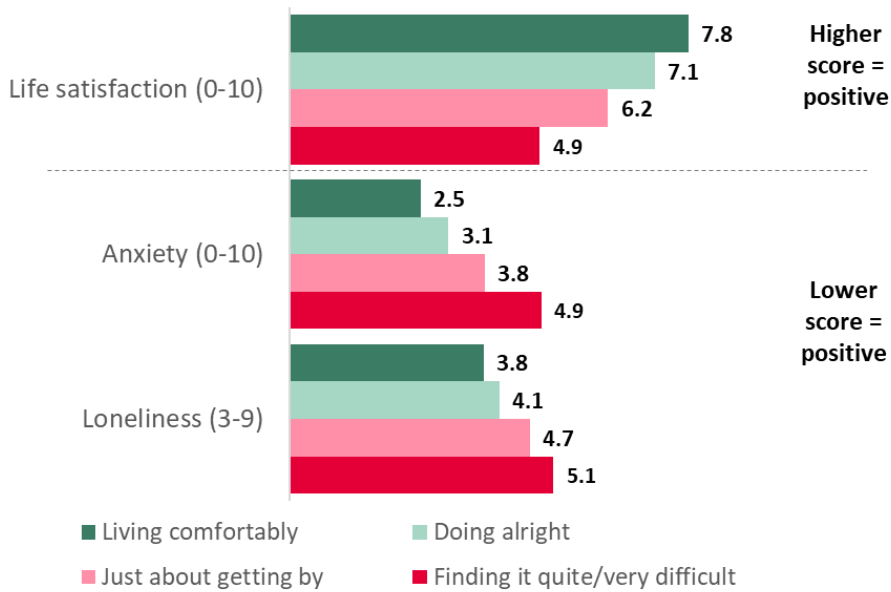
**Chart HW18: School pupils with social, emotional, and mental health needs (2015-2022)**



Source: Department for Education special educational needs statistics (Via [Fingertips](#)).

Financial difficulties have long been recognised as a risk factor for mental health issues. During Covid-19, increased unemployment, reliance on Universal Credit, increased numbers of families shifting to lower income households, uncertainty over job market and job security all increased demand on mental health services. For many, these challenges still remain, with an additional ~62,500 households across Essex districts at risk of negative discretionary income by October 2024 (data for Southend-on-Sea and Thurrock is unavailable). Feelings of life satisfaction have been declining across Essex districts since 2018. Yet, there are vast disparities across wellbeing metrics depending on circumstance. Those living in more deprived areas or those struggling more financially report lower levels of life satisfaction and higher levels of anxiety and loneliness compared to residents that are living more comfortably or in less deprived areas.

**Chart HW19: Financial security vs. wellbeing metrics (2023)**



Source: Essex Residents Survey 2023. Please note, Thurrock and Southend-on-Sea data is unavailable.

**Chart HW20: Levels of Deprivation vs. wellbeing metrics (2023)**

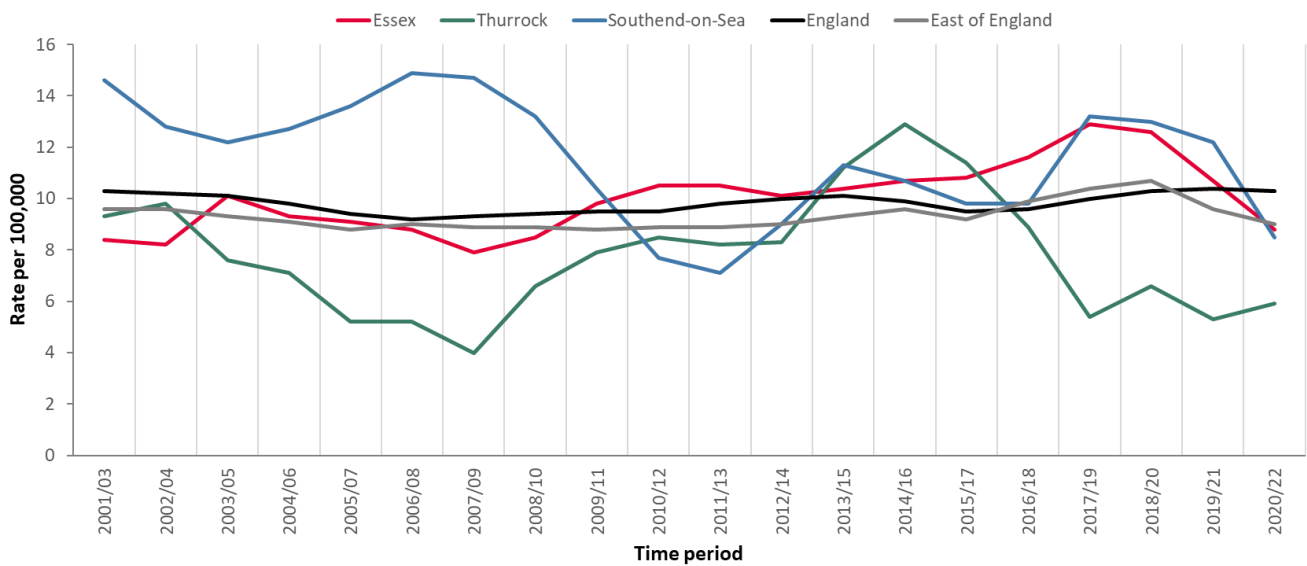


Source: Essex Residents Survey 2023. Please note, Thurrock and Southend-on-Sea data is unavailable.

The increasing pressures faced by our communities is reflected in the continual rise in IAPT (psychological therapy) referrals across Greater Essex, which is reflective of national trends. In the past year, mental healthcare staff across England reported 17,340 serious incidents, occurring at a rate of two incidents per hour. These incidents span issues like self-harm, eating disorders, and psychosis. The prevalence of common mental disorders is far higher across districts with a higher proportion of deprived areas – Harlow, Southend-on-Sea, Thurrock, Basildon and Tendring.

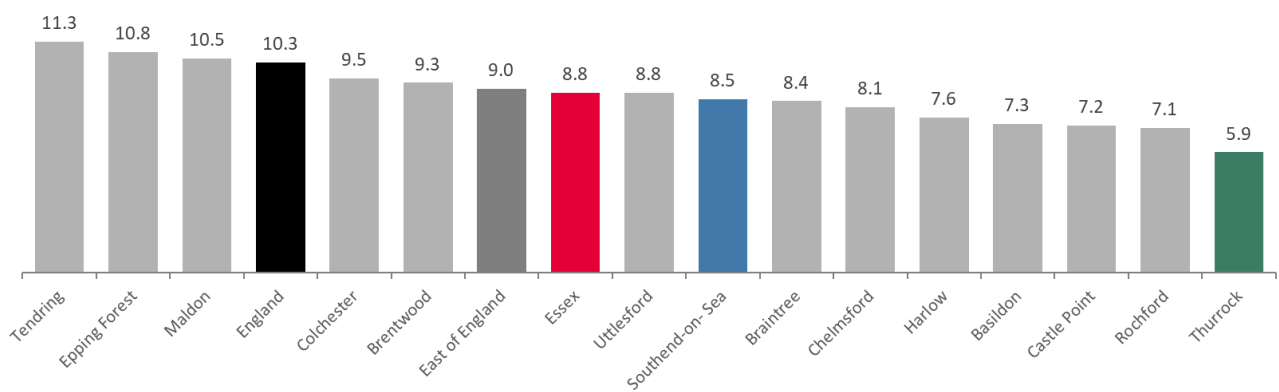
Tragically, for the most part this reflects the rate of suicide across the county, where rates have been historically higher in more deprived areas such as Tendring. Over the course of the last 10 years, suicide rates across Essex districts and Southend-on-Sea have for the most part been higher than England and East of England averages. Rates can fluctuate, but have slowly been increasing over the past decade, though recent data for 2020/2022 suggests the tide may be starting to turn as rates start to decline across Essex, Southend-on-Sea, and East of England. Worsening mental health and increasing suicide rates are a particular risk in more deprived areas of the county as it can be exacerbated by societal risk factors that may be felt more in these areas during the current economic crisis, such as job loss, unmanageable or mounting debts on a reduced income, social isolation, and loneliness.

**Chart HW21: Suicide rate per 100,000 population (trended)**



Source: Essex JSNA 2022.

**Chart HW22: Suicide rate per 100,000 population (2020-2022)**



Source: Essex JSNA 2022.

### Access to healthcare

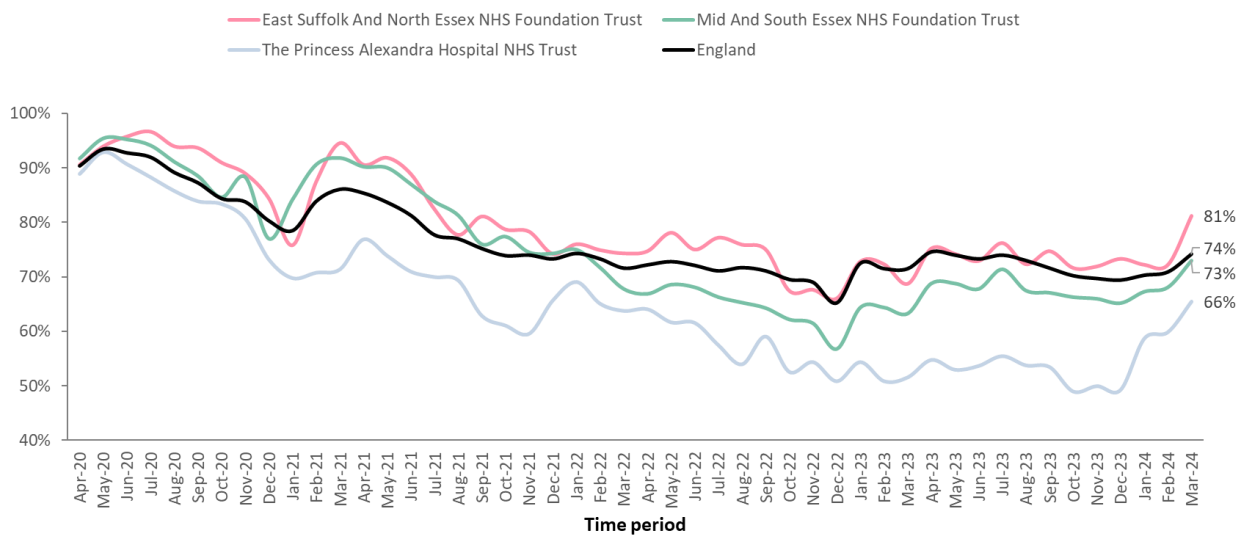
Healthcare services have come under immense pressure over the course of the last decade. During the Covid-19 pandemic, many services were paused as priorities shifted, and healthcare services are yet to recover to pre-Covid service levels. As health services try and recover, they are met with an economic climate which results in a lack of funds to cater to

the needs of our growing, and ageing population, and a crisis of workforce shortages which impacts the quality of care and ability to meet demand. These challenges are felt nationally but have local impacts on our residents and communities.

Research undertaken by Essex County Council, demonstrates that the NHS and healthcare system is a longstanding concern for residents. This is driven by difficulty accessing GP appointments as a first touchpoint; inaccessible appointment processes; long wait times; disjointed services leading to inconsistency in experience, communication breakdown and inefficient record keeping.

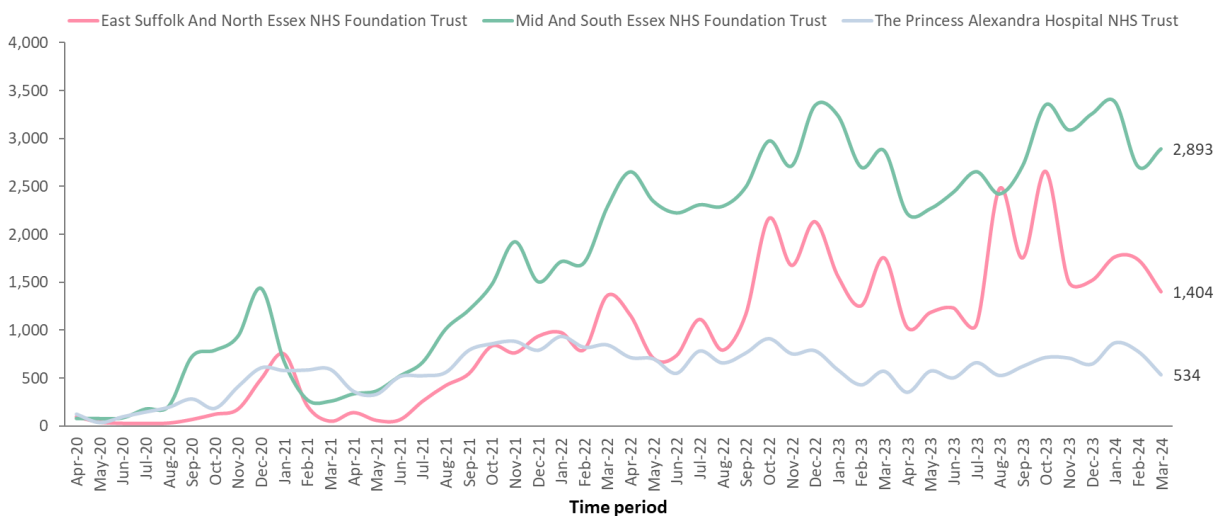
These concerns are reflected in the recorded wait times for treatment across a variety of areas. Wait times for A&E attendances, planned care, emergency admissions, ambulance wait times and cancer diagnosis have all been increasing since the Covid-19 pandemic, despite need remaining fairly consistent.

