



UNIVERSITY OF  
TECHNOLOGY SYDNEY

# School of Leisure, Sport and Tourism Working Paper Series

**UTS: BUSINESS**

**Working Paper No. 12**

## **Alternatives to Standards: A Review of Leisure Planning Guidelines: U-Plan Project Paper 2**

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**4<sup>th</sup> edition: September 2009**

(Publication history: E1: June 2008; E2: March 2009; E3: June 2009)

ISSN: 1836-9979

Series Editor: Simon Darcy, School Research Director

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Lindfield, NSW 2070 <http://datasearch.uts.edu.au/business/publications/lst/index.cfm>

# The U-Plan Project

This paper is one of a series forming the U-Plan project, which is concerned with the development of the methodology for leisure planning

Citation:

Veal, A. J. (2009) *Alternatives to Standards: A Review of Leisure Planning Guidelines: U-Plan Project Paper 2, 4<sup>th</sup> edition*. School of Leisure, Sport and Tourism Working Paper 12, Lindfield, NSW: University of Technology, Sydney (available at: [www.business.uts.edu.au/lst/research/research\\_papers.html](http://www.business.uts.edu.au/lst/research/research_papers.html) and [www.leisuresource.net](http://www.leisuresource.net)).

Note on the 4<sup>th</sup> edition: The main differences between this edition of the paper and the 3<sup>rd</sup> edition are:

- addition of item 13: Recreation Opportunity Spectrum;
- addition of item 43 'Tourism and Community Development' (Palermo et al. 2001);and
- updating of item 28, the Benefits Approach, previously item 27, 'Net Benefits Approach to Leisure (NBAL)', which is now based primarily on Driver (2008) and the renamed: Outcomes-Focussed/ Benefits-Based Management (OFM/BBM) system.

This paper represents work in progress and is therefore likely to be revised/updated from time to time. It is the second in a series of papers:

Project Paper 1: *Open Space Planning Standards in Australia: in Search of Origins* (WP11)

Project Paper 2: *Alternatives to Standards: A Review of Leisure Planning Guidelines* WP12)

Project Paper 3: *Leisure Wants, Needs, Participation, Demand, Preferences, Opportunities, Rights, Benefits and Collective Consumption: Revisiting the Concepts* (WP13)

Project Paper 4: *Leisure and the Concept of Need* (WP14)

Project Paper 5: *Leisure and the Concept of Demand* (WP15)

Project Paper 6: *Leisure and Benefits* (WP16)

Project Paper 7: *Leisure Needs Studies: A Review* (WP17)

Project Paper 8: *U-Plan: A Participation-based Approach to Planning for Leisure* (WP18)

Project Paper 9: *U-Plan: Focus Modules* (WP19)

Project Paper 10: *Need, Social Need and Leisure: a Bibliography*. (Bibliography 11)

Comments on any of these papers would be gratefully received via: [Tony.Veal@uts.edu.au](mailto:Tony.Veal@uts.edu.au).

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# 1. Introduction

Project Paper 1 provides an overview of the history of the use of fixed open space planning standards in Australia, with a particular focus on New South Wales. It is noted in that paper that, despite the limitations of such standards and 30 years of efforts to wean those responsible for recreation planning off the use of them, they have persisted in many areas of professional discourse and practice. In order to overcome all or some of the deficiencies of the standards approach, a range of alternatives to planning approaches – often called 'needs-based' methods – have been outlined by a variety of authors and organisations over the years. The aim of this paper is to review and evaluate as many of these alternatives as it has been possible to locate.

The next two sections of the paper present definitions of standards and a brief summary of the critique of standards. The main section of the paper presents a review of over 40 sets of planning guidelines, models and approaches which can be seen as wholly or partly offering alternatives to the use of standards. A summary is presented in Section 5 and some concluding discussion of issues in Section 6.

## 2. Types of standard: definitions

As discussed in the Project Paper 1, in the context of planning for leisure, the term 'standard' is used in five ways:

1. *Fixed standards*: a prescribed level of provision of facilities or services related to some criterion, typically the level of population, and typically promulgated by a national, state or other authoritative organisation.
2. *Area-percentage standards*. Specification of a fixed percentage of land in a community to be reserved for open space.
3. *Catchment area-based standards*. Specification of the 'service area' radius of various categories of facilities, or maximum distances which residents should have to travel to access a facility.
4. *Facility standards*. Dimensions and other specifications for the design and construction of individual facilities.
5. *Local standards*. Standards of provision established locally – for example for a single local council.

Fixed standards have been the most widely used in planning in Australia and so it these for which alternatives have been offered. Area-percentage standards have been less widely used, but suffer from most of the limitations of fixed standards. Facility standards remain a necessary component of the development and design process regardless of the overall planning approach adopted. Local standards can overcome many of the limitations of fixed standards and may well be an outcome of local needs-based or demand-based planning exercises.

### 3. The limitations of fixed standards

Fixed standards used in Australia in the past have been condemned on two counts:

1. that the technical bases of the standards were suspect; and
2. the standards used were adopted from overseas, notably from the UK and USA, with little or no adaptation to take account of Australian conditions.

Further, there is a consensus in a range of publications that fixed, state-wide or national standards in general should not be used, on the grounds that:

3. they cannot reflect varying *local conditions*, including population age-structure and other socio-economic characteristics, residential densities, local environmental and supply conditions and recreational traditions;
4. they do not generally take account of the *variable quality* of facilities;
5. they do not of themselves provide guidance on *spatial distribution*;
6. standards for different types of facility are invariably developed by different agencies without consideration of *other types of facility* – for example, planning for outdoor facilities without reference to indoor facilities, even when activities may take place in either setting (eg. basketball);
7. standards have tended to cause the planning process to focus on *open space* or *facilities*, rather than the *activities* which facilities are intended to accommodate.

To be fair to the promulgators of standards, they are invariably accompanied by words of caution, advising that local conditions and additional relevant information should be taken into account, but such advice is universally lacking in detail and often ignored.

## 4. Alternatives to fixed standards: guidelines, models, approaches

Numerous sets of guidelines, models and approaches have been presented over the last 40 years to overcome the deficiencies of using fixed standards for the planning of leisure and sectors of leisure, including open space, recreation, sport, tourism and culture<sup>1</sup>. Most have been prepared by or for government agencies, but some have been developed by academics. Over 40 of these have been identified and are listed in Table 1. The guideline documents and other texts are presented in chronological order of publication. Where multiple editions of a document have been published the presentation order relates to the first edition, even though the summary and evaluation tends to refer to the latest edition.

The review seeks to establish the following in relation to each of set of guidelines:

- The scope, in terms of leisure forms covered.
- The overall planning framework recommended.
- The key planning method, particularly how information – on demand, need, supply, preferences, etc. – is to be transformed into policies and plans.

Many of the alternative methods have been described, collectively, as 'needs-based' approaches. There is, of course a well-established literature on the concept of 'need', comparing it with such concepts as 'demand' and 'participation'. Despite its complexities, the term leisure 'need' has been preferred by many policy-makers in the public sector, arguably because it is part of a discourse which locates leisure alongside other social services, therefore increasing the chances of political support. The conceptual difficulties of how to measure 'need' (compared with 'demand', 'latent demand', 'participation', etc.) has tended to be overcome by the use of the public consultation processes. It is believed that people can be relied upon to express their own 'needs' when asked. In this situation it can therefore be argued that the outcome focus is on the political process of addressing stakeholder preferences rather than on leisure outcomes *per se*. This issue is discussed further at the end of the paper.

A number of additional sources with apparently relevant titles was consulted but not considered appropriate for inclusion; these are listed in Appendix A.

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<sup>1</sup> Depending on the definition used, culture may be seen as part of leisure or leisure may be seen as part of culture.



Table 1. Planning Guidelines

#	Date	Authors	Sponsoring agency	Title	Country
1	1968	Sports Council	Sports Council	Planning for Sport	UK
2	1971	Shivers and Hjelte	Academic	Planning Recreational Places	USA
3	1972	Maw and Cosgrove	Academic	Assessment of Demand for Leisure	UK
4	1974	Burton	Academic	A New View of the Planning Process	Canada
5	1977	Garrett & Spedding	Ministry of Recreation & Sport	Ministry of Recreation and Sport Guidelines	NZ
6	1977	Dept of Environm't, Housing & Com. Dev.		Leisure Planning Guidelines for Local Government	Aust.
7	1977	Burton/Ellis/Homenuck	Ministry for Urban Affairs/ CPRA	Guidelines for Urban Open Space Planning	Canada
8	1977	Lothian	Professional/Thesis	Methodology for Countryside Recreation Planning	Australia
9	1977/98	Baud-Bovy & Lawson	Academic	Products Analysis Sequence for Outdoor Leisure Planning (PASOLP)	Switzerland
10	1978	NSW Dept of Sport & Recreation		Planning Standards for Selected Sports Facilities	NSW, Aust.
11	1978/86	University of Missouri	US Dept of Commerce	Tourism USA: Guidelines for Tourism Development	USA
12	1979	Ontario Ministry of Culture & Recreation		Culture and Recreation Master Planning	Ont., Canada
13	1979	Clark and Stankey	US Forest Service	Recreation Opportunity Spectrum	USA
14	1980	Gold	Academic	Innovative Method	USA
15	1980	Urban Res./Dev. Corp.	HCRS	Handbook for Recreation and Planning Action	USA
16	1982/02	Veal	Academic	Planning for Leisure: Alternative Approaches	UK/ Aust.
17	1983	Kelly	Academic	A Model for Need-based Planning	USA
18	1983/05	Torkildsen	Academic	Planning for Leisure and Recreation	UK
19	1984	NSW Dept. of Environment & Planning		Guidelines for Preparing an Open Space Plan	NSW, Aust.
20	1985	Bannon	Academic	Leisure Resources: Its Comprehensive Planning	USA
21	1985	Kelsey & Gray	AAHPERD	Master Plan Process for Parks and Recreation	USA
22	1985	NSW Dept of Environment & Planning		Open Space in the Sydney Region	NSW, Aust.
23	1987/90	Marriott	SA Dept of Sport & Recreation	Recreation Planning Manual for Local Government	SA, Aust.
24	1990	Sport and Recreation Victoria		Community Recreation: Municipal Recreation Planning Guide	Vic, Aust.
25	1991	Steiner	Academic	Landscape Planning: a growth management example	USA
26	1991/02	Office of the Deputy Prime Minister, UK		Planning Policy Guidance 17	UK
27	1991/05	Sport England/CCPR		Towards a Level Playing Field	UK
28	1991	Driver <i>et al.</i>	US Forest Service	Net Benefits Approach to Leisure	USA
29	1992	Manidis Roberts	NSW Dept. of Planning	Outdoor Recreation & Open Space Planning Guidelines for Loc. Govt	NSW, Aust.
30	1992	Dredge & Moore	Academic	Methodology for a Tourism Strategy	Aust.
31	1993/98	Inskeep	World Tourism Organization	Guide for Local Authorities on Developing Sustainable Tourism	Internat'l
32	1994	Vassiliou et al.	Qld Dept. of Tourism, Sport etc	Getting it Right: Guide to Planning & Developing Sport/Rec. Facilities	Qld, Aust.
33	1994/97	Guppy	Australia Council	Better Places Richer Communities	Aust.

34	1995	Grogan and Mercer	Arts Queensland/Australia Council	The Cultural Planning Handbook	Aust.
35	1995/00	Daly	SA Office of Recreation & Sport	Recreation and Sport Planning and Design	SA, Aust.
36	1996	Mertes & Hall	NRPA	Parks, Recreation, Open Space and Greenway Guidelines	USA
37	1996	Scottish Sports Council		Facilities Planning Model	UK
38	1997	WA Dept of Sport and Recreation		How to Undertake a Needs Assessment for a Sport & Rec. Facility	WA, Aust.
39	1998	Dreeszen	Americans for the Arts	Community Cultural Planning: A Guidebook for Community Leaders	USA
40	1998/06	Mill and Morrison	Academic	The Tourism System	USA
41	1999	Dept. of Culture, Media & Sport		Local Cultural Strategies	UK
42	2000	Godfrey and Clarke	Academic	The Tourism Development handbook	UK
43	2001	Palermo <i>et al.</i>	Academic	Tourism and Community Development	Brazil/Canada
44	2001	Evans	Academic	Planning for the Arts: Models & Standards of Provision	UK
45	2003	NSW Ministry for the Arts & Dept of Local Government		Cultural Planning Guidelines	NSW, Aust.
46	2003	Sport and Recreation Queensland		Open Space for Sport & Recreation: Planning Principles etc.	Qld, Aust.
47	2004	NZ Ministry of Tourism		Tourism Planning Toolkit for Local Government	New Zealand
48	2007	2010 Legacies Now/Creative Cities Network		Cultural Planning Toolkit	Canada
49	2007	WA Dept of Sport & Recreation		Decision-making Guide	WA, Aust.

## 1. 1968: Planning for Sport (Sports Council, UK)

The demand-based planning methodology proposed by the UK's Sports Council in 1968 covered outdoor and indoor sport, but not informal recreation (Sports Council, 1968). The methodology, summarised in Figure 1, was demonstrated using percentage participation rates for individual sports from surveys conducted in new towns, where it was known that participation was not constrained by lack of supply of facilities. These were adjusted for the age-structure of an 'average' community (ie. with a national average age-structure) and, in worked examples, were converted into numbers of players and numbers of teams (where applicable) for a hypothetical population of 60,000. The numbers of playing fields, swimming pools and sports halls required to accommodate the demand were then calculated and expressed as a *local* standard in terms of requirements per 1000 population. While the report indicates that its aim was to demonstrate a *method* and that the results obtained did not represent new national fixed standards, they were often subsequently interpreted as such.

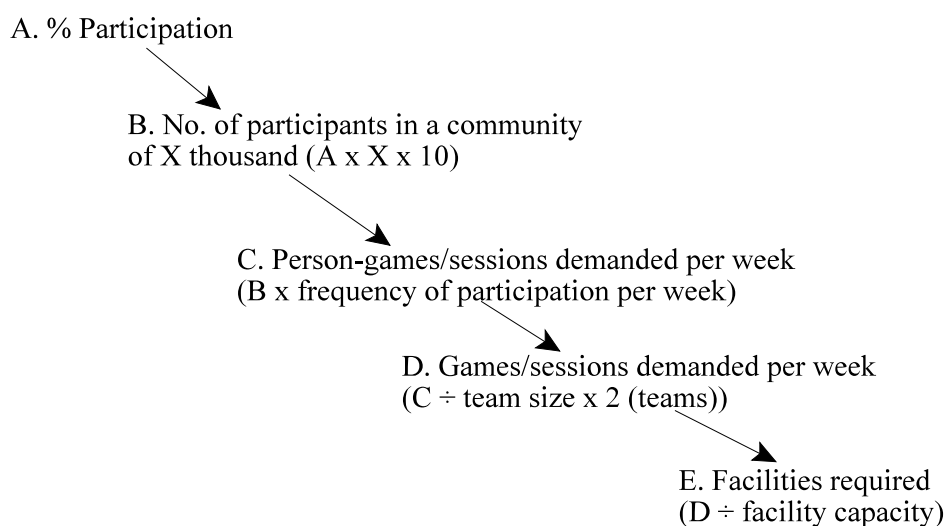


Figure 1. Summary of *Planning for Sport* methodology

The challenge for this methodology lies in the initial step: what level of participation is to be planned for? The worked example in the *Planning for Sport* document used age-specific participation data from British new towns. Any application of the method in a particular area involved application of these participation rates to the age-structure of the local population. The implication is therefore that, age-for-age, the participation levels to be planned for would be those of the new towns where the original surveys had been carried out; given the lack of facility constraints, these were seen as likely maximum possible participation rates. Whether this is a suitable ideal participation level to aim for or not, the implication of the method is that, if generally adopted, age-for-age provision levels would be identical everywhere. No guidance was given as to what other survey sources might be used. Finally, no guidance was given on evaluation of plans based on the methodology.

The major methodology is a quantitative estimation of potential demand/participation and, although the result is a set of local facility standards, since this is based on *participation* this can be seen as the key outcome focus.

## 2. 1971: Planning Recreational Places (Shivers and Hjelte, USA)

Chapter 3 of this substantial (380 page) book, is entitled 'Principles for Planning Recreational Places' and, under a heading 'Surveys to Inventory and Collate Various Community Factors', and a sub-heading 'Survey Outline', appears to present an overall guide to the planning process with 11 components:

- A. Geographical aspects of the city.
- B. Political aspects of the city.
- C. Population statistics. [current only]
- D. Social factors. [Social agencies, Delinquency trends, Public opinion/attitudes toward recreational service of all kinds']
- E. Economic factors.
- F. Government factors.
- G. Physical resources for recreational services.
- H. Critical evaluation of the public recreational services of existing agencies.
- I. Recreational habits of the community. [Largely via consultation with organised groups]
- J. Diagnosis of the important needs of the community as revealed by the foregoing inquiry insofar as the community recreational services are concerned.
- K. Recommendations in terms of:
  - program improvements,
  - space acquisition,
  - facility development,
  - professional personnel recruitment,
  - broadened policies for greater coordination between all community agencies,
  - greater involvement of laymen in planning activities,
  - comprehensive offerings, and
  - opportunities for satisfying the recreational needs of the community.

There is no further guidance on how to conduct the analyses specified in items J and K.

## 3. 1972: Assessment of Demand for Leisure (Maw & Cosgrove, UK)

Maw and Cosgrove's model *Assessment of Demand for Leisure: A Modelling Approach* was designed to simulate the individual's leisure decision-making process in the context of temporal, financial and environmental constraints. The basic model, described in Maw and Cosgrove (1972) and summarised in Maw (1972), is reproduced in Figure 2. The model is rare in including consideration of:

- visitors and workers as well as residents;
- the idea of essential time, travel time and available time; and
- awareness of facilities.

These demand-side variables are then linked to supply-side factors to arrive at 'manifest demand' and 'use of specific facilities'.

