

The

West End.

Vision 2030

The West End Partnership





Vibrant, productive, resilient,
creative and surprising
Playing a pivotal role in London's
continued economic
Providing new jobs and skills
opportunities success
Easy to reach, with less congestion
and better air quality
Safe and secure as well as
open and relaxed
Renowned for the quality, interest
and extent of its public spaces, helping
to differentiate London from other
world cities
Inspiring a sense of common purpose
More self-reliant

The West End.

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foreword

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**We are pleased to
present our vision
for the West End
— a vibrant and
endlessly changing
place of vital
importance to the
UK's capital city.**

The West End is the driver of London's commercial and economic success and lies at the heart of its cultural offer. It is also home to long-established and new communities, bringing family and neighbourhood life to the heart of London. The West End faces both challenges and opportunities to grow in ways that enhance the experience of those who live and work here, as well as those who visit.

The West End Partnership was created in 2013 following the report of the West End Commission. The Commission called for a new strategic body to help shape and support the plans and policies needed to secure the stewardship and long-term future of the West End. The Partnership was created as a result. It has a mandate to secure and enhance the area's unique combination of diverse businesses and cultural attractions which, when combined with a sizeable residential population, create buzz, vitality, interest, investment and demand.

We are acutely aware that building on existing success will bring intense pressures, new challenges and greater responsibility for the stewardship of such an important place. So as a starting point, the Partnership has set out its vision alongside some of the challenges facing the West End.

We will seek to understand the concerns of all relevant stakeholders and accommodate the range of interests and priorities sensitively and productively. By working together in a collaborative spirit we will give a powerful new voice to an area whose success is too often taken for granted. We will ensure that life for those who live and work in the West End is as good as any to be found in comparable international locations; that the distinctive neighbourhood feel of the area's urban villages is enhanced; that large, medium and small businesses thrive; and that the visitor experience is the best it possibly can be.

We must redouble our efforts if we are to unlock this opportunity. With better and greater collaboration, the improvements we want to see brought forward – in our transport and infrastructure networks, such as the Tube upgrades and Crossrail, in the policies underpinning development, in our streetscapes, our amenities and services – can bring greater economic prosperity for all; residents, visitors and businesses alike. If realised and captured, the additional revenues that growth produces can and should be ploughed back into improvements in our physical and social infrastructure, to help sustain jobs for residents and, most importantly, make a tangible difference to the lives of people who live, visit and work in the West End.

We believe that better local powers and greater financial autonomy to fund investment in the West End will spur these achievements. We are discussing this autonomy at a national level as we believe the West End should be recognised for what it is – a major economic and cultural powerhouse of critical importance to the UK and its economy – a powerhouse in need of new tools to maintain its vital role.

The West End's unique and rich mix of businesses, urban neighbourhoods, cultural attractions, leisure and hospitality, and cutting-edge, internationally-recognised commercial sectors, makes the area uniquely challenging to support. But it is precisely this rich diversity that makes the West End a special place, a magnet for millions of visitors and hundreds of thousands of jobs. In the face of growing and intense international competition and constrained public finances, the West End needs both a strong vision and a strong voice to secure its growing success.

The West End Partnership looks forward to working with local people, businesses, Government and investors to make sure the West End maintains its success as it drives the implementation necessary to deliver the vision we have set out here.



Cllr Philippa Roe

Leader, Westminster City Council
Chairman, West End Partnership



Peter Vernon

Chief Executive, Grosvenor Britain & Ireland
Board Director, London First
Vice-Chairman, West End Partnership

context

THE WEST END.
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There is no end to the West End

London's West End is one of the most celebrated and exciting places in the world. It has a wealth and variety of talent, activity, character, space, architecture, heritage and ambience. It is home to vibrant communities and thriving business clusters, a focus for culture and entertainment, a centre of learning and research, and a hub for commerce and retailing. It is both an economic powerhouse and a mix of urban neighbourhoods. It is uniquely resourceful, busy, productive, diverse and dynamic – the West End is endless.