**Chart HW23: Proportion of attendances waiting 4 or less hours from A&E arrival to admission, transfer, or discharge (time-series)**



Source: NHS England A&E Attendances and Emergency Admissions

**Chart HW24: No. of emergency admissions with a wait of over 4 hours from decision to admit to admission**



Source: NHS England A&E Attendances and Emergency Admissions

Distance and travel time to healthcare services is also a contributing factor to inequalities in healthcare usage and access. Residents that have longer travel times to services are less likely to seek care, which may increase longer term risk of health conditions.

Generally, across Greater Essex travel time to GP surgeries is relatively short; 99% of the Essex population can get to a GP in a 10 minute drive, 79% a 10 minute public transport journey or 57% within a 10 minute walk. However, the more rural areas of Greater Essex have unique challenges in accessing health and social care. Residents living in Epping Forest, Braintree, Maldon and Uttlesford all experience longer travel times, and are also more likely to face additional vulnerabilities in their rural areas due to a combination of issues such as poor transport, broadband, lower income, less community support, higher social exclusion, and higher housing costs. Further, with a higher average age demographic, there may inevitably be greater health needs for these residents.

## Health and Wellbeing: Looking ahead.

The health and social care system is still struggling to recover from the shocks of the Covid-19 pandemic, as the country swiftly entered an economic crisis, and faces the fallout of climate change on demand and operations, which has added to the pressure pot on the system. The subsequent impacts will be felt for years to come.

The future health and wellbeing of residents across Greater Essex will rely heavily on the recovery and long term resilience of the healthcare system – which will be influenced by the following factors:

- The growth of our population – as people live longer with poorer health there is likely to be increased demand on health and social care services, as well as other services such as the need for social housing, built and green infrastructure and town planning or transport, to support a more sustainable, healthier lifestyle for residents and communities.
- The economic climate – prices for goods and services have been increasing substantially over the course of the last 2 years. While the rise in inflation is slowing - from 11% in autumn 2022 to 3.2% in March 2024 - services will still cost substantially more to run than they did a few years ago. The consequence is increased strain on health and social care services to deliver more for less, for years to come.
- Individual health behaviours – smoking, diet, physical activity, and exposure to harmful levels of drugs and alcohol are all major risk factors in preventable death and ill-health. While some, not all, of these factors may be moving in the right direction across Greater Essex, the ability to adopt healthy behaviours is influenced, in part, by structural social and economic conditions that are beyond the full control of individuals. Health disparities are at risk of increasing, given the difficult financial context, and the impact will be felt most acutely in our most deprived communities.

- Access and quality of services – While health needs will likely increase, health and social services are still struggling to recover from the backlog experienced during the Covid-19 pandemic. Staff shortages are at critical levels, and the need for trained staff is predicted to increase further in the future. Skilled, trained staff are critical to providing quality care and reducing the backlog. As such a lack of trained and skilled staff is one of the biggest risks to individual and community health to face over the coming years.

Policy makers, both nationally and locally, will need to make some tough decisions to balance the need to address short-term demands on access to services, and the longer-term need to invest in improving social and environmental conditions for our communities to shape better health and wellbeing, and reduce already embedded health inequalities.

### **The growth of our population**

Our population is living longer, but in poorer health. It is predicted that over the period to 2043, the fastest levels of population growth will be seen amongst those aged over 75 years old – at a rate of over 2% per year, which is substantially higher than the 0.3% predicted growth of the working age population. Healthy life expectancy is not improving at the same rate as life expectancy and varies greatly across our communities, and it is predicted that the number of people living with major illnesses will continue to increase. Inequalities are likely to continue, with those from the most deprived communities continuing to see greater disparities in levels of good health, particularly amongst working-age adults.

The result is that inevitably there will be even greater pressure on health and social care services - and other related services such as social housing - as our population grows and ages. Yet, as the working age population fails to grow at the same rate, the resources available to support the health of our population will be severely impacted in the long term. A wider example of challenges around resources is the ability to develop a built environment to reduce carbon emissions and support improved health outcomes, by encouraging physical activity through walking and cycling infrastructure, improve mental and physical health through green infrastructure in urban centres and deprived areas or retrofitting homes to relieve financial pressures and resultant health impacts of living in cold and damp homes. Yet, while the health and social care sector seeks to address immediate concerns around access and financial pressures, care needs to be taken to incorporate wider social and environmental impacts of health into the planning for a growing population.

### **The economic climate**

The economic challenges felt over the last few years have the potential to increase health disparities between more deprived and less deprived communities, as well as increasing demand on services.

As an example, financial and economic pressure are major risk factors for mental wellbeing. While inflation rates may have started to decline Greater Essex residents are still feeling the effects. For example, in 2023 13% of Essex district residents are reported financial difficulties – a significant increase from 11% in 2022. Those living in more deprived areas feel the impacts more acutely. In addition, there still remains a long-term risk of more households

not being able to cover basic costs with current income levels. So, the question becomes how will this play out in terms of demand for mental health services? And are services equipped to deal with an increase in demand that may be felt more in certain areas of our communities?

**Chart HW25: Household counts: Discretionary income (Household level) – October 2023 release**



Source: Experian Mosaic 'Cost of Living dashboard'. Please note: Data reflects Essex only, data for Southend-on-Sea and Thurrock unavailable.

### Individual health behaviours

Individuals' ability to adopt healthy behaviours is heavily influenced by the resources they have to buy food and access to safe places to play and exercise. If the current trajectory of discretionary income continues, there could be a continued increase in the risk factors and health behaviours that lead to poor health – which will particularly impact the communities with more volatile socio-economic circumstances.

Across Greater Essex, the obesity trends for adults and children are already heading in the wrong direction, particularly amongst children - where over the last 15 years there has been an increase of overweight and obese children aged 10/11 years by between 4.5% and 13.3% across Greater Essex. Worryingly, the increase is far higher amongst more deprived areas, and is unlikely to get better if access to healthier, often more expensive, food becomes harder. This trajectory poses a threat for the future health of our population. Health behaviours exhibited as adults often start in childhood, if childhood obesity continues to increase this is likely to be reflected in adult obesity in the future. Being overweight / obese is linked with conditions such as diabetes which are not only life limiting but cause increased strain on health services.

### Access and quality of services

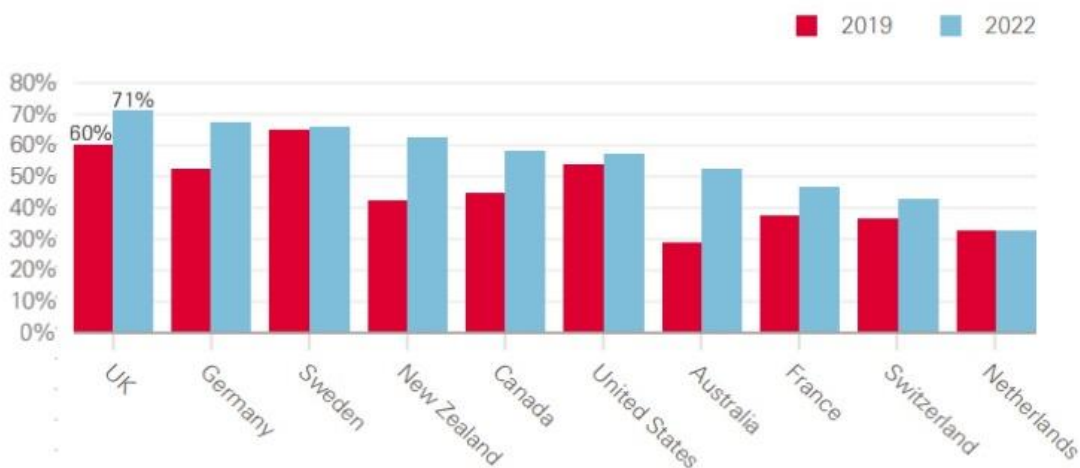
Within the healthcare system, waiting lists have been increasing since the Covid-19 pandemic. As of February 2024, nationally 7.54 million people were waiting to start elective (planned) treatment, an increase from 4.57 million in January 2020. Delays of treatment can result in deteriorations in health and worse outcomes for patients, but also can have social

and economic impacts, such as an ability to be independent and stay in employment. Such unmet health demands also pose risk to other pressurised services such as primary care, Accident & Emergency (A&E) and social care.

The healthcare workforce is vital to maintain the quality of care needed for residents. Yet, there is a gap between workforce in employment and those needed. This gap is predicted to reach 250,000 nationally by 2030. There are a variety of factors driving this, including difficulty recruiting and retaining staff, staff leaving employment early due to stress or burnout, lack of funding and training, or workers experiencing levels of poverty and deprivation.

These challenges are felt across Greater Essex, where there was a 0.8% decline in full-time GPs between October 2021 and April 2022, with the largest declines seen within Basildon, Southend-on-Sea and North East Essex. A lack of trained and properly skilled staff is one of the biggest risks to individual and community health over the coming years.

**Chart HW26: How stressful is your job? % of GPs responding, 'extremely or very stressful', 2019 and 2022**



Source: Health Foundation analysis of the Commonwealth Fund's International Health Policy Survey in Primary care physicians in 10 countries. 2019 and 2022.

National spending on the health service will have a substantial impact on the local ability to meet our population's health needs. There will need to be a balance in attention between tackling the longer term, systemic challenges that can help support future health and address inequalities, and the more immediate challenges around addressing staff shortages, access to services, and reducing waiting times.



**ENVIRONMENT**

# Environment

## Summary

Greater Essex has unique natural and environmental assets that are highly valued by our local residents and businesses. The landscape itself is diverse, from historically and culturally significant sites, to new towns, and the vast rural and coastal landscape.

This diversity brings a huge amount of opportunity to our county. Yet, it also means that connection to 'our environment' can mean different things to different people. It can mean our social and cultural surroundings, and the physical and natural environment that is vital in sustaining our population.

It is clear that our environment is increasingly at risk. The climate and nature crises continue to be the biggest threat seen worldwide and the need for action is urgent. Global temperatures have already risen by 1°C above pre-industrial temperatures, and are predicted to continue to rise to 1.5°C between 2030 and 2052. The impacts of this are stark, rising sea levels, melting glaciers, wildlife in threat of extinction, personal health deterioration, and food and water scarcity.

This isn't a 'far away' issue that can be ignored, but something that is already impacting Greater Essex, our citizens, and the local environment. We are already seeing more extreme weather events with more frequent large-scale storms, hotter, dryer summers, critical water shortages and increased risk of flooding. These risks are increasing year on year, and the impacts to our residents and our businesses could be severe.

In response to this, the County Council established the independent Essex Climate Action Commission (ECAC), bringing together cross party representation alongside experts from across the public, private and community sectors to advise on action needed. In the 2021 report 'Net Zero: Making Essex Carbon Neutral', over 100 recommendations were put forward for all organisations to take action to decarbonise and build climate resilience. Many organisations across Greater Essex have made commitments to reach net zero by 2050 or earlier. Much of the work to achieve this needs to have been implemented, or well underway, by 2030 to have a chance of reaching this target. Yet, there are challenges, requiring changes in organisational, community and individual behaviours, such as changing our land use to protect more effectively from climate risks, upgrading our built environment, changing travel and waste patterns; and re-establishing a sustainable natural environment while managing the demands on water, land, and development for our growing population.