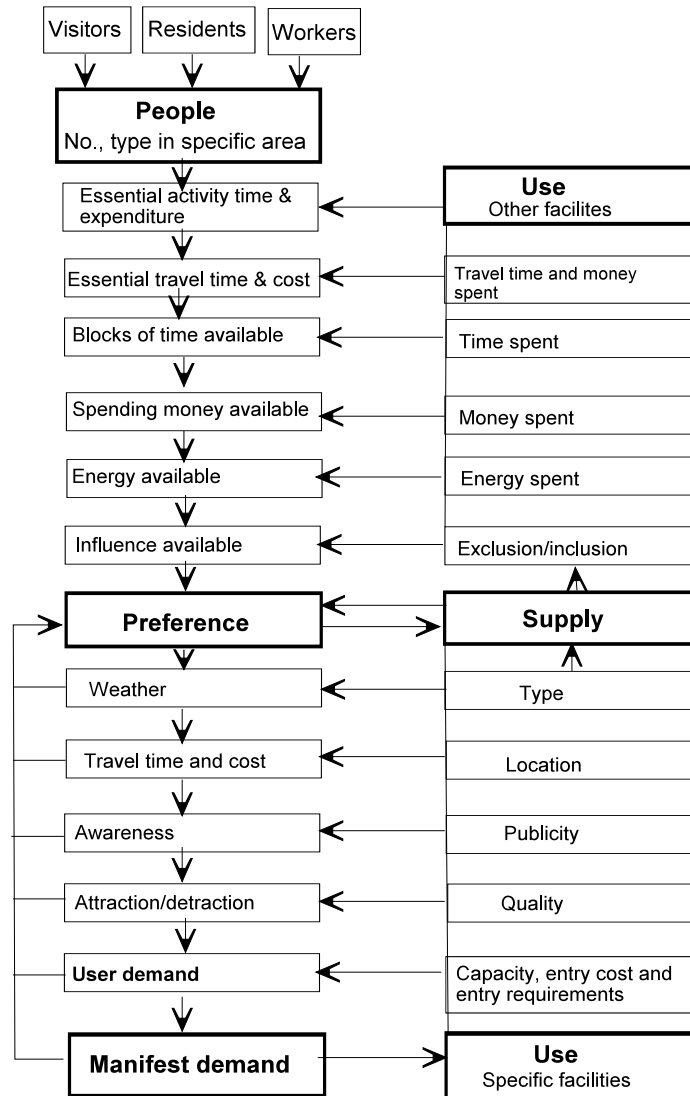


Figure 2. Leisure model (simplified)  
 Source: Maw and Cosgrove (1972: Fig. 1)

The model seeks to overcome the weakness of the Sports Council's model (No. 1 above), namely the identification of the demand level which should be planned for. However, while the Working Paper in which the model was presented and Maw (1970) include supporting data for parts of the model from the work of the Built Environment Research Group at the then Polytechnic of Central London (now Westminster University), the model was never fully operationalised. The methodology could be described as a systems-based behavioural modelling of demand, with the outcome focus being on demand/participation.

#### 4. 1974: A New View of the Planning Process (Burton, Canada)

Burton's 'New View of the Planning Process' was presented at the 1974 national seminar, 'Leisure – A New Perspective', hosted by the Whitlam government's new Department of Tourism and Recreation. His ideas were elaborated in a later book (Burton, 1976) and in part in the Canadian guidelines produced by Burton, Ellis and Homenuck (1975 – No. 7 below). Burton was critical of fixed standards and 'linear' and rigid approaches to planning which were focussed on the provision of facilities as an end rather than a means and proposed instead a process focussed on facilitating leisure *participation/ activity and experiences* (see Figure 3) through a process which was flexible and non-linear (Figure 4). Burton's is a 'broad-brush' exposition in which it is difficult to pin down precise techniques, but the key role of 'Participation or Activity' in Figure 4 suggests that it is the key outcome focus.

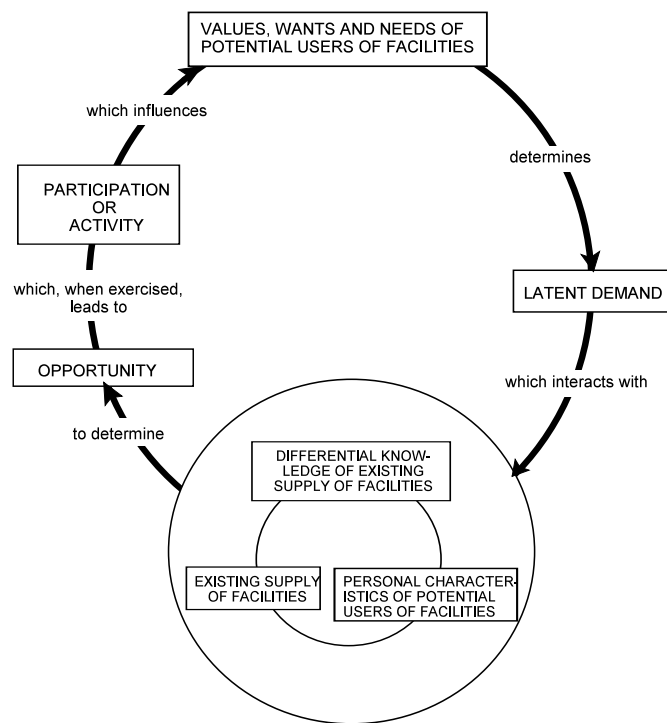


Figure 3. A representation of the leisure activity system

Source: Burton (1974: 326)

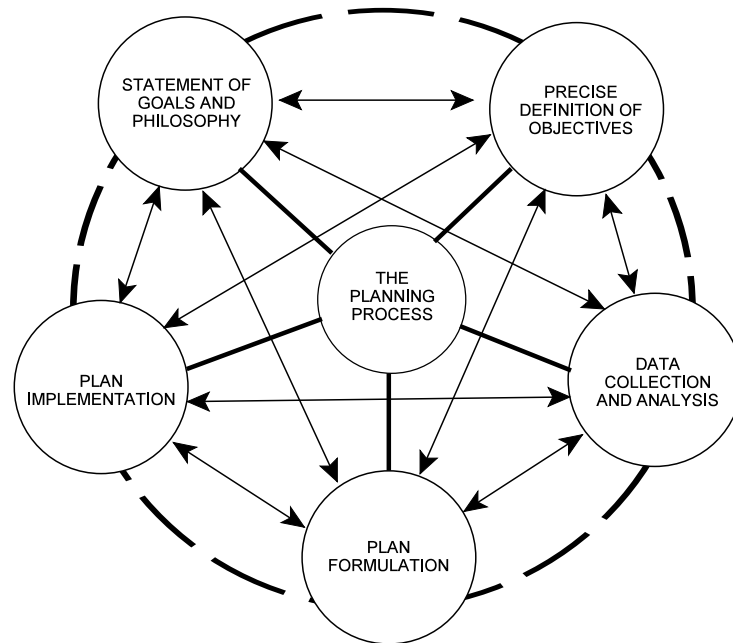


Figure 4. A new view of the planning process

Source: Burton (1974: 330)

## 5. 1977: Guidelines for Community Recreation Planning (Garrett/Spedding NZ)

The New Zealand Ministry of Recreation and Sport published its *Guidelines for Community Recreation Planning* in 1977 (Garrett and Spedding, 1977). The guidelines provided the basis for local authorities to prepare a 'comprehensive recreation plan' within a traditional 'survey-analysis-plan' framework, as shown in Figure 5.

The authors list a number of defects of fixed standards and recommend that communities develop their own local provision standards and facility standards to reflect local conditions. The basis for the development of such standards, and the plan as a whole, is the 'Collection of Base Data', particularly the 'Demands and Needs Analysis'. It is notable that the process outlined gives less status to formal processes of community consultation as a basis for needs assessment than later guidelines. However, surveys and public meetings are recommended since: 'It is essential that the recreation plan be determined by what the public actually want, not by what planners think they want' (Garrett & Spedding, 1977: 8). But the report also states, curiously: 'For our purposes, need exists when a recreation facility or programme is used to its fullest extent and cannot cater for increased use and participation without being extended beyond its capacity'. It is also suggested that future 'demands and needs' can be indicated by extrapolating existing demand on the basis of projected population growth. But the methods by which these various assessments of demand are to be introduced into the plan formulation process is not clear. Thus the recommended methods appear to be a combination of stakeholder consultation, the use of current facilities and future demand estimates.

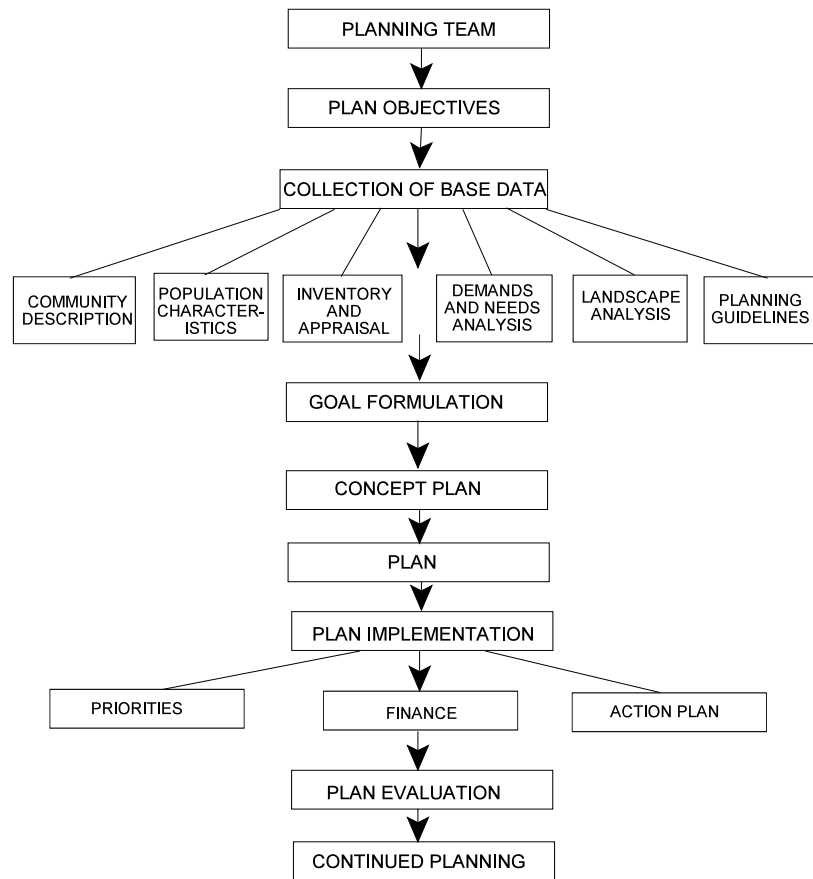


Figure 5. New Zealand guidelines: the planning process

Source: Garrett & Spedding (1977: 3)

## 6. 1977: Leisure Planning Guide for Local Govt (Dept of Environment, etc., Aust.)

The *Leisure Planning Guide for Local Government* was 'based on a report prepared in 1975 for the department of Tourism and Recreation by Consultation Planning Survey Service of Melbourne' (Dept of Environment, Housing and Development, 1977: v). The document provides a broad introduction to leisure in Australia and the role of local government. Referring to Burton's presentation to the national seminar (see 4 above), it sets out the case for a flexible, non-standards-based approach to planning. In a revised version of the Burton framework, as shown in Figure 6, leisure planning is presented as consisting of three elements:

- A set of general objectives and policies
- A bank of relevant information (demographic; 'information about people's needs and interests'; resources (human and physical); trends in leisure, 'options for resource development, the likely success or failure of various strategies, etc.')
- A series of community planning processes and organisational structures to carry out the processes.



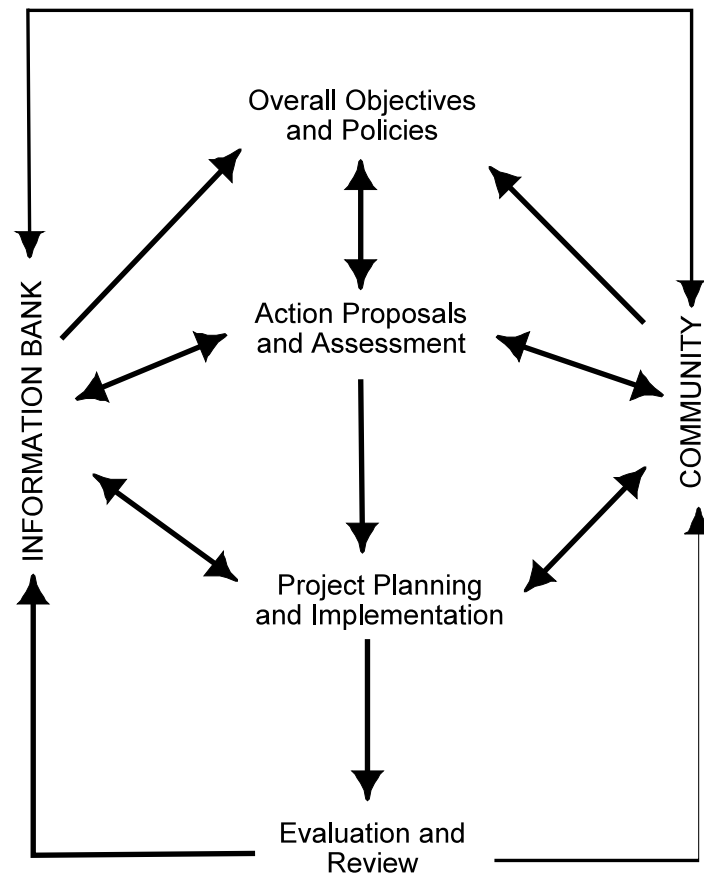


Figure 6. Overall strategic planning for leisure

Source: Dept of Environment, Housing & Community Dev't (1977:20)

The 'community planning processes' are processes for a. generating, and b. assessing *action proposals*. These may be generated from a number of sources, including:

- From the community through widespread demand, through special interest groups.
- From an imaginative and visionary individual.
- From the planning information bank, through data on community needs.
- From a professional assessment of community needs.

(Dept of Env., Housing and Com. Dev, 1977: 20)

A process is outlined for assessing *action proposals*, including assessment of 'community need' to justify proposals and examination of compatibility with 'general objectives and policies'.

A section on 'Measuring community need' canvasses a range of conceptions of the term 'need' and ways of gathering and analysing data on demand, preferences, trends, etc., but the advice is pitched at a broad conceptual level.

Despite the overall stance against standards, in discussing 'Establishing a leisure planning policy' later in the report (p. 37) the use of standards appears to be endorsed; although it is possible that the type of standards being endorsed are local rather than fixed, but this not explained.

## 7. 1977: Guidelines for Urban Open Space Planning (Burton *et al.*, Canada)

The report, *Guidelines for Urban Open Space Planning*, was commissioned by the Canadian Ministry of State for Urban Affairs and published by the Canadian professional body, the Canadian Parks/Recreation Association. The first half of the report is taken up with an 'Urban Open Space Study', which began in 1972 and involved a mail survey of open space planning practice in all 376 communities in Canada with a population over 5000 (response 135), a more detailed examination of practice in six communities and a modified 'Delphi' exercise with six panels of 80 persons (188 returns) drawn from professional and community groups. The results of these surveys provide the basis for the guidelines in the second half of the document.

Fixed, externally determined, standards are dismissed as inadequate but standards developed locally are endorsed. The guidelines present a series of principles to be adopted in planning for open space, including:

- understanding the range of stakeholders and their values and the need for participation in the planning process;
- understanding the difference between short-term and long-term planning and comprehensive versus project or program planning; and
- the need to take account of environmental and aesthetic factors.

The method advised for establishing local provision standards is semi-observational, involving observation of the intensity of open space use, related to residential density and 'service radius' issues. But it is not fully clear how the data on current use patterns of existing facilities are to be used to establish proposals for the future. The guidelines stop short of providing a step-by-step guide to the production of local standards.

## 8. 1977: Methodology for Countryside Recreation Planning (Lothian, Australia)

Andrew Lothian's (1977) 'Methodology for Countryside Recreation Planning' was put forward specifically to overcome the limitations of fixed standards for open space planning or, to use his term 'area standards'. The methodology comprises nine stages, as shown in Figure 7.

The methodology is demand-based. The stages are as follows:

1. *Current participation rates (visits per person per annum) in countryside recreation activities* are identified by household survey in the catchment area.
2. *Current annual demand (visits) for each activity* is identified by multiplying by the catchment area population (P).
3. *Activity demand for each activity in groups per annum* is determined by dividing the above by *group size* discovered from on-site surveys, based on the observation that countryside recreation activities tend to take place in groups.
4. *Peak demand for each activity* is estimated by dividing the above by the average number of group-visits for the highest 20 days, discovered from on-site survey data on the pattern of demand through the year.
5. *Participant types* refers to area-orientated (spend most time travelling around and area and less time at any one site); site-orientated (spend more time at a single site); and intermediate patterns of use, derived from the household survey and divides peak demand for each activity into three types.
6. *The number of sites required per activity at peak times* is estimated by dividing the above

figure by 'turnover rates', which are the number of times a day a site (which accommodates one group) may be used in a day, as determined from on-site surveys.

7. *Land area required* is determined by multiplying the number of sites by an appropriate per-site area – this is discussed in terms of: (i) intensively used area; (ii) vehicular access and parking; and (iii) buffer area: an example is given and 'on-site surveys' given as a source of information.
8. *Spatial distribution of existing facilities* is analysed, related to accessibility (travel time zones) from 'the urban area'.
9. *Adequacy of present facilities* is assessed in terms of overall numbers of site required and existing, but also in terms of spatial distribution, for example, facilities for 'site-orientated' participants (see 5 above) should have a high level of accessibility – but this key process is described in just a single paragraph.