Comprising just a few square miles, it sits at the heart of a global city projected to expand to 10 million people over the next 15 years. The demands placed on London's infrastructure, especially its transport system, as a result of this growth are well documented. Improvements have recently been delivered, and more are due shortly – for example with the opening of Crossrail. These will create greater demand for, and access to, the West End. With some of the unique attributes below, it supports the competitiveness of London and of the UK.

Economic Powerhouse

- The West End is a major national and international asset with economic activity that outpaces that of any other area of London. It generates 3% of the country's economic output (£51.25 billion GVA in 2014), even greater than the City of London's contribution.
- It has one of the largest and most diverse concentrations of jobs anywhere in the UK and hosts 610,000 employees. With over 120,000 employees per square kilometre, it is also one of the world's densest employment hubs, on a par with Hong Kong.
- It is home to a wide range of businesses and sectors including financial, commercial and professional services, retail, leisure, tourism, entertainment and culture – and a large number of SMEs. Over 80% of its businesses employ fewer than 10 people.



Retail and Hospitality Hub

- The West End boasts the busiest shopping district in the world around Oxford Street, Regent Street and Bond Street, which in recent years has broken all records in retail sales and visitor numbers.
- The West End supports London's £22 billion visitor economy. In 200 million visits a year, people spend an estimated £11 billion in its hotels, restaurants, bars and shops, which in turn support 200,000 jobs across the capital.



Cultural Heartland

- The West End hosts some of the most famous centres of cultural activity in the world, with public events and iconic public spaces that are hugely popular to Londoners and visitors alike. The five most popular attractions alone welcome 25 million people a year.
- Alongside its many centres of research, teaching and further education, it is home to four world-class universities. UCL is ranked by QS as the world's fifth best university; Kings College's Pharmacy & Pharmacology School is ranked number three in the world; the London School of Economics is the sixth best in the world by employer reputation; and the University of Westminster's Media, Communications and Journalism school is ranked second in Europe.
- The area borders three Royal Parks and contains seven historic parks and gardens. It is home to 30 museums, public and private galleries and 40 theatres including the Royal Opera House and the Coliseum, home of English National Opera.



Vibrant Urban Neighbourhood

- The West End has vibrant and well-established residential communities. The local neighbourhoods of the wider West End, where 59,000 people live, amid the hustle and bustle of a major city, help define London's character.
- It is an area widely acknowledged as a network of urban villages. Many of them – such as Marylebone, Mayfair, Covent Garden and Soho – are known throughout the world.



our vision

THE WEST END.
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To support London's competitiveness the West End must accommodate growth whilst at the same time strengthening its unique cultural character, amenity and openness

Maintaining growth and cultural character are twin goals. We believe they are compatible and deliverable. This is why the West End Partnership was formed – to be the catalyst and mechanism for action and delivery, with new policies, plans and actions.

But as London grows, the demands on the management of the West End intensify. Stakeholders in the West End will have to collaborate more closely than ever if reasonable expectations of liveability, the need to respond to growth and competition, and the imperative to enable changing patterns of retail, business, culture and lifestyle are to be met.

In the first instance we have established a set of principles to unify the purpose and plans of many voices and partners. Our vision for the West End is summarised below and accompanied by some of the challenges the Partnership will tackle in implementation.

Our vision is that over the next 15 years the West End will be:

- 1 **Vibrant, productive, resilient, creative and surprising**
- 2 **Playing a pivotal role in London's continued economic success**
- 3 **Providing new jobs and skills opportunities**
- 4 **Easy to reach, with less congestion and better air quality**
- 5 **Safe and secure as well as open and relaxed**
- 6 **Renowned for the quality, interest and extent of its public spaces, helping to differentiate London from other world cities**
- 7 **Inspiring a sense of common purpose**
- 8 **More self-reliant**



One

Vibrant, productive, resilient, creative and surprising

The West End will perform important, diverse functions for the whole of the UK – economic, social and cultural.