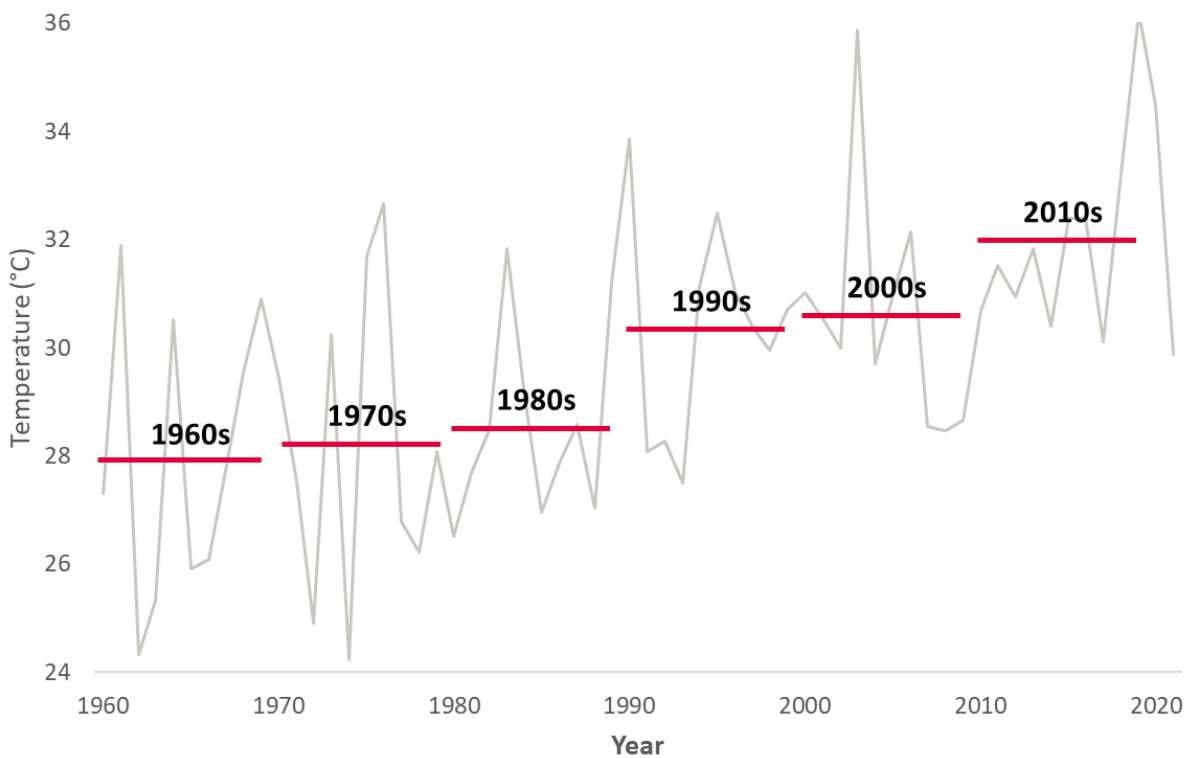
There are significant economic opportunities arising from the transition to net zero of which Greater Essex can take full advantage. Moreover, there are real opportunities to significantly improve residents' health with actions to decarbonise and address climate risks: increasing green space to improve physical and mental health; retrofitting housing will reduce bills and remove health impacts of cold, damp homes; increasing active travel options to increase physical activity; move to electric vehicles and heat pumps reduces the two largest sources of air pollution - diesel and petrol vehicles and gas and oil boilers.

While many initiatives are being moved forward across Greater Essex partners to try and secure this target, there is still a long way to go to achieve our net zero ambitions and secure a more sustainable future for the county and its residents in the future.

### Impacts of Climate Change

The changes to global and local temperatures and rainfall are a clear signal of the impacts of climate change. The Intergovernmental Panel on Climate Change (IPCC) highlighted the impact that human related climate change has had on the world, with rising temperatures and sea levels, adverse weather, as well as impact on food and freshwater scarcity. It is no coincidence that during the five extreme heat-periods between June and August 2022, deaths in the UK were 6.2% above the five-year average. These changes have significant repercussions for the Greater Essex environment, such as increased temperatures over the last few decades. 2022 was a benchmark year for the UK, suffering with 40-degree heat for the first time. Greater Essex experienced wildfires which destroyed homes and saw farmers wrestling with severe drought. The areas to experience the warmest weather in the UK were across the East of England, which is also where the largest increases in temperatures in 2022 vs. 1991-2020 are seen according to the Met Office.

**Chart EN1: Annual maximum temperature in Essex with average maximum temperature by decade, from 1960 to 2020**



*Source: Met Office Hadley Centre. Please note this data is not based on Essex and Greater Essex boundary data, instead the data is based on a grid system which will include some overlapping areas of Suffolk and Hertfordshire.*

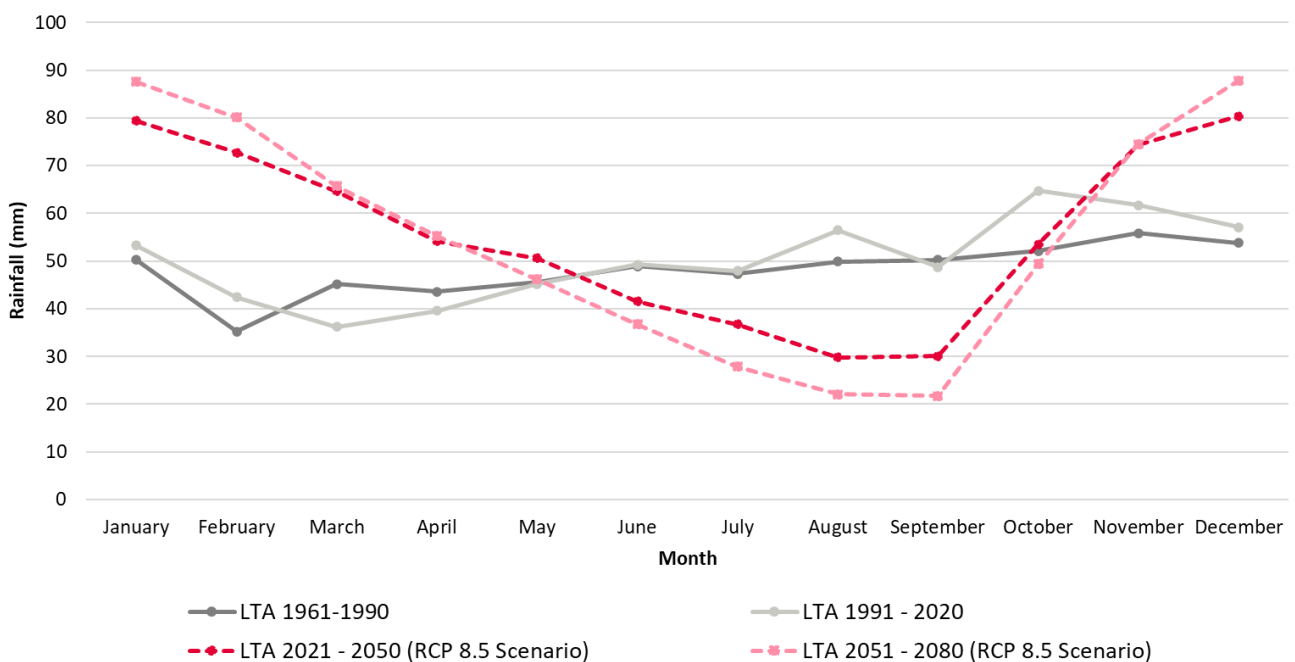
Along with the warmer weather, 2022 saw 6% less rainfall across the UK vs. 1991 – 2020. Greater Essex was generally drier vs. the rest of the UK, along with other Eastern and Southern areas. Despite large increases in ‘dry days’ over the last decade, there has also

been an increase in heavy periods of rainfall in the winter, which is predicted to continue increasing over the next 25 years. UK Climate Projections in high emission scenarios show that by 2070 Essex average winter precipitation will increase by up to +35%; average summer precipitation will decrease by up to -47%; and hourly rainfall intensity will increase by 25% meaning drainage systems will increasingly struggle to cope as rain comes in shorter, heavier bursts. This means Greater Essex will continue to face increasing water scarcity alongside flooding.

The Met Office research indicates that the UK should expect to see storms more frequently meaning risks to key infrastructure, and buildings, increased disruptions, and threats to resident wellbeing.

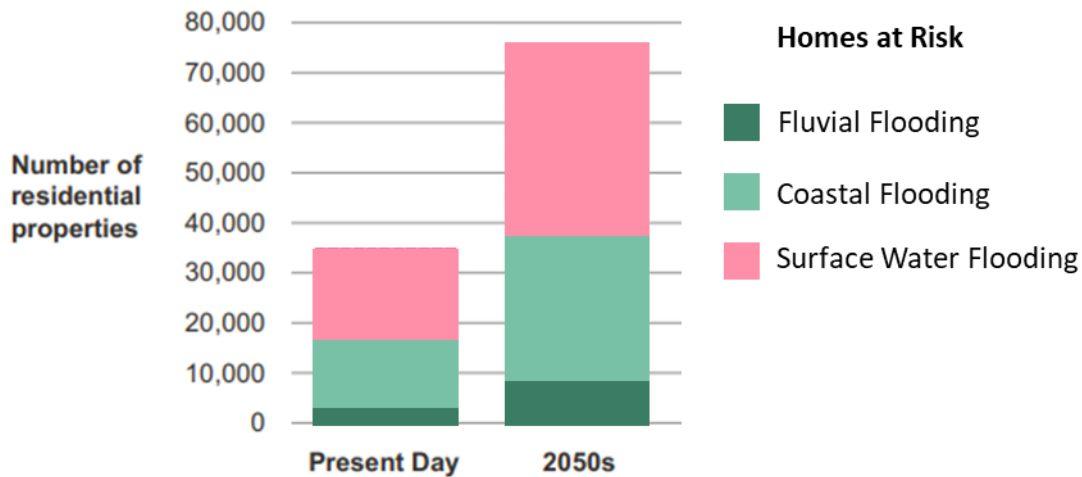
Sea levels have risen across the UK by 18.5mm since the 1900's, with 60% of this occurring over the last 30 years. Greater Essex has approximately 350-400 miles of coastline, the second longest in the country, which puts the county at a higher risk of coastal flooding and coastal erosion. The UK Committee on Climate Change note that these risks will increase in the future. Across the Greater Essex area, the risk of flooding is set to double over the next 30 years. Particularly driven by surface water flooding which is already a prime contributor and is set to increase exponentially over the next few decades.

**Chart EN2: Long term average (LTA) historic and projected rainfall for Essex by month**



Source: Met Office Hadley Centre. Projection assumes: continued increases in greenhouse gas emissions under a high RCP8.5 emissions or "business as usual" scenario. Please note this data is not based on Essex and Greater Essex boundary data, instead the data is based on a grid system which will include some overlapping areas of Suffolk and Hertfordshire.

**Chart EN3: Residential properties at significant flood risk in Essex, Norfolk, and Suffolk (2017)**

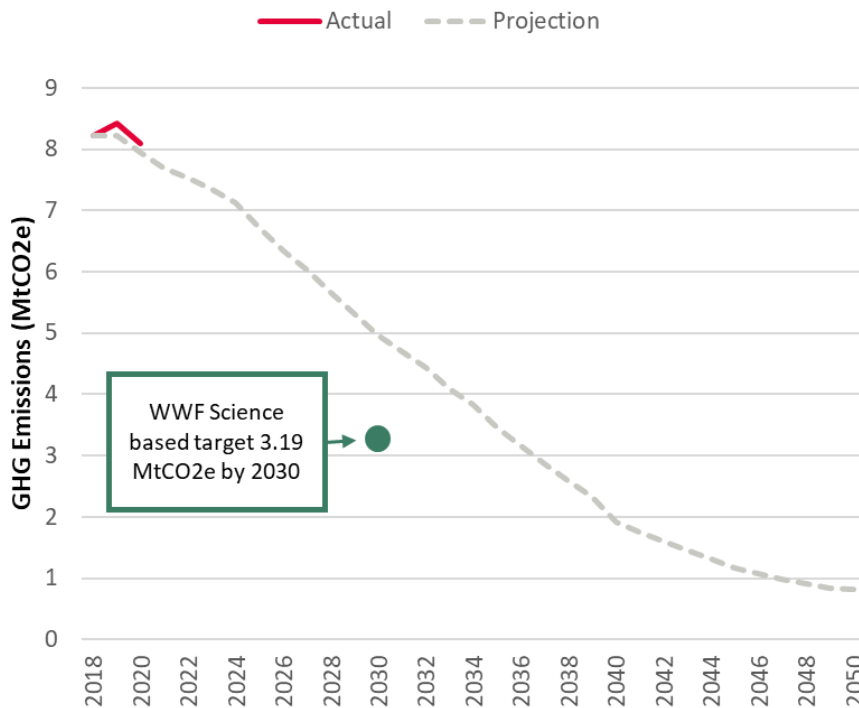


Source: Sayers et al. *Climate Change Risk Assessment 2017: Projections of future flood risk in the UK.*

The impacts of climate change are increasingly apparent, and the effects are no longer distant, but are being felt at a Greater Essex level. In response to the global crisis, the UK has committed in law to become a net zero country by 2050. A large contributor of this target is reducing greenhouse gas emissions to a low enough level that they are absorbed.

As a county, carbon emissions need to be reduced from 8.09 MtCO<sub>2</sub>e in 2020 to 3.19 MtCO<sub>2</sub>e by 2030 to be on track to reach the net zero target. However, according to latest projections, the trajectory of carbon emissions will not meet the science based target by 2030, which highlights the need for an even greater rate of decarbonisation.

