North Essex Economic Board

# NORTH ESSEX'S ECONOMIC BASELINE

HENHAM STRATEGY


Writtle University College – Chelmsford

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## The North Essex Vision

A proactive, productive and progressive North Essex that advances its economic potential through inward and outward-facing partnerships, with all residents, businesses and visitors benefitting from the region's economic prosperity.

Alongside the North Essex Economic Board's (NEEB) 'North Essex Strategic Narrative', the partnership has undertaken a robust review of national, regional and local datasets to present 'North Essex's Economic Baseline', further informing the 2-year delivery plan presented within the NEEB's 'Delivering for North Essex' plan. This economic baseline has been produced in partnership with Henham Strategy, who have provided an independent voice to the evidencing and identification of the four key strategic priorities and the North Essex Vision. The four strategic priorities will deliver prosperity for the region's residents and businesses, with the 'Delivering for North Essex' plan outlining the short-term actions and long-term ambitions the NEEB will deliver.

**Working together, we can leverage North Essex's core strengths…**

**Our innovative and thriving SME community and cutting edge HE and FE institutions, delivering good, local jobs**

**Our dynamic and competitive renewable energy generation strengths, driving net zero progression**

**Our unique strategic location linked to regional and international partners, supporting inward investment**

**Our proud urban, rural and coastal communities, focused on supporting prosperous residents and businesses**

# Methodology

In November 2022, Henham Strategy commenced work on developing a robustly evidenced North Essex economic baseline, underpinned by a comprehensive desktop and data analysis review process. This exercise allowed for an understanding of the region's economic opportunities, challenges and risks, alongside a comprehension of areas of collaboration that the NEEB could lead on to drive productivity, innovation and economic growth.

The economic baselines draw on existing material from NEEB authorities and their partners, alongside official statistics from the ONS, Essex Open Data, NOMIS, the Thriving Places Index, central government, and other sources. Data findings were also tested and developed through a series of workshops with councillors, officers, key local businesses and Higher Education and Further Education institutions.

## The Data Analysis

To extend and deepen the evidence base and understand how North Essex's economy has comparatively performed in recent years, comparator geographies (and associated data) were used throughout the analysis. As well as using regional level data (at an East of England level) and national data (at an England level), we also analysed four other 'similarly-sized' Local Authority districts that were similar to the NEEB in statistical terms, based on a comparative analysis of publicly available Census 2021 data.

Our approach to the analysis of the four similarly-sized districts is outlined below:

- For each of the six North Essex districts (excluding Essex County Council), we looked at data on 'Population Density', 'Household Size (1 person, 2 people, 3 people, 4 people)', 'Distance Travelled to Work (less than 10km)', 'Distance Travelled to Work (10km and over)', '[Workers] Working Mainly From Home', 'Economically Inactive' and 'Economically Inactive'.

- For each dataset, we found the North Essex average to allow for a comparison to be made to districts across the country we may have wanted to include within our comparative analysis.

- Using the North Essex averages, we found the percentage differences in the statistics recorded for a long list of districts (identified through our strategy analysis stage and an initial analytical review of 'Population Density' data), before calculating the average percentage difference and using this as an indicator to demonstrate which districts were most closely aligned to the six that constitute North Essex.

With North Hertfordshire, Central Bedfordshire, Maidstone and Dover identified as the similarly sized districts, and an awareness of the need to analyse data on a regional and national level (East of England and England as a whole), we conducted our data analysis, bringing together district, county, regional and national level data (where possible) for the years 2017 – 2022. This timeframe was identified to help uncover potential COVID-19 and EU Exit impacts outlined within the datasets analysed.

The findings of the data analysis exercise made clear that there were four themes ('key strategic priorities') that united all seven authorities, from which a coherent and compelling 'North Essex Vision' could be built. These were:

### 1. Innovative Businesses and Skilled Residents

A resilient and outward-facing economy that builds on its incumbent strengths and is positioned to deliver economic opportunities for North Essex's residents, and drive inward investment to support businesses within the region's critical growth sectors.

### 2. A Green and High Growth Economy

A forward-looking economy that utilises the diversity of its resources in a sustainable way that furthers North Essex's clean energy strengths, boosts growth, and promotes residents' prosperity through net zero commitments.

### 3. A Dynamic and Connected Region

A well-connected and digitally-linked region that provides residents with quick and reliable access to key services, encourages inward investment, and makes the most of ties to regional and international neighbours.

### 4. Prosperous and Inclusive Communities

A thriving and inclusive region where all residents and businesses have the opportunity to contribute and prosper, exemplifying the region as a great place to live, work and visit.

## Stakeholder Workshops

In order to test and refine the analysis underpinning the economic baseline, a series of six workshops were held with key local stakeholders, including councillors from each authority, lead council officers, local businesses, business representative groups, Higher Education and Further Education institutions, and others. The objective of each workshop was to test data findings, strengthen insights and conclusions, and understand their priorities for the 2-year delivery plan the NEEB will lead on. These workshops took place in February and March 2023.

The evidence baseline has then informed the 'Delivering for North Essex' plan, as well as the 'North Essex Strategic Opportunities and Challenges' document, which seeks to draw together North Essex's compelling vision around the four key strategic priorities above.

# What has changed since 2019?

As part of the development of North Essex's economic baseline, a robust analysis has been undertaken on the key economic changes that have occurred since 2019, helping to develop an understanding of the current North Essex economic baseline. Predominantly, three key economic events have occurred since the NEEB published its last economic strategy – i) Brexit; ii) COVID-19; and iii) the current cost of living pressures. The impacts of these events on the North Essex economy have been detailed below.

## Brexit

The first significant event that provides the economic context in which North Essex now finds itself in is the UK's formal departure from the EU on 31st January 2020. Over three years on from this moment, North Essex is continuing to adapt to the changing business and trading environment that has resulted. Essex Chamber of Commerce surveys have highlighted the extra challenges now placed upon North Essex's SME community, including the increased cost of purchasing from, and transporting to, the EU, artificially high shipping prices, an increase in paperwork and costs due to extra duty charges, and concerns around exports "standing still"[1]. In addition, these surveys hone in on some of the recruitment challenges now faced as a result of Brexit, with North Essex businesses now finding it particularly challenging to recruit for 'semi/unskilled' roles[2].

With recent Office Budget for Responsibility (OBR) forecasts highlighting some of the negative Brexit consequences – including the UK and the EU's new trading relationship likely to reduce long-run productivity by 4% relative to remaining in the EU (as a result of increased trade barriers) – challenges are likely to remain as North Essex and the UK as a whole adapts to its new global position post-Brexit[3].

## Covid-19

The second significant event that provides the economic context in which North Essex now finds itself in is the onset of COVID-19 and the significant economic, health and social consequences that continue to impact the region and beyond. Unmatched in its impact, the pandemic has led to lasting economic behaviour changes that North Essex has had to adapt to, with these changes considered within the 'Delivering for North Essex' plan.

Like many other regions across the country, North Essex was significantly impacted by the restrictions enforced to protect people from the virus, with the restrictions' impact clearly evidenced by North Essex's claimant count across the pandemic period. Akin to other parts of the country, the region saw large increases in claimant count during the pandemic's onset, with this variable increasing sharply in all of the NEEB's constituent members in March 2020. As the pandemic's first year progressed – and with the furlough scheme's support – the region's claimant count remained roughly around the peak recorded in May 2020. As the Government progressed its roadmap out of lockdown, North Essex's claimant count started to gradually decline, with the rate observed lower than the rate of increase observed in March

[1] Essex Chambers of Commerce. 2022 First Quarter Economic Survey. Source: EssexQ1QuarterlyEconomicSurveyMarch2022.pdf (essexchambers.co.uk)
[2] Essex Chambers of Commerce. 2022 First Quarter Economic Survey. Source: EssexQ1QuarterlyEconomicSurveyMarch2022.pdf (essexchambers.co.uk)
[3] Office for Budget Responsibility (OBR). Brexit Analysis (2022). Source: Brexit analysis - Office for Budget Responsibility (obr.uk)

2020[4]. This reflects the difficulty people faced getting back into work over the reopening period as the furlough scheme began to wind down.

Whilst the claimant count has fallen across the North Essex authorities following the pandemic period, COVID-19 has left a worrying and long-lasting economic trend that has gained much attention. This trend is the rise in economic inactivity across the pandemic years (2019 – 2020 and 2020 – 2021) and the observation that economic inactivity rates across the country have remained high relative to pre-pandemic levels. This has been observed within North Essex, with **Figure 1** outlining how the North Essex average economic inactivity rate rose considerably at the start of the pandemic (rising from 16.9% to 20.2% between 2018 – 2019 and 2019 – 2020), and stayed above pre-pandemic levels in 2021 – 2022 at 19.5%. Whilst the majority of North Essex's authorities have seen a fall in their economic inactivity rates in 2021 – 2022, Chelmsford (18.3%) and Tendring (32.1%) saw increases in this year, with Tendring facing particular challenges in reversing the economic inactivity pandemic trend observed[5].