- Diverse and long-established communities will flourish and enjoy as high a quality of urban living as any other world city.
- The coordination of city management and new project delivery will maintain and improve the West End's special character as a place in which to live and work, as well as to visit.
- The West End's diversity – economic and social – will be an important source of resilience and will be considered and promoted as one of its key strengths and a magnet to inward investment.
- There will be clarity on the strategies required to enhance the West End's internationally-renowned retail offer in the light of changing retail patterns and competition; as well as to ensure the delivery of flexible new places of work.
- The opportunities created by Crossrail will help to ensure new patterns of development, movement, and public space.

The challenges

- Areas of London outside of the West End are growing in their presence and appeal to investment and talent. The West End has historically accommodated changes of use to allow for market changes, and this characteristic must be enhanced if the West End is to adapt to the future economic geography of London. This enhancement must also balance the needs and priorities of residents so that the special character of the West End grows rather than diminishes, given the pace of change.
- This flexibility will require reflection and understanding at sectoral level. The West End is a destination for both flagship stores and independent brands and hosts a rich mix of retail activity. Maintaining and growing this mix requires innovative solutions for ground floor uses that will need to feed into future retail policy framework.
- At the same time, the scale of competition posed by new international and regional retail centres needs to be recognised as we refresh our policies for the West End concerning movement and transport.



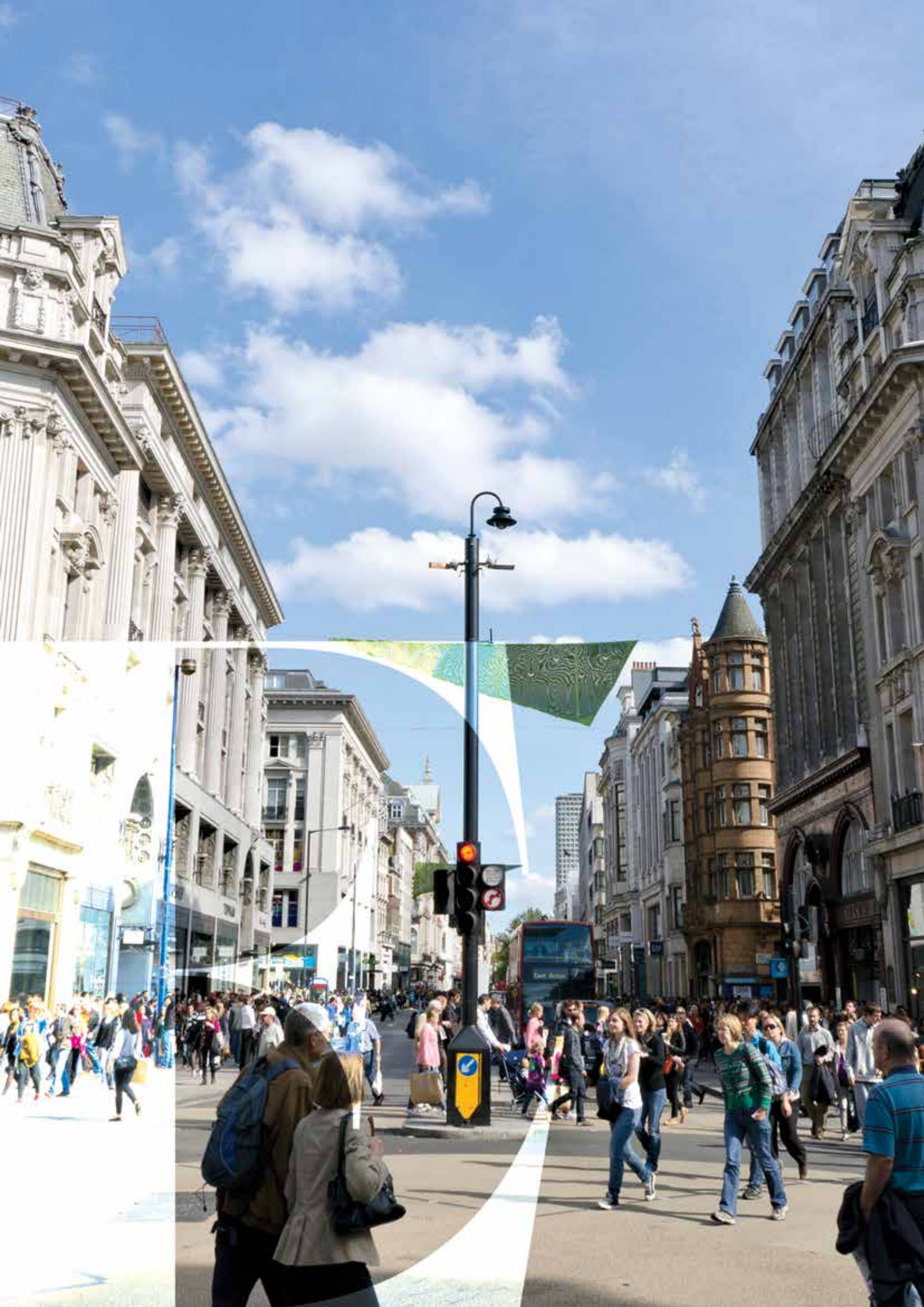
Playing a pivotal role in London's continued economic success