**Chart EN4: Projected and Actual Essex GHG Emissions (MtCO<sub>2</sub>e) – 2018 to 2050**

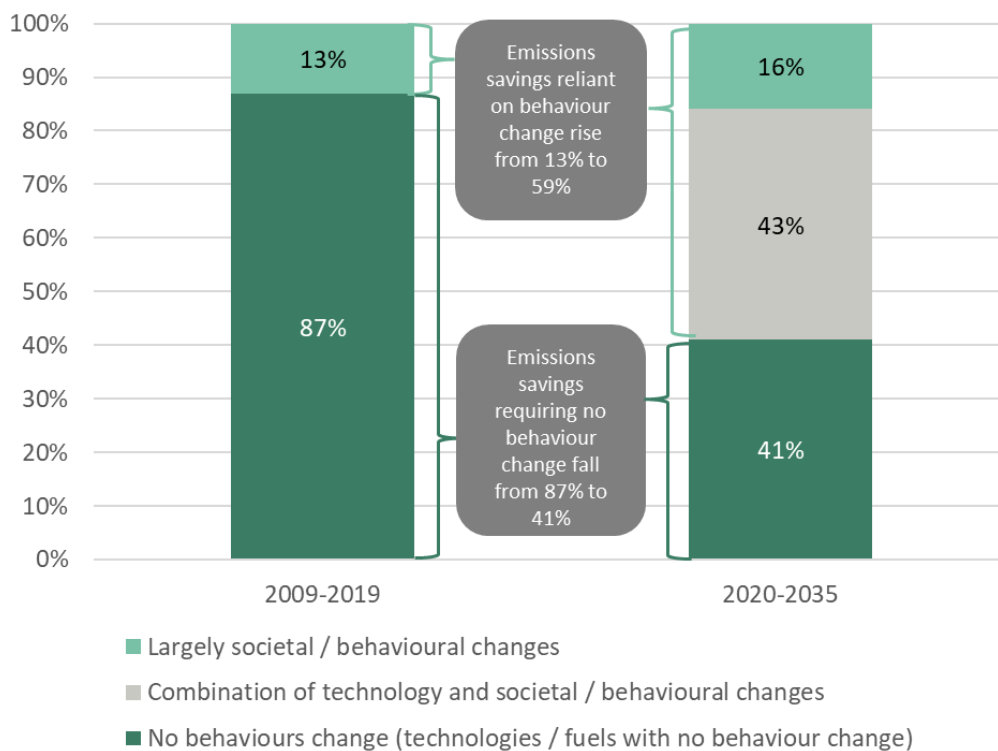


Source: SCATTER, GHG Inventory, 2018 Reporting (latest release date – June 2022) & Element Energy ECAC Scenario. Please note: This target was set using up to date science-based methodologies and is aligned to the Paris Climate Agreement signed at COP 21 in 2015, when the global community pledged to keep average global temperature rise well below 2 degrees Celsius.

There are many opportunities across Greater Essex to work towards better protecting the future environment. These range from investments in economic development; developing transport and renewable energy infrastructure; retrofitting existing buildings; future proofing new developments and significantly increasing natural green infrastructure, with more trees, meadows, and wetlands. This also offers opportunities for new jobs and growth, particularly clean energy, and construction, as outlined in the ‘Economy’ chapter.

Everyone has a part to play in delivering a cleaner, greener, and healthier environment. Every household should aim to cut carbon emissions. The most impactful actions to reduce carbon footprint are, in order: replacing a petrol or diesel car with an electric vehicle; taking one fewer long-haul flight per year; switching household energy to a renewable supply; cycling, walking, and using public transport; and replacing a household boiler with a heat pump. Yet, there are challenges to achieving this; the geographical landscape of Greater Essex and the availability of active travel options and public transport; the supply chains and skills for building retrofit and heat pumps; the need for new housing and infrastructure to support the needs of a growing population; and fundamentally changing everyday behaviours of individuals and communities to embed more sustainable choices.

**Chart EN5: Pathway to Net Zero**



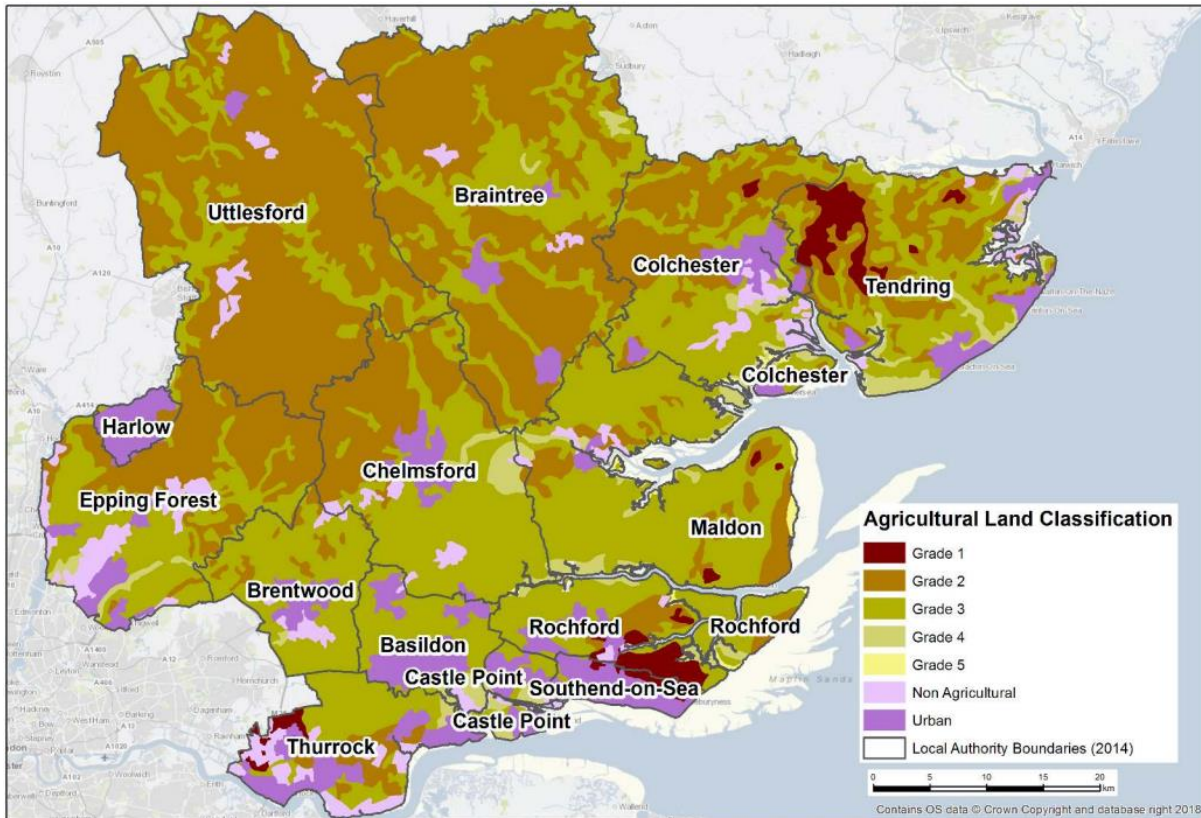
Source: Climate Change Committee

## The Physical Environment

Greater Essex has a rich and varied landscape, and despite some areas being highly urbanised, particularly in the South and West, has been historically shaped by its rural character. Two thirds of Greater Essex is farmland; 7% woodland and 11% is urban areas. We benefit from one of the longest coastlines in the country but only 5% of our water bodies,

streams and rivers, have good ecological status. According to the 2011 census, around a third of the population call rural areas home, higher than the latest England estimates of 17% in 2020, with a much higher concentration in areas such as Uttlesford (~80%), and Maldon (~60%). Greater Essex has a long history of farming, in which over two thirds of the county is graded as agricultural land, not included as part of the green infrastructure across Greater Essex.

**Chart EN6: Map of the graded agricultural land across Greater Essex**



Source: Green Essex Strategy: Credit: School of Environmental Sciences, University of East Anglia (2018)

Greater Essex has a rich and varied environment which provides internationally, and scientifically significant habitats for wildlife within reservoirs, rivers, canals, woodlands, grasslands, mudflats, fens, marshes, and swamps; and contains some of the UK’s best geological sites.

Areas of particular importance for biodiversity (APIBs) include natural conservation sites; local nature reserves; and ‘other areas of particular importance for biodiversity’. APIBs cover nearly 14% of the Greater Essex LNRS region in total. This includes sites under protection from national and international designations. For example, from Special Areas of Conservation, Special Protection Areas (SPA), Ramsar and Sites of Special Scientific Interest (SSSIs). These designations cover:

- 2 Areas of Outstanding Natural Beauty
- 11 Special Protected Areas
- 78 sites of Special Scientific Interest
- 10 Ramsar (wetland sites designated to be of international importance)

- 3 Special Areas for Conservation
- 6 National Nature Reserves
- 1,698 Local Wildlife Sites
- 1 Community Forest

These sites all vary both in appearance and in the habitats and species they support and are spread across Greater Essex. For example, the coastal estuaries such as the Crouch, Blackwater, Colne, Stour, Roach, and Orwell; woodland areas such as Hales Wood and Hatfield Forest in Uttlesford; the flats and marshes at Foulness in Rochford. Greater Essex also has over 100 sites across the county that have been designated as Special Roadside Verges that provide an invaluable habitat for wildflowers and other native species.

However, across Greater Essex, over the last century, and continuing today, there has been a substantial loss of natural habitats and biodiversity from the removal of meadows, hedgerows, fresh and saltwater marshes, orchards, and woodland. This is primarily driven by the intensification of agriculture and the growth of towns, villages, and infrastructure to support a growing population and now climate change.

### **Green Infrastructure**

Protecting and developing natural habitats, biodiversity, and wider green infrastructure across Greater Essex is vital for both people and nature. The UK Government has committed to protect 30% of the land and sea in the UK for nature's recovery, by 2030. Greater Essex has a part to play by supporting more space for nature and better connecting people to communities, nature, and landscape.

Green Infrastructure (GI) includes a variety of different land uses including woodland, parks, gardens, meadows, wetlands, and marshes. There are multiple environmental, economic, and social benefits to protecting and developing GI across our urban, rural, and coastal communities. GI in all areas is vital for absorbing carbon dioxide, removing this key greenhouse gas from the atmosphere, and sequestering it.

In urban areas, parks, pocket parks, street trees, and sustainable drainage features such as rain gardens, swales and green roofs build climate resilience delivering reduced flood risk by slowing the flow and absorbing rainwater; reduced risk of overheating by providing shade, deflecting sunlight, and releasing moisture into the atmosphere. They further support better health for residents by filtering air pollutants reducing exposure to air pollution and providing increased green space for improved mental and physical health. New housing developments are now required increase biodiversity alongside new housing with a minimum 10% net gain against the original biodiversity on the development site; or invest to deliver an equivalent offsite. UK Government have also signalled that sustainable drainage on new developments will be made mandatory in the near future. A challenge for Greater Essex is to continue to build these improvements into existing and developing spaces.

In rural areas increased GI and a move to sustainable farming practises are key to helping the landscape absorb and hold water more effectively, reducing risks from increasing drought in summer and increasing flooding in winter. This reduces water pollution from pesticide and

fertilizer run-off and stops soil loss and degradation, while supporting critical pollinators. These changes are key to the agricultural productivity and successful food production across Greater Essex and are supported by changes in Government farming subsidies that are rolling out now under Environmental Land Management (ELMS).

Landscape change is supported by substantial new investment beyond ELMs including the new biodiversity net gain credits, carbon credits and in the future further funding flows for ecoservices such as water management are also expected. Forestry, woodland management, innovation in farming and agri-tech are growing industries.

Only 14% of land across Greater Essex is defined as natural green infrastructure. Essex has accepted a target to increase this to 30% of all land by 2040. To meet this target, this would require an additional natural green infrastructure of over 630km<sup>2</sup>, more than doubling the total area today. While this seems a daunting prospect, change is already happening through initiatives such as the Essex Forest Initiative; the development of a Climate Focus Area in North East Essex; the Department of Education requiring all schools, colleges and universities to consider their estates as a National Education Nature Park; and the current development of a Local Nature Recovery Strategy by local authorities across Greater Essex, landowners and farmers, wildlife and environmental bodies, businesses and communities.

Reaching this target will be more of a challenge in some districts due to the disproportionate distribution of green infrastructure and the need for agricultural and productive land use across Greater Essex. For example, districts with the lowest proportion of GI, such as Uttlesford and Braintree, have higher proportions of land use for production. There is a fine balance needed to ensure Greater Essex maintains the need to use land for production and infrastructure to sustain our population, and to better improve our natural environment to help combat the risks of climate change.