The cause of this rise in economic inactivity has been much debated, from an increase in early retirees to childcare costs making it unviable for parents to return to the workplace.

| North Essex Economic Inactivity (%) (2017 – 2022) | | | | | |
|---|---|---|---|---|---|
| **Area** | **2017 – 2018** | **2018 – 2019** | **2019 – 2020** | **2020 – 2021** | **2021 – 2022** |
| **Braintree** | 11.3 | 14.4 | 16.5 | 15.6 | 14.8 |
| **Colchester** | 17.8 | 12.0 | 17.1 | 20.0 | 18.3 |
| **Chelmsford** | 15.3 | 20.1 | 16.5 | 15.8 | 18.3 |
| **Tendring** | 17.1 | 20.7 | 31.3 | 31.3 | 32.1 |
| **Maldon** | 17.0 | 15.3 | 21.0 | 21.5 | 15.3 |
| **Uttlesford** | 19.4 | 18.9 | 18.8 | 24.3 | 18.0 |
| **Essex** | 18.4 | 19.7 | 20.2 | 20.6 | 18.9 |
| **North Essex Average** | **16.3** | **16.9** | **20.2** | **21.4** | **19.5** |

*Figure 1: North Essex Economic Inactivity Rates (2017 – 2022)*

[4]Essex Open Data. COVID-19 Economic Impacts Report (2022). Source: COVID-19 Economic Impacts Report | Essex Open Data

[5] NOMIS. Labour Market Profiles (Essex) (2022). Source: Labour Market Profile - Nomis - Official Census and Labour Market Statistics (nomisweb.co.uk)

Away from North Essex's changed economic inactivity picture, the final COVID-19 related change to note is the dramatic adoption and acceptance of hybrid working within workplaces across the region. With little choice during lockdowns, much of the working world switched to full working from home arrangements, with today's working arrangements for many businesses reflective of employees' desire to keep some element of home working, alongside commuting to collaborative office spaces. This change in workplace attitudes it illustrated when comparing Census 2021 and 2019 ONS working from home data. **Figure 2** below illustrates the Census 2021 data collated for the North Essex authorities, with Tendring the North Essex authority that recorded the lowest proportion of its workers working from home – 22.9% – and Uttlesford the highest proportion – 39.4% – in 2021[6]. These figures are significantly higher than the ONS data collated in 2019 for the East of England as a whole that outlined that only 5.5% of workers in this region worked mainly from home prior to the pandemic's onset[7].

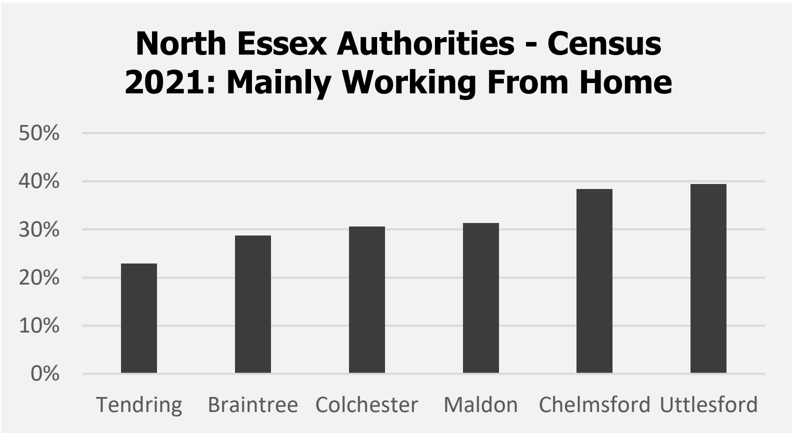


*Figure 2: North Essex Authorities – Census 2021: Mainly Working from Home*

The increase and continued retention of hybrid working patterns within the workplace has had a significant impact on the structure of regional economies, with commuting patterns, high street footfall and retail/leisure expenditure all still being impacted by the new ways of working. This impact has been considered during the development of the 'Delivering for North Essex' plan, with a strong awareness of the impact this critical change has had on the North Essex economy.

## Cost of Living Pressures

The impact of the continued cost of living pressures within North Essex is best evidenced through published Essex Open Data[8]. Through in-depth interviews with 20 participants from across Essex, an understanding has been collated on experiences around the increasing cost of living; the impact this is having on people's day-to-day lives as well as bigger life decisions being made or considered; and what things may help ease pressures. Key points from this research include:

[6] ONS. Percentage of workers who work mainly at or from home (Census 2021). Source: [Method of travel to workplace - Census Maps, ONS]
[7] ONS. Coronavirus and Homeworking in the UK Labour Market: 2019. Source: [Coronavirus and homeworking in the UK labour market - Office for National Statistics (ons.gov.uk)]
[8] Essex Open Data. Cost of Living Qualitative Research (2023). Source: [Cost of living qualitative research | Essex Open Data]

- **Some are experiencing the cost-of-living increase much more harshly than others.** Groups particularly impacted include those not working and in receipt of welfare (due to disabilities), families with children where only one parent is working, and single parent families.

- **The cost of living is impacting on day-to-day wellbeing, as well as life decisions and milestones.** Many residents across Essex feel they are 'surviving' rather than living due to the removal of non-essential spending from budgets, whilst some are struggling to even afford the essentials such as food and heating. Many are also postponing key life-decisions.

- **All are making lifestyle changes and cutbacks, but some residents have no other options to address cost of living pressures.** Essex residents are making lifestyle changes to save money, with these including small behaviour changes to more significant sacrifices.

The challenges many North Essex residents have faced in light of the recent cost of living pressures are widely acknowledged, with this macroeconomic impact a key difference considered since publication of the 2019 economic strategy.

# North Essex's Strategic Priorities

## 1. Innovative Businesses and Skilled Residents

The data analysis was clear that North Essex has incumbent key sector strengths, growth sector potential and SME foundations that are robust building blocks for future economic growth.

In regard to North Essex's incumbent sector strengths, the most recent Gross Value Added (GVA) data, which measures economic contribution, demonstrates North Essex's several incumbent sector strengths. First and foremost, the region benefits from a strong 'Real Estate and Activities' sector, with this contributing £3.1 billion of GVA to the North Essex economy in 2020[9]. This sector produced the greatest output for all six North Essex authorities in 2020. **Figure 3** outlines the top three sectors – in terms of GVA – for every North Essex authority in 2020.

| North Essex Authorities – Top 3 Sectors (GVA) in 2020 | | | | | |
|---|---|---|---|---|---|
| **Braintree** | | | **Chelmsford** | | |
| No. | Sector | Value (m) | **No.** | Sector | Value (m) |
| 1 | Real estate activities | £500 | 1 | Real estate activities | £820 |
| 2 | Financial and insurance activities | £433 | 2 | Wholesale and retail trade; repair of motor vehicles | £568 |
| 3 | Wholesale and retail trade; repair of motor vehicles | £374 | 3 | Construction | £544 |
| **Colchester** | | | **Maldon** | | |
| **No.** | Sector | Value (m) | **No.** | Sector | Value (m) |
| 1 | Real estate activities | £726 | 1 | Real estate activities | £235 |
| 2 | Human health and social work activities | £548 | 2 | Construction | £192 |
| 3 | Wholesale and retail trade; repair of motor vehicles | £492 | 3 | Manufacturing | £188 |
| **Tendring** | | | **Uttlesford** | | |
| **No.** | Sector | Value (m) | **No.** | Sector | Value (m) |
| 1 | Real estate activities | £426 | 1 | Real estate activities | £406 |
| 2 | Wholesale and retail trade; repair of motor vehicles | £250 | 2 | Construction | £249 |
| 3 | Manufacturing | £167 | 3 | Transportation and Storage | £222 |

*Figure 3: North Essex Authorities – Top 3 Sectors (GVA) in 2020*

[9] ONS. Regional Gross Value Added (balanced) by industry: local authorities by ITL1 region (2022). Source: Regional gross value added (balanced) by industry: local authorities by ITL1 region - Office for National Statistics (ons.gov.uk)

Alongside North Essex's incumbent strengths in 'Real Estate Activities', the region also has strengths within the 'Wholesale and retail trade; repair of motor vehicles', 'construction' and 'manufacturing' sectors. It is also important to note the diversity present within North Essex's economy – with Braintree having a specific incumbent strength within the 'Financial and insurance activities' sector and Colchester seeing a specific incumbent strength within the 'Human health and social work activities' sector.

Building on the understanding of North Essex's incumbent sector strengths, it is important to reflect on the number of businesses that operate within certain sectors, to provide a picture of where North Essex's most prominent employment opportunities can be found. Referring to ONS Business Count data, we see that the sector with the greatest number of businesses within North Essex, in 2022, was the 'Construction' sector, with a total of 6,885 businesses[10]. Aligning to this observation, the same data indicates that the 'Construction' sector saw the greatest increase in the number of businesses within North Essex between 2017 and 2022, with 1,305 businesses establishing themselves within this sector[11]. **Figure 4** outlines the top 3 sectors that saw the greatest increase in businesses between 2017 and 2022 within North Essex.

[10] NOMIS. UK Business Counts – enterprises by industry and employment size band (2022). Source: UK Business Counts - enterprises by industry and employment size band - Nomis - Official Census and Labour Market Statistics (nomisweb.co.uk)
[11] NOMIS. UK Business Counts – enterprises by industry and employment size band (2022). Source: UK Business Counts - enterprises by industry and employment size band - Nomis - Official Census and Labour Market Statistics (nomisweb.co.uk)

| North Essex Authorities – Top 3 Sectors in terms of business increase (2017 – 2022) | | | | | |
|---|---|---|---|---|---|
| **Braintree** | | | **Chelmsford** | | |
| No. | Sector | Number of Businesses | **No.** | Sector | Number of businesses |
| 1 | Construction | 165 | 1 | Construction | 225 |
| 2 | Administrative and support service activities | 85 | 2 | Wholesale and retail trade; repair of motor vehicles and motorcycles | 110 |
| 3 | Accommodation and food service activities | 60 | 3 | Transportation and storage | 75 |
| **Colchester** | | | **Maldon** | | |
| **No.** | Sector | Number of Businesses | **No.** | Sector | Number of Businesses |
| 1 | Construction | 450 | 1 | Construction | 100 |
| 2 | Transportation and storage | 250 | 2 | Accommodation and food service activities | 40 |
| 3 | Administrative and support service activities | 167 | 3 | Real Estate Activities | 20 |
| **Tendring** | | | **Uttlesford** | | |
| **No.** | Sector | Number of Businesses | **No.** | Sector | Number of Businesses |
| 1 | Construction | 160 | 1 | Construction | 205 |
| 2 | Transportation and storage | 100 | 2 | Administration and support service activities | 100 |
| 3 | Accommodation and food service activities | 65 | 3 | Accommodation and food service activities | 25 |

*Figure 4: North Essex Authorities – Top 3 Sectors in terms of business increase (2017 – 2022)*

The large number of businesses operating within North Essex's 'Construction' sector reflects another important characteristic of the region's business landscape – the large proportion of SMEs delivering North Essex's economic output. The UK defines an SME as an enterprise that employs fewer than 250 employees, with **Figure 5** illustrating the high proportion of SMEs operating within North Essex. 90% of North Essex's businesses are defined as 'Micro', meaning they employ between 0 and 9 employees. Illustrating the importance of this North Essex characteristic further, there were only 95 businesses within North Essex defined as 'Large', meaning they employ over 250 people in 2022, with these businesses accounting for just 0.3% of North Essex's business population[12].