Given its advantages, the West End will grow economically at a rate at least as fast as London's. It will support the capital's rising population with the supply of new and refurbished spaces in which to work and live. It will offer every opportunity to attract and retain jobs.

- The West End's prosperity will drive London's economic success. Employment and other activity-rich growth, such as new business formation and enterprise expansion, will drive value and GVA reflected in growth rates at least matching those of London's. More space for employment and expanding businesses will be provided.
- Higher levels of economic growth in both the core West End and in its fringes will be matched by the sustainable and balanced creation of new capacity, in terms both of accommodation and city management.
- A suitable, market-led blend and quantity of office and retail accommodation will ensure the area attracts and retains its diverse mix and clustering of businesses, whilst at the same time balancing the needs of residents and a growing population.
- Economic and social opportunity will be created for those living in the heart of the capital.

The challenges

- In the core West End, demand for commercial space outstrips supply. According to a recent Deloitte study, supply is at an all-time low with some districts seeing exceptionally low vacancy rates of 3% in 2013/14. By the end of 2014, the core West End had just 23,000 square metres of available Grade A office space. Affordable space for small and growing firms is also in short supply and so measures will be needed to support flexible and small workspaces in the centre of the city. Failure to deliver sufficient new supply will drive up rents and narrow the range of businesses that can afford the West End.
- National planning policies, such as those which allow the conversion of offices to residential accommodation without reference to the very special local context of the West End of London, mean that it is difficult to achieve balanced growth. A dialogue with Government is necessary to ensure that the future of the West End is recognised in policy formulation.



three

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Providing new jobs and skills opportunities

The West End will deliver a significant reduction in long-term unemployment and dependency on public services in less well-off London communities, including those immediately adjacent to the West End. It will do so in part by strengthening the chances that job growth in diverse sectors will translate into opportunity for disadvantaged Londoners.

- The West End's employment base will grow at least in proportion to London's, with a suitable, market-led mix of large, medium and small enterprises.
- It will continue to host a rich diversity of economic sectors. Growth will not be dominated by any one sector.
- Investment in skills and improving pathways to work will connect local people with the job opportunities created in the West End.
- The West End will be at the forefront of creative and technological innovation, with the infrastructure upgrades needed to underpin them, in particular superfast broadband and reliable mobile connectivity, security/CCTV technology and public information systems.

The challenges

- Employment in the West End and its wider adjacent areas is strong, and Camden and Westminster account for nearly one in five jobs in London. But entrenched areas of unemployment and deprivation exist on the fringes of the West End requiring concerted action.
- Between 1961 and 2011 employment in Westminster expanded by 3.5% (to 673,000 jobs). The equivalent growth in Camden was 27% (to 325,000 jobs). The London-wide average was 14% (to five million jobs).
- At the same time, between 2010 and 2012 the unemployment rate amongst working-age adults averaged 6% in Westminster and Camden – no lower than the UK average.
- Demand for housing of all types, especially social and intermediate and other affordable housing in central London remains very high. This challenge is clearly a London one that will not be tackled within the West End alone, so working with housing providers and the Mayor's team on this issue is going to be important in future.



four

Easy to reach, with less congestion and better air quality

The West End will have a wide range of transport services for residents, commuters and visitors, at different hours of the day and night. It will benefit from a traffic management strategy that will, alongside the opening of Crossrail, and improvements to the Tube and bus networks, reduce dependence on motor vehicles, improve flow and reduce congestion.

