



GREATER ESSEX TRENDS

June 2024



POPULATION

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.

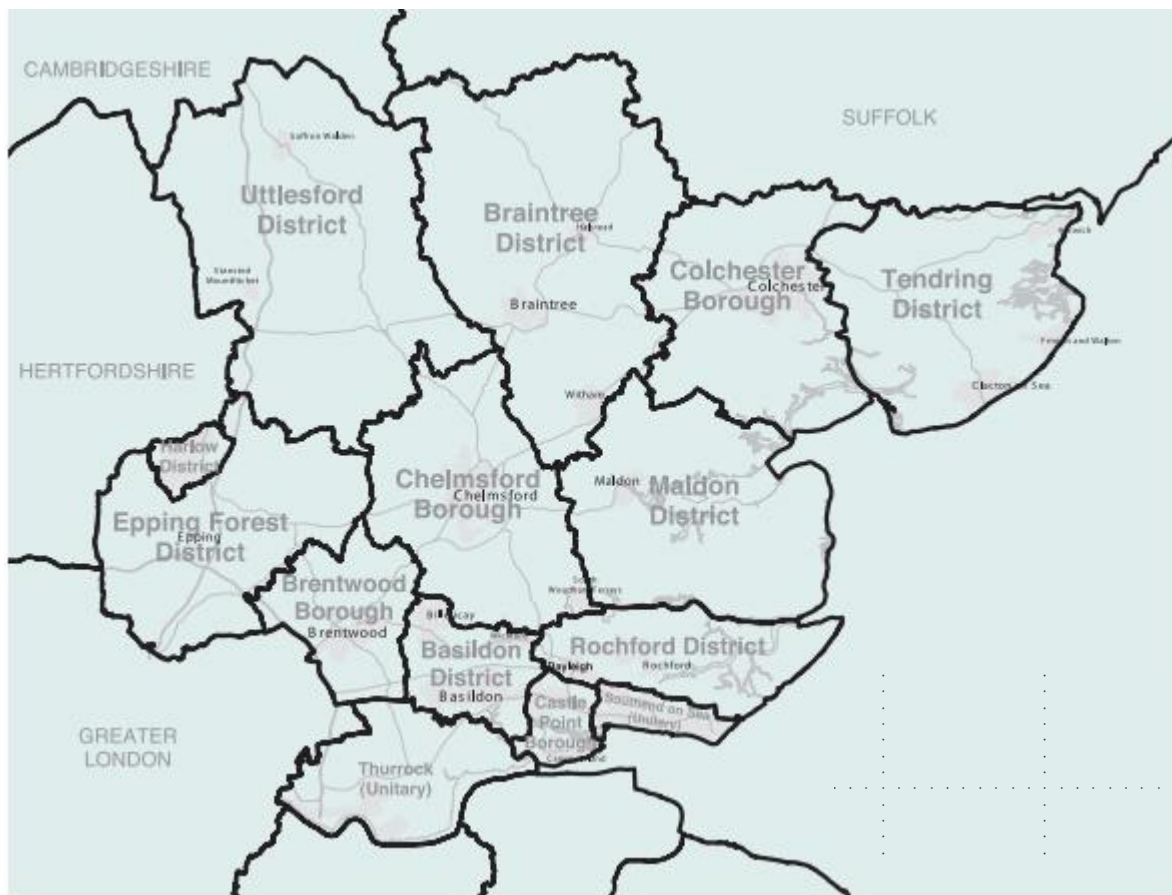
Rather, Greater Essex Trends provides information at a more fundamental level. It presents the information that allows us to make these decisions. It paints a picture of our county's population profile, economy, environment, and infrastructure as it is today and how it might develop in the future. In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

This chapter focuses on Population.

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).

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.

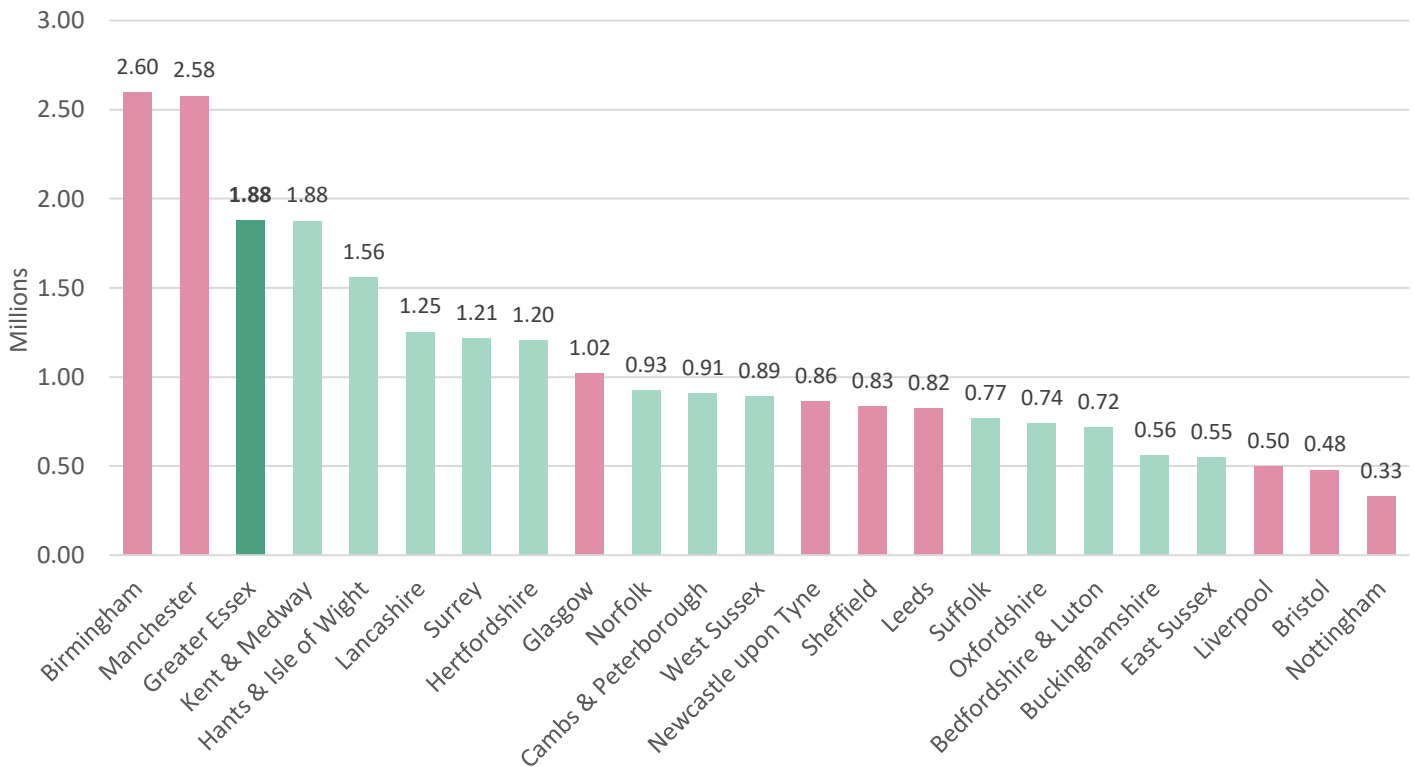
Demographic pressures will drive physical changes in towns and cities across Greater Essex too. We will, for example, need to build more homes. Local plans currently provide for c.197,000 new homes to meet the needs of a growing population to the mid-2030s (c.48,000 of these have already been built). 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