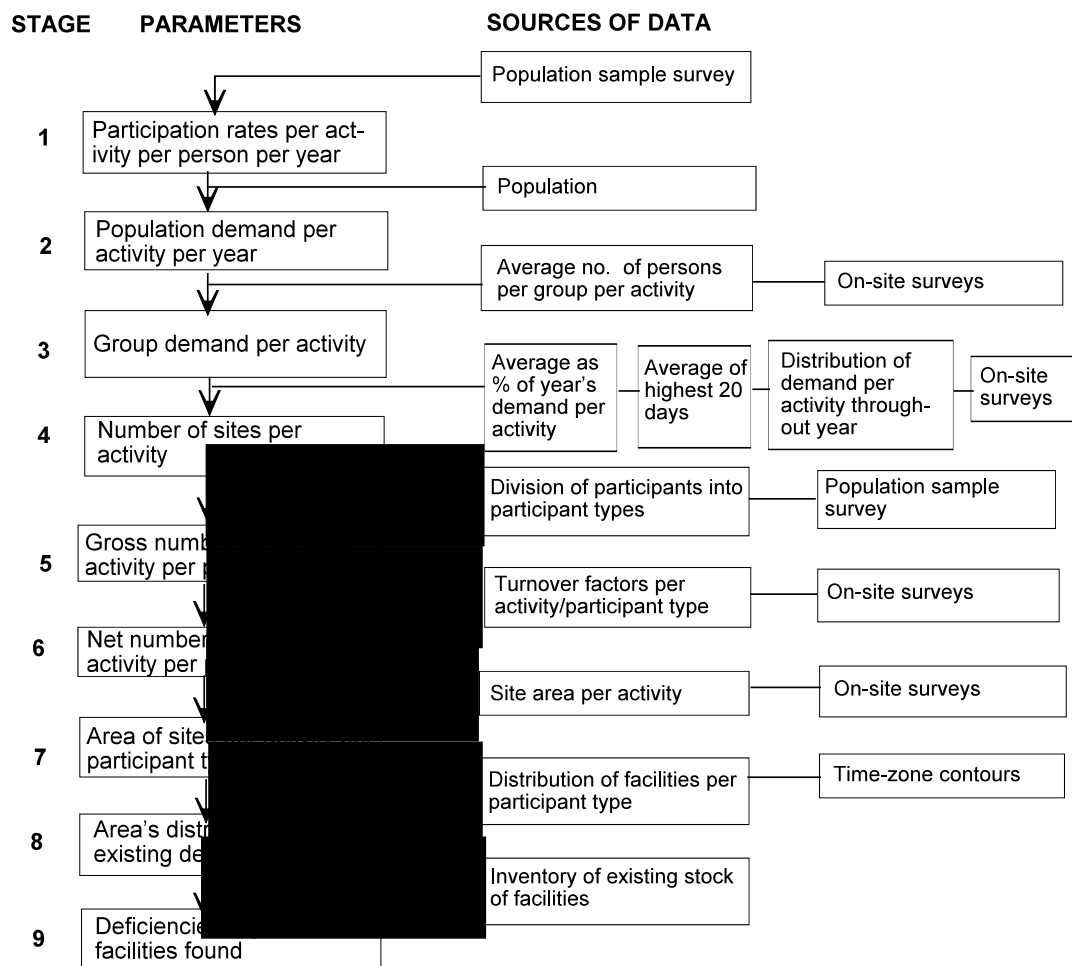


Figure 7. Methodology for countryside recreation planning - Lothian  
Source: Lothian (1977)

To describe the approach as involving just nine stages is somewhat misleading since the above procedure describes only the status quo. Lothian goes on to describe the use of the methodology in prediction. He notes that many of the data items involved may change over time and should therefore be monitored by periodic repetition of the household and site surveys, the data from which could also be used to determine trends, which could in turn be used for forecasting.

The methodology is of interest because:

- it is rare in specifically addressing the countryside recreation context (although much of the approach is applicable to the urban context);
- it introduces the idea of group demand;
- it addresses the issue of planning for peak demand, albeit somewhat arbitrarily;
- it introduces the area-orientated vs site-orientated typology and associated site 'turnover rates'.

9. 1977/1998: Products Analysis Sequence for Outdoor Leisure Planning (PASOLP) (Baud-Bovy and Lawson, Switzerland/International)

Curiously, despite its title, Baud-Bovy and Lawson's planning model, Products Analysis Sequence for Outdoor Leisure Planning (PASOLP), is primarily focussed on tourism. The approach, originally developed in 1977, is presented in diagrammatic form and has changed in detail over the years (see, for example the version in Baud-Bovy, 1982). The 1998 version is shown in Figure 87. The original diagram was pitched at the national and regional level but is equally applicable at other levels. Our concern here is with the local or regional level so in Figure 8 the word 'region' has replaced 'country' in the original.

The 'flow by flow analysis' referred to in the 'Products analysis ...' box refers to various potential markets and associated 'products' (eg. USA backpackers, Japanese package tourists) which must each be analysed in turn to provide a basis for deciding on 'priority tourism flows'. Very little guidance on the application of the PASOLP model is offered in the half page devoted to its discussion. While the 'additional facilities' which must be provided to cope with tourist flows relate to the capacity of the accommodation and transport sector, they could also relate to leisure facilities, tourists' use of which could be considered alongside demand generated from the resident population.

However, this link is not made by the authors; instead, another version of the model is presented for use in preparing a 'master plan for recreation' (p. 207). In this version, as shown in Figure 9, the word 'recreation' replaces 'tourism' and the box labelled 'Competing tourism products' is replaced by 'Protection of the environment', although one would have thought that environmental considerations would be the same in both types of planning. The name of the model and the associated discussion refers to *outdoor leisure*, but it is not clear why the model could not be equally applied to indoor facilities. As with the tourism-orientated version, little advice is available on applying the model.

Later in the book US open space standards (from Mertes and Hall/NRPA see No. 32 below) and even standards from the former USSR are presented, but it is advised that 'Their application should be replaced by a more sensitive approach taking account of the needs and behaviour of local people' (p. 244).

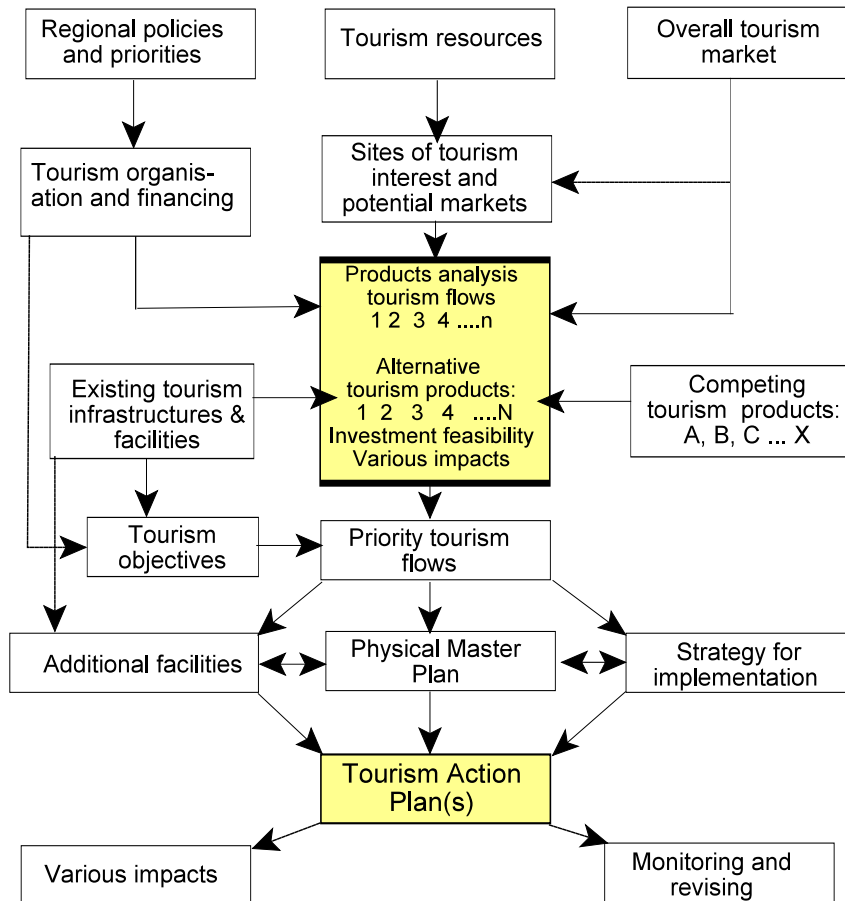


Figure 8. Products Analysis Sequence for Outdoor Leisure Planning (PASOLP)  
Based on Baud-Bovy (1998: 174)

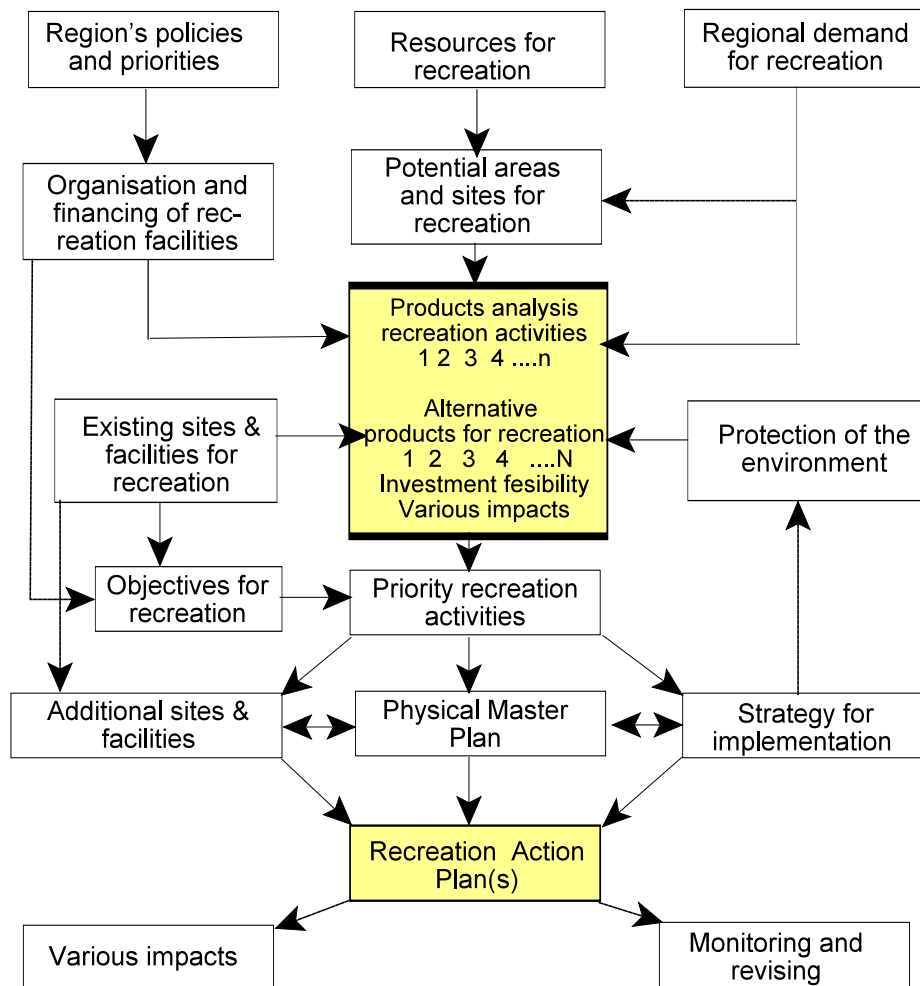


Figure 9. Products Analysis Sequence for Outdoor Recreation

Based on Baud-Bovy (1998: 207. NB. in the book, the output is still labelled 'Tourism Action Plan(s)' but it has been assumed that this is an oversight so 'Recreation Action Plan(s)' has been inserted here).

#### 10. 1978: Planning Standards for Selected Sports Facilities (DSR, NSW, Aust.)

A publication with the title *Planning Standards for Selected Sports* might seem an odd choice for inclusion in a list of guidelines intended to present *alternatives* to the use of standards. However, this document presents, in effect, not *fixed* standards but *local* standards and, in so doing, outlines, with worked examples, a methodology which could be used by others. The aim of the study was to establish standards of provision for towns with a population of 20,000 or less. Eight towns in the South Coast region of the New South Wales Department of Sport and Recreation were included together with seven sports activities: golf, tennis, squash, swimming, basketball, cricket and football (all codes). Councils in each of the eight towns were asked to provide information for each activity on:

- the 'effective age range' for the activity (upper and lower age limits encompassing most participants);
- existing facilities; and

- 'indicators of usage levels' of the identified facilities, including indications of over-use or under-use.

Because the towns and activities varied the establishment of common standards for each activity is not formulaic, but includes an element of judgement: however, the reasons for the judgements and the data upon which the judgements are based are presented in the report. It should also be noted that the effect of tourism on golf demand in coastal towns is discussed. The resultant standards are summarised in Table 2.

**Table 2. NSW Dept of Sport & Recreation, South Coast small town standards, 1978**

Activity	Facility unit	Effective population	Effective age-range
Golf	9 holes	6,000	Males and females aged 10-69 yrs
	18 holes	12,000	
Tennis	1 court	300	Males and females aged 6-54 yrs
Squash	1 court	1,000	Males and females aged 10-49 yrs
Swimming	1 pool 16.3 m.	2,000-6,000	Total population
	1 pool 25 m.	6,000-10,000	
	1 pool 33 m.	1,000-15,000	
	1 pool 50m.	15,000-20,000	
Basketball	1 indoor stadium (1 major court or 2 cross-courts)	2,000 minimum	Males and females aged 10-30 yrs
Cricket	1 wicket	350	Males 5-44 yrs
Football (all codes)	1 field	300	Males 5-34 yrs

Source: NSW Dept of Sport & Recreation (1978)

These standards are expressed in terms of facilities per 1000 'effective' population, suggesting that towns with different age structures would have different levels of provision. Golf, cricket and football are significant in terms of open space requirements and translating these standards into conventional 'hectares per 1000 population' produces standards of: 3.8 ha./1000 total population for golf, which is close to the 4 ha. frequently put forward in fixed standards (see Project Paper 1), and 1.2 ha./1000 total population for cricket and football combined, which is identical to the traditional NSW fixed standards for playing fields, although activities other than football and cricket would boost the standard.

The methodology presented in this report is rare in developing quantified local standards on the basis of data on local patterns of supply and demand as indicated by the use of existing facilities. Since it is facility-focussed, it can be seen as an example of the 'organic approach' to planning (see No. 14 below).

## 11. 1978/91: Tourism USA: Guidelines for Tourism Devt (TTA, USA)

The *Tourism USA* guidelines, sponsored by the US Travel and Tourism Administration, were originally published in 1978 and revised in 1986 and 1991 (University of Missouri Dept of Recreation and Park Administration, 1991). Chapter 1, 'Appraising Tourism Potential', reviews the local benefits of tourism generally and provides advice on how local potential should be assessed.

Much of Chapter 2, 'Planning for Tourism', is devoted to 'leadership' requirements, organisational roles and structures and 'coordination of the tourism industry', although it does present a generic 8-step process, as illustrated in Figure 10. :

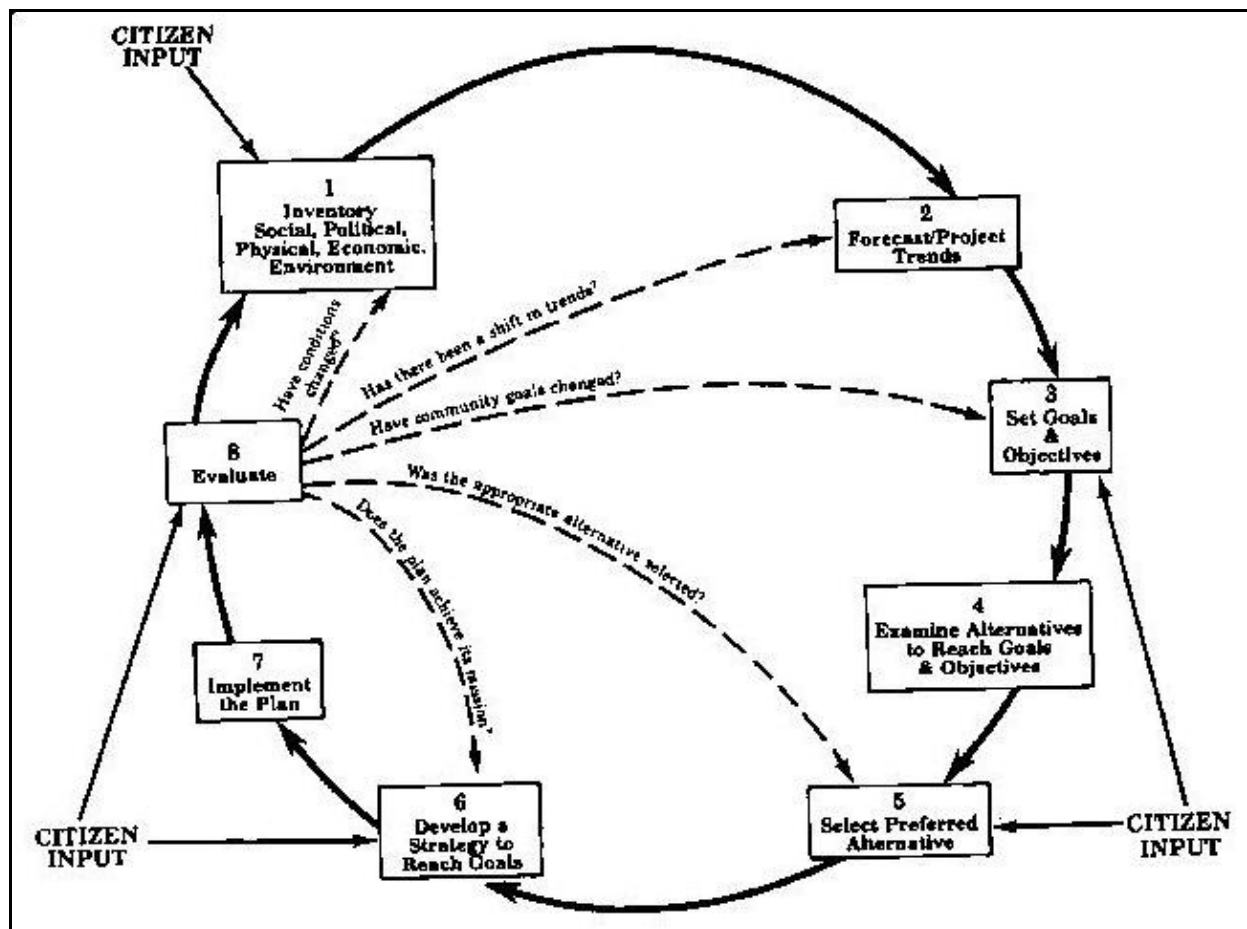


Figure 10. The Tourism Planning Process

(Source: Univ. of Missouri, Dept of Recreation & Park Admin., 1991: 20)

Chapter 3, 'Assessing Product and Market', contains the bulk of the technical planning advice. It consists of discussions of a number of tourism data collection techniques, including numerous model questionnaires and other templates, and economic and other analysis techniques, but this is not clearly linked to an overall strategy preparation process. Considerable guidance is offered on identification of 'target markets'. There is no discussion of the link between local residents' recreation demand and that of tourists.

## 12. 1979: Culture & Recreation Master Planning (Min. of Culture/Rec., Ont., Canada)

The Ontario Ministry of Culture and Recreation's 1979 *Culture and Recreation Master Planning* guidelines do not mention standards, but put forward a six-step planning process:



- Terms of reference
- Data collection
- Data analysis
- Goals, objectives, policies
- Implementation
- Review and evaluation (Ontario Ministry of Culture and Recreation, 1979: 8).