- The West End is well connected benefiting from Underground, bus and train services. The Night Tube will bring additional benefits and add a new dimension to the connectivity.
- The reinstatement of two-way roads will improve access for all road users, and the consolidation of deliveries and waste collection, as well as more efficient delivery during “out of peak” periods which will reduce congestion, but in a manner that reduces inconvenience for local residents and businesses.
- The opening of Crossrail is a huge opportunity, further boosting capacity and enhancing connectivity, and the changing pedestrian flow patterns will be the catalyst for transforming the quality, shape and extent of the public realm, which will in turn encourage walking and cycling.
- The major east-west routes of Oxford Street and Euston Road will be a key focus for significant change. Working with the Mayor, the Partnership will reduce traffic volumes on Oxford Street and develop solutions to remedy long-standing transport challenges.
- Air pollution will be cut, starting with the worst air quality hotspots.
- The proposed Ultra Low Emissions Zone will encompass the West End and, along with the introduction of the Zero Emission Capable Taxi and more hybrid powered buses, will bring significant improvements in air quality. The Partnership will work to make sure it is effective as quickly as possible.

The challenges

- Sufficient and sustained investment to further enhance the transport network is essential.
- Research suggests a near doubling of passenger numbers at peak times at Tottenham Court Road and Bond Street stations by the mid-2020s. Measures to avoid pedestrian congestion in some streets and around stations will be necessary.
- Although Crossrail stations will have step-free access, from train to pavement, accessibility in much of the West End must be improved if it is to remain a premier destination catering for all of London’s residents, businesses and visitors.
- Pollution in the West End remains at some of the highest recorded levels in Europe.





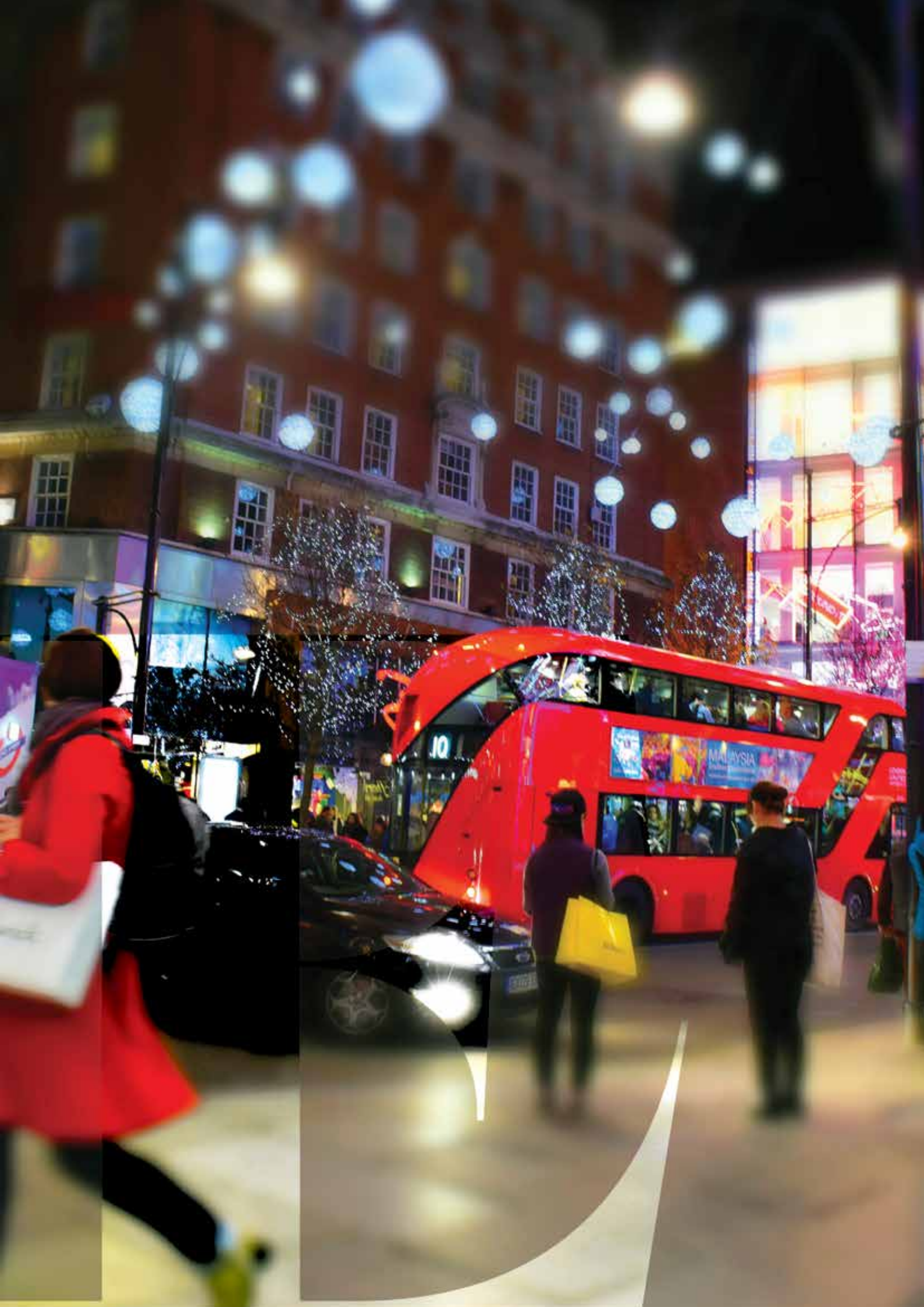
Safe and secure as well as open and relaxed