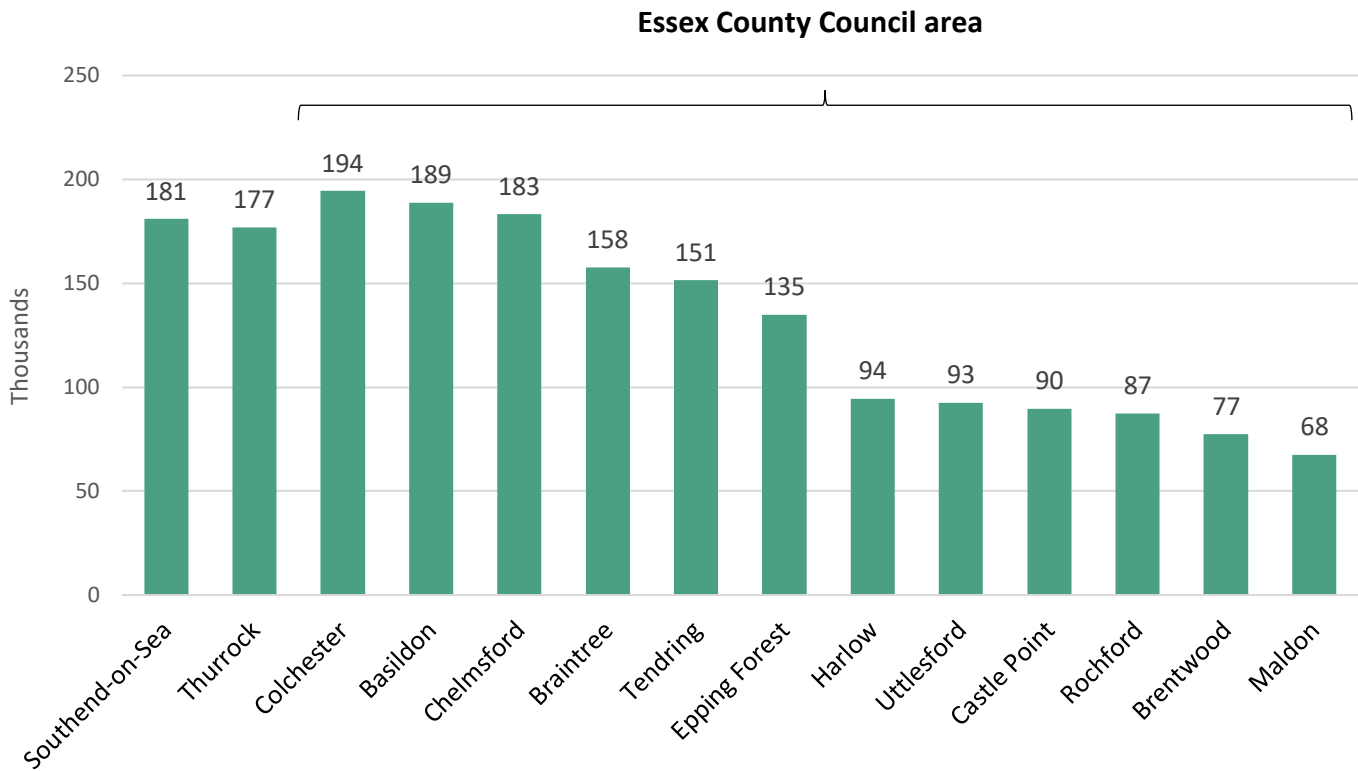


Source: Mid-year Population estimates 2022, National Statistics

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

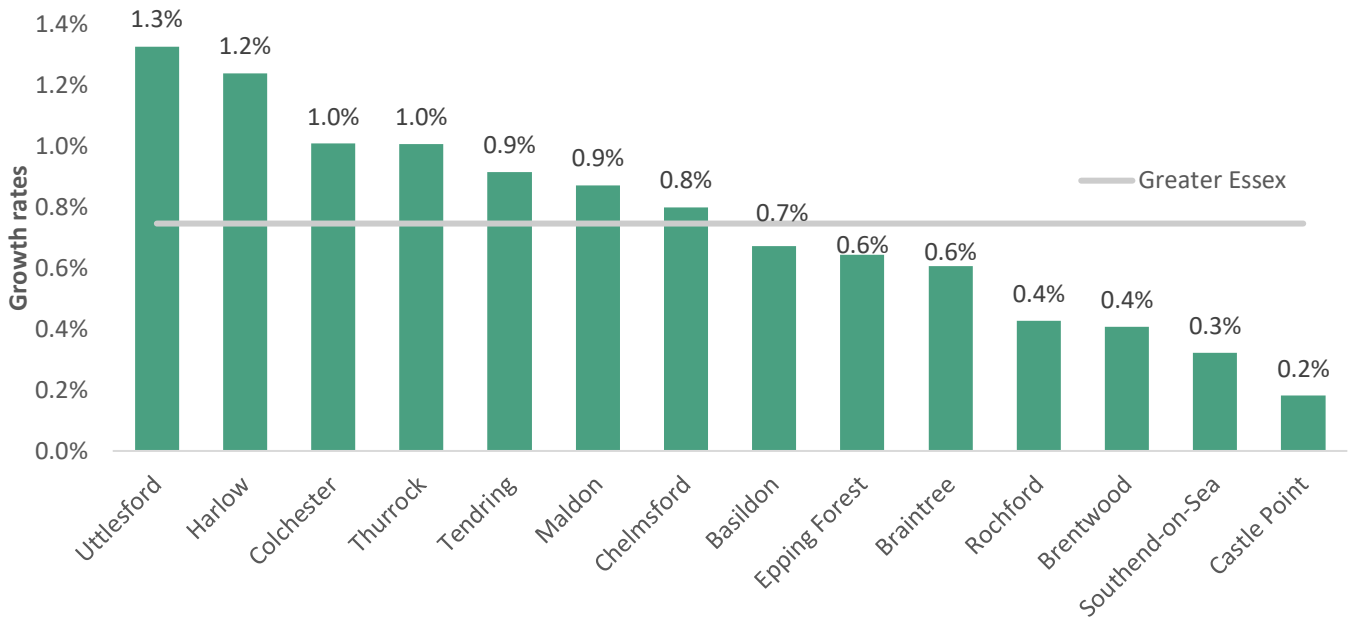


Source: Mid-year Population estimates 2022, National Statistics

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.

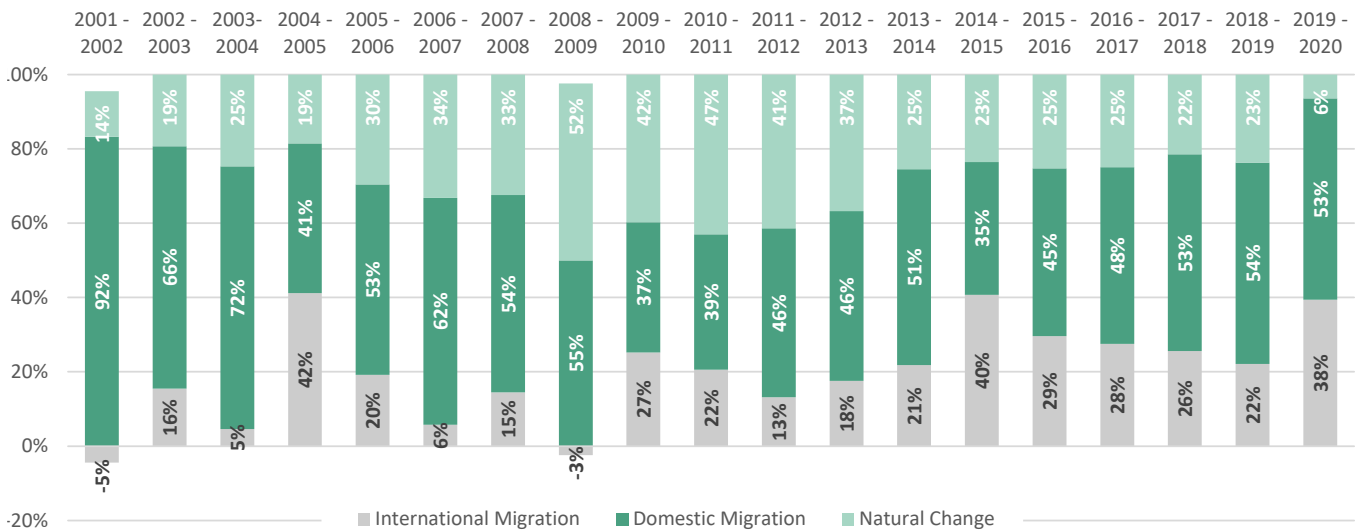
Chart PD3: Average Annual Population Growth rates, Greater Essex and its constituent areas. 2012-2022