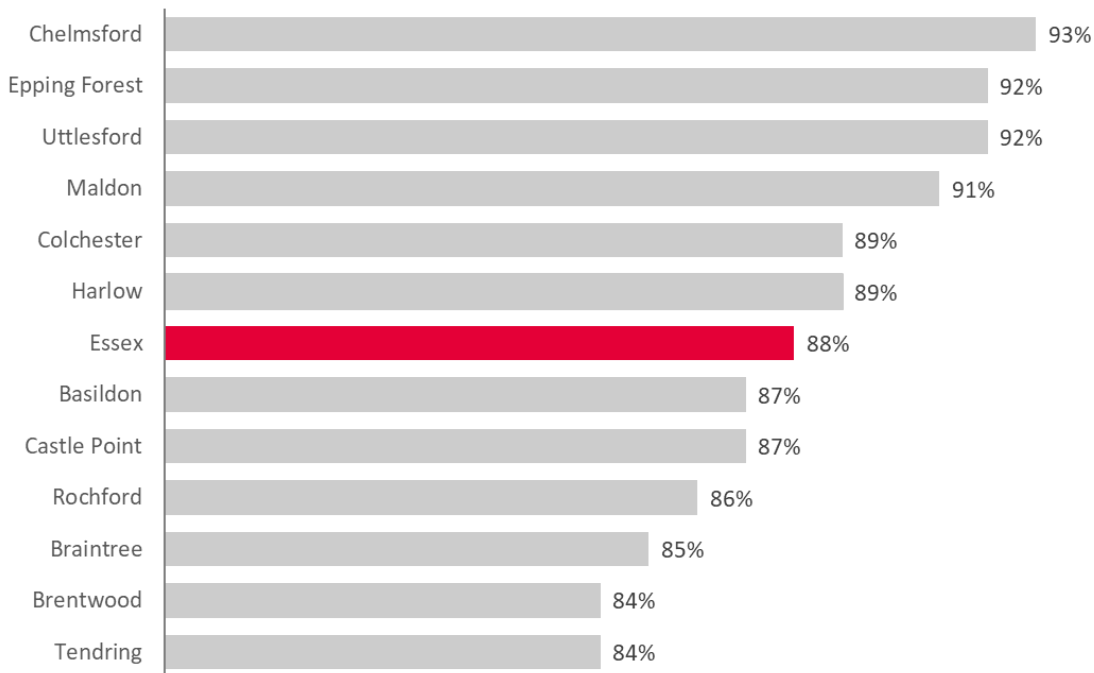
### **Natural Green Space**

Access to natural spaces is highly valued by residents and have wider benefits for public health and our residents physical and mental wellbeing.

This became particularly apparent during the Covid-19 pandemic where reliance on natural spaces solidified the importance of maintaining these areas. In a survey conducted in April 2021, 87% of Essex residents agreed that visiting local green and natural spaces had become more important for their wellbeing since the pandemic. There are clear links between access to green and natural spaces and increased levels of happiness, life satisfaction, physical activity, and reduced levels of stress.

Yet, access to publicly accessible green and natural spaces is not equal, by location or socio-economic background. Only 29% of the Essex population are within a five-minute walk from publicly accessible green space. Inequalities in access and participation are also seen nationally, across Greater Essex and amongst resident groups. Residents from low-income households, more deprived urban areas, ethnic minority backgrounds and those with a limiting illness or disability are less likely to access green and natural spaces compared to the rest of the population.

**Chart EN7: Green and Natural Spaces: Level of agreement ‘within easy walking distance’, variation across Essex districts**



Source: Essex County Council Residents Survey 2022. Please note, Thurrock and Southend-on-Sea data is unavailable.

## Energy

As of 2022, the electricity supply sector was responsible for 14% of the UK’s greenhouse gas emissions. This has significantly reduced since 1990 by -73%, so can be considered a success story in decarbonisation. The UK Government is committed to have fully decarbonised the electricity system by 2035, and while there have been big step changes towards renewable energy sources, with zero-carbon sources providing 48.5% of the electricity used in 2022 with 28.6% of the UK’s total energy generation being from wind power alone, meeting this target will mean ongoing and significant investment.

Greater Essex is playing its part, securing increasing amounts of renewable generation across the county, supporting the UK’s wider ambition. Greater Essex is well placed to benefit from inward investment and job growth in clean energy.

Off and On-Shore Wind: Greater Essex benefits from 350-400 miles of coastline, the second longest in the UK. With several offshore wind projects Greater Essex has a significant offshore wind capacity and continues to attract new investment. For example, the UK Government has an ambition to connect 50GW of offshore wind in the UK by 2030. The Five Estuaries Offshore Windfarm is key to this ambition, and proposes to extend the existing £1.5 billion, 353MW Galloper Offshore Wind Farm located in the southern North Sea, off the coast of Greater Essex. This has the potential to see a growth in the green job market in North Essex, and vital economic opportunities in an area of the county with traditionally lower employment prospects.

Solar energy: Greater Essex has vast rural areas, urban centres with many buildings to utilise, and is a relatively sunnier region of the UK compared to elsewhere - with over 1600 hours of sunshine per year (across Essex, Suffolk, and Norfolk), which lends itself to opportunities to produce solar generation, both on buildings but also through solar farms.

Many organisations are taking advantage of this. For example, in Q1 2024, Essex County Council sites produced 187.2M (Wh) of electricity from solar panels by utilising the estate. While this does not meet total electricity needs it highlights the potential to utilise our urban centres. There are many planned solar farms across Essex to contribute to the generation of renewable energy, such as the 37.5 hectares in Cray's Hill Billericay, 82 hectares at the Birch Solar Farm in Colchester, and the 453 hectare site at Longfield Solar Farm near Chelmsford in Essex. However, there has been concern that solar farms are occupying good quality farmland and competing with food production. While guidance states solar farms should be built on poor quality land, it is a factor to consider when balancing land use options across Greater Essex, particularly in terms of increasing biodiversity and utilising alongside agricultural uses.

### Electricity Grid

The electricity grid is critical to any decarbonisation effort, with heating moving away from oil and gas to electrically powered heat pumps; and cars moving from diesel and petrol to electric. Increasing both energy storage options and grid capacity is key to ensuring everyone can benefit from decarbonised energy. As of 2021, there were fifteen storage battery sites for renewable energy in Essex. This raises land use challenges as grid extensions are not always universally welcomed. Local area energy plans are recognised as the leading method of unlocking the most cost-effective way to unlock local energy system changes. Local authority led, these utilise the convening power of local authorities to bring stakeholders together and map renewable generation capacity and grid requirements against current and future development needs.

### **Waste**

Waste management is currently responsible for about 5% of greenhouse gas emissions in the UK. In recent years, the government has introduced new policies and legislation to minimise the impact that waste management has on climate change, including ambitious targets to achieve a minimum of 65% recycling by 2035 and the halving of residual waste by 2042. The 2021 Environment Act is expected to lead to more accessible and simple recycling services, the introduction of deposit return schemes, and greater responsibility on manufacturers and retailers to reduce packaging and fund waste services.

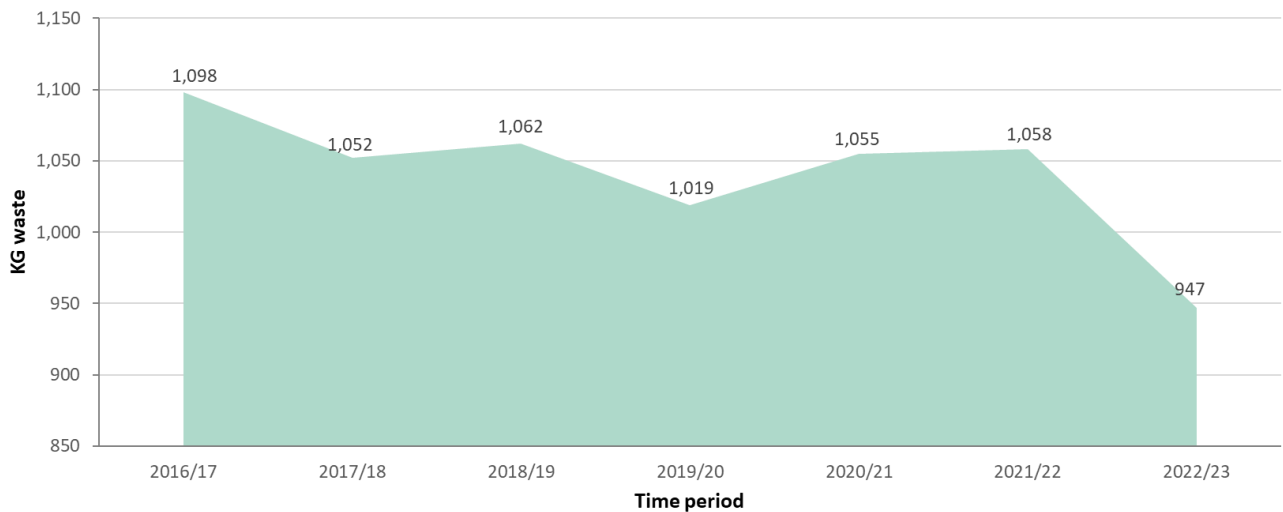
Waste generated by Essex residents costs the taxpayer more than £130 million a year. Without changing how we operate; waste management will cost more in future. The issue of waste creation needs to be considered. Despite an increasing population the quantity of waste collected each year by Essex Council has remained stable for many years at around 700,000 tonnes. The most recent waste tonnage estimates for 2022/23 are indicating waste is at its lowest level for over 20 years, this is a national trend. This reduction is likely to be primarily due to the dry summer of 2022 which reduced the amount of garden waste generated. Despite the most recent reduction in waste, Essex councils still collected over

660,000 tonnes of waste and recycling in 2022/23 – the equivalent weight of about 53,000 London buses.

There has been an increase in the proportion of waste recycled from 21% in 2000/01 to 52% in 2020/21, driven primarily by the expansion of kerbside recycling services. The introduction of kerbside food waste collection services and other system changes from 2008 onwards led to further improvements with recycling rates peaking at 55%.

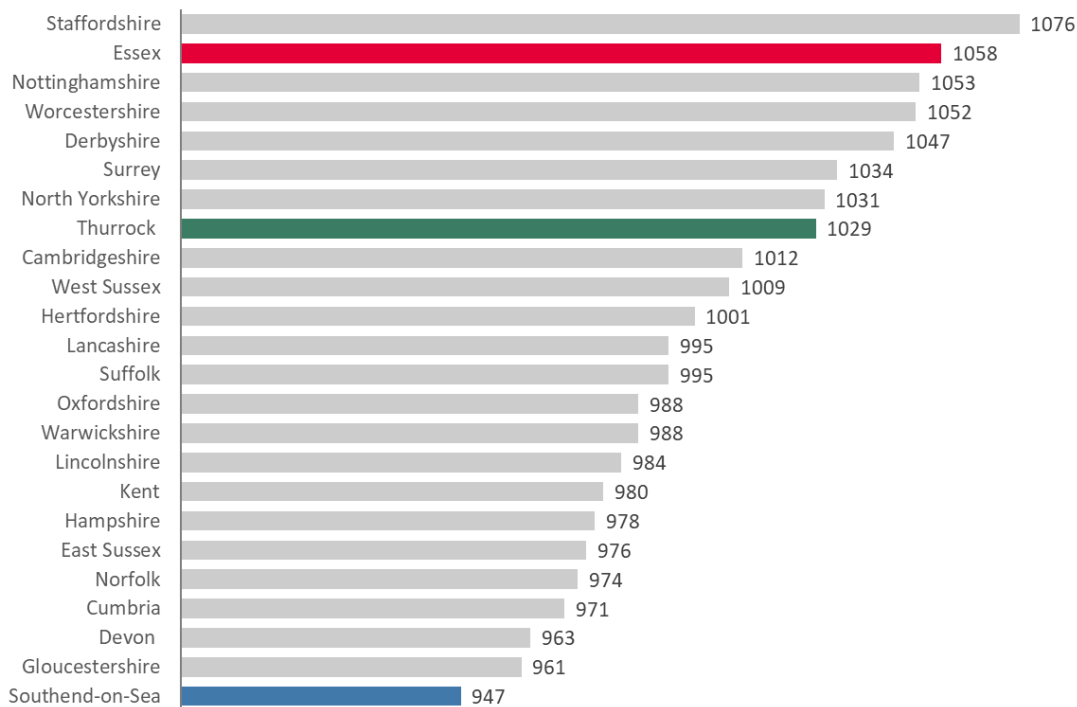
Although this has plateaued over recent years and in some areas falling, with households in Essex and Thurrock continuing to produce more waste than other areas in the country. A significant change is needed to protect the environment and conserve resources, particularly as Greater Essex is projected to increase its population, bringing more waste even with household contributions declining. The best way to deliver change is to move towards a circular economy where our finite resources are conserved and used efficiently.

**Chart EN8: Total KG waste per household by year**



Source: Waste team ECC; and DEFRA (ENV18 – Local authority collected waste: annual results table)

**Chart EN9: Total KG waste per household comparator data 2021/22**



Source: Waste team ECC; and DEFRA (ENV18 – Local authority collected waste: annual results table). Please note, 2021/22 is used above as this is the latest national comparison data available.