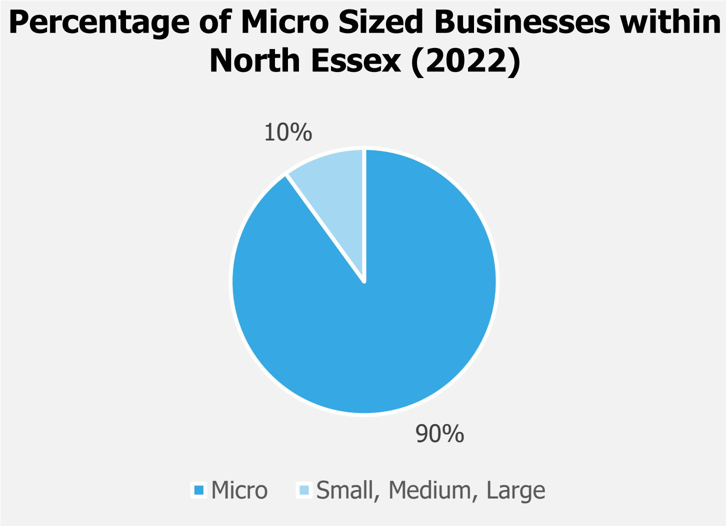


*Figure 5: Percentage of Micro Sized Business within North Essex (2022)*

Away from North Essex's incumbent business strengths and characteristics, Cambridge Insights' forecasts provide a view on the roles that are likely to see the greatest growth in terms of employment in the lead up to 2040. Given population growth and areas of North Essex having relatively high levels of elderly residents, it is no surprise that for some of the North Essex authorities – Chelmsford, Uttlesford and Maldon – 'Caring Personal Service Occupations' roles are expected to see the greatest employment growth over this time period. For Braintree and Colchester, employment growth over this time period is expected to be greatest within 'Skilled Agricultural Trades' roles, whilst for Tendring, the authority is expected to see the greatest employment growth in terms of 'Corporate Managers'[13]. **Figure 6** outlines the top three roles the Cambridge Insight modelling suggests will see the greatest percentage increase in employment growth leading up to 2040 for each North Essex authority.

[12] NOMIS. UK Business Counts – enterprises by industry and employment size band (2022). Source: Nomis - Official Census and Labour Market Statistics - Nomis - Official Census and Labour Market Statistics (nomisweb.co.uk)
[13] Cambridge Insight. East of England Forecasting Model (EEFM) (2019). Source: Cambridgeshire Insight – East of England Forecasting Model (EEFM)

| North Essex Authorities – Top 3 roles in terms of expected employment increases (up to 2040) | | | | | |
|---|---|---|---|---|---|
| **Braintree** | | | **Chelmsford** | | |
| No. | Sector | % increase | **No.** | Sector | % increase |
| 1 | Skilled Agricultural Trades | 57 | 1 | Caring Personal Services Occupations | 34 |
| 2 | Caring Personal Services Occupations | 33 | 2 | Corporate Managers | 31 |
| 3 | Health and Social Welfare Associate Professionals | 27 | 3 | Health and Social Welfare Associate Professionals | 30 |
| **Colchester** | | | **Maldon** | | |
| **No.** | Sector | % increase | **No.** | Sector | % increase |
| 1 | Skilled Agricultural Trades | 44 | 1 | Caring Personal Service Occupations | 40 |
| 2 | Caring Personal Services Occupations | 41 | 2 | Health and Social Welfare Associate Professionals | 33 |
| 3 | Managers and Proprietors in Agriculture and Services | 39 | 3 | Customer Service Occupations | 33 |
| **Tendring** | | | **Uttlesford** | | |
| **No.** | Sector | % increase | **No.** | Sector | % increase |
| 1 | Corporate Managers | 39 | 1 | Caring Personal Services Occupations | 47 |
| 2 | Caring Personal Service Occupations | 38 | 2 | Health and Social Welfare Associate Professionals | 37 |
| 3 | Customer Service Occupations | 37 | 3 | Health Professionals | 37 |

*Figure 6: North Essex Authorities – Top 3 roles in terms of expected employment increases, up to 2040. The percentage increase has been calculated by taking the number jobs in 2022 and finding the percentage difference between the expected number of jobs in 2040*

This analysis links to the strategic analysis undertaken by the North Essex authorities within their own economic strategies, with Essex CC's Sector Development Strategy providing insights into the growth sectors that North Essex – and the broader county – are expected to prioritise over the coming years to boost economic growth and drive prosperity across the region. These growth sectors are expected to focus on 'Construction and Retrofit', 'Clean Energy', 'Advanced Manufacturing and Engineering', 'Digital Tech' and 'Life Sciences'[14]. These

[14] Essex County Council. Essex Sector Development Strategy (2022). Source: Plans and strategies: Sector development strategy - Essex County Council

growth sectors build on North Essex's incumbent strengths outlined within the data above, and will provide new and career progressing jobs for many residents across the region.

Shifting focus to the skilled residents elements of this strategic priority, to secure the good jobs the North Essex region is expected to benefit from, North Essex's residents need to have the opportunities and confidence to develop requisite skills.

When looking at North Essex's current skills levels, it is clear there is a divergence in attainment across the region. The latest Census 2021 data has been used to establish the skills baseline for the NEEB's 2-year delivery plan, providing detail of the relative skills attainment levels across the North Essex region. **Figure 7** outlines the North Essex average in terms of skills attainment at differing levels, and how these figures compare to regional and national comparators.

| **Skills Attainment (2021) – North Essex, East of England and England as a whole** | | | | |
|---|---|---|---|---|
| **Area** | **No Qualifications** | **Apprenticeships** | **NVQ Levels 1, 2 and 3** | **NVQ Level 4** |
| **North Essex Average** | 18.1% | 5.8% | 44.5% | 29.0% |
| **East of England** | 18.1% | 5.5% | 42.0% | 31.6% |
| **England as Whole** | 18.2% | 5.3% | 39.9% | 33.9% |

*Figure 7: Skills Attainment (2021) across North Essex, the East of England and England as a whole*

North Essex performs relatively well compared to the East of England and England as a whole when it comes to mid-lower skills level attainment, with a higher proportion of its working age population involved in apprenticeships and having attained NVQ skills up to level 3 (equivalent to 2 or more A levels or VCEs, 4 or more AS levels) when compared to regional and national comparators. Despite this success, North Essex compares less favourably when considering the proportion of its working age population that has secured skills at NVQ level 4 and above (equivalent to a degree (BA, BSc) or higher degree (MA, PhD, PGCE)), with both the East of England and England as a whole recording higher percentages for this skills metric. This suggests North Essex has a relatively smaller proportion of high skilled workers compared to the regional and national comparators[15].

Alongside comparing the North Essex average to the regional and national comparators, it is also important to note the differences in skills attainment seen within the North Essex region. Taking the 'NVQ Levels 1, 2 and 3' and 'NVQ Level 4' metrics, there is a clear divergence in the proportion of lower and higher skilled workers across the North Essex authorities. This diversity is highlighted in **Figure 8**.

[15] ONS. Education: Highest level of qualification (Census 2021). Source: Highest level of qualification - Census Maps, ONS

| Skills Attainment (2021) – Lower and Higher Skilled Workers Divergence across North Essex | | |
|---|---|---|
| **Area** | **NVQ Levels 1, 2 and 3** | **NVQ Level 4** |
| **Braintree** | 47.2% | 25.8% |
| **Chelmsford** | 43.1% | 33.9% |
| **Colchester** | 44.6% | 32.2% |
| **Maldon** | 45.9% | 25.4% |
| **Tendring** | 43.8% | 19.9% |
| **Uttlesford** | 42.3% | 36.6% |

*Figure 8: Skills Attainment (2021) – Lower and Higher Skilled Workers Divergence across North Essex*

Whilst there is some consistency to the proportion of workers across the North Essex authorities with skills attained up to NVQ level 3, there is a strong divergence when reviewing the proportion of working age populations within the North Essex authorities that have attained skills at NVQ level 4 and above. This divergence is observed by the difference between the highest ranking North Essex authority for this metric – Uttlesford – and the lowest ranking North Essex authority for this metric – Tendring – with a difference of 16.7% recorded[16]. This diversity in skills attainment across the region is an important consideration within the NEEB's 'Delivering for North Essex' plan.

Whilst local authority data for T levels is not available, apprenticeship data provides some insight into the kind of vocational training available. The 2021 – 2022 data is shown in **Figure 9**. The number of apprenticeship uptakes are expectedly higher in Colchester and Chelmsford, as the urban districts, and lower in Uttlesford and Maldon, as the more rural districts. Tendring sees higher than expected levels of apprenticeship starts, closer to Braintree's numbers. One significant trend is low, although similar, levels of vocational attainment across authorities[17].

| Apprenticeship Starts and Achievements (2021 – 2022) | | | |
|---|---|---|---|
| **Area** | **Starts** | **Achievement** | **Participation** |
| **Braintree** | 870 | 360 | 1850 |
| **Chelmsford** | 1030 | 450 | 2240 |
| **Colchester** | 1060 | 440 | 2230 |
| **Maldon** | 360 | 130 | 790 |
| **Tendring** | 800 | 310 | 1680 |
| **Uttlesford** | 490 | 170 | 980 |

*Figure 9: Apprenticeship Starts and Achievements (2021 – 2022)*

Finally, on skills, it is worth noting the productivity of North Essex's working population, with this being a key factor in driving economic growth. Referring to ONS data outlining the GVA per hour worked, the North Essex region has seen an increase in productivity since 2017,

[16] ONS. Education: Highest level of qualification (Census 2021). Source: Highest level of qualification - Census Maps, ONS
[17] GOV.UK. Apprenticeships and traineeships. Source: Apprenticeships and traineeships, Academic year 2022/23 – Explore education statistics – GOV.UK (explore-education-statistics.service.gov.uk)

recording a figure of £32.4 in 2020[18]. **Figure 10** illustrates this increase and shows how the region compares to the East of England and England as a whole.