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



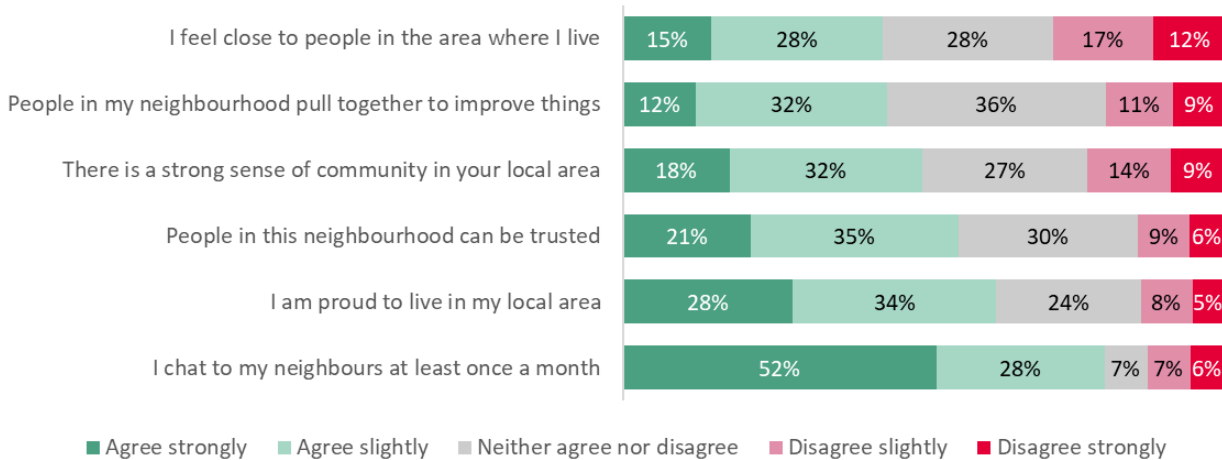
Source: Mid-year Population estimates 2001 - 2020, National Statistics

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

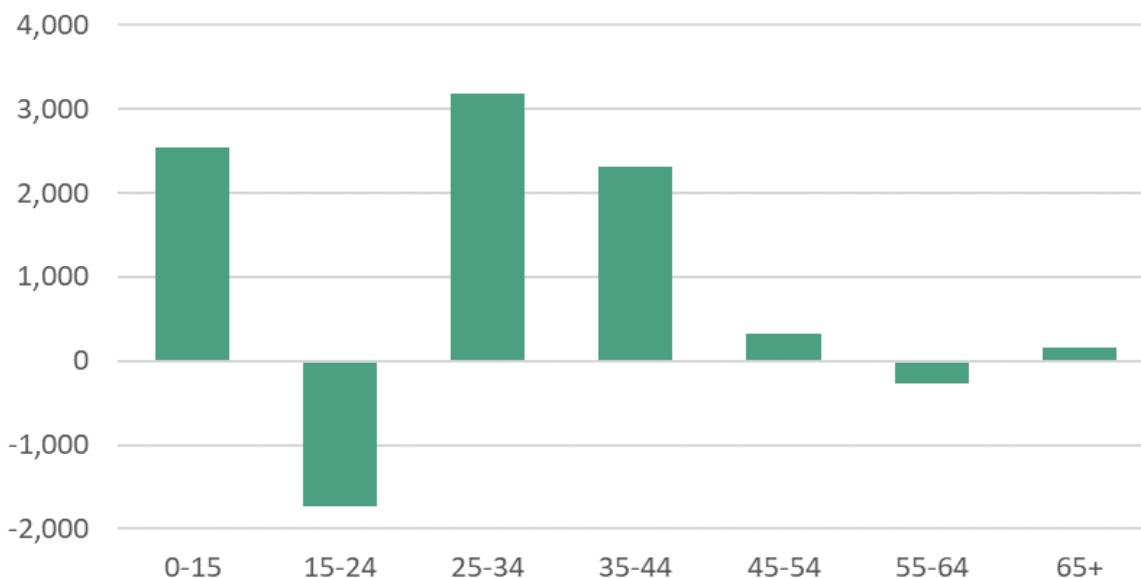
Residents were asked "How much do you agree or disagree with the following statements?"



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)



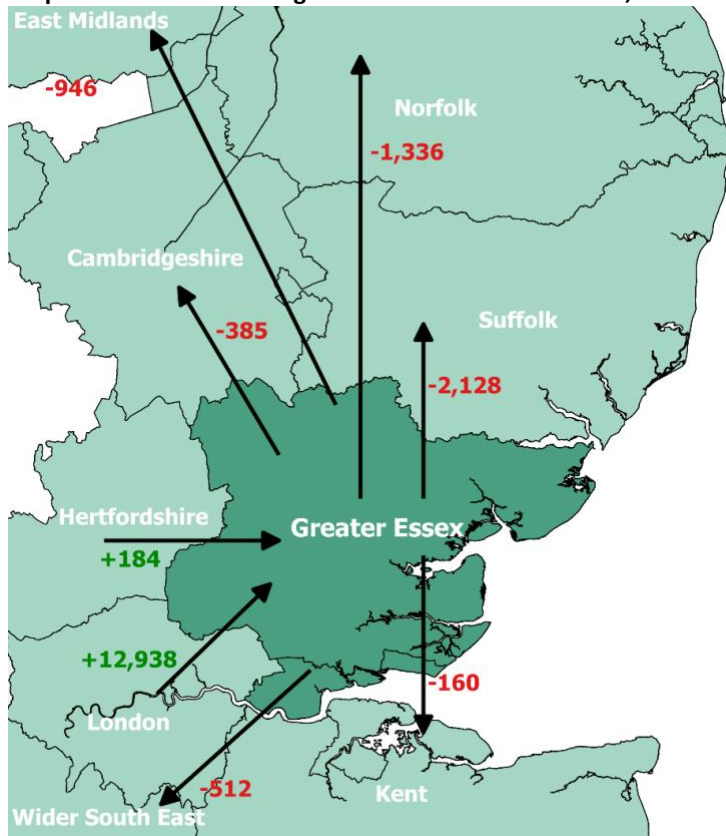
Source: Detailed internal migration statistics, year to June 2016-2020, ONS

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.