The 'Data collection' step comprises:

- Background studies – mainly existing policies
- Physical features
- Social characteristics
- Inventory of historical/architectural resources
- Inventory of supply of leisure resources
- Inventory of demand for leisure resources – surveys, stakeholder consultation
- Trends and issues – in all of the above.

The description of the 'Data analysis' step occupies just half a page of text and outlines the objectives of the process, concerned with existing and additional facilities and services required, but not the procedures to be followed. It concludes, vaguely: 'Once the analysis is completed, areas of concern can be identified and alternatives developed' (Ontario Ministry of Culture & Recreation, 1979: 13).

### 13. 1979: Recreation Opportunity Spectrum (Clark and Stankey, USA)

The Recreation Opportunity Spectrum (ROS) is framework for classifying open space developed for the US Forest Service in the 1970s (Clark and Stankey, 1979; Stankey *et al.*, 1999; see Jubenville and Twilight, 1993 for further information on origins). It classifies areas, or 'settings', in which people might seek outdoor recreation along a continuum from the totally undeveloped, such as pristine wilderness ('primitive'), to the highly developed, such as a fully serviced camping site and recreation area ('modern'). Against this are set the sorts of activity which the management and other users of these areas might engage in to maintain the appropriate 'ambience' of the site and compatibility with visitor expectations. These ideas are summarised in Figure 11.

Figure 11. The Recreation Opportunity Spectrum

Management/on-site Activities	Spectrum of Settings			
	Modern	Semi-modern	Semi-primitive	Primitive
1. Access (roads etc.)	Easy	Moderately difficult	Difficult	Very difficult
2. Non-recreation resource uses (eg. forestry)	Compatible on large scale	Depends on circumstances	Depends on circumstances	Not compatible
3. Management site modification	Very extensive	Moderately extensive	Minimal	None
4. Social inter-action (contact with other users)	Frequent	Moderately frequent	Infrequent	None
5. Visitor impact	High	Moderate	Minimal	None
6. Regimentation (overt visitor control)	Strict	Moderate	Minimal	None

Source: Clark and Stankey, 1979/Pigram, 1983, p. 27

While it has been developed primarily in the context of resource-based outdoor recreation, ROS is also adaptable, in modified form, to the urban setting (Jackson, 1986).

The spectrum was put forward as a theoretical framework, rather than being based on any explicit empirical evidence on recreation participants. It certainly does not quantify the amount of demand to be accommodated in the different settings specified. It can therefore be seen as a guide for *management* rather than planning.

#### 14. 1980: Innovative Method (Gold, USA)

Seymour Gold's 'innovative method' for recreation planning focusses on planning for activities in parks and hinges almost entirely on community consultation at the neighbourhood level (Gold, 1973: 209ff; 1980: 186). Local communities are required to formulate *goals and objectives* which relate to:

- activities they would like to see provided for;
- the percentage of the population which should be accommodated at peak periods; and
- the density of use (persons per hectare).

In an application of the method to a hypothetical inner city neighbourhood, however, the planning is based on the 'leisure preferences of a stratified, random sample of the neighbourhood residents' (Gold, 1973: 238). Complex processes are described for converting these desires into facility and space requirements. To this reader, however, the detail remains impenetrable. Some comments on the limitations of the process:

- While no less than 10 data collection methods and activities are suggested, it is not clear how the data so collected are intended to relate to the process of goal and objective formulation upon which the whole process is based.
- No mechanism is explained to constrain unrealistic 'wish lists' emerging from the consultation process.
- Planning beyond the neighbourhood level is approached by simply aggregating neighbourhood plans (Gold, 1973: 238), begging the question of how district, sub-regional or regional-level facility requirements are to be assessed.
- While the use of 'advocacy planners' is introduced, there is still the danger that the most persuasive case for provision will be made by relatively privileged neighbourhoods with the requisite analysis and lobbying skills rather than the more deprived neighbourhoods which the agency might wish to target.
- While the planning process is presented as almost continuous, with five year and two-year reviews and reassessments, the 'black box' of neighbourhood/community decision-making is repeated in each cycle, so the precise methods for evaluation of the resultant plans are unclear.

Overall the 'innovative method' can be seen as primarily based on stakeholder consultation.

Gold's approach was initially developed in his doctoral thesis (Gold, 1969) and was published in book form in 1973. It is therefore puzzling that, in Gold's longer, generously illustrated textbook, *Recreation Planning and Design*, published seven years later (Gold, 1980), the method is summarised in just a single page.

## 15. 1980: Handbook for Recreation & Planning Action (URDC, USA)

The *Handbook for Recreation and Planning Action* was developed by the US Urban Research Development Corporation as an aid to communities developing 'Action Programs' required when applying for funds under the federal Urban Park and Recreation Recovery (UPARR) Act, 1978. The process recommended involves ten steps in three phases:

### *Phase I: Framework*

1. Process design and organisation (Workflow chart, time schedules, staff resources)
2. Process relationships (Other planning processes; other organisations; citizen participation mechanisms)

### *Phase II: Assessment*

3. Inventory and evaluation (Present goals; survey of recreation needs; facility/service inventory)
4. Conclusions, implications and issues (Identify issues; public consultation)

### *Phase III: Action Plan*

5. Goals and objectives (Should emerge from steps 3 & 4)
6. Possible choices for action (Professional input on available options for achieving goals and evaluation)
7. Strategies (Selection from among available choices)
8. Park, recreation and open space plan
9. Action program (Priorities and scheduling)
10. Action plan adoption and continuing planning.

The weakness in these guidelines lies in the lack of detail provided for steps 3 and 4; how data are to be analysed to feed into the later stages of the process.

## 16. 1982/2002: Planning for Leisure: Alternative Approaches (Veal, UK/Aust.)

In a working paper, published in 1982 (Veal, 1982) and subsequently developed in two editions of a textbook (Veal, 1994, 2002: 118-47), I sought to address the problems of the use of standards and to present a range of alternatives. In the later versions an overall framework for the planning process was presented: Chapter 5 of the latest edition of the textbook, *Leisure and Tourism Policy and Planning*, presents a 'rational-comprehensive' approach to the decision-making process, as shown in Figure 12. The NSW government guidelines and the UK guidelines discussed below (Nos 26 & 36) are summarised in Chapter 6 (Veal, 2002: 88-115).

A limitation of many of the other guidelines reviewed here is the lack of advice on how to analyse data to produce policies and how to identify and evaluate options to produce a plan. The issue of data analysis and policy development was arguably the main focus of my own work. In addition to the analytical nature of the techniques presented:

- Chapter 6 discusses SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis and importance-performance analysis;
- Chapter 9 discusses economic impact and cost-benefit analysis; and
- Chapter 10 discusses various approaches to performance evaluation.

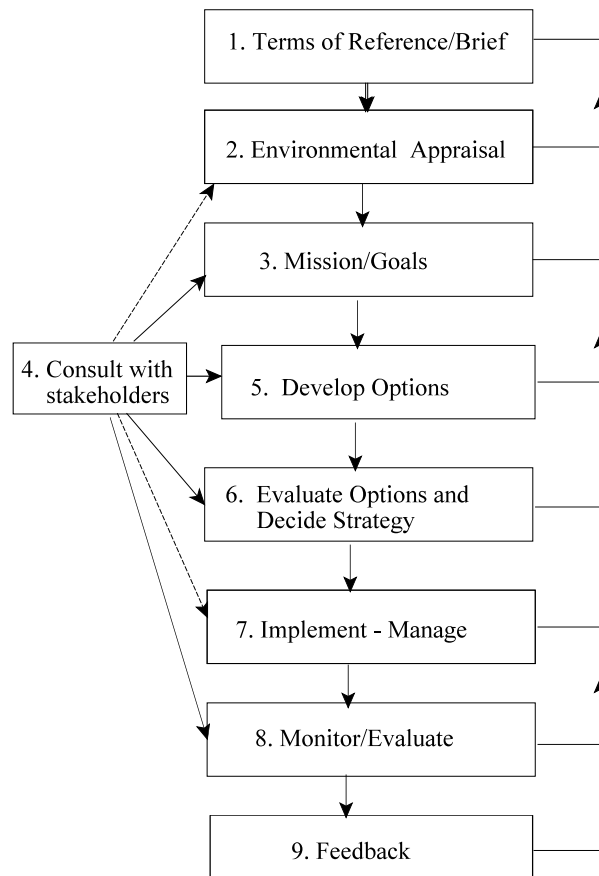


Figure 12. The rational-comprehensive decision-making process  
 Source: Veal (2002: 82)

The initial working paper presented a discussion of standards and a list of seven alternative leisure planning techniques, which was later expanded to ten. The ten alternative planning approaches are briefly summarised below.

1. *Resource-based planning (RBP)*

Resource-based planning is typically based on topography and amenity and the capacity of the land to accommodate recreation activities – it comes into play particularly in planning for tourism and for outdoor recreation on greenfield sites and in rural areas.

2. *Gross demand/market share approach (GDMS)*

The gross demand/market share approach involves converting quantified current or future demand for recreational activity into total facility requirements (gross demand – public sector) or into a plan to secure a share of the market (market share – private sector). The demand level to be planned for must be based on some selected target indicator – typically a participation rate.

### 3. *Spatial approaches (SPA)*

Spatial approaches comprise a number of techniques for the planning of facilities based on the study of patterns of use of existing facilities in relation to existing or potential catchment areas – this may be developed into quantified, transportation-style, modelling.

### 4. *Hierarchies of facilities (HIER)*

The hierarchies of facilities idea arranges facilities according to planning hierarchies – eg. regional, sub-regional, district, neighbourhood – this is partly a variation on standards, since each level of the hierarchy is associated with a level of population, and partly a variation on spatial analysis, since each level of the hierarchy has a spatial dimension and is therefore related to the idea of facility catchment areas.

### 5. *Priority social area analysis (PSAA)*

Priority social area analysis locates facilities according to spatial measures of social deprivation, typically based on analysis of small-area census data, and current relative deficiencies in supply.

### 6. *Recreation Opportunity Spectrum (ROS)*

The Recreation Opportunity Spectrum model is an open space/recreation facility classification system based on types of recreational experience offered, related to associated management regimes – ranging from low-use pristine wilderness areas to managed, developed, high-use areas. (See entry 13 above)

### 7. *Matrix approach (MTRX)*

In the matrix approach, future provision is based on an assessment of the extent to which the existing range of leisure facilities within a community serves various socio-demographic groups and/or neighbourhoods – facilities are listed down the side of the matrix, socio-demographic groups and/or neighbourhoods across the top, and the assessments are contained in the body of the matrix..

### 8. *Organic approach (ORG)<sup>2</sup>*

The organic approach is based on an appraisal of the extent to which existing facilities are under-used, fully-used or experiencing excess demand and the extent to which all geographic areas of the community are being served (spatial component). The approach is summarised in Figure 13.

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<sup>2</sup> Some 25 years after devising this approach and labelling it 'organic', I discovered that Lewis Mumford used the term in 1961 to describe a planning approach which 'does not begin with a preconceived goal: it moves from need to need, from opportunity to opportunity, in a series of adaptations that themselves become increasingly coherent and purposeful, so that they generate a complex, final design' (quoted by Steiner, 1991: 519). Steiner goes on to relate the approach to the idea of *contingency*, which is very apt.

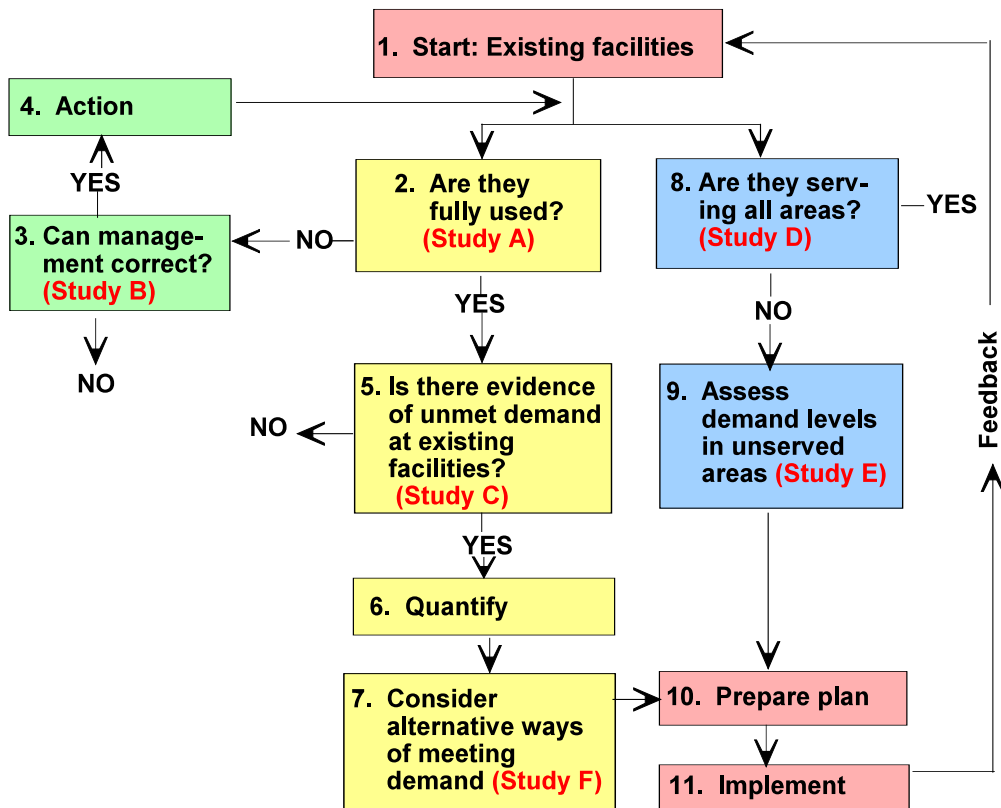


Figure 13. Organic approach

Source: Veal (2002: 142) Studies: A. Capacity/use study; B. Management options study; C. Study monitoring enquiries, crowding, etc. D. & E. Spatial studies; F. Management options study

### 9. Community development approach (CDA)

The community development approach involves community consultation/involvement with devolution of decision-making to the local community level: the planning process is used as a tool of community development.

### 10. Issues approach (ISS)

The issues approach develops an agenda for planning on the basis of the identification of *issues* of concern to the planning agency and/or stakeholders, identified through consultation processes.

The list of alternative approaches suffers from a major limitation, namely that it is just that: a list. Recently attempts have been made to relate the various techniques/approaches to the planning process as a whole to indicate to what extent they complement one another, making distinct contributions to the planning process, and to what extent they are genuine alternatives (Veal, 2006). The result is summarised in Figure 14.

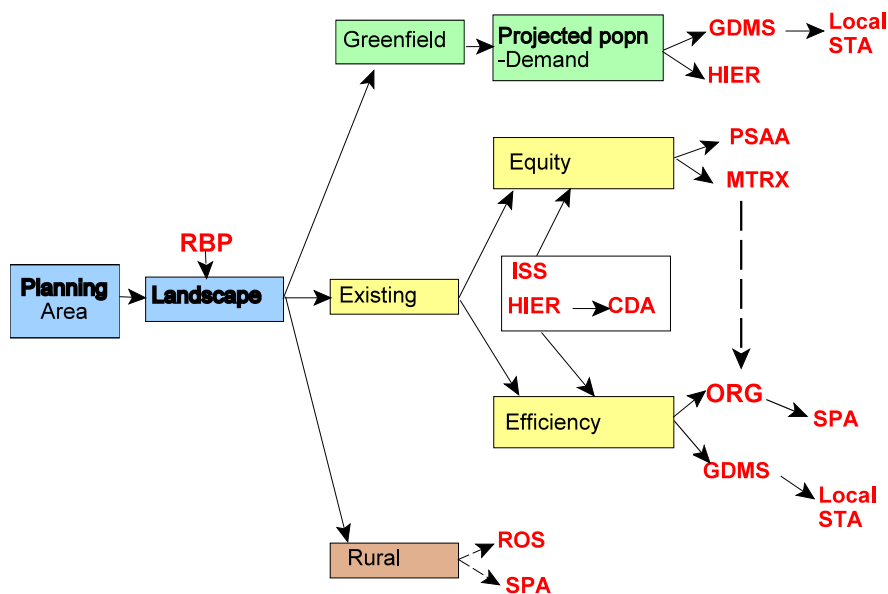


Figure 14. Planning for leisure: relationships between alternative approaches

Source: Veal (2006) Key to abbreviations - see above listing.

Resource-based planning is seen to play an initial role in regard to the landscape of any planning area; it is also relevant in tourism and cultural heritage planning. The other techniques may play differing roles depending on whether the planning is taking place in a greenfield site, an existing developed urban area or a rural area. In existing developed areas there is a divide between equity-based planning approaches (based on priority social groups) and efficiency-based approaches (based on maximisation of participation regardless of social group).

## 17. 1983: A Model for Needs-based Planning (Kelly, USA)

John Kelly's 'Model for Needs-based Planning' was put forward on the grounds that 'Basing recreation on the needs of persons rather than on opportunity-based participation rates or on the lobbying of interest groups would be a move in the direction of programming for human fulfilment' (Kelly, 1983: 172). The model is summarised in a 'community recreation planning sequence' reproduced in Figure 15.