The West End will benefit from more effective ways of influencing the behaviour of those who come here with fewer conflicts between the needs and demands of different uses and people, including visitors, workers and the sizeable and vital resident population. These will include new approaches to policing and the enforcement of rules and regulations.

- Crime and anti-social behaviour will not be allowed to detract from the enjoyment of residents, businesses and visitors.
- As the West End grows, improvements to design and operations will enhance a sense of place and safety for residents and visitors.
- Licensing and other powers will ensure that the needs of businesses and residents are met through close dialogue and collaboration.

The challenges

- The area is constantly changing and so requires management that can respond to this change to best advantage.
- An integrated approach to street management will be required and new tools, powers, resources and approaches to cut crime and anti-social behaviour will be developed.
- The policing and enforcement of the evening and night time economy will need to carefully balance the sometimes differing priorities of visitors, residents and businesses. Changes to licensing and funding mechanisms may be required.
- The West End's popularity as a visitor attraction throughout the day and well into the night puts great demands on city management and creates negative externalities such as noise, anti-social behaviour and crime.



Renowned for the quality, interest and extent of its public spaces, helping to differentiate London from other world cities

The West End will have world-class places and streets that are easy to find, accessible, inspiring and enjoyed all year round, not just for their economic function but also as places to meet, relax, learn and be entertained.

- The quality of the West End's public realm, cultural assets, tourist attractions and iconic architecture will be central to the area's identity and appeal – an “exportable image” that not only draws visitors and businesses to the capital, but also creates places that residents can help shape and enjoy. People will not simply be in the West End, but love to be there.
- New and upgraded public spaces, both large and small, will add quality, identity and a sense of belonging to the many great places of the West End.
- The streets and spaces of the West End will comfortably accommodate large numbers of pedestrians. Crossrail 1 and Crossrail 2 will bring many more people into the area. Footfall figures for the West End – where, for example, 520,000 people walk down Oxford Street every day – will continue to be on a par with major global shopping malls.

- The West End's evening and night-time offer will underpin its character. Its hotels, bars, clubs, cinemas and theatres will benefit from growing transport accessibility, better public realm and a reduction in anti-social behaviour and the fear of crime.
- The West End will be a place enjoyed for its special events in its streets and squares, building on the success of West End LIVE Summer Streets, SohoCreate, the Bupa Westminster Mile, Prudential Ride London, Pride, Christmas Lights, Trafalgar Square events and many other cultural and sporting occasions that bring people together to enjoy the city.
- A framework for the long-term maintenance and management of public spaces will encourage private sector investment for the benefit of local workers, residents and visitors.