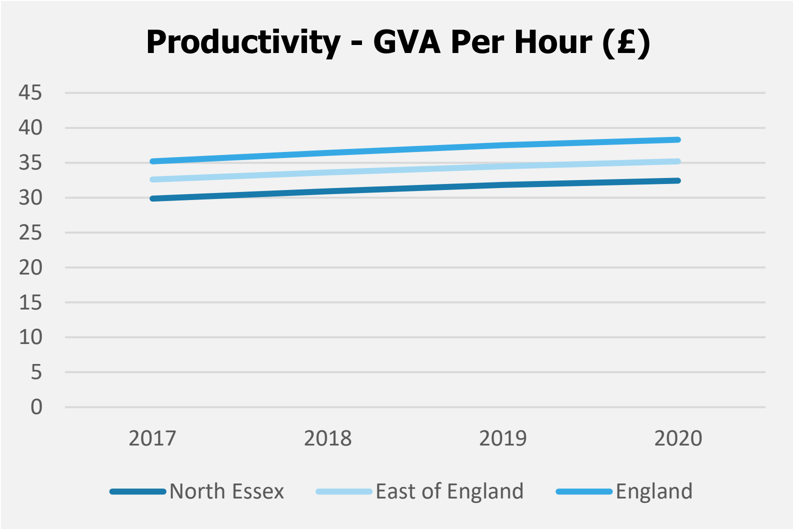


*Figure 8: Productivity – GVA per hour (£) for the North Essex region, East of England and England as a whole between 2017 and 2020*

Whilst North Essex's productivity has been rising between 2017-2020, the region's productivity has consistently ranked below that of the East of England and England as a whole. The differences in 2020 are quite significant, with the East of England's GVA per hour £2.8 greater in 2020, and England as whole £5.9 greater[19]. With North Essex lagging behind regional and national productivity comparators, it is essential actions are delivered to drive up productivity to help boost economic growth in the region.

## 2. A Green and High Growth Economy

Local Authorities across the country are playing a vital role in supporting the UK to achieve its net zero objectives. In terms of establishing North Essex's baseline for this area, data on the region's renewable electricity capacity and generation has been collated, alongside data on attitudes towards the green economy and progress made in making households across the region more energy efficient.

Starting with renewable electricity capacity and generation, North Essex has the potential to build on its incumbent strengths in this space, positioning itself as a renewable energy exemplar. In 2021, the North Essex region had a renewable electricity capacity of 563.3 MW, with this capacity generating roughly 1 million MWh of renewable electricity in the same year[20]. The regional renewable electricity strengths are driven by three main sources of energy – onshore wind, offshore wind and solar power, with **Figure 11** outlining the amount of renewable electricity each of the North Essex authorities generated from these sources in 2021.

[18] ONS. Subnational productivity: labour productivity indices by local authority district (2022). Source: Subregional productivity: labour productivity indices by local authority district - Office for National Statistics (ons.gov.uk)
[19] ONS. Subnational productivity: labour productivity indices by local authority district (2022). Source: Subregional productivity: labour productivity indices by local authority district - Office for National Statistics (ons.gov.uk)
[20] BEIS. National Statistics – Regional Renewable Energy Statistics. Source: Regional Renewable Statistics - GOV.UK (www.gov.uk)

| North Essex's Renewable Electricity Generation (2021) (MWh) | | | |
|---|---|---|---|
| **Area** | **Onshore Wind** | **Offshore Wind** | **Solar Power** |
| **Braintree** | 132 | 0 | 31,720 |
| **Chelmsford** | 76 | 0 | 10,783 |
| **Colchester** | 85 | 0 | 83,745 |
| **Maldon** | 152,931 | 0 | 10,311 |
| **Tendring** | 28,122 | 513,080 | 71,442 |
| **Uttlesford** | 41 | 0 | 44,322 |

*Figure 9: North Essex's Renewable Electricity Generation (2021) (MWh) from onshore wind, offshore wind and solar power sources*

Both Maldon and Tendring have particular strengths when it comes to onshore wind generation, whilst Tendring – given its coastal characteristics – is the only North Essex authority to benefit from offshore wind renewable electricity generation. In contrast to these sources of renewable electricity – where there are clear divergences in generation – all of the North Essex authorities generate a good amount of renewable electricity from solar power, with Colchester leading the way when considering this energy source. Building on these renewable electricity generation strengths will be essential as the region looks to benefit from the green skills and jobs required to deliver net zero commitments.

Away from the region's renewable electricity capacity and generation statistics, another important aspect to understanding North Essex's green economy baseline is residents' attitudes towards the green economy and the extent to which residents are invested in supporting the delivery of net zero commitments. As a proxy for this measurement, data has been collated on the North Essex authorities' recycling rates, with a high recycling rate taken as an indication of residents' willingness to support the environment and avert negative climate consequences**. Figure 12** outlines the recycling rates for the six NEEB authorities[21].

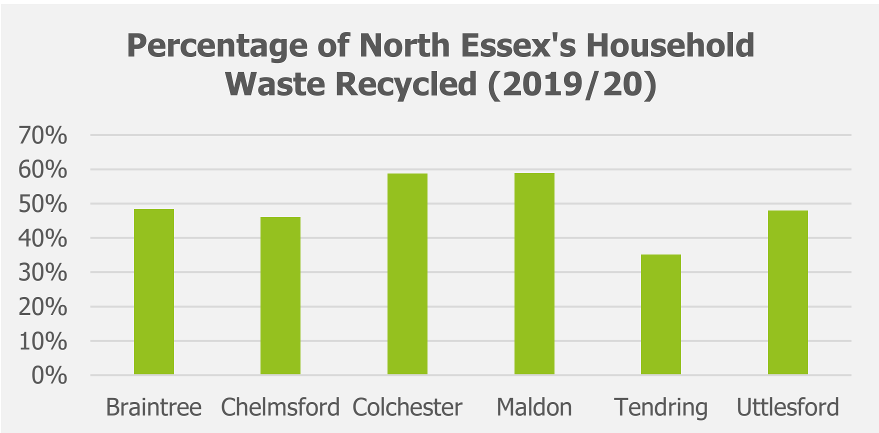


*Figure 10: Percentage of North Essex's Household Waste Recycled (2019/20)*

[21] NimbleFins. Which English Councils are best and worst at recycling? Top 10 and bottom 10 revealed. Source: [Which English Councils are Best and Worst at Recycling? Top 10 and Bottom 10 Revealed | NimbleFins]

There is a divergence across North Essex in terms of household waste recycling rates, with Tendring having the lowest recycling rates, and Maldon the highest. Whilst an interesting perspective on the relative green engagement within North Essex, it is important to consider how these rates compare to other local authorities across the country, to have a view on how the North Essex region compares to other areas when it comes to green engagement. Reviewing broader local authority data available, all North Essex's authorities – aside from Tendring – ranked in the top 50% of local authorities in terms of household waste recycled, with Colchester and Maldon ranking in the top 25%[22]. This suggests there is a fairly positive engagement with green actions, when taking household recycling rates as a proxy for this engagement. However, it does appear that progress is needed with regards to attitudes towards the green economy, with Essex recording a relatively low level of conversation sites in positive management (36%) compared to some of its neighbours, including Norfolk who recorded a positive management rate of 74% in 2021/22[23].

In addition to household waste recycling rates and positive conservation site management, another important statistic to consider when understanding North Essex's green economy baseline is the extent to which its households are energy efficient across the region, with the type of central heating used within households a useful metric to consider when understanding a region's relative green impact. Using Census 2021 data, **Figure 13** provides a view on how the North Essex region compares to the East of England and England as a whole in terms of the type of central heating utilised within households[24].

| Percentage Central Heating Source (2021) – North Essex, East of England and England as whole | | | | |
|---|---|---|---|---|
| **Area** | **Mains Gas Only** | **Electric Only** | **Oil Only** | **Renewable Energy Only** |
| **North Essex Average** | 66.0% | 9.8% | 10.5% | 0.7% |
| **East of England** | 70.1% | 9.5% | 7.2% | 0.7% |
| **England as Whole** | 74.0% | 8.7% | 3.2% | 0.4% |

*Figure 11: Type of Central Heating (2021) – North Essex, East of England and England as a whole (main types of central heating – alongside renewable energy only source)*

[22] NimbleFins. Which English Councils are best and worst at recycling? Top 10 and bottom 10 revealed. Source: Which English Councils are Best and Worst at Recycling? Top 10 and Bottom 10 Revealed | NimbleFins
[23] GOV.UK. ENV10 – Local sites in positive conservation management. Source: ENV10 - Local sites in positive conservation management - GOV.UK (www.gov.uk)
[24] ONS. Housing. Type of central heating in household. (Census 2021). Source: Type of central heating in household - Census Maps, ONS)

Whilst North Essex records a similar percentage to the East of England and England as a whole when considering renewable energy only and electric-only central heating, there are strong divergences when it comes to mains gas only and oil only. Less central heating is provided in North Essex through mains gas and more through oil, when compared with the regional and national comparators. The relatively high proportion of central heating systems being fuelled by oil only is largely explained by the relatively high proportion of this fuel being used within Maldon, Tendring and Braintree, as **Figure 14** demonstrates.

| **Percentage of Central Heating Fuelled by Oil Only in North Essex (2021)** | |
|---|---|
| **Area** | **Percentage** |
| **Braintree** | 10.8% |
| **Chelmsford** | 5.3% |
| **Colchester** | 6.2% |
| **Maldon** | 19.8% |
| **Tendring** | 4.7% |
| **Uttlesford** | 16.3% |

*Figure 12: Percentage of Central Heating Fuelled by Oil Only in North Essex (2021)*

Central to North Essex's future economic prosperity will be the effective transition to a green and high-growth economy, with the data above illustrating how the region can look to build on its strong renewable electricity generation foundations, facilitate further resident engagement to promote the importance of green actions, and continue to work to consider how households can be made more energy efficient through the use of cleaner energy sources. This has all been considered within the development of North Essex's 2-year delivery plan.