The process for establishing a 'population-need profile including special vulnerabilities' is described as follows:

Planning would begin with a simple analysis of census data for the community. Particular needs of population groups taking account of life careers and temporary and lifelong limitations do not vary greatly from community to community. Therefore, no new indepth study will be required once the basic needs-satisfaction analysis is developed. Rather, the critical needs will be correlated with the population characteristics to produce a need profile for the community. In the community profile recreation needs will be listed by the size of the population groups having those needs. (Kelly, 1983: 173)

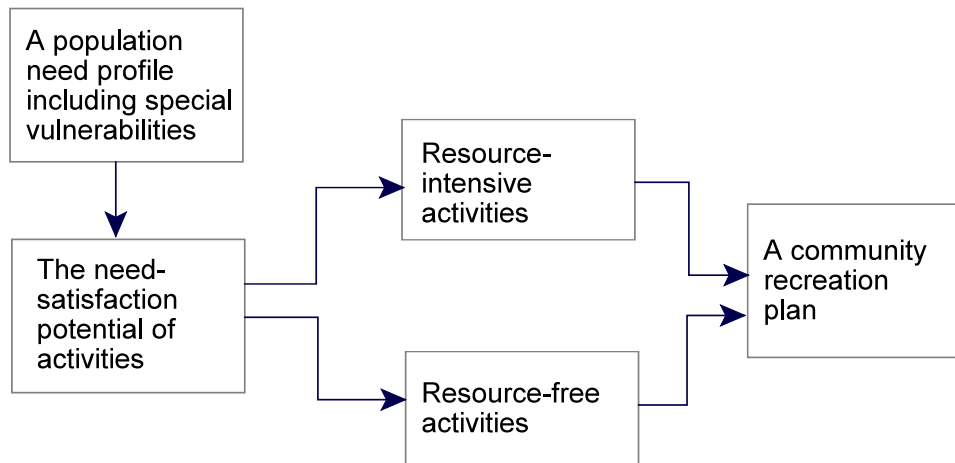


Figure 15. A community recreation planning sequence  
(Source; Kelly, 1983: 173)

Thus, according to Kelly, people's 'needs' can be predicted simply by knowing their socio-demographic characteristics as indicated by the population census and leisure patterns related to 'life careers and temporary and lifelong limitations' (ie. stages in the life-cycle) which are known from existing surveys, such as Kelly's own research in English and American new towns, and these 'do not vary greatly from community to community'.

Seven of these 'needs' are listed in a table, together with a 'preliminary list' of activities which, according to Kelly's surveys, are effective in satisfying them. Thus, in the case of the leisure need 'rest, relaxation, work contrast', the activities reading for pleasure and TV-watching provide 'predominant' satisfaction, while swimming, hobbies, concerts and family outings provide a 'major satisfaction element'. Kelly does not, however, indicate how people's census-based socio-economic characteristics are related to the incidence of these seven 'needs'. He then refers to another American study which identified just four 'needs': (1) achievement and skill mastery; (2) autonomy/ control; (3) physical fitness; and (4) social enjoyment. But when these were related to need-satisfying leisure activities, it was found that the pattern 'did not vary significantly by age or sex' (Kelly, 1983: 175).

While the above statement suggests that socio-economic groups would be ranked according to the 'size of the population groups having those needs', in an illustrative example of the application of the process Kelly suggests that 'vulnerable groups' would be given priority, but how these are to be selected is not indicated.

## 18. 1983/2002: Planning for Leisure and Recreation (Torkildsen, UK)

The first edition of George Torkildsen's textbook, *Leisure and Recreation Management*, was published in 1983 and included a chapter on 'Planning for Recreation', which presented a discussion and critique of standards, followed by summaries of case studies of a number of UK examples of the use of alternative planning approaches. It also includes the presentation of a 'needs-based' perspective involving four lists:

- A. Ten individual leisure opportunity factors;
- B. Ten advantages of participatory planning;



- C. Ten ways of improving the process; and
- D. Ten ways to get things done (Torkildsen, 1983: 286-90).

The chapter has evolved over the subsequent four editions of the text. In the third edition a number of the techniques, apparently from my own list as discussed above (No. 14), were introduced (Torkildsen, 1992: 144-58), including spatial analysis, hierarchies of facilities, national participative (sic) rates (equivalent to my 'Gross demand'), the grid approach (which I later termed 'matrix'), and the 'need index' approach (which I had called priority social area analysis).

In the fifth edition of the book (Torkildsen, 2005: 225-73), standards are critiqued but not entirely dismissed. Six alternatives to standards are presented:

- *Catchment areas and location* – a general discussion of catchment areas as a basis for planning and a detailed summary of a hierarchy approach (thus covering spatial approaches and hierarchies of facilities in No. 14 above).
- *National participative (sic) rates* – a single paragraph discussion of national surveys as sources of information on demand without any explanation of how the data might be used (although this was provided in the third edition of the book (an example of the Gross Demand/ Market Share method).
- *Matrix-grid approach* – this is not related to the matrix approach discussed above; the 'grid' here is a spatial, 0.5 kilometre grid surrounding a facility in which percentage levels of use (or 'penetration') of an existing facility are analysed, but the source of data and the analytical procedure used for this exercise are not indicated. This can be seen as a type of spatial approach.<sup>3</sup>
- *Need index approach* – this is equivalent to priority social area analysis method (No. 14 above).
- *Expressed demand and the Playing Pitch Strategy* – draws on a 1991 Sports Council methodology which estimates playing field requirements on the basis of age-specific participation rates converted into 'team generation rates' – see Sport England (No. 25) below.
- *Facilities Planning Model* – refers to a 1998 Sports Council demand-based methodology which appears to be a development of the 1968 methodology referred to above (No. 1) – see Sport England (No. 25) below.

Presentation of these techniques is followed by discussions of community consultation and a 10-stage planning process model:

1. Review policies, goals and objectives
2. Evaluate provision
3. Consult widely
4. Assess demand
5. Determine deficiencies/surplus
6. Identify available resources

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<sup>3</sup> Torkildsen's use of 'grid' and 'matrix' over the years has been confusing. In the 1982 and 1994 versions of my own list of planning techniques I included a 'Grid' approach and Torkildsen presented this, without attribution, in his 1992 third edition. However, in his 1999 fourth edition he introduced a spatially-orientated planning technique under the name 'grid' so, in the 2002 version of my own list, to avoid confusion on the part of students, I changed the name 'Grid' to 'Matrix' and included a footnote explaining why. This came to nought when, in his 5th edition, Torkildsen renamed his spatial technique the 'Matrix-grid approach'!

7. Select management approaches (extent of involvement of private sector management)
8. Produce or revise the authority's Cultural Strategy and local leisure plan
9. Action plan
10. Monitor and evaluate.

In addition to the various editions of his textbook, Torkildsen, with Gwynne Griffiths, produced a guide to 'Strategic Planning for Leisure Provision' as one of *Torkildsen's Guides to Leisure Management* (Torkildsen and Griffiths, 1993). This essentially reflected the content of the third edition of the textbook.

#### 19. 1984: Guidelines for Preparing an Open Space Plan (DEP, NSW, Aust.)

This brief, 13-page, document was issued by the NSW Department of Environment and Planning as an attachment to a departmental circular (No. 73, 1984), so is seen as relating to statutory planning processes in New South Wales. Councils are advised to prepare an open space plan as 'primarily the tool in which a council establishes its recreational and open space need and which it uses to determine what should be its priorities for open space acquisition and development'. The guidelines cover four tasks:

- (i) assess existing supply;
- (ii) identify needs;
- (iii) determine how to satisfy unprovided need; and
- (iv) establish/develop programs [of acquisition, improvement and management of open space].

Regarding the identification of needs, the report states:

It is now widely accepted that the application of rigid standards to the provision of open space is not always appropriate. Different areas have different needs and a wide range of factors influences and constrains the location and amount of open space that can be provided. However, some sort of standard will always be needed as a guide to assessing open space. The standard of 2.83 ha/1000 people has been accepted for many years as a yardstick for the adequate provision of open space. It is now suggested that councils could set a standard higher or lower than this amount in relation to their needs and resources.

(NSW Dept. of Environment & Planning, 1984: 4)

Factors to be taken into account in setting open space standards are:

- whether they are achievable;
- whether regional open space and other easily accessible publicly owned land provides for some of the needs of the population;
- the amount of private open space (e.g. back gardens) that exists in the area and whether this compensates for local parks;
- the availability of school facilities and the possibility of these being used by the community;
- the proximity of other alternative recreational facilities, such as city entertainment.

(Dept of Environment and Planning, 1984: 5)

No further advice is given on just how these factors should be taken into account – notably, how the trade-off between open space and 'city entertainment' should be assessed.

Factors to be 'considered in assessing the population and its open space *needs*' are:

- age profile of the population;
- occupancy rates of existing or planned development;
- changes likely to result from development;
- changes in recreation *demand* likely to result from changes in the demographic characteristics of the population;
- criteria relating to the desirable distribution of various forms of open space;
- special *needs* (e.g. the disabled). (Dept of Environment and Planning, 1984: 5, emphasis added)

While both demand and needs are mentioned, no advice is given on the difference between the two concepts or how analysis of data collected might be carried out.

It is then suggested that one way of determining 'recreational and open space needs' is to conduct a 'survey of the demand for facilities by users and potential users'. How people's responses to a demand survey should be converted into 'recreational and open space needs' is not explained, but a survey manual to collect the data is promised from the Department of Sport and Recreation<sup>4</sup>.

Finally, based on the 1982 survey of open space in council areas in Sydney, the report presents four 'population models', together with associated standards for 'an adequate provision of various types of open space', as summarised in Table 3. The detailed basis for the standards indicated is not provided, although the various community types are defined in a table, in terms of age-structure and expected rates of population growth/decline. It can be seen that the overall totals vary considerably, particularly between 'developing' communities and the rest.

This report can be seen as part of the process of transition from standards-based planning to some other form of planning, but there is a clear reluctance to abandon standards and there is confusion on whether the move is to a demand-based or a need-based approach.

**Table 3. An adequate provision of various types of open space for population models**

Type of open space	Type of community			
	Developing	Mature	Ageing	Recycling
ha./1000 people				
Playing fields	1.5	1.0	0.5	0.75
Other sporting facilities	0.2	0.2	0.2	0.2
Playgrounds/small parks	0.5	0.25	0.5	0.5
Other parks	1.5	1.5	1.5	1.5
Total	3.7	2.95	2.7	2.95

Source: NSW Dept of Environment and Planning (1984: 7)

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<sup>4</sup> A draft manual was produced in 1984 (NSW Dept of Leisure, Sport and Tourism and ABS, 1984) but no final version is known. The model question included in the manual asks respondents about participation in a wide range of leisure activities, but not whether they have visited a park or other open space.

20. 1985: Leisure Resources: its Comprehensive Planning (Bannon, USA)

The first edition of this standard US text, with the curious grammatical error in its title, was published under the single authorship of Joseph Bannon in 1985; in the second edition, published in 1999, Bannon was joined by two additional authors and it is upon this edition that this summary is based (McLean, Bannon and Gray, 1999). It contains three chapters of particular relevance to planning:

- Chapter 1 on 'Defining the process through strategic planning';
- Chapter 3 on 'Master planning leisure resources', authored by Stephen A. Wolter, with a 'demographics' section by Doug Nelson and Howard Gray; and
- Chapter 5, on 'Construction and Utilization of the Community Survey', written by Anandra Mitra.

In the strategic planning chapter a 'Strategic Planning Model', is presented containing four components and 13 steps, as set out in Figure 16, with my comments added.

Figure 16. Survey and analysis – Bannon

<b>1.</b>	<b>Foundations</b>	
1.1	Need and readiness	The organisation's recognition of the need for a plan.
1.2	Values clarification	}
1.3	Vision creation	}These steps involve stakeholder consultation.
1.4	Mission identification	}
1.5	Performance audit	Addresses the question: 'Are we doing things right?'; involves an evaluation of all organisational activities against the vision.
<b>2.</b>	<b>Support systems</b>	
2.1	Influence scanning	Appears to be what is often called 'environmental scanning'.
2.2	Evaluation & monitoring	Monitoring the progress of the strategic planning process itself.
<b>3.</b>	<b>Process outcomes</b>	
3.1	Operational plans	The core of the planning process: the identification of 'strategic issues': apparently done by the strategic planning team through processes such as SWOT analysis. Followed by identification of priorities and creation of the plan, but these steps are described in very general terms.
3.2	Capability to implement	Further SWOT analysis of organisation's capabilities.
3.3	Contradiction resolution	Resolving incompatibilities among issues/priorities.
3.4	Vision validation	Checking plan against vision.
<b>4.</b>	<b>Delivery systems</b>	
4.1	Consolidating the plan	}
4.2	Implementation	}Implementation

Source: McLean, Bannon and Gray (1999: 17ff)

Overall, this is an 'issues' approach to planning. There is no indication of any formal approach to assessing participation, needs or demand.

The 'master planning' chapter is mostly discursive, but includes some specific guidelines, for example a listing of the components of the 'survey and analysis' task:

- Natural resources inventory, including land available, unique resources to be protected, and areas of exceptional value.
- Recreation program/services inventory including current and projected need, review of service providers in area, and revenue management issues.
- Administrative factors including personnel, financial resources, authority, and board support.
- Trends in field/community (sic) that have implications for the provision of recreation activities, facilities, and park areas.
- Progress evaluation of the park and recreation agency based on the agency's success in gaining objectives from any previous master plans that are available.
- Population forecast and demographic implications.
- Survey findings of leisure needs and preferences from the public. (McLean, Bannon and Gray, 1999: 164-65)

The 'Level of Service' model of Mertes and Hall (1996 – see No. 36 below) is recommended. 'Current projected need' in item 2 is based on officer assessment. Details regarding the last item in the list are provided in very general terms in less than two paragraphs (there is reference to a Figure 2 containing a 'sample needs assessment' but this does not exist), and some master planning and community consultation models are discussed.

The chapter on community surveys is primarily a generic introduction to the conduct of questionnaire surveys, with some additional material on focus groups. The basic question on 'existing level of interest and participation' recommends asking residents about their 'level of interest' in a list of activities, with response categories ranging from 'strongly interested' to 'strongly averse'. No guidance is given on how this information informs the planning process. As regards 'future needs', a model question is provided which lists a number of 'projects' (eg. baseball fields with lights, bike paths, ice hockey) and asks residents: 'Should this be done?' and 'Would you pay for it by fees or taxes?'. Three case-study questionnaires using similar questions are provided in an appendix (see Appendix B to this paper).

## 21. 1985: Master Plan Process for Parks and Recreation (Kelsey & Gray, USA)

Kelsey and Gray's (1985) *Master Plan Process for Parks and Recreation*, published by the American Alliance for Health, Physical Education, Recreation and Dance (AAHPERD), presents an 8-step planning process:

- |                         |                                       |
|-------------------------|---------------------------------------|
| 1. Goals and objectives | 5. Standards analysis                 |
| 2. Supply analysis      | 6. Agency action plan                 |
| 3. Population analysis  | 7. Expenditure analysis               |
| 4. Demand analysis      | 8. Priority criterion ranking system. |

While these guidelines recommend the conduct of resident surveys and public meetings to assess the 'current and future demands (or desires, wants, participations [sic], needs) for parks and recreation services' in the community (Kelsey and Gray, 1985: 33), they nevertheless recommend the application of standards, such as those proposed by the NRPA. The authors state that 'A standard is a guide, a benchmark, a direction identifier, and should not be considered the absolute, definitive statement for every community' (Kelsey and Gray, 1985: 44). But they do not indicate how, when or why particular communities might deviate from the standard or how the data collected might be used to inform this process.

## 22. 1985: Open Space in the Sydney Region (DEP, NSW, Aust.)

In the 1970s and 1980s the NSW Department of Environment and Planning and its predecessors and successors conducted 10-yearly censuses of public open space in the 40 or so local authorities in the Sydney metropolitan area and published the results (see Project paper 1). In these publications, reference was made to planning matters, but not in detail.

As with No. 17 above, the 1985 publication represented a transition stage between the recognition of fixed standards and their replacement by 'needs-based' planning (see No. 26 below). While restating the accepted fixed standards in the body of the report, a two-page appendix was included, entitled 'Guidelines for a flexible approach to determining open space needs', which outlined a 'needs-based' approach. The appendix outlines a number of the limitations of applying fixed standards and concludes that: 'One way of determining recreational and open space needs is through a survey of the demand for facilities by users and potential users'. While reference is made to a manual on conducting such surveys<sup>5</sup>, no guidance is provided on how to use the data collected to develop a plan. The report states, however, that: 'in the absence of a survey of user needs a more general approach can be taken'. It then goes on to offer the modified standards approach, with four sets of standards for four different types of community: developing; mature; ageing; and ageing/recycling, as shown in No. 17 (Table 3) above.

## 23. 1987/90: Recreation Planning Manual for Local Govt (Marriott, SA, Aust.)

The South Australian government guidelines, *Recreation Planning: A Manual for Local Government*, prepared by Kenneth Marriott, were first published in 1987 and revised and published in a second edition in 1990 (Marriott, 1987, 1990). The guidelines emphasise an overall policy-making process rather than technical procedures. In particular, the guidelines set out an eight-step process, involving:

1. Pre-planning – recognition of the need for a plan, agreeing the planning process, scope and definitions (sporting activities, 'passive leisure pursuits', arts and cultural pursuits and tourism are listed in one example);
2. Policy formulation including establishing:
  - a. a goal – a single broad statement;
  - b. a set of principles – dealing with such issues such as fairness, combatting isolation; monopoly vs competition and environmental impacts;
  - c. an array of objectives – outlining the 'broad areas or means of action' for achieving the goal.
3. Socio-economic analysis;
4. Review of existing council policies;
5. Existing provision review;
6. Community consultations, including surveys;
7. Development of policies and recommendations;
8. Implementation and evaluation.

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<sup>5</sup> See footnote 3.

Step 7 brings together the material assembled from the first six steps to develop a plan. The essence of the process involves deciding priorities among the various preferences arising from the community consultation process, primarily on the grounds of equity. Thus the proposed methodology hinges primarily on stakeholder consultation.

24. 1990: Municipal Recreation Planning Guide (Sport & Rec. Victoria, Aust.)

Sport and Recreation Victoria's *Community Recreation: Municipal Recreation Planning Guide* is a substantial document, running to some 180 pages. The report does not define 'recreation' but is focussed on planning councils' own recreation services rather than providing a framework for all providers. A seven-step 'recreation planning process' is proposed, as indicated in Figure 17.