The challenges

- Some very important public spaces fail to live up to the expectations of residents and visitors, and need radical improvement. The potential of Crossrail 1 and 2 and other infrastructure improvements to bring benefits to the West End would thus be lost if the public realm is not also upgraded.
- The intensive use of space and the mix of functions have detrimental impacts resulting in noise, petty crime and air pollution that will require improvement and constant focus.
- A cohesive and ambitious approach to public realm improvements will be needed to protect the distinctive identity of different neighbourhoods taking into account the wide-ranging needs of visitors, workers and businesses.
- Investment to improve the public realm of key areas such as Leicester Square, Piccadilly, Covent Garden, Marble Arch, Oxford Circus and Regent Street has been significant. Enhancing the quality of other areas to the same level will require additional focus and investment.



WILLIAM SHAKESPEARE

THIS ENCLOSURE
WAS PURCHASED, LAID OUT
AND DECORATED AS A GARDEN
BY ALBERT GRAY ESQ. M.P.
CONVEYED BY HIM 21 JULY 1874
METROPOLITAN BOARD OF WORKS
TO BE PRESERVED FOR EVER
FOR THE FREE USE AND ENJOYMENT
OF THE PUBLIC.

seven

THE WEST END.
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Inspiring a sense of common purpose

The West End will be the focus for collaboration between residents and public and private sector stakeholders to create a dynamic programme of long-term improvements. It will gain investment and contributions from a wide range of groups, businesses, government and other bodies to support the programme.

- Growth will be sustainable, having a positive impact on neighbourhoods, residents and businesses whilst at the same time enhancing the area's character.
- Job creation will bring with it a growth in building floorspace, while changes to the West End's built density, mass and form will be achieved creatively and sensitively.
- A growing working age resident population will have opportunities to work in the West End rather than commute to places outside the area.
- The contribution of private and public sector leaders, including Business Improvement Districts, property owners and neighbourhood forums, will be recognised and harnessed.
- The views of residents and local businesses will be recognised and listened to. Residents will have as many opportunities to participate as possible in developing the West End. Partners will also work together to ensure the success of the night-time economy is balanced with resident priorities.

The challenges

- It is estimated that Westminster will need to host thousands of new jobs every year over the next 20 years just to maintain its share of London's employment market, given the forecast growth in population.
- The necessary growth in floor space to meet these jobs targets will be required over the next 20 years.
- Changes to the West End's density, massing and form will have to be considered, on the basis that the interests of both residents and the needs of businesses can be met. It must enhance the West End, not detract from it.
- Many important national and international institutions based in the West End, such as hospitals and universities, will have to respond to their own pressures for change and growth.
- At the same time, the scale of competition posed by new international and regional retail centres needs to be recognised as we refresh our policies for the West End concerning movement and transport.



eight

THE WEST END.
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More self-reliant

The West End will have been recognised by Government for its role in driving economic and cultural performance in the UK. It will have the ability to attract the investment needed to maintain and enhance its communications and utilities infrastructure to meet the needs of a global city.

- The West End will benefit from reforms to public finance that create local autonomy. An increase in jobs and economic growth will provide clear incentives for local investment, so that the proceeds of growth will bring tangible public benefits to local people and Londoners.
- As the most intensively active area in the UK, the West End will have the resources and powers to deal with detrimental actions and behaviour of organisations and individuals in order to protect quality of life for those who live, visit and work in it.

The challenges

- The growing demands of the night-time and tourist economy will require renewed efforts to reduce noise pollution, anti-social behaviour and criminal activities.
- The West End will require new partnerships and policy to reduce or otherwise mitigate air pollution and the challenges posed by climate change, in part by “greening” the West End with new green spaces and greater energy efficiency.
- Financial autonomy, business rate reform and retention of London taxes are agendas of critical importance to the West End that require national policy changes to happen quickly.



implementation

THE WEST END.
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With firm foundations in its history and heritage, the West End of the future will serve the needs of growing and thriving businesses and residential communities, and be a magnet for national and international visitors.