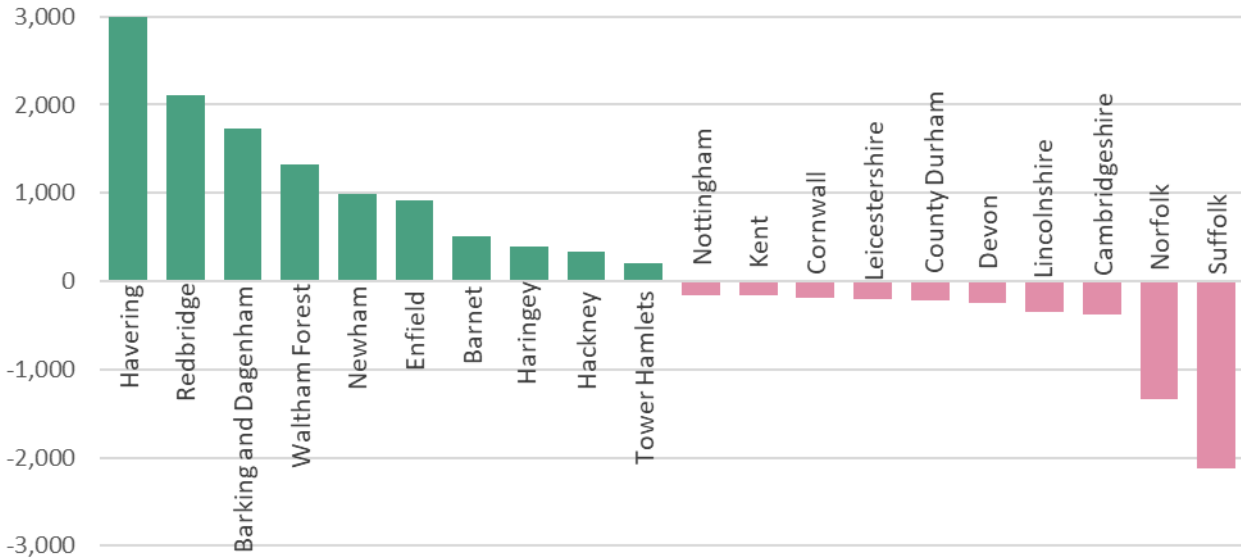
Northerly patterns of migration can be seen even within Greater Essex. Those moving within the county tend to move from the more urbanised south to the more rural north.

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



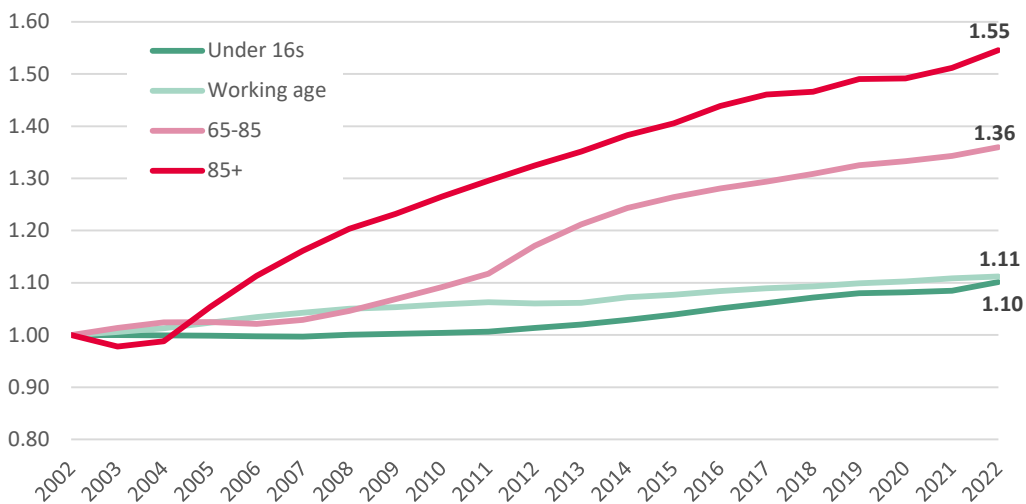
Source: Detailed internal migration statistics, year to June 2020, ONS

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)