## 3. A Dynamic and Connected Region

With the green and high-growth economy strategic priority referencing key aspects of North Essex's green economy infrastructure, it is appropriate that the next area central to the region's baseline focuses on broader transport and digital infrastructure, critical enablers for economic growth.

Starting with transport, it is clear a rural/urban divide exists within the region, with those from the more rural authorities – in particular Maldon and Uttlesford – facing greater transport challenges when compared to the more urban authorities of Colchester and Chelmsford. This divide is best evidenced by 2019 data that illustrates the time it takes to get to key services by public transport/walking. As highlighted in **Figure 15**, the more rural authorities of Maldon and Uttlesford see the greatest time taken to get to key services by public transport/walking, with average journey times of 28 and 27 minutes respectively when travelling by these modes of transport. In contrast, North Essex's more urban authorities – Colchester and Chelmsford – see much shorter average journey times, 19 and 18 minutes respectively[25].

[25] Department for Transport. Officials Statistics – Journey time statistics, England: 2019. Source: [Journey time statistics, England: 2019 - GOV.UK (www.gov.uk)]

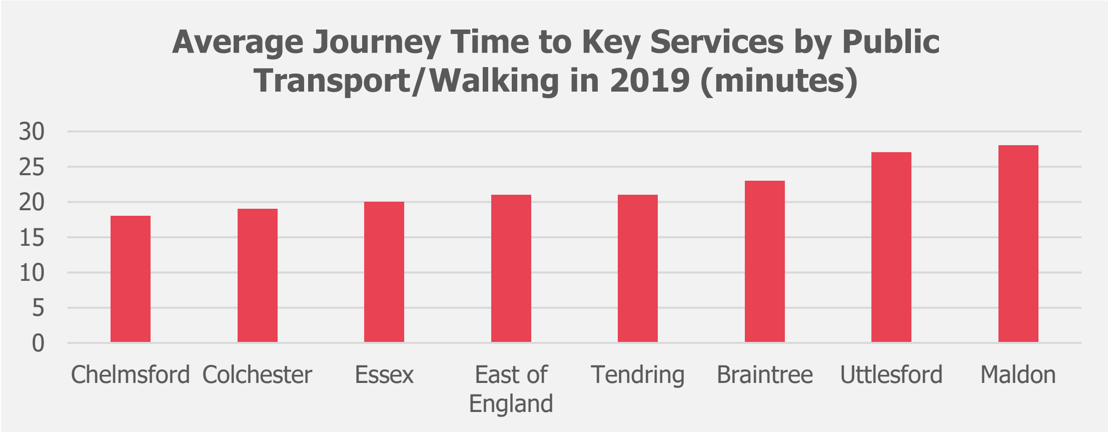


*Figure 13: Average Journey Time to Key Services by Public Transport/Walking in 2019 (minutes)*

In addition to analysing North Essex's public transport infrastructure – and the divergence in coverage across the region – Census 2021 data has been used as a way of understanding the demands placed on the different parts of the region's transport infrastructure when its residents travel to work. Whilst some of the travel to work Census 2021 data is likely to have been impacted by the COVID-19 restrictions that were in place during the first half of 2021, this data provides a proxy for the relative demand for different modes of transport when residents within the North Essex region are travelling to work.

The first Census 2021 travel to work data to note is the relative distances those living in different parts of North Essex travel to get to work. As **Figure 16** demonstrates, there is once again a rural/urban divide within North Essex, with a greater proportion of residents from the more rural North Essex authorities having to travel more than 10km to get to work, with Braintree the North Essex authority with the highest proportion when considering this metric[26].

| Proportion of workers travelling more than 10km to get to work (2021) | |
|---|---|
| **Area** | **Percentage** |
| **Braintree** | 29.7% |
| **Maldon** | 28.8% |
| **East of England** | 26.3% |
| **Uttlesford** | 26.2% |
| **Tendring** | 25.6% |
| **Essex** | 22.6% |
| **England** | 21.8% |
| **Chelmsford** | 20.1% |
| **Colchester** | 18.7% |

*Figure 14: Proportion of workers travelling more than 10km to get to work (2021)*

[26] ONS. Work: Distance travelled to work (Census 2021). Source: Distance travelled to work - Census Maps, ONS

In a similar fashion to the average journey time to key services by public transport/walking statistics, it is only Colchester and Chelmsford that recorded statistics less than those recorded for Essex, the East of England and England as a whole – reflective of the authorities' urban characteristics.

Linked to the distances travelled to get to work, much of the congestion seen on North Essex's critical roads – including the A120, A12 and A131 – can be explained by the dominance of the use of cars/vans as the main mode of transport for getting to work in North Essex. As **Figure 17** demonstrates, car/van use is particularly prominent within Tendring, Braintree and Maldon as the main mode of transport to get to work, with these authorities ranking above the percentages recorded for Essex, the East of England and England as a whole. Once again, it is North Essex's more urban authorities – Chelmsford and Colchester – where we see the lowest use of cars/vans, with Uttlesford – likely due to the high proportion of its workers working mainly from home – also recording relatively low car/van use in journeys to work[27].

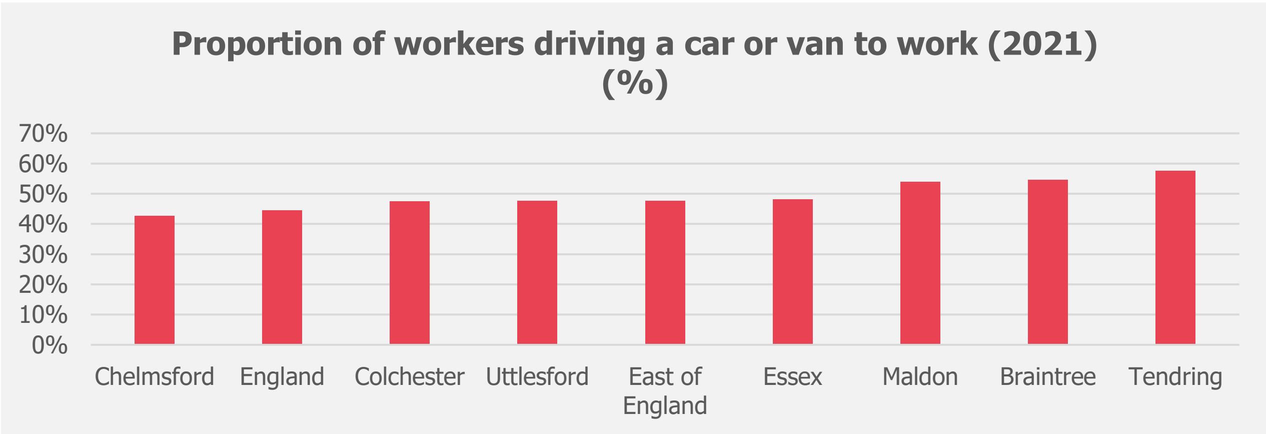


*Figure 17: Proportion of workers driving a car or van to work (2021) (%)*

From an active travel perspective, it is also worth noting that the only two North Essex authorities to rank above figures recorded for the East of England and England as a whole for the proportion of workers travelling to work on foot are Colchester and Tendring. As **Figure 18** demonstrates, the North Essex authorities with the lowest percentages of workers walking to work are Maldon and Uttlesford, with these two North Essex authorities ranking below the figure recorded for Essex CC[28].

[27] ONS. Work: Method of travel to workplace (Census 2021). Source: Method of travel to workplace - Census Maps, ONS
[28] ONS. Work. Method of travel to workplace (Cenesus 2021). Source: Method of travel to workplace - Census Maps, ONS

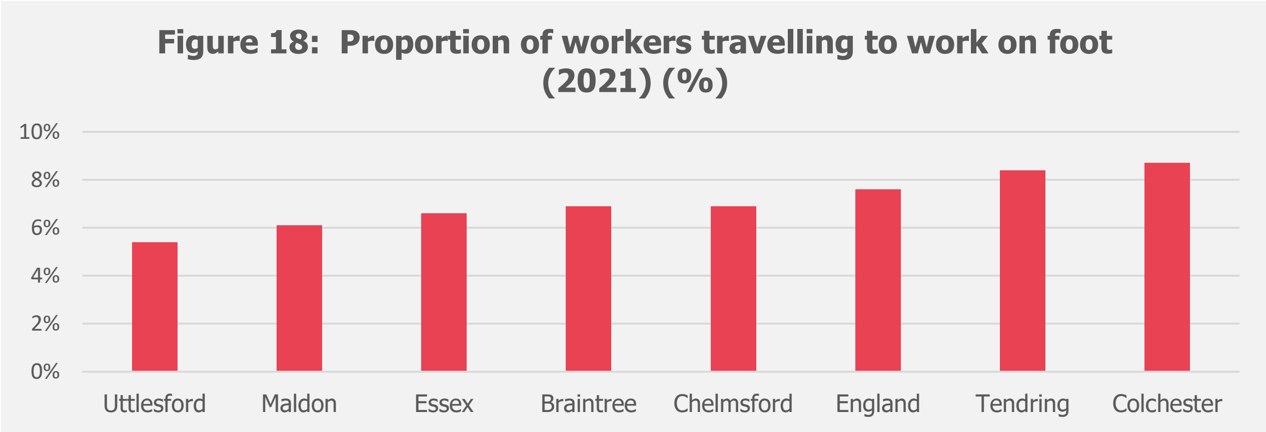


*Figure 18: Proportion of workers travelling to work on foot (2021) (%)*

Away from transport infrastructure, Ofcom data presented in **Figure 19**, has been reviewed to consider the region's relative digital connectivity, to understand the improvements that could be made to this economic enabler to help stimulate economic growth.