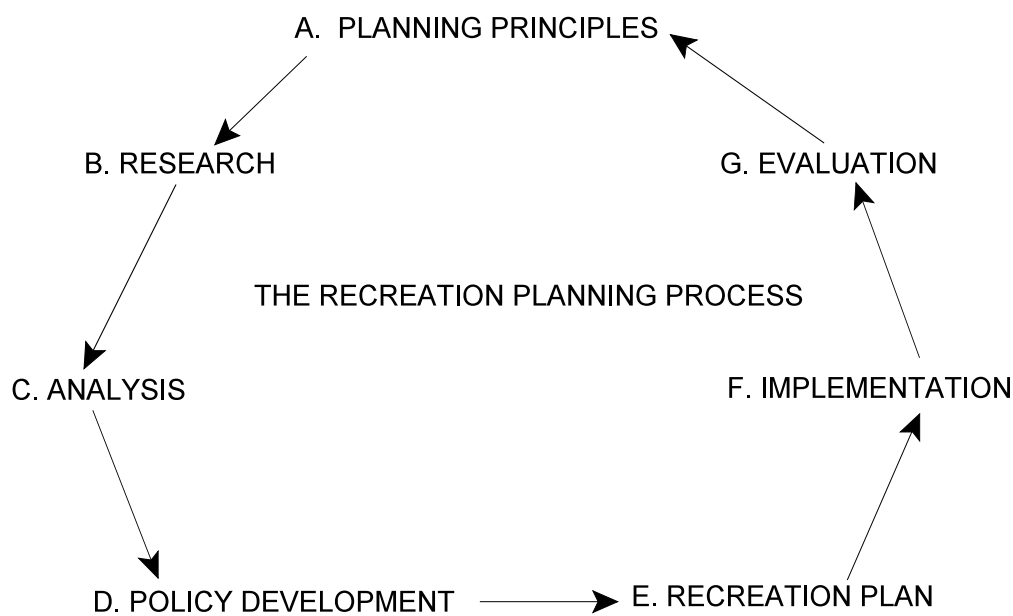


Figure 17. Recreation Planning Process  
 Source: Sport and Recreation Victoria (1990: 1)

The core of the proposed planning process is almost entirely based on public consultation. Regarding the conduct of research for the 'Community Recreation Needs Assessment', the document states:

The major component of the research process is determining the recreation requirements of the community and obtaining information on the community values that will guide the long-term recreation planning. 'Community consultation' is a means of providing the best opportunity for residents to express their needs. It is a readily accepted concept used in recreation planning. Recreation planning studies and manuals produced in the last ten years focus on a range of community consultation techniques, including discussion groups, workshops, public forums, and questionnaires. Given the right circumstances, the community or population comprising the municipality is in the best position to define their own needs. Researchers do utilise such

information as demographic statistics and comparative participation data to support or test what the community is saying about recreation, but this type of second-hand data is only useful for comparative purposes. (Sport and Recreation Victoria, 1990: 60)

It is not clear what the 'right circumstances' are. 'Comparative participation data' are discussed in a rather enigmatic way as follows:

Comparative participation information is second-hand data based on statistics on recreation participation trends of other communities or of larger communities of which the one you are studying is part. This information can be examined against the type of population living in your municipality. This will help making predictions about what people do. As with primary data on participation, it will not tell you what recreation pursuits participants are having difficulty gaining access to. (Sport and Recreation Victoria, 1990: 60)

No further explanation of this advice is provided. Clearly data on participation, whether local or 'comparative', are seen as of limited use. The idea that comparison between participation rates in similar municipalities or between the municipality and its region or state might provide a basis for exploring issues of under-provision (resulting in low participation rates) is not discussed. And the obvious situation where such data has to be used – large new developments where there is no existing population – is not mentioned. Instead the latter type of environment is seen as suitable for the application of fixed planning standards. Thus fixed standards are not dismissed entirely but are seen as providing 'only part of the information necessary for planning purposes' (p. 61) and failing to provide the sort of information obtainable from community consultation. Passing reference is made to National Capital Development Corporation standards and a full page of standards from the South Australian Land Trust (see PP1).

Advice is given on different procedures for conducting community research/consultation exercises, including general advice on 'Analysing and interpreting recreation information'. The guidance on how the information gathered is to be used in development of a plan is limited. It is suggested that a 'policy statement' be developed based on 'community beliefs regarding recreation service provision' and 'service gaps and needs'. On the basis of the policy statement, 'Recommendations and strategies' can be developed, which together make up the plan, but again little advice is presented on just how this should be done.

## 25. 1991: Landscape Planning: .. Growth Management Example (Steiner, USA)

As the title of this paper, 'Landscape planning: a method applied to a growth management example', implies, its orientation is landscape planning, but author states that the method is 'designed for physical, land-use or ... landscape planning' (p. 520). He also states that it 'reflects a middle ground approach to physical planning, somewhere between a purely organic and a truly rational one' (p. 520). Using the range of techniques outlined in entry 15 above, it lies somewhere between 'resource-based planning' and the 'issues approach'. An 11-step process is described, as indicated in Figure 18.

Step 5, 'Detailed studies' includes 'suitability analysis' which involves assessing the physical suitability of tracts of land for land-uses with a variety of physical requirements, such as mining, landfill sites and recreation and tourism. The paper does not cover the process of assessing recreation/tourism demand/need.



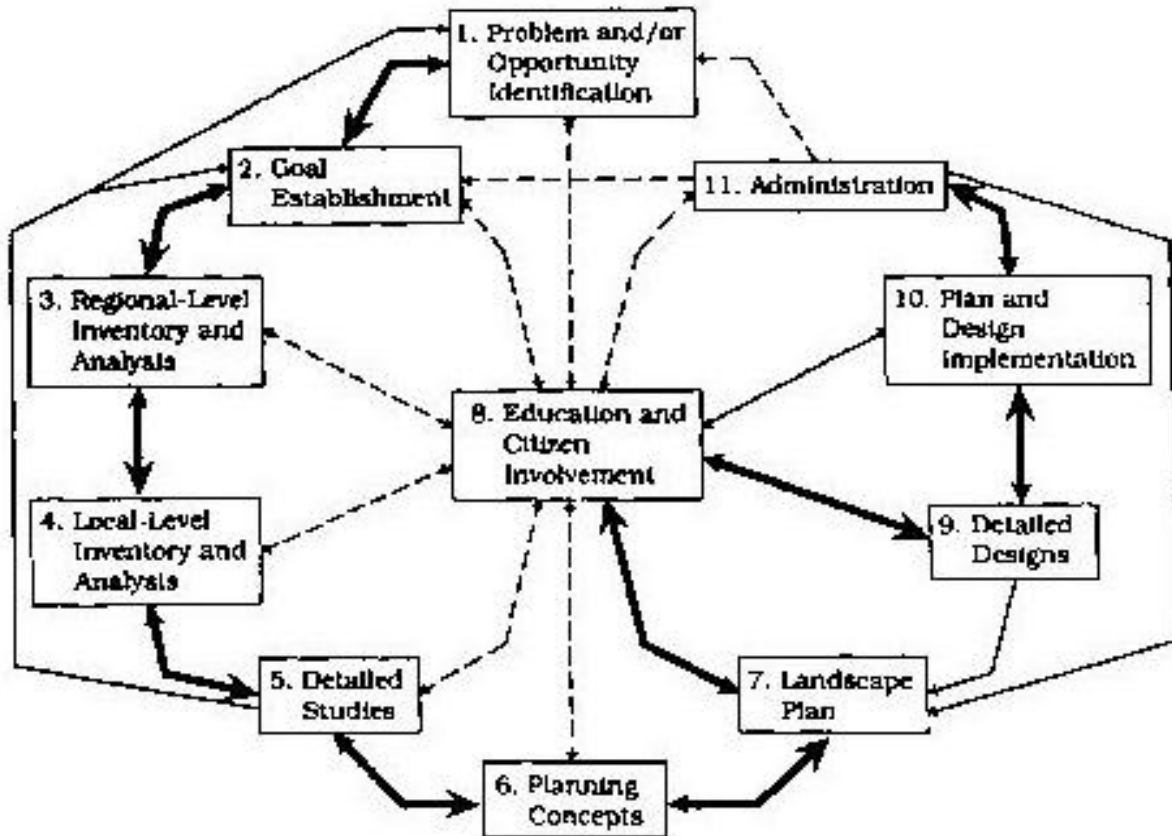


Figure 18. Steiner: Landscape planning process  
Source: Steiner (1991)

## 26. 1991/2002: Planning Policy Guidance 17 (Office of the Deputy PM, UK)

The UK government's *Planning Policy Guidance 17: Planning for Open Space, Sport and Recreation* was originally published in 1991 but was revised and republished in 2002, together with a 'companion guide' (ODPM, 2002a, b). This summary draws on the later version of the documents.

The guidelines are more than just advice: they form part of the statutory planning process in England and Wales, in that local authority planning activity which fails to comply with the guidelines may be open to challenge by, for example, developers. The use of locally derived standards of provision is officially endorsed:

The Government believes that open space standards are best set locally. National standards cannot cater for local circumstances, such as differing demographic profiles and the extent of existing built development in an area. (ODPM, 2002a: Para. 6)

While this statement refers to 'open space' only, it may be surmised that 'sports and recreational facilities' are intended to be included since the rest of the document refers throughout to 'open space and sports and recreational facilities'. The latter include: 'swimming pools, indoor sports halls and leisure centres, indoor bowls centres, indoor tennis centres, ice rinks, community centres and village halls' (ODPM, 2002a: Annex, para. 5).

The prescribed planning process is centred on the undertaking of a 'local assessment' which involves five steps:

1. Identifying local needs.
2. Auditing local provision.
3. Setting provision standards.
4. Applying provision standards.
5. Drafting policies.

'Identifying local needs' itself involves seven steps:

1. *Initiating a local assessment* – primarily setting up a steering group including stakeholder representation.
2. *Planning an assessment* – linking the process with other council planning activities; setting a timetable.
3. *Identifying the implications of existing strategies*
4. *Reviewing existing planning policies and provision standards* – assessing the effectiveness of past/existing planning policies.
5. *Consulting communities and developing a 'vision'* – appears to be the main method.
6. *Assessing the adequacy of the amount of existing provision* – includes an inconsistent recommendation to use 'national standards' to assess the adequacy of local provision (albeit with caution and consultation).
7. *Summary of local needs.*

'Setting provision standards' involves six components:

1. quantitative
2. qualitative
3. accessibility
4. minimum acceptable size
5. site area multiplier (areas of typical site components - eg. playing pitches + pavilion + parking)
6. cost.

Discussion of the quantitative component in regard to recreation open space and facilities includes consideration of format and a single, somewhat vague, paragraph:

Appropriate quantity standards should be determined from analysis of existing quantity provision [sic] (Step 2), in the light of local community views as to its adequacy and details of levels and types of use (Step 1). This should be undertaken against a background of objective assessment and benchmarking. This can need careful judgement in relation to poor quality or poorly located provision. As paragraph 18 of PPG17 points out, 'Where recreational land and facilities are of poor quality or under-used, this should not be taken as necessarily indicating an absence of need in the area'. At the same time, there is no point in adopting standards which are unlikely to be achievable.(ODPM, 2002b: Para. 6.5)

The guidance on the other five components is similarly vague. Worked examples are given in some cases, but not generic procedures for arriving at local parameters. Overall, the only specific guidance on methodology relates to the stakeholder consultation.

These guidelines are clearly important for providing a formal framework for recreation planning, but fail to provide detailed guidance on practices to replace the use of standards. This gap has been filled by 'facility planning models' developed by UK sports councils and these are discussed in items 27 and 35.

## 27. 1991/2005: Towards a Level Playing Field (Sports Council *et al.*, UK)

From the time of its publication, it had been recognised that the Sports Council's 1968 *Planning for Sport* document (No. 1 above) would require updating. Thus in 1976 a working party convened by the Sports Council prepared a report entitled *Playing Fields: a New Approach to Assessing Requirements* (Sports Council, 1976). This moved from the *Planning for Sport* method of assessing demand on the basis of external survey-based participation rates, to a methodology based on counting the existing number of teams in a given community for each relevant sport. The focus of the report is then on how to translate this into an estimate of peak demand, which is to be the basis of provision. It has not been possible to track developments in detail over the ensuing 20 years, but in 1991 the Sports Council, the National Playing Fields Association and the Central Council of Physical Recreation published the *Playing Pitch Strategy* (Sports Council *et al.*, 1991), which was updated in 1994 in the form of *Facilities Factfile: Assessing Pitch Requirements at the Local Level* (Sports Council, 1994). The latest version was published in 2005 under the title *Towards a Level Playing Field: a Guide to the Production of Playing Pitch Strategies* (Sport England/CCPR, 2005) and it is on this version that the following summary is based.

The document is concerned, as the title indicates, only with playing fields, although the methodology could in principle be applied to other types of facility with appropriate modifications. It was developed against a background of the loss of playing pitches in the UK as a result, in particular, of changes in school requirements and development pressures on private and non-profit playing pitch owners. The guidelines are based on an 8-step model to be applied to each pitch-based sport:

1. Identifying teams/team equivalents
2. Calculating home games per team per week
3. Assessing total home games per week
4. Establishing temporal demand for games
5. Defining pitches used/required each day
6. Establishing pitches available
7. Assessing the findings
8. Identifying policy options and solutions.

The core of the methodology lies in step 1, 'Identifying teams/team equivalents' ('team equivalents' includes non-standard uses such as school classes and mini-soccer leagues). In the Gross Demand/ Market Share method discussed in No. 14 above, the starting point is the level of participation to be planned for; to operationalise this information for planning purposes it must be converted into units which relate to facilities with specified capacities at specified times. In the case of sports pitches, this unit is teams, or team equivalents, at peak periods.

The guidelines give advice on how to collect information on existing sports teams in a local area and convert this information into 'Team Generation Factors (TGFs)' and thence into pitch requirements. On-line spreadsheet templates are available to assist local councils in the task. Advice is available on forward projections related to predicted demographic change. The advice on how

to assess current under-provision or over-provision seems less clear: it is suggested that this be based on comparisons with other areas, using a data-base of TGFs from 160 councils available on the Sports Council website, but the TGFs vary so dramatically it must be difficult to do this with any confidence. Overall the methodology is focussed on a quantitative assessment of demand.

A variation on this method is provided by the Scottish Sports Council (see item No. 35).

## 28. 1991: Benefits Approach (Driver *et al.*, USA)

Unlike most of the other guidelines reviewed here the Benefits Approach to leisure planning/management does not consist of a single document but at least two books and a series of papers published over two decades (see particularly items in the bibliography by Driver and colleagues and by Allen (1996), and Allen *et al.* (1998)). The leader of what was termed the 'benefits movement' was Dr Bev Driver, a research scientist with the US Forest Service. The ideas of Driver and his colleagues were supported by the main US professional body, the National Recreation and Parks Association (and the Canadian equivalent, the Canadian Park and Recreation Association), which, in the mid-1990s, established a Benefits Task Force and launched a training program under the slogan: 'The Benefits are Endless...' (Park, Clark and Rudick, 1997).

The evolution of the approach has been accompanied by a confusing array of terms, and acronyms, as summarised in Figure 19.

Figure 19. Evolution of the Benefits Approach

Year	Name	Reference	Comment
1970	No formal name	Driver & Tocher, 1974	Originally a 1970 conference paper; often cited as the first exposition of the benefits approach.
1991	<i>Benefits of Leisure</i> (book)	Driver, Brown & Peterson, 1991	Collection of 35 papers on research into benefits of leisure.
1992/ 1997	Benefits-Driven Approach	CPRA, 1992, 1997	The Canadian version reflected in two editions of the <i>Benefits Catalogue</i> .
1996	BBM: Benefits-Based Management	Allen, 1996	
1997	BAL: Benefits Approach to Leisure	Driver, 1997	'Management' dropped to emphasise its role in 'leisure policy development, research and education' (Driver, 1997: 38)
2000	NBAL: Net Benefits Approach to Leisure	Driver, Bruns & Booth, 2000	'Net' added 'to make explicit that the NBAL requires the consideration of both positive and negative impacts of the management and use of recreation resources' (Driver <i>et al.</i> , 2000: 245).
2005	BOAL: Beneficial Outcomes Approach to Leisure	Moore and Driver, 2005	** Not examined at this point
2008	OFM: Outcomes-Focussed Management	Driver, 2008a	A collection of 25 papers, 11 of which are case-studies of applications of OFM.

The benefits approach began as a development in the *management* of large estates such as national park and forest systems, but in later versions the word 'management' was dropped to emphasise its potential in regard to *policymaking* and *strategic planning*. However, in the latest version, presented in a collection of 25 papers edited by Driver (2008a), it is referred to as

'Outcomes-Focussed Management' (OFM) with the word 'benefits' dropped altogether and the word 'management' reinstated. Outcomes-focussed management is of course a term used to describe a generic management approach. In his introductory chapter Driver notes the existence of outcomes/performance approaches in the public services generally and states that 'OFM is complementary to these other outcomes-oriented models and can be more readily identified with them than BBM can' (Driver, 2008b: 1-2). In these opening chapters Driver summarises the general OFM approach, as discussed below.

Of the remaining chapters, 11 offer case studies of the application of the approach, something which had been missing from the earlier published literature. But from the point of view of comprehensive leisure planning, these are disappointing: they are all concerned with outdoor, nature-based recreation; none relates to a mixed-purpose agency such as a local council; and most refer to management of an estate rather than community-based planning. Admittedly, one of the introductory chapters is concerned with 'Implementing OFM in Municipal Parks and Recreation Departments' (Tucker and Allen, 2008), but it does not follow the Driver model, instead adopting an 'issues' approach (see entry 16, item 10, above) and concentrating on the management of programs to the exclusion of any consideration of facilities. A chapter on 'OFM and Local Community Benefits' (Anderson *et al.*, 2008) is not concerned with community-based planning as such but with how the planning activities of agencies such as national parks organisations relate to communities in the immediate neighbourhoods of their sites.

Driver and Bruns refer to the overall OFM approach as a 'recreation opportunity production process' which is represented in a diagram reproduced here as Figure 20. In the diagram:

- *inputs* refers to land and management resources;
- *facilitating outputs and settings* refers to the planning process, *outputs* being specific facilities (eg. a trail) and *settings* being the environments in which they are located;
- *recreation and other outcome opportunities* refers to the facilities and services established;
- *outcomes* are the direct and indirect benefits and dis-benefits experienced by users and affected non-users of the facility/service.

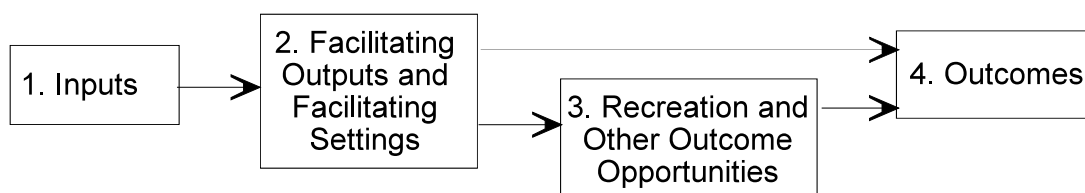


Figure 20. Outcomes-Focussed Management: recreation opportunity production process  
Source; Driver and Bruns (2008: 42)

The direct link between boxes 2 and 4 indicates that benefits may arise even if a facility/service/opportunity is not used (eg. economic impact of the building and staffing of facilities and environmental improvements – but see Project Paper 6 regarding economic impact vs benefits) .