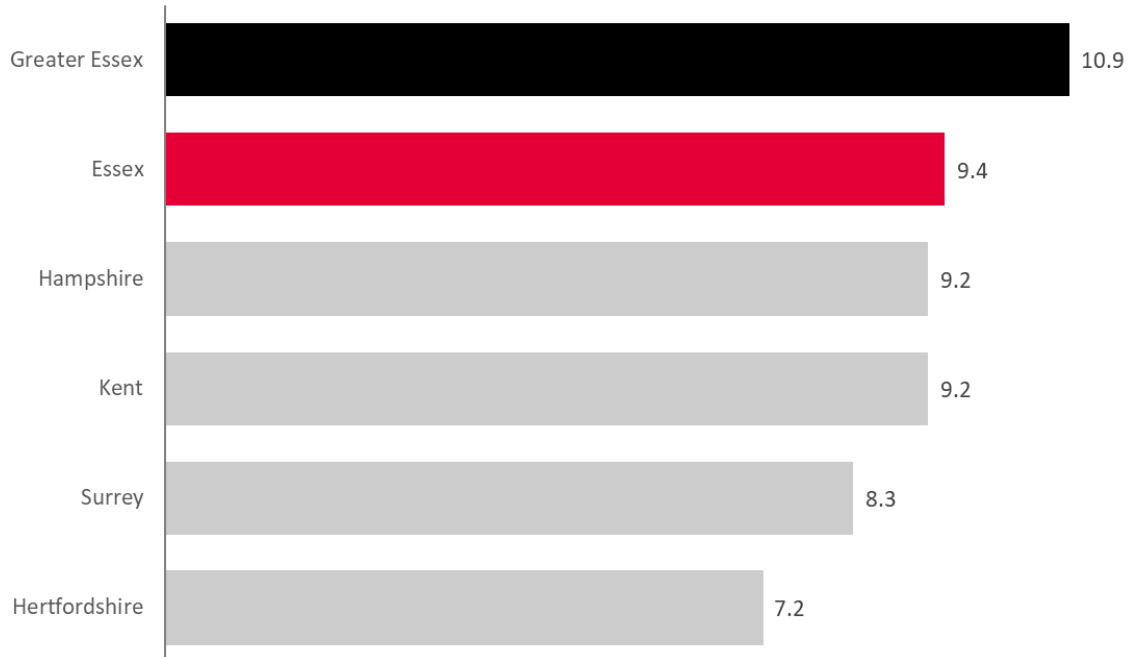
## Transport

Transport is the main contributor to UK greenhouse gas emissions, contributing to 28% of the UK total. Across Greater Essex, transport is responsible for an even greater share of our greenhouse gas emissions, consistent with higher levels of road traffic in the East of England compared to the rest of the UK. The vast majority of these emissions come from road traffic.

Increased digitisation provides opportunities to access education, employment, and services without travelling - avoided journeys are the best way to reduce transport emissions. The pandemic has significantly changed working patterns with many people reducing commuting, and easing pressure on both congestion and carbon emissions. Encouraging and supporting people to take more sustainable methods of transport is key to decarbonisation and meeting the UK's climate commitments.

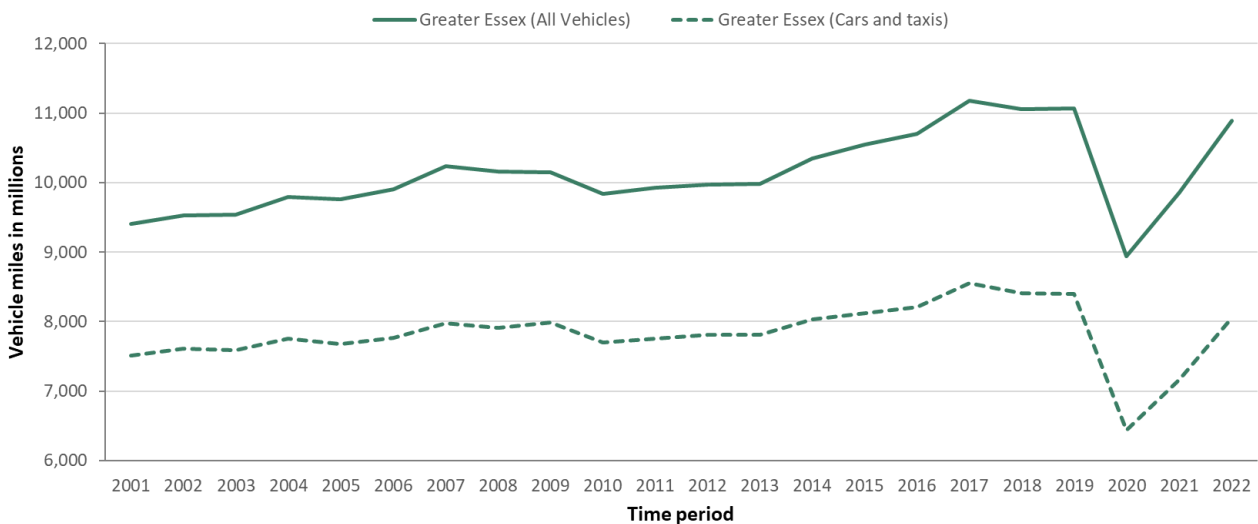
Yet, Greater Essex covers a large area, with multiple urban hubs and vast rural and coastal areas, and subsequently faces some unique challenges. Poor connections are a particular challenge for the residents living in rural or coastal areas, with two thirds of our rural residents living in a 'transport desert', which understandably increases the use of private cars to access jobs, education, and essential services. Subsequently, Greater Essex is one of the areas with the highest estimated traffic in the UK, and despite a dip in 2020, there has been a gradual increase in vehicle use over the last decade.

**Chart EN10: Areas with highest estimated traffic in 2022: Vehicle miles (billions)**



Source: Department for Transport, Road Traffic Statistics

**Chart EN11: Annual traffic across Greater Essex**



Source: Department for Transport, Road Traffic Statistics

Bus patronage has been in decline for many decades, as cars became more affordable in the 1970s, further boosted by rising household incomes in the 1990s. In recent years, bus patronage was severely affected by the Covid-19 pandemic and has yet to fully recover. Despite the number of local bus passenger journeys in England increasing by 79.6% to 2.8 billion in the financial year ending March 2022, this was still far lower than in the financial year ending 2020 where passenger journeys for England were 4.1 billion. As of March 2023, bus passenger numbers across Essex were forecast to be 29 million which is roughly 75% compared to pre-Covid levels.

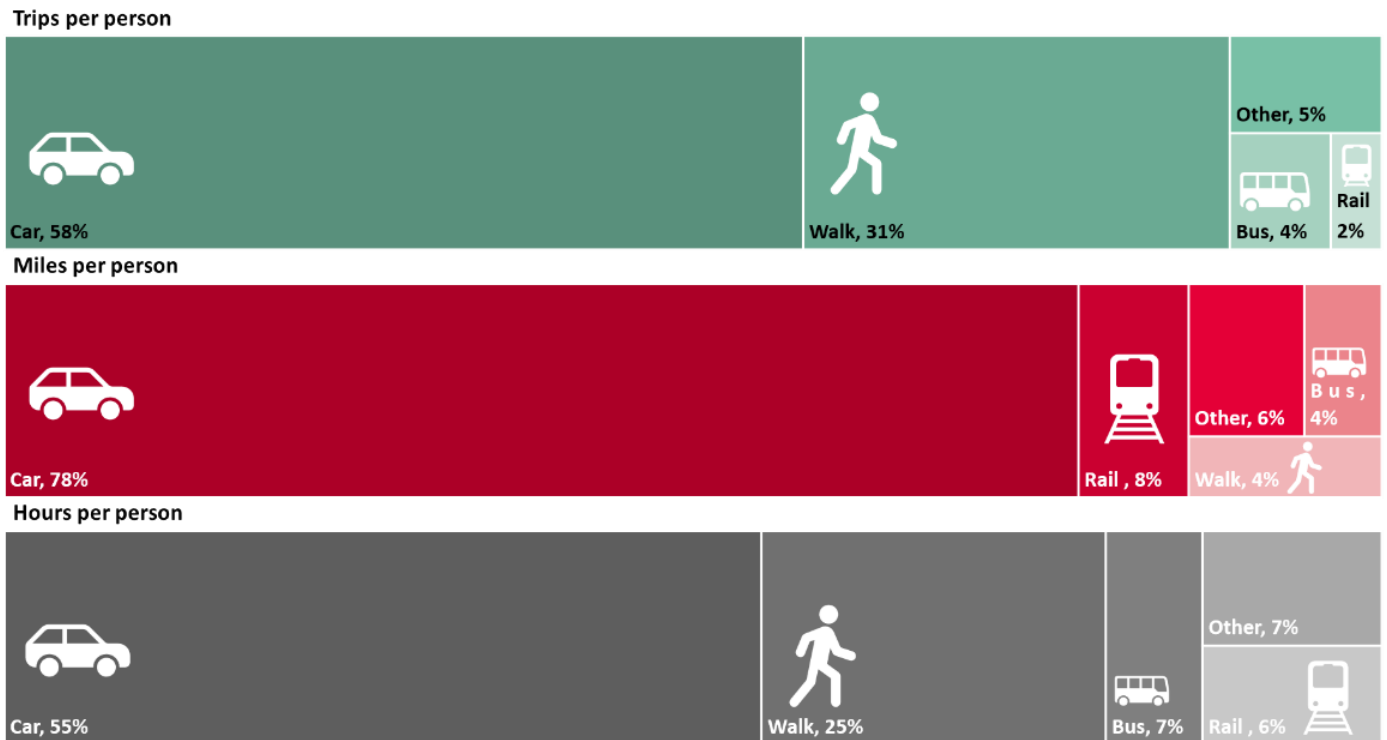
Rail travel also saw significant impacts from the pandemic. Across England, passenger rail journeys almost doubled (95.9% increase) in the 20 years before the pandemic, reaching a record 1.8 billion journeys in 2018 to 2019. Despite seeing a 39.9% increase on the previous

year, rail passenger journeys in 2022 to 2023 are still 20.4% lower than this peak, at 1,385 million.

In urban areas, active travel (walking and cycling) is an alternative option, yet levels are not as high as they could be. In a 2022 survey of Essex residents, only 11% cycled for commuting, and while 44% were willing to walk over 20 minutes to commute, willingness to walk further distances for other services such as shops, green space and healthcare was much lower.

Around 49% of trips in towns and cities under 5 miles were made by car in 2021, with around a quarter of all car trips in England less than 2 miles. Alongside cutting greenhouse gas emissions and air pollution, this also delivers significant direct health benefits. Physical inactivity indirectly costs £8.2 billion a year to businesses and wider society, with £1 billion of costs to the NHS. The growth in road transport has been a major factor in reducing levels of physical activity and increasing obesity. Building walking or cycling into daily routines are the most effective ways to increase physical activity.

**Chart EN12: Breakdown of modes of travel across Great Britain in 2022**



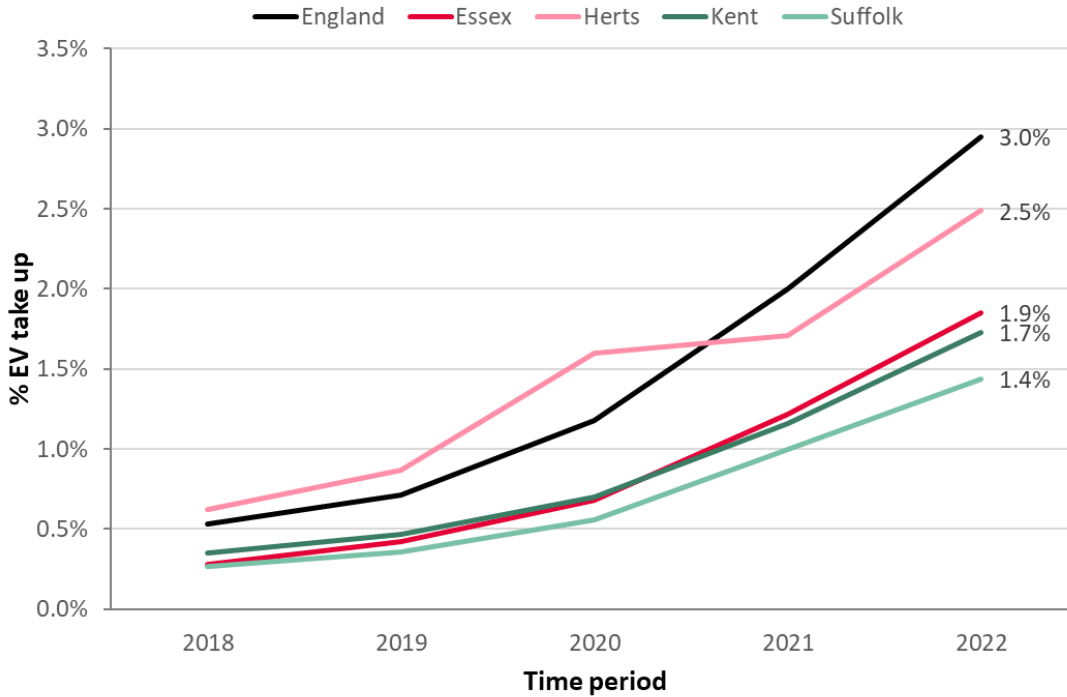
Source: Department for Transport, Rail factsheet 2023

Given the scale of Greater Essex and the continued challenge of accessing public transport, particularly in rural and coastal areas, electric and ultra-low emission vehicles (ULEVs) are the low carbon option compared to petrol and diesel vehicles.