Starting with the number of premises with access to superfast broadband, the data shows that every North Essex authority performs well in terms of access to this broadband speed, with the lowest ranking North Essex authority – Uttlesford – still seeing 94.5% of its premises having access to superfast broadband. Tendring is the North Essex authority with the greatest proportion of its premises with access to superfast broadband, recording a figure of 97.8%[29]. The high proportion of premises across North Essex with access likely reflects Essex CC's 'Superfast Essex' programme successes[30].

The story is a little different when considering statistics collated for ultrafast – or gigabit – broadband, with divergence across the region in terms of the number of premises with access to this level of broadband speed. The more urban North Essex authorities – Colchester and Chelmsford – recorded the highest proportion of premises with access to ultrafast broadband, with figures of 66.2% and 63.0% respectively. Whilst Colchester and Chelmsford were the North Essex authorities with the highest proportion of ultrafast premises, the authorities ranked below 3 of the 4 similarly sized authorities included within the comparative analysis undertaken, with North Hertfordshire, Central Bedfordshire and Maidstone recording figures of 75.7%, 71.1% and 69.4% respectively. This suggests the North Essex region is behind other parts of the country in terms of ultrafast broadband rollout, with this observation reinforced when considering the North Essex authorities with the lowest proportion of premises with ultrafast broadband availability – Braintree and Tendring – who recorded figures of 48.6% and 14.8% respectively[31].

[29] Ofcom. Connected Nations 2022 (Superfast Broadband). Source: Connected Nations 2022 - Ofcom
[30] Superfast Essex. Source: Superfast Essex
[31] Ofcom. Connected Nations 2022 (Ultrafast Broadband). Source: Connected Nations 2022 - Ofcom

| Superfast Broadband | | Ultrafast Broadband | |
|---|---|---|---|
| **Authority** | **Premises %** | **Authority** | **Premises %** |
| **Tendring** | 97.8 | **Colchester** | 66.2 |
| **Essex** | 96.9 | **Chelmsford** | 63.0 |
| **Braintree** | 96.8 | **Uttlesford** | 59.4 |
| **Colchester** | 96.2 | **Maldon** | 58.7 |
| **Chelmsford** | 96.1 | **Essex** | 58.1 |
| **Maldon** | 96.0 | **Braintree** | 48.6 |
| **Uttlesford** | 94.5 | **Tendring** | 14.8 |

*Figure 19: North Essex's Superfast and Ultrafast Broadband Coverage (2022) (%)*

The transport and digital connectivity baseline has been considered within North Essex's 2-year delivery plan, with this infrastructure critical to North Essex's economic growth.

## 4. Prosperous and Inclusive Communities

Data indicators for North Essex's prosperous and inclusive communities have been considered to provide a robust understanding of how the 2-year delivery plan's actions can best facilitate economic growth for everyone within North Essex, ensuring no-one is left behind as the region looks to build on its incumbent strengths and seize future growth opportunities.

When understanding North Essex's community strengths, it is first important to understand the region's age demographics. **Figure 20** shows the North Essex authorities with the highest proportion of their populations aged 15 and under are Uttlesford, Colchester and Chelmsford, recording figures of 19.5%, 18.9% and 18.6% respectively. Tendring is the North Essex authority with the lowest proportion of its population aged 15 and under, recording a figure of 15.8%. Moving to those of working age, the more urban North Essex authorities – Colchester and Chelmsford – have the greatest proportion of their populations of working age, recording figures of 63.3% and 62.0% respectively. Once again, Tendring is the North Essex authority with the lowest proportion, with only 54.6% of its population of working age. Finally, it is North Essex's more rural authorities – Tendring, Maldon, Braintree and Uttlesford – that have the highest proportion of their populations aged 65 and over, recording figures of 29.6%, 25.0%, 20.4% and 20.2% respectively[32]. Clearly, a rural/urban divide exists when considering North Essex's demographics, with the region's more urban authorities (not considering Uttlesford) having a higher proportion of younger residents, whilst the more rural authorities have a high proportion of older residents. This is an important consideration, with there likely being differing demands across the region that reflects the contrasting demographics across the North Essex authorities.

[32] ONS. Population: Age (Census 2021). Source: Age - Census Maps, ONS

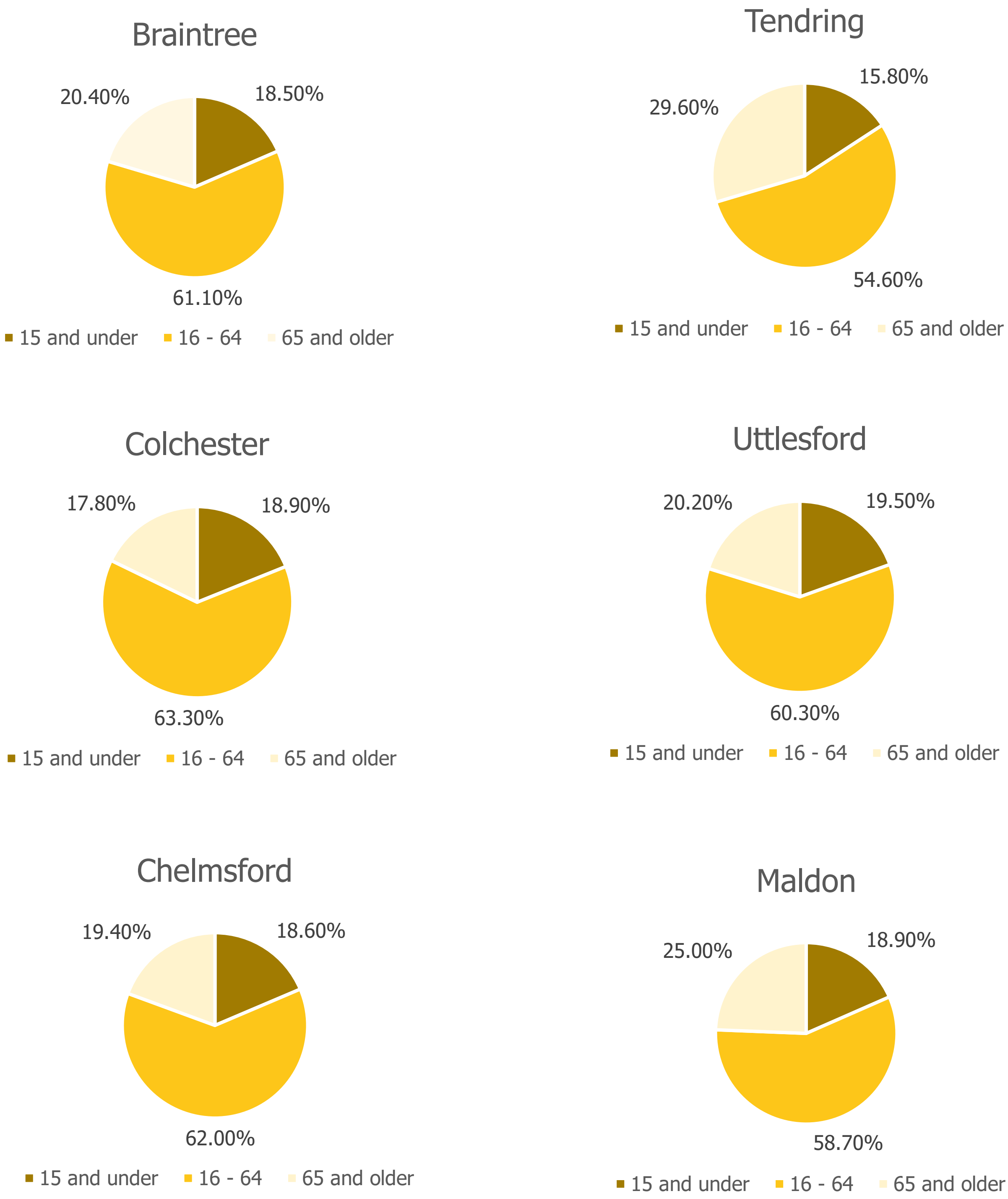


*Figure 20: North Essex authorities' age demographics (ages 15 and under, ages 16 – 64 and ages 65 and under)*

Building on the age demographics – and utilising the Thriving Places Index – critical community data provides a view of the region's relative equality, local conditions and sustainability opportunities and challenges. Before exploring the metrics underpinning the three variables, it is important to note the scale used by the Thriving Places Index, with this critical to understanding the relative opportunities and challenges of North Essex's authorities within these variables. This scale is outlined in **Figure 21**.

| Thriving Places Index Scale | | | | |
|---|---|---|---|---|
| **Low** | **Low – Medium** | **Medium** | **Medium – High** | **High** |
| <3.5 | 3.5 – 4.5 | 4.5 – 5.5 | 5.5 – 6.5 | 6.5< |

*Figure 21: Thriving Places Index Scale*

Starting with the equality variable, 2022 Thriving Places Index data suggests that Tendring and Colchester are the most equitable North Essex authorities, with Uttlesford and Maldon the least. Only Uttlesford and Maldon ranked in the 'Low – Medium' category for this variable. Moving the focus to the 'local conditions' variable, Uttlesford and Chelmsford are the North Essex authorities that recorded the highest score for this variable, both ranking within the 'Medium – High' category. The only North Essex authority to rank as low as the 'Low – Medium' category was Tendring, with a figure of 4.2. The index suggests there is a gap between Tendring and the next North Essex authority on the scale, with Colchester recording a score of 5.4, falling just short of the 'Medium – High' category for this variable. In terms of sustainability, all North Essex authorities performed relatively well when considering this variable, with the lowest ranking North Essex authority – Chelmsford – recording a figure of 4.9 which put it in the 'medium' category. The North Essex authority with the highest figure recorded for this variable is Colchester, with a figure of 6.2 putting this authority in the 'Medium – High' category[33]. **Figure 22** lists the figures recorded for all the North Essex authorities across the 3 categories.

| Thriving Places Index | | | | | |
|---|---|---|---|---|---|
| **Equality** | | **Local Conditions** | | **Sustainability** | |
| Authority | Score | Authority | Score | Authority | Score |
| Tendring | 6.0 | Uttlesford | 6.3 | Colchester | 6.2 |
| Colchester | 5.6 | Chelmsford | 6.0 | Essex | 5.9 |
| Essex | 5.0 | Braintree | 5.7 | Maldon | 5.4 |
| Chelmsford | 4.7 | Maldon | 5.5 | Braintree | 5.3 |
| Braintree | 4.7 | Colchester | 5.4 | Uttlesford | 5.2 |
| Uttlesford | 4.3 | Essex | 5.3 | Tendring | 5.1 |
| Maldon | 3.9 | Tendring | 4.2 | Chelmsford | 4.9 |

*Figure 22: Thriving Places Index – Equality, Local Conditions and Sustainability scores (2022)*

[33] Centre for Thriving Places. Thriving Places Index (2022). Source: Thriving Places Index | Centre for Thriving Places

It is clear that there is greater diversity across the North Essex region in terms of the equality and local conditions variables than when compared to the sustainability variable. This suggests there is greater work that could be done to increase equality within both Maldon and Uttlesford, and to improve Tendring's local conditions to ensure residents across the region feel a similar amount of pride in place and attachment to where they live.