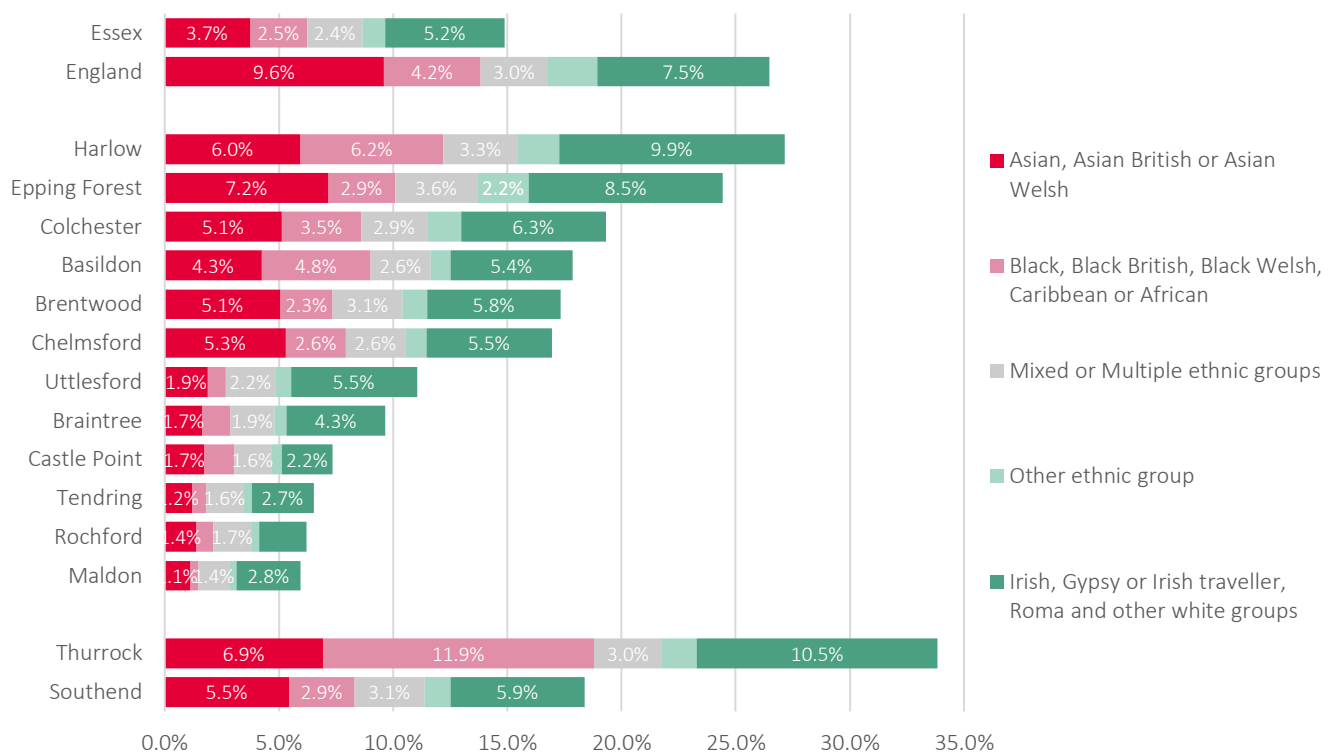


Source: Mid-year Population estimates 2002 - 2022, National Statistics

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

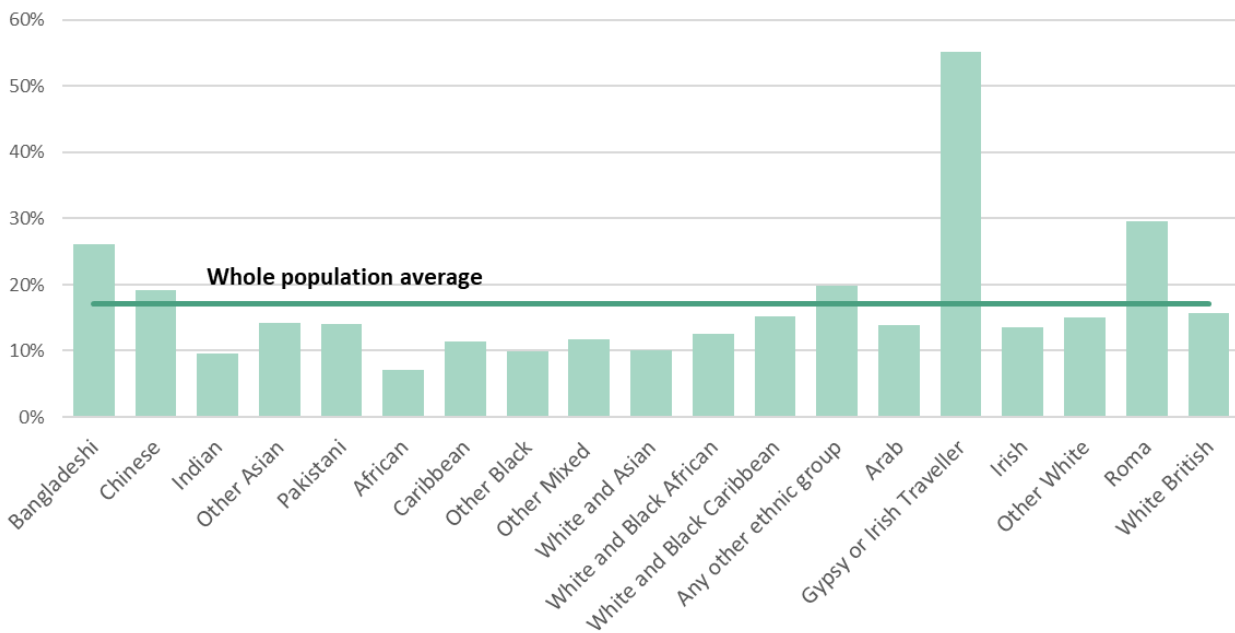
The composition of the ethnic minority population in Greater Essex is also different to that of the country as a whole. The “other white group” as recorded by the Census (including Irish, Gypsy and Irish traveller, Roma, and other white groups) is the largest minority ethnic