Essex has seen a gradual increase in ownership of electric and ULEVs in recent years, rising from 2,760 registered keepers at the end of 2018 to 18,340 in 2022. Infrastructure to support electric vehicles has also seen an increase over recent years in the county with over

3006 registered publicly accessible charge points across Essex, including 50 ‘ultra-rapid’ (100kW), 50 ‘rapid’ (50kW), 60 ‘fast’ (22kW), and 150 ‘slow’. These include a mix of publicly and commercially operated sites at car parks, petrol filling stations and a purpose-built GRIDSERVE® Electric Forecourt at Braintree, the first electric forecourt in the UK. From 2030, 80% of all new cars and vans sold must be electric. Ramping up charging infrastructure to support these new electric vehicles is a key requirement.

**Chart EN13: % of EV take up – Essex and comparator areas over time.**

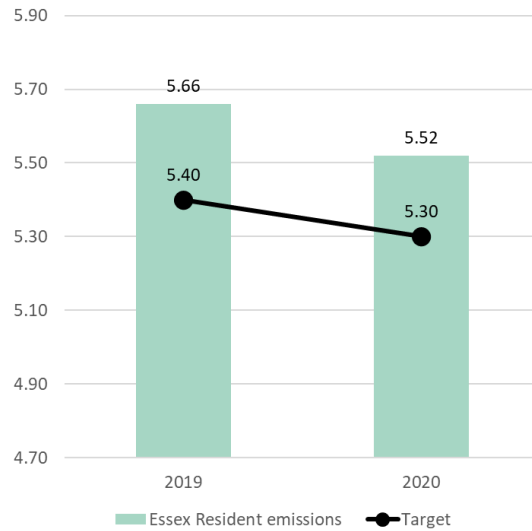


Source: Department for Transport, Vehicle licencing statistics. Please note, Thurrock and Southend-on-Sea data is not currently available.

### Resident participation in the reduction of climate change

Residents across Greater Essex have a key part to play in reducing personal carbon emissions. Data from DESNZ suggests that the average UK resident emits 6.04 tonnes of CO<sub>2</sub>e per person within the country and 11.54 CO<sub>2</sub>e per person outside of the UK's borders. In comparison, while emissions are lower in Essex, and declining, emissions fell short of the target for 2020 required to help support the trajectory to net zero.

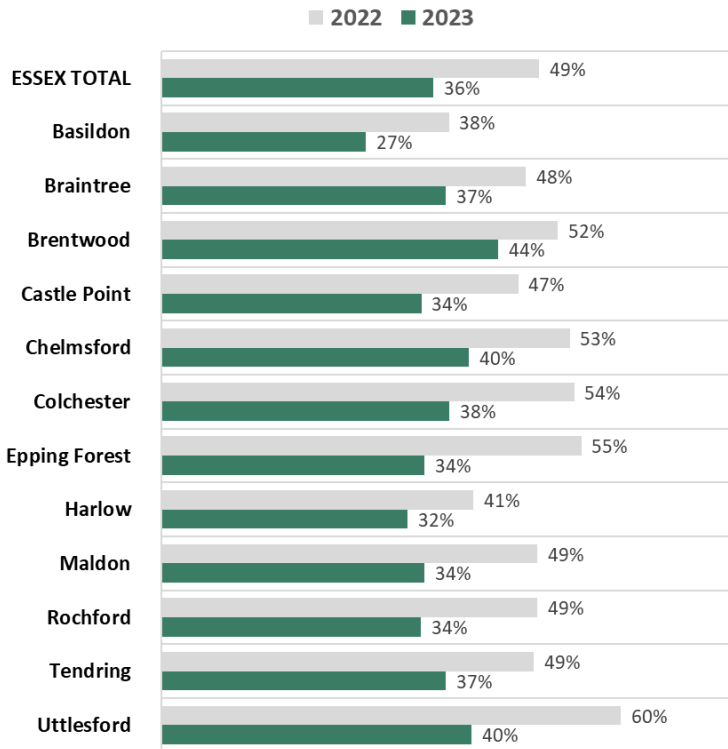
**Chart EN14: Emissions (tCO<sub>2</sub>e) per Essex Resident**



Source: Essex Climate Action Commission; DESNZ. Please note, this data does not include Thurrock or Southend-on-Sea

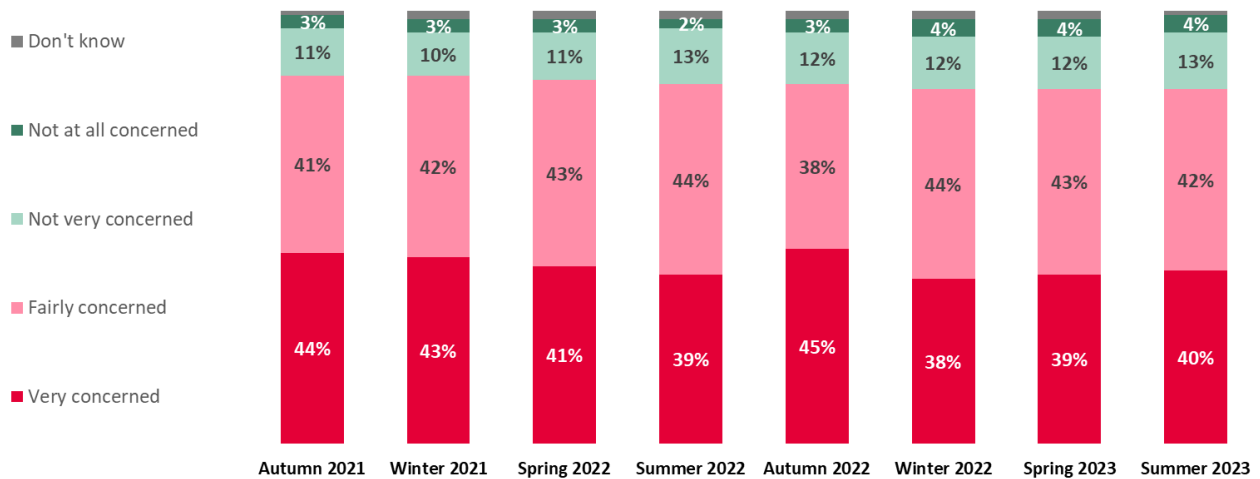
While the climate and environment crises remain on residents’ minds, concern over climate change has been declining over time. This sentiment is reflected in the comparative reduction in Essex residents feeling personally responsible to try to reduce climate change (56% feeling highly responsible for reducing climate change in 2023 vs. 64% in 2022). This is not unique to Essex. There has been a gradual downward trajectory in levels of concern about climate change at a national level since 2021.

**Chart EN15: Essex District resident concern about climate change (2022-2023) - % Extremely / very worried**



Source: Essex Residents Survey 2023 – Please note, all changes from 2022 to 2023 are statistically different to a 95% confidence level. This data is based on Essex districts only, Southend-on-Sea and Thurrock data is unavailable.

**Chart EN16: Concern about Climate change, UK (Autumn 2021 to Summer 2023)**



Source: DESNZ Public Attitudes Tracker: Net Zero and Climate Change, Summer 2023, UK

Previous research shows that even those that are concerned about climate change, tend to view this as a distant, rather than local, issue, or as something that affects other people and other places. Despite the increasing challenges of more extreme weather seen nationally and locally.

Considering the turbulent few years our communities have had to face; coming through the Covid-19 pandemic, the added pressures of inflation and rising costs of living; it may be no surprise that residents are prioritising immediate, personal challenges over issues that feel more remote. Protection of local green spaces is potentially one ‘bridge issue’ that can bring the concept of climate action closer to home.

This presents an issue when societal behaviour change is needed. Particularly as research shows that while individuals acknowledge their actions have an impact, most do not fully understand the level of impact certain behaviours can have on tackling climate change. Many expect the Government and businesses to take the lead.

People tend to overestimate their contributions to reducing carbon emissions. Those changes which have been widely adopted tend to be largely those requiring lower effort and less cost or inconvenience. Adopting more environmentally friendly behaviour, such as reducing flying, or reducing car use in favour of cycling, walking, or using public transport, eating a vegetarian diet, can be seen as undesirable lifestyle choices. Research shows that the greatest opportunity to effect behaviour change is where residents can see personal benefits. For example, increasing the number of meat-free days, reducing food waste, and making home upgrades. Behaviours such as transport changes, where personal benefits are not as immediate will be the most challenging. There is no doubt delivering substantial change remains a challenge.

# Environment: Looking ahead

## Protecting the environment and meeting the demands of our population

Given the scale of the climate crisis it is widely accepted that accelerated action is required to adapt to climate change, and rapidly reduce greenhouse gas emissions. The health and wellbeing, economy and natural and built environment across Greater Essex, particularly considering the growing population and needs, all depend on these actions.

Improving and protecting our environment across Greater Essex in the coming years relies heavily on the ability to protect and expand the outstanding areas of natural and green space across Greater Essex; and in the ability to turn the tide on the devastating impacts of climate change by living more sustainably.

These two outcomes need to be achieved in the context of a growing population that will inevitably place increasing demand on our natural resources. The Greater Essex population is projected to increase by c.10,000 people per year over the next decade, this could result in a population of almost 2.1 million by 2043. These changes will have a substantial influence over the infrastructure needs of the population, as well as increasing the demands on our food and water supply, and access to our green infrastructure and areas of natural habitats.

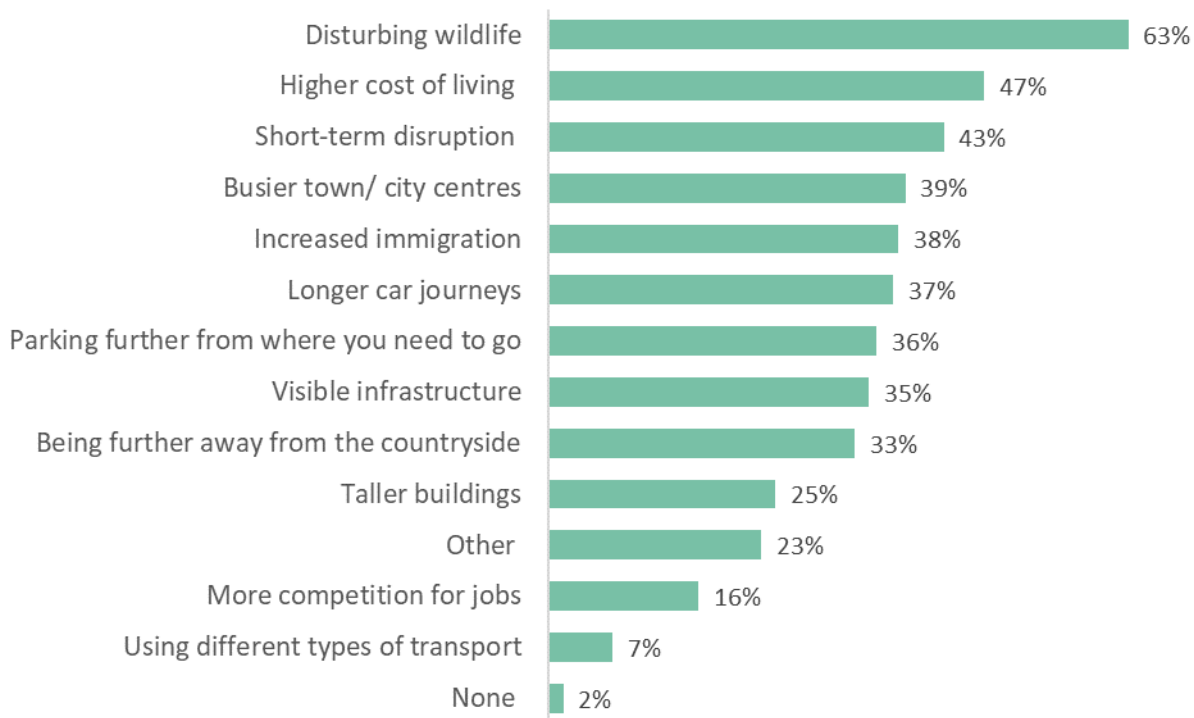
However, these challenges also bring significant opportunities. The Skidmore review commissioned by the Government and published in 2023 identified the transition to net zero as the key economic opportunity of this century. Beyond this, there is the opportunity to increase the natural green infrastructure across Greater Essex to reduce exposure to climate risks and increase green space for the benefit of both people and wildlife. There is opportunity to further improve the health of Greater Essex residents, increasing activity levels with greater access to active travel and improved housing. This will need to be a consideration in land use planning as the population and need for infrastructure grows.

## Development and the built environment

Population growth will inevitably drive change to our built environment, largely driven by the need for more local housing, meaning that villages, towns, and cities across Greater Essex will likely need to expand to meet housing and infrastructure demands. There are currently local plans to provide an additional c.197,000 new homes by the mid-2030s, including 5 new garden communities and some 40 new schools, many of these may be developed in what was once used as agricultural land or adjacent to green space and infrastructure.