Implementation of the approach involves 7 phases with 20 component steps, as summarised in Figure 21. The approach is designed around a typical national park or forest with a number of distinct 'recreation management zones' and the aim is to generate in each zone a range of appropriate outcomes or benefits by designing and providing appropriate facilities/opportunities to accommodate appropriate activities. 'Appropriate' means suited to the environment or 'setting' and

to the benefits sought by the users and affected non-users of the facilities/opportunities. 'Setting' is related to the sorts of category which make up the Recreation Opportunity Spectrum (ROS) (See entry 13 above).

**Figure 21. Outcomes-Focussed Management: implementation**

Phase 1: Preparatory Actions	1. Ensure that relevant supervisor(s) and managers approve and support adoption of OFM.
	2. Organise the planning team.
	3. Ensure all members of the planning team understand OFM.
	4. Understand responsibilities and constraints.
	5. Consider essential needs for collaborative management and related public involvement efforts.
	6. Identify critical issues and concerns.*
Phase 2: Gather, Analyse, Interpret and Integrate Supply and Demand Information	1. Assess recreation preferences of the most relevant recreation participants and affected residents of local communities.
	2. Inventory or update inventories of key recreation-tourism resource attractions and services.
	3. Analyse recreation opportunity supply by possible recreation management zones and corresponding customer market demand.
	4. Select relevant recreation-tourism markets and market segments.
	5. Identify the most logical recreation management zones and corresponding niches within the primary market(s).
Phase 3: Develop the Management Plan	1. Determine which outcomes can feasibly, and should be, targeted within each recreation management zone and determine feasible alternatives (where necessary), involving identification of: recreation benefit 'gestalts' (group of benefits associated with an activity/setting), most salient experiences, and benefits. chain of causality.
	2. Develop management objectives.
	3. Identify and prescribe the essential setting characteristics.
	4. Define the essential recreation-tourism service environment.
Phase 4: Develop an Implementation Plan	1. Identify management actions to be implemented.
	2. Identify marketing actions to be implemented.
	3. Identify monitoring actions.
	4. Identify supporting administrative actions.
	5. Provide ample opportunities and time-frames for review of the proposed plan.
Phase 5: Adjust Management/ Implementation Plan as Needed and Approve Final Plan	
Phase 6: Implement the Plan and Adjust Field Operations Accordingly	
Phase 7: Revise the Plan as Needed or Required by Agency Directives	

Source: Driver and Bruns (2008: 45-60)

The approach is concerned with securing appropriate packages of settings, facilities/opportunities, activities, and outcomes/benefits. Thus step 3.2 involves:

.. trying to find the best match between the capabilities of each recreation management zone to provide desired benefit outcomes [and] one of the more relevant markets which reflect the greatest desire or need for those outcomes. (Driver and Bruns, 2008: 51)

Essentially the process is a form of market segmentation exercise: for existing facilities it involves sharpening the focus of facilities/services in relation to the requirements of selected market segments. This is illustrated in Figure 22, which is my own construction, not in the original.

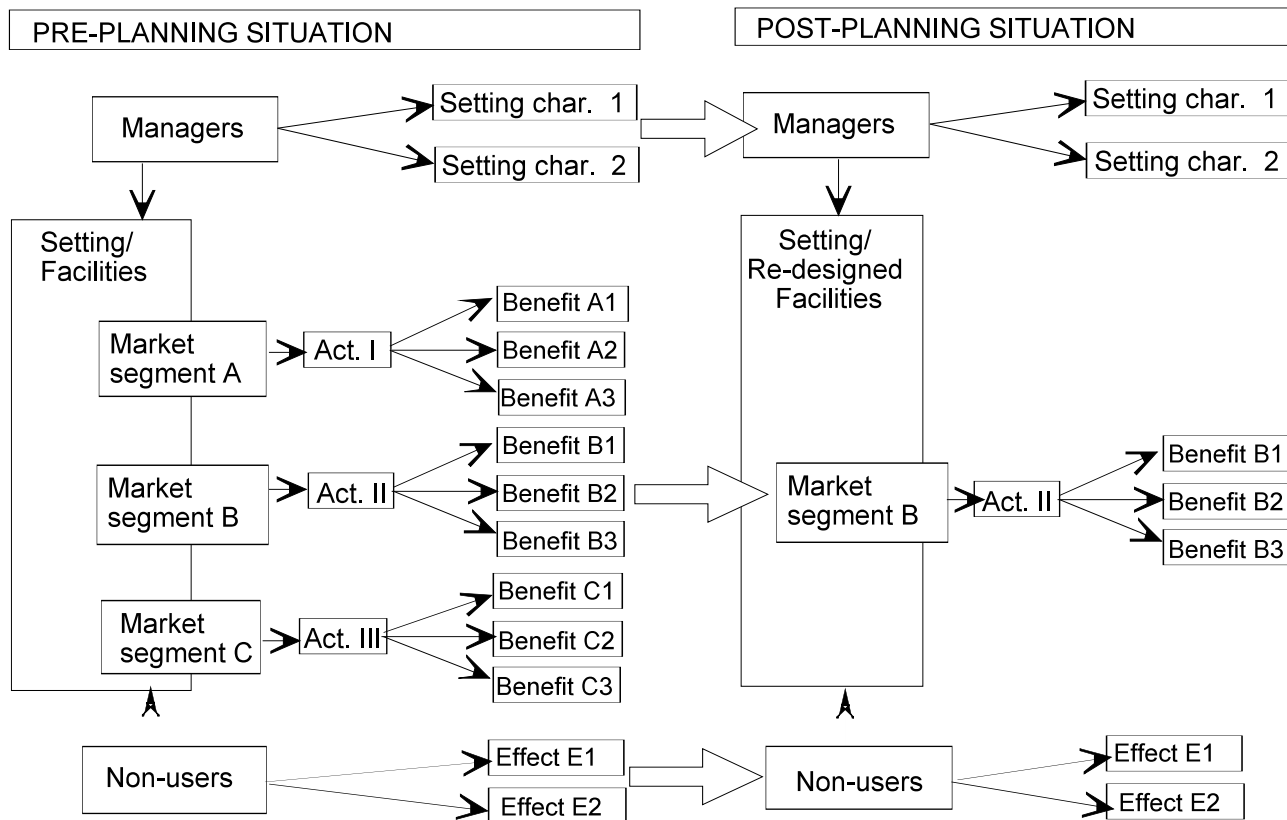


Figure 22. Simplified summary of OFM benefits approach

Of the three market segments indicated, the benefits sought by Market Segment B are judged to be the most appropriate and the facilities are redesigned to enhance those benefits. The redesigned facilities are now even more attractive to members of market segment B, so their evaluation scores increase, and are less attractive to the other two segments who are no longer attracted, or attend in lower numbers with lower evaluation scores. Of course it is possible that two compatible segments might be favoured. The non-users (eg. neighbouring community members) remain in the picture, and their level of satisfaction may or may not be enhanced.

The selection is to be based on whether:

- a. the outcome/benefit is highly valued by the members of the market segment;
- b. the 'recreation setting characteristics' are 'distinctive/scarce/ unique' (taking account of the 'biophysical, social and managerial' components of the setting) ; and
- c. the opportunities are being provided elsewhere in the 'market area'. (Driver & Bruns, 2008: 51)

Driver and Bruns emphasise that the selection process is intended to be objective. Of course the assessment of each of the three selection criteria could be conducted in a relatively objective manner, but is not clear how the manager can 'objectively' balance the three sets of measures:

A curious feature of Driver and Brun's exposition of the OFM approach is that it would appear that *numbers of participants* do not feature in the decision-making. The commentary on step 2.1, the step concerned with data collection, indicates that 'demand studies' should be conducted, but this is clearly interpreted to mean surveys, focus groups, etc. to determine users' attitudes and benefit preferences. It is suggested that secondary sources, 'such as economic, social, and environmental impact assessments', should also be used, but there is no reference to data which the organisation itself might have on usage levels. Step 2.2, on compilation of facility/service inventories, requires estimates of facility/service *capacities* but not use levels. In the example in Figure 22 one would think that the relative sizes of the market segments might be a consideration in the pre-planning situation and would be a factor in the above selection process. And in the post-planning situation it might be thought that a successful plan would result in an increase in the numbers of participants in market segment B, unless relative solitude was one of the benefits being sought. Furthermore, it might be expected that some consideration would be given to the fate of segments A and C, on grounds of equity or in the interests of overall visit numbers to the park/forest.

Overall, the approach is conservative, being focussed on existing facilities and, primarily, existing users and affected non-users. There is some suggestion (in step 3.1, Figure 21) that the planner should develop 'feasible alternatives': that is, alternative hypothetical market segments with associated sets of outcomes/benefits based on published research, but the rationale which should be used for developing these is not clear.

Figure 20 shows 'outcomes' as the culmination of the process. Normally it would be expected that the achievement of certain outcomes would be the goal of the planning process: hence the circular format of most planning models, in which outcomes are monitored to ensure that goals/objectives are achieved. But, as can be seen in Figure 21, development of management objectives appears in the middle of the process (step 3.2) and this step is concerned with selection process discussed above. Thus the resultant outcomes are contingent on this process rather than the overall goals of the agency.

The benefits approach is discussed further in Project Paper 6.



29. 1992: Outdoor Rec'n & Open Space: Planning Guidelines (DoP, NSW, Aust.)

The New South Wales *Outdoor Recreation and Open Space: Planning Guidelines for Local Government* (NSW Dept. of Planning, 1992), prepared by consultants Manidis Roberts, follow a similar format to the South Australia guidelines (No. 21), but are restricted to outdoor sporting and informal recreation. The guidelines recognise that variations in the methodology adopted will be required for new release areas, developed areas and infill development areas.

Six components of the planning process are identified, as shown in Figure 23. Components 3-5 can be seen as data collection exercises, with analysis and synthesis taking place in component 6, the Open Space Plan. However, the guidelines provide little advice on how to use the data gathered to develop policies or courses of action. As with the South Australian guidelines, the main task would appear to be resolving conflicting views of different stakeholder groups identified through community consultation. Hence, the primary method advocated is stakeholder consultation.

One of the features of these guidelines is the lack of clarity regarding the difference between 'demand' and 'need'. Box 5 in Figure 23 and a corresponding chapter of the report indicate that data should be collected on recreation 'demand'. The chapter states:

A number of techniques are available for the collection of recreation *demand* information. The aim of these techniques is to understand the community demand for different recreational opportunities. The subsequent open space plan simply matches supply with *demand* to identify areas of *need*. ... Resident recreation surveys are household based data collection exercises that attempt to understand the *demand* for recreation opportunities and to identify *needs*. (p. 14) ... organisational surveys ... should never be used alone to estimate community recreation *demand*. An organisational survey does not address the broad community *need* nor does it attempt to define non-user *demand* (p. 15). (Dept. of Planning, 1992, emphasis added)

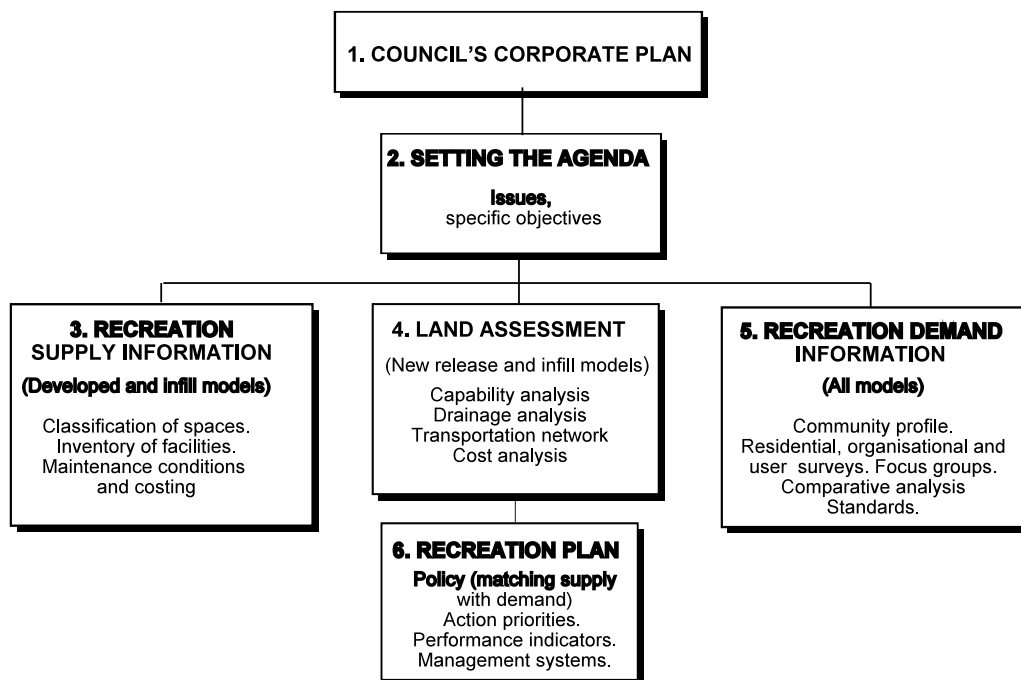


Figure 23. The process of outdoor recreation and open space planning

Source: Dept. of Planning (1992: 4)

Focus groups are described as a technique for obtaining 'recreation demand data' and for 'specification of community recreation demand priorities' (p.15). 'Comparative analysis' involves 'deriving recreation demand data for an area' and applying 'recreation needs survey conclusions to another comparable area' (p. 16). Regarding user surveys, the report states: 'For the purposes of assessing community recreation demand, these techniques should only be used in support of other techniques such as needs surveys or focus groups' (p. 17).

Despite the frequent use of the terms 'demand' and 'need', the assumed difference between the two concepts, if any, is not explained.

### 30. 1992: Methodology for a Tourism Strategy (Dredge & Moore, Aust.)

In a 1992 paper Dredge and Moore (1992) express concern at the lack of integration of tourism into the town planning process, which they attribute to the 'lack of understanding that planners have had on the nature and workings of the tourism industry and how their activities can affect tourism'. They discuss the relationship between tourism and local planning and critically review a number of examples of local tourism plans produced in Queensland in the 1980s. In the final three pages they present their 'Methodology for a tourism strategy', which comprises eight components, as follows:

1. Set goals and objectives
2. Resource inventory
3. Identification of market composition, development and trends
4. Community participation
5. Identification of destination image and character
6. Identify tourist infrastructure and servicing opportunities and constraints
7. Identify tourism opportunities which should be enhanced or protected
8. Strategic Plan, Development Control Plans and Policies

Each of these components is discussed only briefly, in a single paragraph, so no detailed guidance is provided.

While the paper promotes integration of tourism planning with local planning generally, it does not specifically draw attention to the relationship between local leisure demand and supply and tourist leisure demands.

### 31. 1993/1998: Guide for Local Authorities on Sustainable Tourism (WTO)

The framework for local tourism planning developed by Edward Inskeep and presented in the World Tourism Organization's *Guide for Local Authorities* consists of a list of 'components of a tourism plan' and a seven-step 'tourism planning process'. The components are:

1. *Tourist markets* – including international, national and local/regional visitors divided into general and special interest groups, business travellers and 'residents' use of tourist attractions, facilities, services and infrastructure'.
2. *Tourist attractions and activities*.
3. *Accommodation*.

4. *Other tourist facilities and services* – tour/travel services, restaurants, cafes, bars, and postal, medical, banking and retail services.
5. *Transportation*.
6. *Other infrastructure* – water, power, waste management, telecommunications.
7. *Institutional elements* – government/regulatory/planning, education/training, marketing.

It is notable that, as tourism planners, the authors identify the phenomenon of *residents using tourist facilities*, whereas traditional local leisure/recreation planners might have identified the phenomenon of *tourists using local facilities*. In the Australian context, except for relatively remote resorts, there will be few leisure facilities used exclusively by tourists. Thus a comprehensive approach to leisure and tourism planning would see tourists and residents as two demand groups of varying size, depending on the type and location of the facility/service concerned.

The seven-step tourism planning process comprises:

1. *Study preparation* – 'pre-feasibility' study involving 'evaluation of resources', determination of terms of reference and assembling of team.
2. *Determination of development objectives* – broad economic, environmental and socio-cultural considerations – in consultation with the local community.
3. *Surveys and evaluations* – studies of actual and potential tourist attractions, infrastructure and markets.
4. *Analysis and synthesis* – establishing predicted or targeted tourist numbers and conversion into accommodation needs; establishing carrying capacity of resources; SWOT analysis to evaluate alternative development options.
5. *Policy and plan formulation* – conclusions from steps 2-4.
6. *Recommendations*.
7. *Implementation and management*.

The detail of how to assess tourism markets and determine likely tourist numbers is not provided. The only advice, under 'surveys and evaluations: existing and potential tourist markets and travel patterns', is as follows:

If there is some existing tourism, a special survey should be conducted of tourist arrivals to determine their characteristics and attitudes toward existing tourist attractions, activities, facilities and services and their expenditure patterns in the area. (WTO, 1998: 46)

But such surveys would not, apparently, be used to assess total tourist numbers. Under 'Analysis and synthesis' the advice is:

All the elements surveyed are analysed in an integrated and comprehensive manner (planning synthesis) to understand their inter-relationships. It is important to carefully analyse tourist markets in relation to the types of attractions and activities that can be available for tourists and other components of the tourism product. Instead of projecting tourist arrivals, which is difficult if there is little or no existing tourism in the area, the approach is used of establishing market targets. These targets indicate the number and types of tourists that can be attracted to the area if the recommendations of the tourism plan, such as improvements to attractions, facilities, services, transportation and other infrastructure and promotional programmes, are implemented. (WTO, 1998: 47)

Thus no guidance is given on how to quantify current or future tourist numbers if there are existing tourists, but if there are not any existing tourists then supply will determine demand! There seems to be no reference to the 'market share' concept, in which local planners at least seek information on regional demand patterns so that any additional local provision that is made can be assessed in terms of capturing a reasonable share of the regional market.

While a method for determination of accommodation requirements is outlined, and carrying capacity constraints of natural resources are discussed, the impact of tourists as a demand sector for local built leisure facilities is not discussed.

The WTO guidelines were prepared by US consultant Edward Inskeep and reflect his well-established textbook on tourism planning (Inskeep, 1991).

### 32. 1994: Getting it Right (Vasilou *et al.*, Qld, Aust.)

*Getting it Right: A Guide to Planning & Developing Sport & Recreation Facilities*, was jointly funded by the Sport and Recreation Ministers' Council, the Queensland Department of Tourism, Sport and Racing and New Zealand's Hillary Commission and was written by a team comprising representatives from the latter two organisations and three consultancy firms. The guidelines are concerned with the development of individual facilities from the planning stage through to design and development, so the planning process forms just part of the report.