group in Greater Essex, while 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.

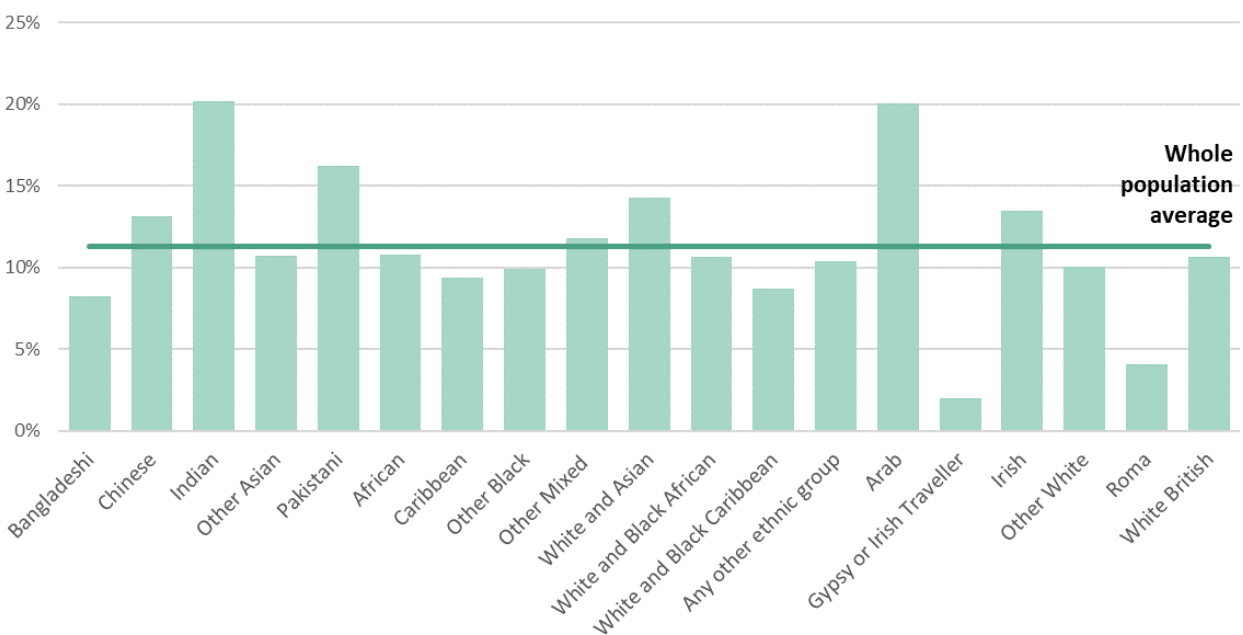
When we analyse the data, controlling for the effects of age, we can see that, while some minority ethnic populations do very well – exceeding population benchmarks on key measures of education, health, and labour market success – there are some minority ethnic groups in Greater Essex that fare much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