This is the vision of the West End Partnership – a vision that will reflect the voices and ideas of all those who care about the West End’s future. As we move ahead with a programme of transformation, the delivery of improvements will involve as many people as possible. Your contribution will be valued.

Having set out its eight desired outcomes the Partnership will now move to a delivery plan to achieve them, and will agree the metrics against which it will measure progress. It will consult widely as it does so, and seek momentum with the delivery of a range of early successes. We call on all those who feel they have a positive role to play in the West End to join us in this vital mission to see the area flourish for generations to come, for the benefit of local communities, London and the United Kingdom.



apostrophe

end.

appendix 1

The West End Partnership's governance

In 2013 the West End Commission concluded that the West End's importance to London and the UK necessitated a "single voice" for the area. A body was needed to set a broad strategy and create "a better integrated framework for place-shaping," given the significant opportunities and challenges facing the area over the coming decade.

The Partnership created in response seeks to provide stronger leadership, greater coordination and a more influential voice for the West End at local, national and international level.

It brings together a coalition of senior public service and private sector leaders, academic experts and residents' representatives. Its Board comprises representatives of:

- Greater London Authority
- London Borough of Camden
- London Chamber of Commerce and Industry
- London First
- London School of Economics
- Metropolitan Police
- Royal Opera House
(representing the cultural sector)
- Transport for London
- Westminster City Council
- West End Business Improvement Districts
- West End Community Network
(representing Westminster residents)
- Westminster Property Association

In 2014 the Partnership instigated a programme of planning and prioritisation coordinated by specialist task and finish groups. It consulted a wide range of local businesses, resident groups, property owners, investors, BIDs and other organisations.

appendix 2

Defining the West End

The following definition has been used to arrive at statistical data. However, the West End is growing and not bound by maps so this is only used here to refer to the current area of focus rather than to restrict actions and plans in future.

Boundary reflecting the views of the Partnership

For the purposes of statistical references, the following terms have been adopted to describe and analyse the West End:

The ‘core West End’ – which includes all of the St. James’s ward and the West End ward in Westminster and half of the Holborn and Covent Garden ward in the London Borough of Camden, including Seven Dials.

Wider areas 'adjacent to the West End' – which are distinct from the core West End but where development will have a high impact on the West End. These areas include the wards of Bryanston and Dorset Square, Marylebone

High Street in Westminster and Bloomsbury ward in the London Borough of Camden. In statistical terms we have added both the core and adjacent wider areas to describe the West End's economy, but this is not intended as a basis for recommendations on the planning and management of the West End in the future.

The fringe areas of change related to the West End –

these are areas on the fringe of the West End that are set to play a major role in the future growth of the West End. They are areas of change and destinations in their own right seeing or planning for significant growth and development. They include established development areas such as Paddington, Tottenham Court Road, Victoria, Euston and King's Cross. They also include areas of very rapid economic and social change such as Midtown/Holborn in Camden and Church Street to the east of Edgware Road in Westminster and Edgware Road itself. More widely relevant to the future of the West End are developments south of the River Thames such as at Nine Elms/Battersea, Waterloo/South Bank and London Bridge/More London.





The

Urban Plan

VISION 2030



The West End Partnership

BAKER STREET
QUARTER
PARTNERSHIP



MAYOR OF LONDON



West End
Community
Network



The West End.

Formed in 2013 the West End Partnership brings together senior public service and private sector leaders, academic experts and resident representatives.

It was created to be the catalyst and mechanism to enable the West End to accommodate growth, whilst at the same time strengthen its unique cultural character, amenity and openness.

The West End is one of the most celebrated and exciting places in the world. Comprising just a few square miles, it sits at the heart of a global city projected to expand to ten million people over the next fifteen years.

The Partnership will coordinate and initiate action and delivery in response to this growth with new policies, plans and actions which benefit residents, communities, businesses and visitors alike.