Moving away from the Thriving Places Index, another important aspect when considering North Essex's community opportunities and challenges is consideration of housing data and the level of crime prevalent within the area. Linking this data to economic growth, house prices are a key form of wealth for many, with an understanding of house prices and form of tenure within a region useful indicators of relative wealth that can support economic growth. In terms of crime, a more deprived area is likely to see increased incidences of crime, proving a useful proxy for economic growth considerations.

Within North Essex, it is clear there is diversity in house prices across the region, with the more rural authorities of Uttlesford and Maldon seeing the highest average house prices in 2023. In contrast, the lowest average house price is recorded by Tendring, with a price difference of £180,892 observed between Uttlesford and Tendring[34]. This suggests there is significant divergence in wealth across the region, which has been considered when developing actions included within the Delivery Plan. **Figure 23** provides a view of the different average house prices within North Essex and how these figures compare to Essex CC and the East of England.

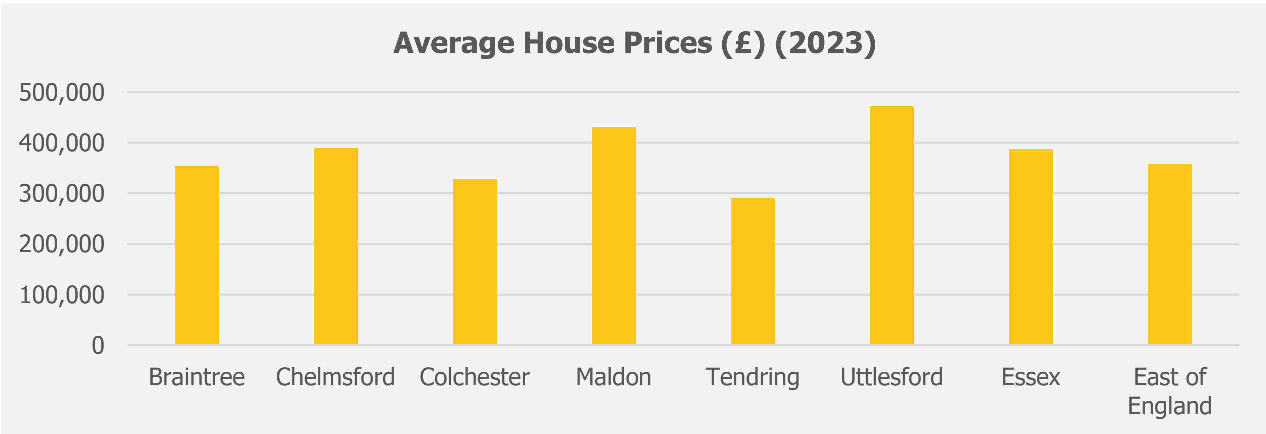


*Figure 23: Average House Prices (£) (2023)*

[34] UK House Price Inex. House Price Statistics (2023). Source: UK House Price Index (data.gov.uk)

Building on the average house prices across North Essex to understand the region's relative wealth, it is important to consider the form of tenure. As **Figure 24** illustrates, there is a divergence in the proportion of home owners (both with and without mortgages) across the North Essex authorities, with Maldon the authority with the highest proportion of home owners and Colchester the lowest, according to Census 2021 data[35]. Given the average house prices within both Uttlesford and Maldon – and the relatively high levels of home ownership within these authorities – it can be concluded that these two authorities are likely to see a higher proportion of wealthier residents when compared to other authorities across the region.

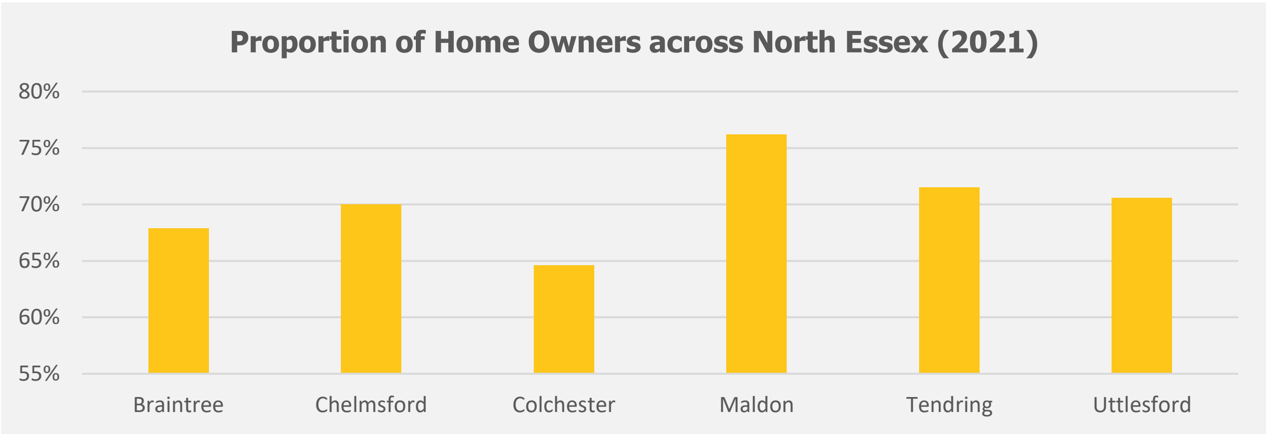


*Figure 24: Proportion of Home Owners across North Essex (2021)*

Away from house prices and home ownership, the region's crime statistics also provide a useful proxy for the region's relative wealth. As **Figure 25** demonstrates, Tendring and Colchester are the North Essex's authorities with the highest police recorded crimes per 1,000 population, both recording figures of 98.6 for this metric. Maldon and Uttlesford – the North Essex authorities with the highest average house prices – see the lowest crime rates, recording figures of 59.9 and 62.3 respectively[36].

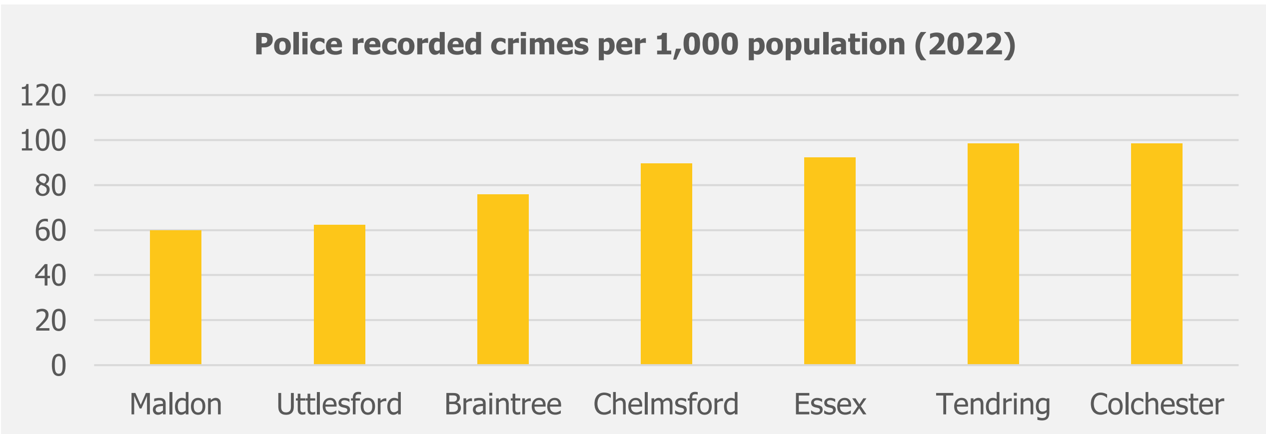


*Figure 25: Police recorded crimes per 1,000 population (2022)*

[35] ONS. Housing: Tenure of Household (Census 2021). Source: Tenure of household - Census Maps, ONS
[36] Police.UK. Compare your area. (2022). Source: Compare your area | Police.uk (www.police.uk)

In addition to the data above, the prosperous and inclusive communities strategic priority has considered data that provides perspective on residents' views towards the North Essex region and pride and happiness they feel going about their everyday lives. This data is important to understanding this strategic priority, as it provides a view of North Essex's resident's engagement with their local communities, an important consideration when understanding how best to drive economic growth. ONS data has been presented below that provides a view of North Essex's residents' life satisfaction, happiness, anxiety, and a feeling that their lives are worthwhile.

Starting with life satisfaction, residents across North Essex feel fairly satisfied with their lives, with the North Essex authorities performing similarly across the board. As **Figure 26** outlines, Uttlesford recorded the greatest score for this statistic, recording an average figure of 7.9 out of 10, whilst Colchester recorded the lowest score at 7.4[37].