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



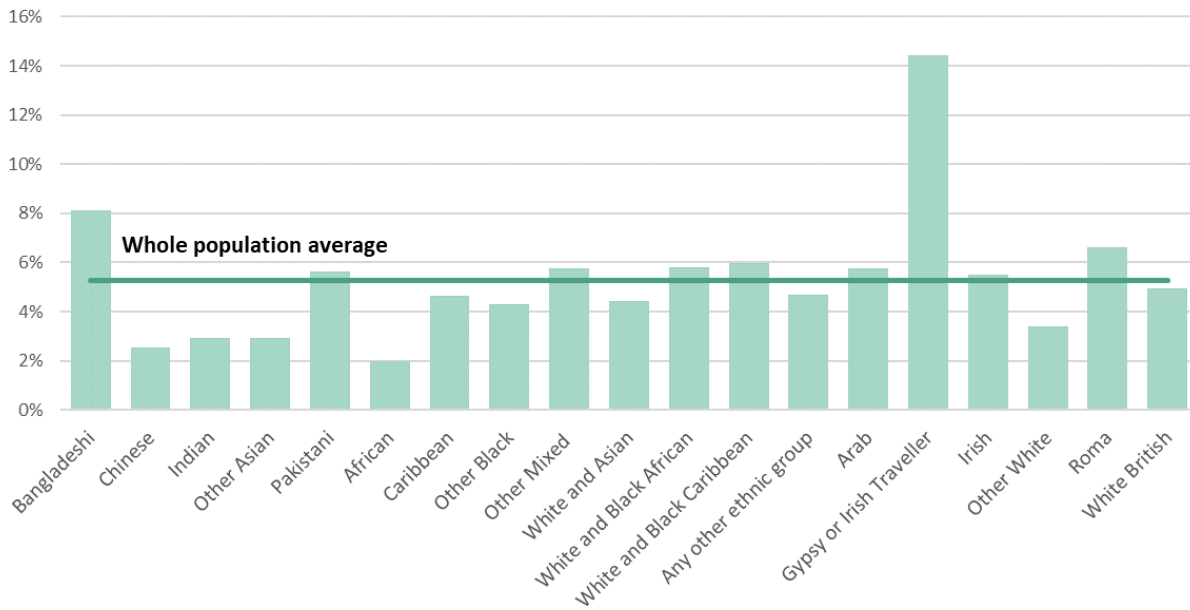
Source: Census 2021

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



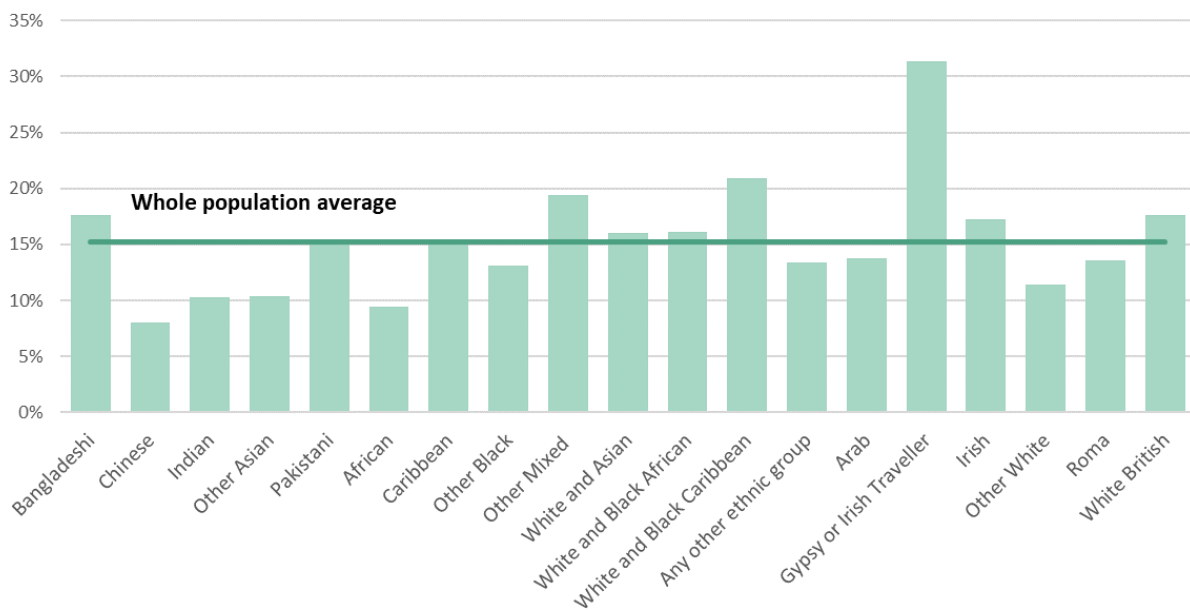
Source: Census 2021

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.