Residents have fairly split opinions on development, with many seeing opportunity in busier town centres and improved job opportunities. However, by far the biggest concern for residents is the impact growth will have on the local wildlife and countryside.

**Chart EN17: Essex Resident concerns around local growth**



Source: Essex County Council, Sustainable Growth survey 2023

These concerns are not unwarranted. Aside from the acquisition of space, homes and businesses are the largest source of climate emissions after transport, with 25% of UK emissions being directly attributable to the built environment. This all has a knock on impact on the local environment. Given the need to build new homes and infrastructure, there is real opportunity to rapidly reduce carbon emissions by prioritising sustainable practices and developing a net zero, climate resilient and regenerative built environment.

Developing homes with low greenhouse gas emission – low or net zero homes - is one mechanism to do this. Energy-efficient homes not only contribute to reducing greenhouse gas emissions and the overall carbon footprint, but also have a positive impact on the health of our population. To ensure that developers are building new properties as energy efficiently as possible, the government has launched new legislation which came into effect in June 2023, for new-build homes to produce at least 31% less carbon emissions than previously. From 2025, developers will need to improve further and comply with the new Future Homes Standard (FHS), where new homes will produce 75-80% less carbon emissions by having higher energy efficiency standards and low carbon heating systems such as heat pumps - no oil or gas boilers. This sits alongside regulations to increase natural green infrastructure. Further changes are expected to require sustainable drainage system to be mandatory.

Progress has been made in this area across Greater Essex; net zero homes are now only marginally more expensive to build; planning authorities are moving to net zero policies; there are tighter standards for new commercial buildings and the Department for Education now require new schools to be net zero. However, homes have continued to be built that are below net zero carbon standard. A home built to building standards in Jan 2023 would

require some £10,000 investment to bring up to a net zero carbon standard (EPC A). This has increased the scale of an already enormous challenge – upgrading our existing housing.

Upgrading existing housing stock to use less energy is a significant challenge, largely due to the cost of doing so and the extent of upgrades needed for ageing properties. In 2023, 41.2% (3,777) of domestic energy performance certificates (EPC) that were lodged in Essex had an energy efficiency rating (EER) of D or worse. The EPC (Energy Performance Certificate) ratings play a crucial role in promoting environmental sustainability, and also indicate how expensive properties are to heat: an EPC A is very low cost, lower grades are more expensive to heat. An estimated £3.9bn investment is required to bring all 631,000 Essex homes up to an EPC C.

For the most part, private renters and homeowners are more likely to live in properties with low energy efficiency, particularly driven by poor quality walls, heating control or windows. This not only impacts the ability to reduce carbon emissions and reach net zero targets, but severely impacts the health of our population and increases the burden on healthcare services. With a cost burden to the NHS of £1.4bn p.a. due to the health impacts of cold, damp homes. Department for Energy Security & Net Zero report that 72,075 households suffer fuel poverty in Essex (some 11% of homes).

There is significant grant funding from both Government and, under statutory carbon reduction schemes, from power companies to support upgrades in low-income households (EPC D or below and a household income below £30,000). However, roll out has been hampered by restricted delivery capacity and a market with too few companies qualified to take on installations. Similarly, while grants are available for the installation of heat pumps, the lack of capacity in the installation market is a significant barrier to uptake. Similar retrofit challenges are felt across the private and public sector, while there is a commitment from many organisations across Greater Essex to commit net zero in their operations, and mechanisms are in place to identify opportunities for carbon reduction – such as the School Energy Surveyors – capacity will be a continued challenge for implementation. In contrast solar panel installation have a healthy supply chain and are seeing rapidly increasing demand.

A core focus for the future of the Greater Essex built environment is to use sustainable methods in new development plans and to invest in retrofitting existing buildings to improve energy efficiency and contribute to lower energy bills and the lowering of carbon emissions. There is a significant job and growth opportunity in Greater Essex, where the construction sector is an important feature of the economy, to ensure businesses have the skills and capacity to take advantage of these new markets and increasing opportunities.

### **Water Scarcity**

Greater Essex is a highly water stressed area. There are approximately 680,000 households that are supplied by 4 water companies across Essex, and with the UK daily average usage of households being 350 litres, there is a clear need for large volumes of water to be supplied. On average the county consumes larger volumes of water per person than most of England.

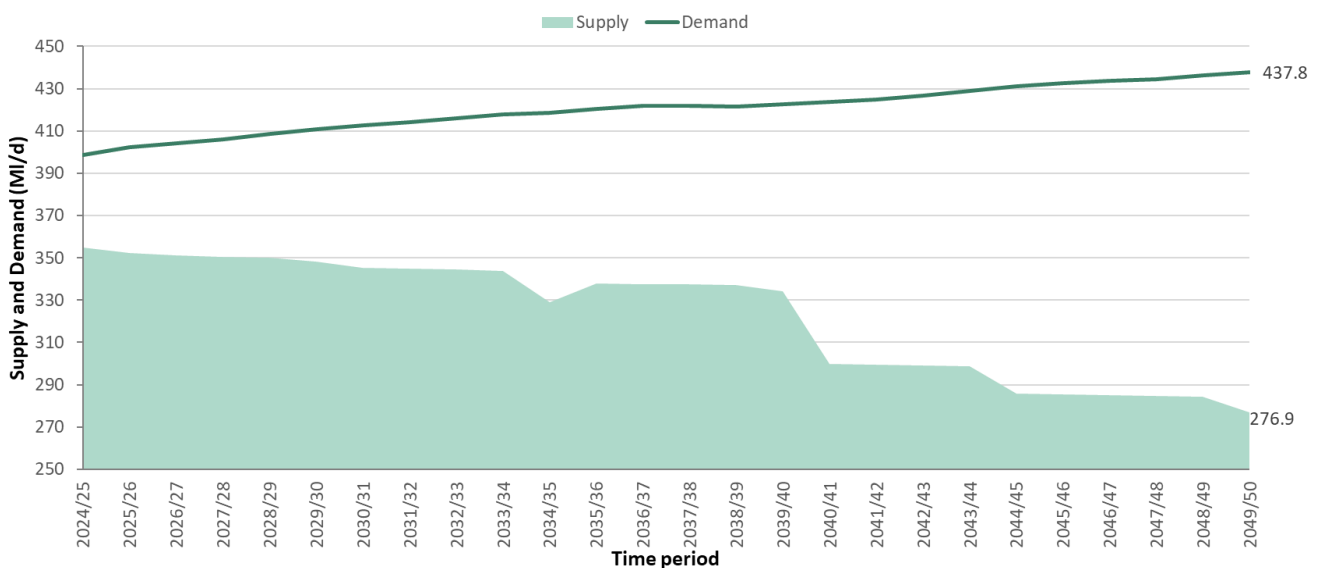
Only three fifths of the drinking water consumed here comes from the county itself. The rest has to be imported from elsewhere.

However, demand for water is already outweighing the ability to supply households across Greater Essex. Climate change is exacerbating existing resource constraint. As the local area continues to experience lower levels of rainfall year on year and the demand for water amongst residents and businesses continues to increase, the risk of water scarcity will worsen if no changes are made to the way water is managed. By 2050 the East of England could see a public water supply shortage of around 730 million litres of water per day (MI/d). This is equal to over a third of the predicted future need.

On top of this, Essex water quality is below the national average with only 5% of water courses meeting a good ecological standard. Extensive water pollution from storm overflows discharging sewage into the water supply is a severe challenge; pollution from fertilisers and poor livestock management and run off from urban areas and roads.

There is a clear and concerning need to set out actions to manage the water supplies and improve water quality. This is one of the purposes of the Essex Water Strategy which was published in 2024.

**Chart EN18: Estimated supply/demand balance (mega litres per day - MI/d) from 2024/2025**



Source: Essex County Council, Essex Water 25 Year Projections. Projections are based off a dry year annual average scenario if supply and demand continue on the same trajectory with no intervention.

### Extreme changes to the local climate

The IPCC reports that human-induced climate change is causing dangerous and widespread disruption in nature and affecting the lives of billions of people around the world. Change to our climate is already baked in with the emissions in the atmosphere for hundreds of years.

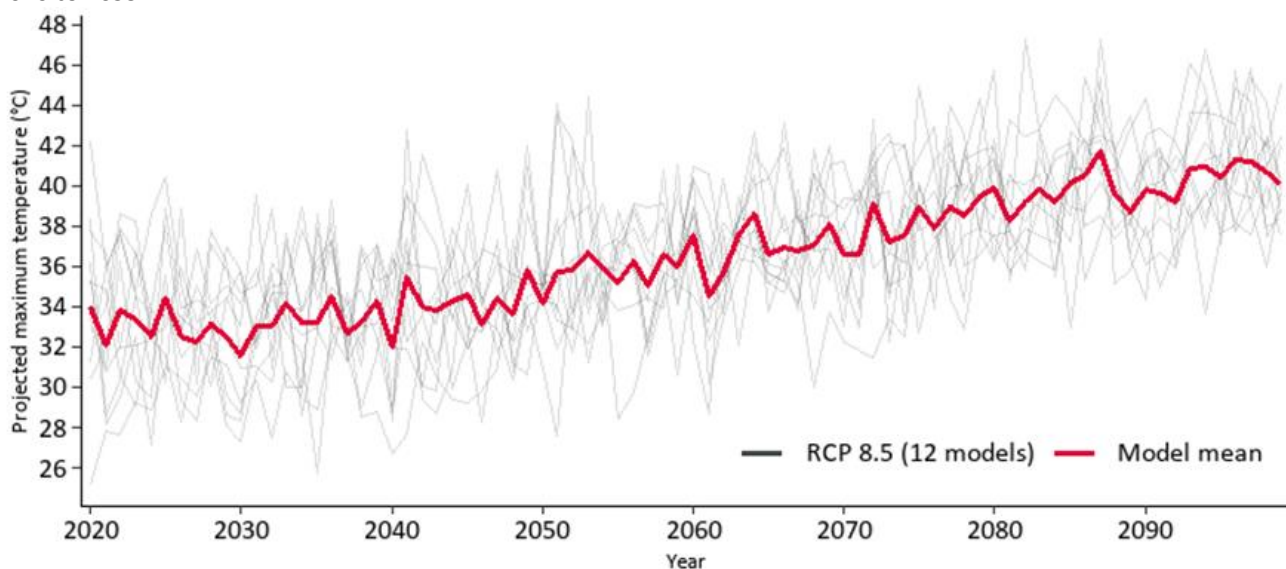
At the current trajectory, without greater intervention and change to societal lifestyles, Greater Essex is unlikely to meet the carbon emission target of 3.19 MtCO<sub>2</sub>e by 2030. This target was set to meet the Paris Climate Agreement signed at COP 21 in 2015, when the global community pledged to keep average global temperature rise well below 2°C. Warming

to 2 degrees puts far more of the population at risk of deadly extreme weather and increases the likelihood of the planet reaching irreversible tipping points, such as the collapse of the polar ice sheets and the mass death of coral reefs.

Locally, Greater Essex is already feeling the impact of rising temperatures, but this is predicted to continue to rise over the course of the next 50 years. If this happens, the consequences will be dire. The rise in temperatures will result in more storms, lower levels of rain but falling in short extremely heavy bursts, longer periods of dry spells which could have catastrophic repercussions for the local Greater Essex environment, such as more droughts, flooding and the associated damage to the local infrastructure and communities.

In addition, higher temperatures have severe consequences to residents' health. Many health conditions and illnesses are exacerbated by heat which in turn can increase risk of death, particularly for vulnerable residents. There are also additional impacts on infrastructure and services to consider; high temperatures can cause failure in IT systems, increase sickness absence which in turn impacts productivity, overheating of poorly insulated buildings, transport disruption, and increase risk of fires.

**Chart EN19: Projected annual maximum temperature in Essex under a high RCP8.5 emissions scenario – From 2020 to 2099**



*Source: UK Climate Projections – Met Office Hadley Centre. Please note this data is based on a grid system which will include some overlapping areas of Suffolk and Hertfordshire.*

Due to the diverse landscape of Greater Essex, with high population urban centres, vast rural communities, agricultural land use and being home to significant wildlife habitats, these changes to the local climate, could result in less ability to produce food through agricultural land use, increased water scarcity, and damage to our wildlife habitats. As climate related food scarcity could drive up food prices, the impacts are likely to be felt most harshly amongst more of our deprived areas and lower income households, further exacerbating systemic community inequalities. There are also significant risks to local and global supply chains. It may become increasingly difficult to meet the needs of our population unless there

is rapid transformation in the way partners, businesses, communities, and individuals operate.

The real danger when looking to the future is that we become overwhelmed by the climate crisis. There will be tough investment and funding choices to make for policymakers. To act now and invest in carbon neutral economic growth. Or, to wait and spend more in the future to adapt to higher temperatures and the associated destructive climate impacts.

The scale of the challenge also brings equally large opportunities to build a greener Greater Essex, with increasing natural green infrastructure, secure agriculture and more green spaces for people and wildlife; a resilient Greater Essex with a net zero economy and a healthier population who can enjoy a secure future.

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