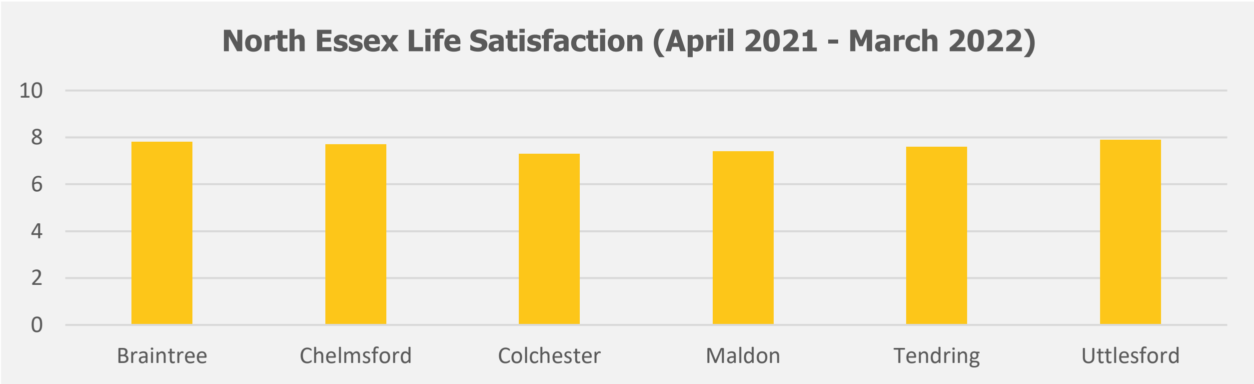


*Figure 26: North Essex Life Satisfaction (April 2021 – March 2022)*

When considering happiness, it can be seen that five of the North Essex authorities recorded average scores of above 7, with Braintree the authority that recorded the highest average score of 7.7. As **Figure 27** shows, Colchester recorded the lowest happiness average score, with a figure of 6.8[38].

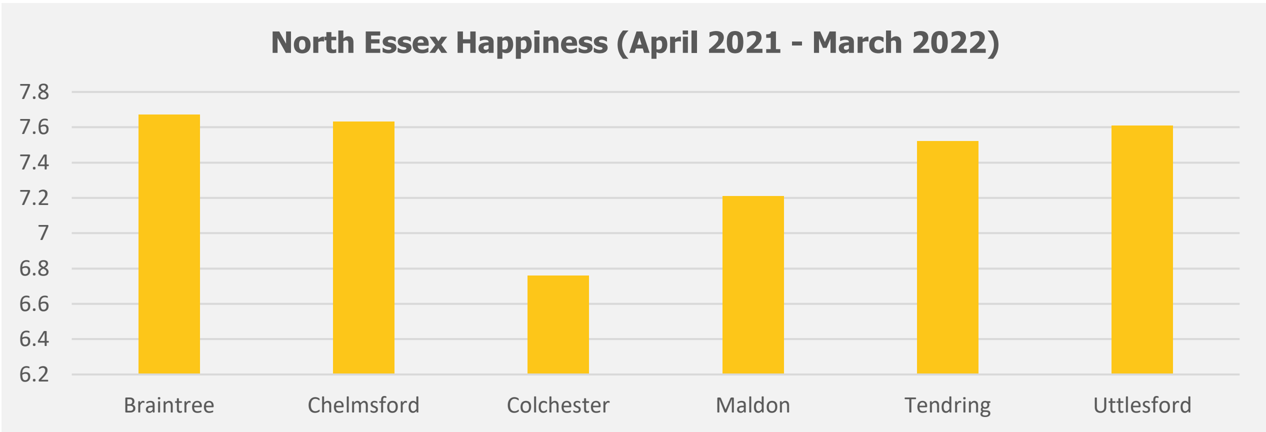


*Figure 27: North Essex Happiness (April 2021 – March 2022)*

[37] ONS. Personal well-being in the UK: April 2021 to March 2022. Source: Personal well-being in the UK - Office for National Statistics (ons.gov.uk)
[38] ONS. Personal well-being in the UK: April 2021 to March 2022. Source: Personal well-being in the UK - Office for National Statistics (ons.gov.uk)

Moving to anxiety, the North Essex authorities had similar average scores for this metric, with it important to note that the lower the score, the less anxious an authority is feeling. There is very little difference between the North Essex authority with the lowest anxiety levels – Braintree (3.0) – and the North Essex authority with the highest anxiety levels – Maldon (3.4)[39]. This is exemplified in **Figure 28**.

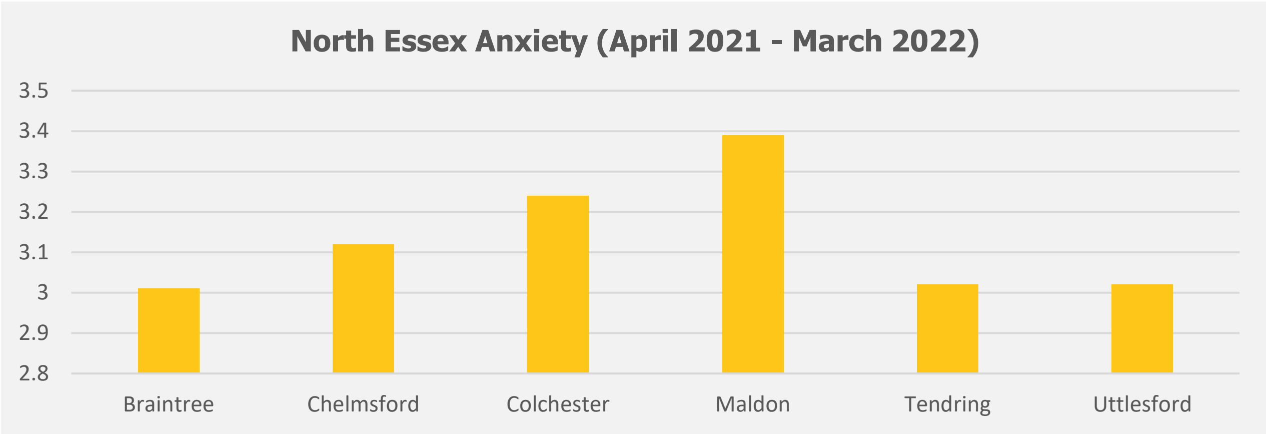


*Figure 28: North Essex Anxiety (April 2021 – March 2022)*

Turning to the extent to which residents view their lives as worthwhile, again, the data collated for the North Essex authorities is fairly consistent, with little difference observed between the authority – Braintree (8.1) – recording the highest score in terms of residents viewing their lives as worthwhile and the authority – Colchester (7.6) – recording the lowest score in terms of residents viewing their lives as worthwhile[40]. This is exemplified in **Figure 29**.

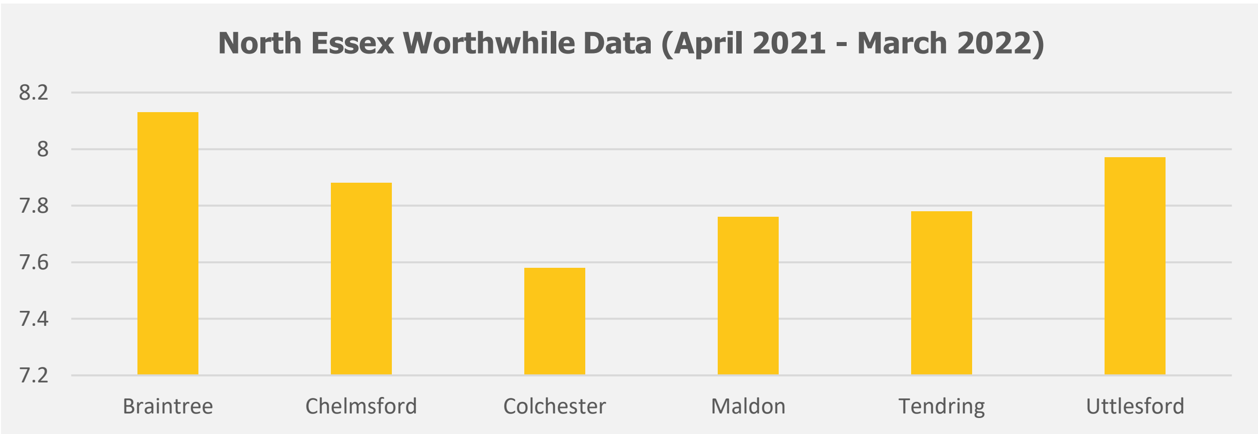


*Figure 29: North Essex Worthwhile Data (April 2021 – March 2022)*

[39] ONS. Personal well-being in the UK: April 2021 to March 2022. Source: Personal well-being in the UK - Office for National Statistics (ons.gov.uk)
[40] ONS. Personal well-being in the UK: April 2021 to March 2022. Source: Personal well-being in the UK - Office for National Statistics (ons.gov.uk)

The importance of these metrics to North Essex's 2-year delivery plan is understood when considering the impact life satisfaction, happiness, anxiety and perception of worthiness have on a resident's confidence and willingness to engage with economic opportunities available, such as those offered by the NEEB. As explored elsewhere, there is a need to further explore why some NEEB opportunities delivered have not seen the uptake expected from residents across the region. Accessibility is likely one reason for limited uptake in some instances, but there is also likely a confidence aspect to consider. The more that can be done to boost life satisfaction, increase happiness, reduce anxiety and advance the feeling of worthiness, the more likely the region's residents – in particular those that feel they are being left behind – will engage in economic opportunities available, supporting North Essex's economic growth ambitions.

**Stansted Airport – Uttlesford**

The North Essex Economic Board (NEEB) is a partnership of district and county councils offering fully funded business support and skills programme to support economic growth across North Essex. The partnership consists of Maldon, Tendring, Braintree, Uttlesford District Councils. Chelmsford and Colchester City Councils, and Essex County Council. Find out more at www.neeb.org.uk Socials @neebgrowth

Henham Strategy is a public policy and economic development consultancy with a focus on local growth, trade and investment and higher education. We aim to connect local, regional and international actors to stimulate economic growth across the UK.

North Essex Economic Board

HENHAM STRATEGY