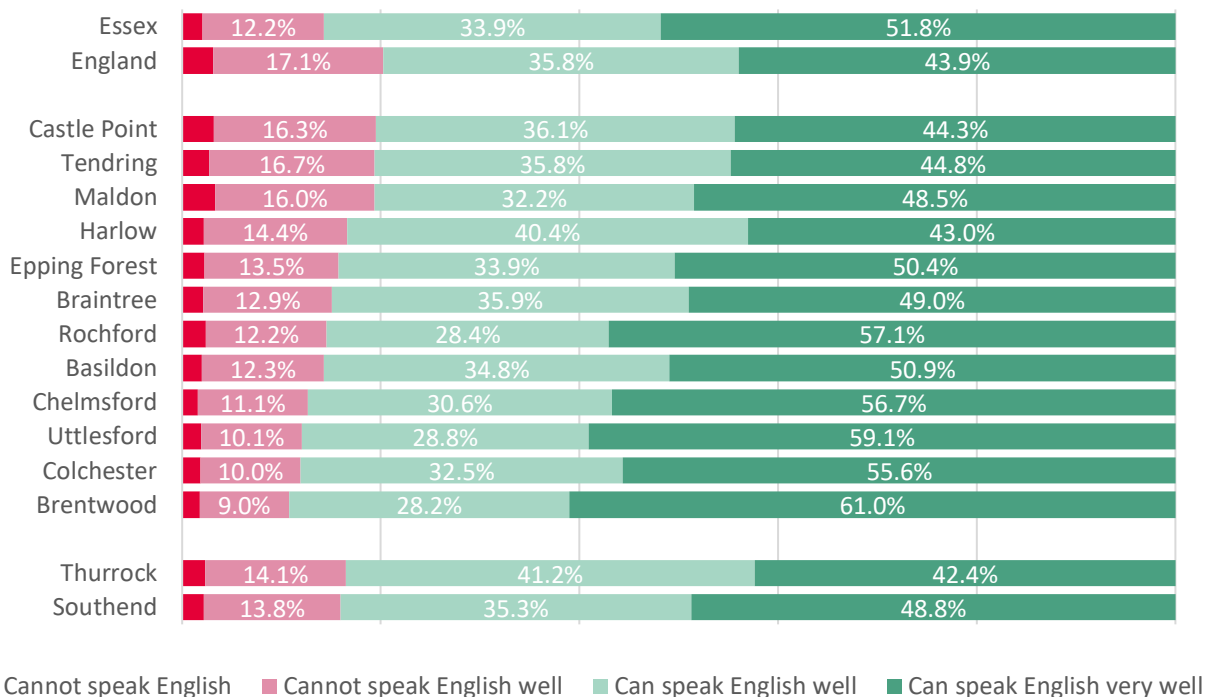
Table PD15: Most common languages other than English, Greater Essex 2021

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

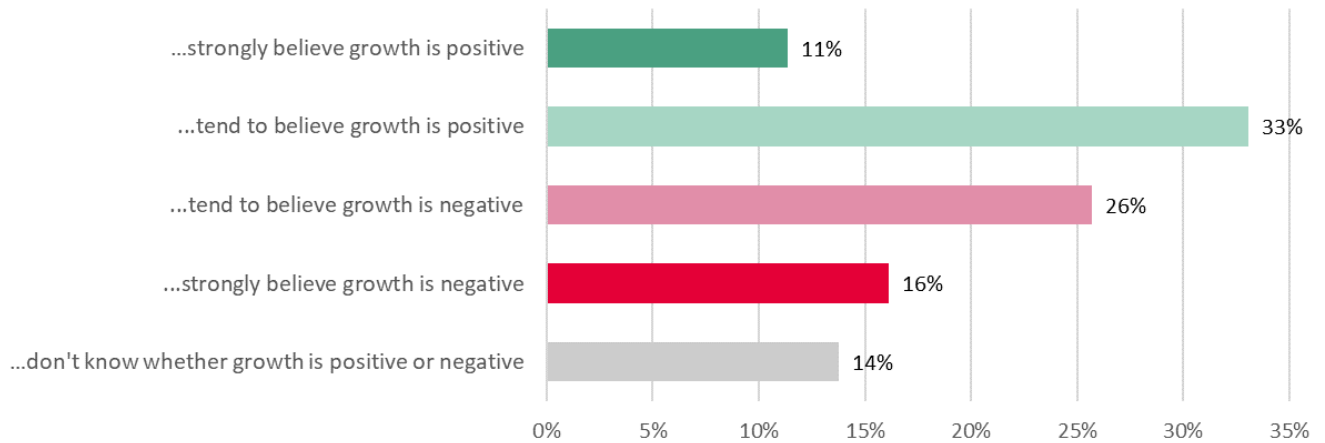


Source: ECC analysis of DLUHC live Table 122 (Net additional dwellings by LA district 2001-02 to 2022-23) and 110 (Dwellings by District and tenure in England, 2022).

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.

Appendices - Data Sources

Population

- Department for Education (2022) '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)'
- Essex County Council (2023) 'Essex Resident Survey 2020 dashboard'. Access: <https://data.essex.gov.uk/dataset/emd8g/essex-resident-survey-2023-dashboard-and-reports>
- Essex County Council (2024) 'Survey of Essex Residents Panel'
- ONS (2001-2022) 'Mid-year Population estimates'
- ONS (2016-2020) 'Detailed internal migration statistics'
- ONS (2021) 'Census 2021'

This information is issued by:
Policy Unit

Contact us:
research@essex.gov.uk

Policy Unit
Essex County Council
County Hall, Chelmsford,
Essex CM1 1QH

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