The report stresses the need for the development of individual facilities to take place in the context of 'overall policies and statements of intent' and 'leisure provision goals which are consistent with those policies' together with: objectives, strategies; priorities; and evaluation measures/performance criteria. The planning process for facilities is termed 'Assessment and Evaluation on Needs and Opportunities', which is outlined under four sub-headings:

1. *Existing and comparative provision reviews* – inventory of current provision; use levels (if possible); community consultation; possible SWOT analysis; review of existing policies (the 'comparative' component is not explained).
2. *Facilities information system and geographic information systems* – a discussion of computerised information storage and retrieval systems – essentially a tool to undertake item 1.
3. *Community consultation and needs analysis* – an outline of various public consultation techniques, including participation surveys.
4. *Social indicators and trend analysis* – collection of census and other community profile data.

Guidance on how to use the data collected consists of the following brief statement:

Evaluate the data to identify the major characteristics, the 'highlights' and the 'lowlights', patterns and trends in relation to the issues under review and their implications to [sic] the provision of sporting and recreation facilities, programmes and services for the community as a whole and special groups within it. (Vassilou *et al.*, 1994: 14)

### 33. 1994/97: Better Places, Richer Communities (Guppy, Aust.)

The first edition of *Better Places, Richer Communities: Cultural Planning and Local Development* was published in 1994 under the editorship of Graham Sansom: this review is based on the 1997 second edition, edited by Marla Guppy. In between these two editions, the Australia Council sponsored the publication of *The Cultural Planning Handbook*, by Grogan and Mercer (19995) (see No.31 below).

This is the first of a series of 'cultural planning' guidelines (see also 31, 35, 36, 37, 38, 40) in which the question of the definition of culture invariable arises. A broad definition of 'culture' is adopted here:

'Culture' should be defined broadly to include a wide range of elements which contribute to local identity, sense of place and quality of life. The cultural resources of a local community are extremely diverse, including formal and informal cultural activities; natural and built environments; as well as public and commercial cultural and entertainment facilities. Cultural experiences can range from a walk in the park, to lunch at the club, to a night at the opera. 'Cultural development' therefore involves numerous Council functions, including not only arts, entertainment and cultural programs, but also community services and facilities; urban and landscape design; heritage conservation; parks and recreation; planning and development controls. (Guppy, 1997: 7)

The report also states:

For Local Government, a practical definition of culture is one which highlights those Council functions which make major contributions to local identity, sense of place and quality of life. These functions include:

- Support for entertainment, arts and cultural activities
- Library services
- Various civic, cultural and community facilities
- Community services and development programs
- Building, urban and landscape design
- Land use planning and development control
- Heritage conservation
- Parks, playgrounds and recreation facilities.

Cultural development on the part of Local Government can thus be seen as the purposeful and coordinated pursuit of these functions in order to enrich local identity, sense of place and quality of life. (Guppy, 1997: 12-13)

On the face of it, this implies that 'cultural development' covers virtually the whole of local government activity. A similar broad-ranging definition was presented in the 1994 document: *Creative Nation: Commonwealth Culture Policy*:

Culture arises from the community, even when the community may not be fully aware of it. It encompasses our entire mode of life, our ethics, our institutions, our manners and our routines, not only interpreting our world but shaping it. The most highly developed and imaginative aspects of our culture are the arts and sciences which are fed back to the community by the most talented individuals. (Commonwealth of Australia, 1994: 1)

In practice, the guidelines are much more limited than this type of definition might suggest, being concerned primarily with traditional arts and heritage matters, although adopting the stance that these impinge on a wide range of community activities. This feature of 'cultural planning' is common to a number of later documents discussed below. The concept of cultural planning is discussed in more detail in Appendix 3.

Cultural *planning* is defined in these guidelines as 'simply a purposeful, strategic approach to cultural development', involving:

- Assessing the existing situation, trends, needs and opportunities (cultural assessment)
- Setting goals and objectives
- Identifying key issues and priorities
- Proposing courses of action to address those key issues and priorities
- Assembling resources required for implementation
- Initiating adopted courses of action (Guppy, 1997: 14)

The first of these tasks, 'cultural assessment' includes: the gathering of demographic data; examining 'the cultural and social needs of different groups within the population'; and an inventory of resources ('cultural mapping'), all conducted in consultation with stakeholders. No detailed advice is given on how to conduct these data collection activities or how to utilise the data gathered. Neither is any indication given as to how the, 'key issues and priorities' of second task are to be identified.

The report advocates an 'integrated approach', implying a comprehensive council strategy, integrated with other council planning activity. However, in part 2 of the report, containing 'examples of practice', 10 of the 14 examples are one-off, relatively self-contained projects, mostly involving the integration of art works into urban development projects.

#### 34. 1995: The Cultural Planning Handbook (Grogan and Mercer, Aust.)

*The Cultural Planning Handbook: an Essential Australian Guide* was sponsored by Arts Queensland and the Australia Council, despite the latter having published the first edition of *Better Places, Richer Communities* (see No. 30 above) only the year before.

As with *Better Places, Richer Communities*, the handbook adopts an ambitious definition of 'culture', as follows:

Our culture is everything that contributes to the quality of our lives. Going to the football is a cultural activity. Sitting at home and knitting is a cultural activity. So is going to the pub, riding on a bus, watching the news, tinkering in the garage and pruning the roses. (Donovan, quoted in Grogan and Mercer, 1990: 12)

The broad sweep of this definition is further emphasised in another statement:

Culture does not simply mean *the arts*. It includes the arts – traditional, folk and new – and also a much wider range of human, physical, intellectual and spiritual activities, experiences, and forms. The cultural life of the community is not just a few people going to the opera. It is about participation, celebration, identity, belonging to a community and having a sense of place. (Grogan and Mercer, 1995: 12, emphasis in the original)

This broad concept would seem to include other forms of leisure, including sporting and physical recreation activity and social/entertainment activity, but this idea is not consistently followed up in the pages which follow. Thus, for example, the following inconsistencies can be seen in the report:

1. a list of 'cultural resources' mentions parks but not sports facilities (p. 13), but a subsequent list of 'cultural assets' does not include either parks or sports facilities (p. 58);
2. it is recommended that a community 'cultural assessment' include the preparation of a single 'tourism and leisure activities' profile (p. 14) but, when discussing integration of cultural planning with other strategic planning processes, 'Culture' is separated from 'Tourism' (p. 19);
3. the Australia Council is listed as a relevant stakeholder at federal level, but not the Australian Sports Commission or the Heritage Council or the Tourist Commission (pp. 23, 67);
4. at state level, the Office of Arts and Cultural Development and Heritage Department (Qld) are listed as relevant stakeholders but not the relevant agencies in sport and recreation or tourism (p. 23), despite the fact that, in discussing the idea of a 'policy audit', the authors declare that '.. departments looking after tourism, sport and recreation ... are actively involved in cultural planning' (p. 67);
5. a list of relevant 'community' stakeholders does not include sporting clubs (p. 24);
6. in conducting a 'quantitative cultural assessment' information is to be collected on 'artswokers' (p. 40, 55-57) but workers in other areas of 'culture' such as sport, tourism, parks, entertainment or hospitality are not referred to.

Thus *The Cultural Planning Handbook* seeks to establish 'cultural planning' as a process which encompasses more than just 'the arts', but in practice areas outside of the arts and heritage end up being just a backdrop or context for traditional arts-based activity. For example, while patterns of involvement in sport may be seen as part of local 'culture', cultural planning, as put forward in *The Cultural Planning Handbook*, is not concerned with the planning of sports fields; and while parks are seen as a component of 'heritage' and a contributor to a 'sense of place', cultural planning is not concerned with the provision of open space.

The handbook is structured around a five-step process, as follows:

1. *Set up* – Appoint steering group; identify stakeholders; design provisional program.
2. *What is our current situation?* – Quantitative and qualitative resources assessment, including 'surveys and research'; population and cultural assets profiles; and 'cultural mapping'.
3. *Where do we want to be?* – SWOT analysis; 'future vision' workshops; turn vision into goals and objectives.
4. *How do we get there?* – Strategy formation: brainstorm, evaluate and select, refine and draft strategy, integrate with other strategies; and action plan: decide who will do what, when; set budgets.
5. *Getting there* – Monitor and review progress; publish results.

Procedures for converting data from surveys, profiles and cultural mapping into proposals and/or a plan are not provided: the latter are assumed to emerge from SWOT analysis, workshops, brainstorming and further consultation.

### 35. 1995/2000: Recreation and Sport Planning and Design (Daly, Aust.)

The first edition of Daly's *Recreation and Sport Planning and Design* was published in 1995 as a set of guidelines by the South Australia Department of Recreation and Sport. Essentially these guidelines appeared to supersede the Marriott guidelines, the second edition of which had been published by the same agency five years previously (see No. 21 above). While the new guidelines paid more attention to design issues, a different planning approach is presented without any explicit reference to its relationship to earlier guidelines. The second edition, little changed from the first, was published commercially in 2000 (Daly, 2000).

In the chapter on 'Planning Methodology', Daly briefly reviews five planning frameworks, including those presented by the Victorian Department of Sport and Recreation, reviewed above (No. 22), and the Marriott approach, also reviewed above, but proposes his own preferred 'Simple Planning Method'. This is put forward on the grounds that: 'Most council members and representatives of community groups ... are not experts in recreation and sport strategy planning' (Daly, 2000: 42), apparently ignoring the fact that councils employ professional staff and/or consultants for precisely that reason! Indeed, Daly refers to 'the consultants' in outlining the proposed method and, in an appendix, provides a model brief for commissioning consultants to carry out the exercise. The 'Simple Method' is described in less than two pages and comprises three elements:

#### 1. *Analysing the existing situation*

- Past reports.
- Population trends.
- Facility inventories and 'assessment of their effectiveness and efficiency'.
- Current and future demands for recreation.
- Consultation with key groups.

#### 2. *Assessments*

- Key issues paper 'prepared for discussion by the consultants with the project management group and others who may be able to input constructive comments' (Daly, 2000: 43).
- Open spaces allocated to recreation and sport.
- Outdoor and indoor recreation and sport facilities.
- Capital costs of any proposed development.
- Maintenance and management costs of recreation and sport open spaces and facilities.

#### 3. *Implementation*

- Formulating policies.
- Preparing short-term, medium-term and long-term action plans.
- Identifying priorities 'following the establishment of clear objectives, goals, priorities and actions' (Daly, 2000: 43).
- Establishing management structures for facilities 'and programs'.
- Preparing evaluation and review procedures.

Thus we have a 'simple planning method' which:

- includes assessment of 'future demands' in a section on 'analysing the existing situation';
- requires estimates of capital costs for proposals without indicating how proposals are to emerge; and



- advises that the formulation of policies and establishment of 'objectives, goals, priorities' is part of the implementation stage.

No guidance is given on how the data collected is to be analysed to produce policies.

A subsequent chapter on 'Local Recreation and Sport Strategy Plans' is focussed on the 'all-important issue of developing a policy framework' (Daly, 2000: 53). A ten-step 'policy formulation' process is outlined, together with a 'simple four-step process' as an alternative, but the relationship between these processes and the earlier 'simple planning method' is not discussed. The chapter then offers sets of 'generally acceptable objectives and principles' for eight different sorts of leisure facility and discusses nine 'key local recreation and sport planning issues'. A further chapter on 'Regional and State Recreation and Sport Strategy Plans' makes brief reference back to the earlier 'simple planning process' and offers a new set of generic 'objectives' and discusses six 'key regional issues'.

Overall, the advice offered here for local planning is potentially confusing and lacking in detail.

### 36. 1996: Parks, Recreation, Open Space ... Guidelines (Mertes & Hall/NRPA, USA)

The US National Recreation and Park Association (NRPA) *Parks, Recreation, Open Space and Greenway Guidelines* adopts a 'systems planning approach' which is defined as 'the process of assessing the park, recreation, open space needs of a community and translating that information into a framework for meeting the physical, spatial and facility requirements to satisfy those needs' (Mertes and Hall, 1996: 16). The 'system planning model' involves ten steps:

1. Identify customers (community profile; user groups; non-users);
2. Obtain customer involvement and develop relationships (surveys, focus groups and public consultation);
3. Assess need, involving:
  - a. Trends report (actually an 'environmental scan' or 'position paper');
  - b. Resource inventory and evaluation;
  - c. Condition assessment of parks, open spaces, pathways, and related facilities;
  - d. Participation rates and use patterns;
  - e. Planning unit profiles (community profiles of spatial sectors of the community);
  - f. Relationship to other plans;
  - g. Literature and secondary research;
4. Develop strategic plan;
5. Develop system framework;
6. Develop system plan;
7. Develop recreation services delivery plan;
8. Develop maintenance and operations plan;
9. Develop an implementation plan;
10. Evaluate overall effectiveness of systems plans and service delivery.

Items 4-7 constitute a somewhat overblown 'plan preparation' stage, with items 5 and 6 concentrating on open space and facilities (the 'system') and item 7 perhaps usefully separating out the program/services aspects of the plan. Item 8 is operational and generally not seen as part of the *planning* process. Item 9 is what would be called an 'action plan' in the Australian context, with named projects, timings and possibly budgets.

The NRPA report smacks of the committee approach to report-writing (the 'task force' comprised 25 people, with an additional nine constituting the 'research and writing team' and others being 'contributing reviewers') in that a lengthy chapter on the 'Level of service guideline for system planning' is included but appears not to be linked explicitly with the above process. The 'Level of Service' (LOS) approach, a term borrowed from transport planning, is a demand-based process involving eight steps, as follows:

1. *Park Classification*: identification of the *types of parks* (neighbourhood, district, etc.) within the park system to which the 'level of service' process will apply (it is not clear why it would not apply to all park types).
2. *Recreation Activity Menu*: identification of the *range of activities* and associated range of recreation facilities (tennis courts, picnic units, etc.) provided for in each park type.
3. *Open Space Size Standards*: area specifications for the types of recreation facility included.
4. *Present supply* – actually the *capacity* of each recreation facility type in terms of visits per year, based on a daily/weekly figure somewhere between average and peak use – eg. one tennis court has a capacity of 4200 person-visits a year.
5. *Expressed demand* – survey-based estimate of current participation levels in terms of current visits per head of population per year for each activity – eg. the average member of the community uses a tennis court 2.9 times a year.
6. *Minimum population service requirements* (MPSR) for each activity – number of persons served per unit – ie. facility capacity (item 4) divided by visits per head of population (item 5) – eg. MPSR for tennis is  $4200/2.9 = 1448$  persons served per tennis court.
7. *Level of service* (LOS) for each park type – for each park type, the aggregate area of facilities for the activities on the 'recreation activity menu' is divided by the aggregate of their MPSRs in thousands, to give acres per 1000 population served.
8. *LOS for total park and recreation system* – aggregation of item 7 across all parks and all park types.

It is then suggested that a surplus or deficiency can be determined by comparing the 'level of service as measured demand' as indicated in steps 7 and 8 above, with the 'level of service as currently available inventory provides'. The approach is flawed in a number of respects:

- There is apparently double counting in step 7: individuals who participate in more than one activity are counted each time.
- In step 4, an estimate has to be made in regard to facility capacity (or 'expected use'), on the basis of the current patterns of average and peak use, but the formula offered is a weighted average of peak and non-peak usage, that is the overall average. So the capacity of facilities is defined as the current level of use, regardless of whether facilities are fully used, under-used or over-used. If the step 7 double counting is eliminated, the method then ends up merely stating the current ratio of open space to population.
- Non-resident users are mentioned but no advice is offered on how to take account of them.
- It is suggested that 'latent demand' be measured via the resident survey: this is illustrated in the case-study of Dade County (Appendix A), where survey respondents re asked about activities which they 'would like to participate in but cannot because of cos, low quality facilities, lack of available facilities or inadequate skills' (p. 150), but when this is added to the recreation demand calculations, it adds nly 0.5% to existing demand (table 5 p. 142).
- Being based entirely on formal activities, no allowance is apparently made for informal open space in parks.

The 'system planning model' appears to use a needs-based approach, while the 'Level of Service' method is based on the patterns of use of current facilities, so it might be seen as a version of the 'organic' method (as described in No. 16 above), although it results in the production of 'local standards'.

### 37. 1996: Facilities Planning Model (Scottish Sports Council, UK)

Details of the Facilities Planning Model are currently available on the Scottish Sports Council, or sportscotland, website but there are references to a version on the Sport England website and Torkildsen attributes the model to the latter (Torkildsen, 2005: 256). The sportscotland website summary also indicates that developmental work was conducted by consultants Kit Campbell Associates and current analytical support is provided by the Planning Data Management Service at Edinburgh University.

The model is a computerised system which provides an aid for local authorities in Scotland in the planning of a range of sports facilities, namely: athletics tracks; bowling greens; indoor bowls centres; cricket pitches; football pitches; golf courses; hockey pitches; ice rinks; rugby pitches; sports halls; squash courts; synthetic grass pitches; swimming pools; and tennis courts. The database on which the model is based comprises three components: demand/participation data; an inventory of the supply of facilities and their size and location; and facility catchment areas.

Based on a rolling program of 'user surveys at facilities, analysis of management data and household surveys', levels of participation in the relevant activities are available for 10 age/gender groups of people living in well-supplied areas, where participation is unlikely to be constrained by lack of facilities. The difference between these participation rates and participation rates in less well supplied council areas is a measure of latent demand and can be used to assess the likely demand for additional facilities. Thus the model is clearly focussed on a quantitative estimate of projected demand, also related to spatial factors.

### 38. 1997: How to Undertake a Needs Assessment (Dept of Sport & Rec., WA, Aust.)

Despite the fact that the title of this document, *How to ... Undertake a Needs Assessment for a Sport and Recreation Facility*, refers to single facilities, the methodology presented is quite generic and could equally be applied to the provision of multiple facilities. A five-step process is recommended, as shown in Figure 24.

In common with a number of the other guidelines examined, procedures to convert 'data' into demand or 'need' are vague. Standards are treated with caution and public consultation is given considerable weight in the planning process, but it is suggested that the latter produces a list of 'wants' and analysis of other sources of data provides the basis for determining which of these are 'needs' (p. 15). The guidelines are rare in identifying comparative analysis of supply-demand situations between different communities as a possible basis for assessing deficits. It is, nevertheless, difficult to identify these guidelines with any particular planning model.

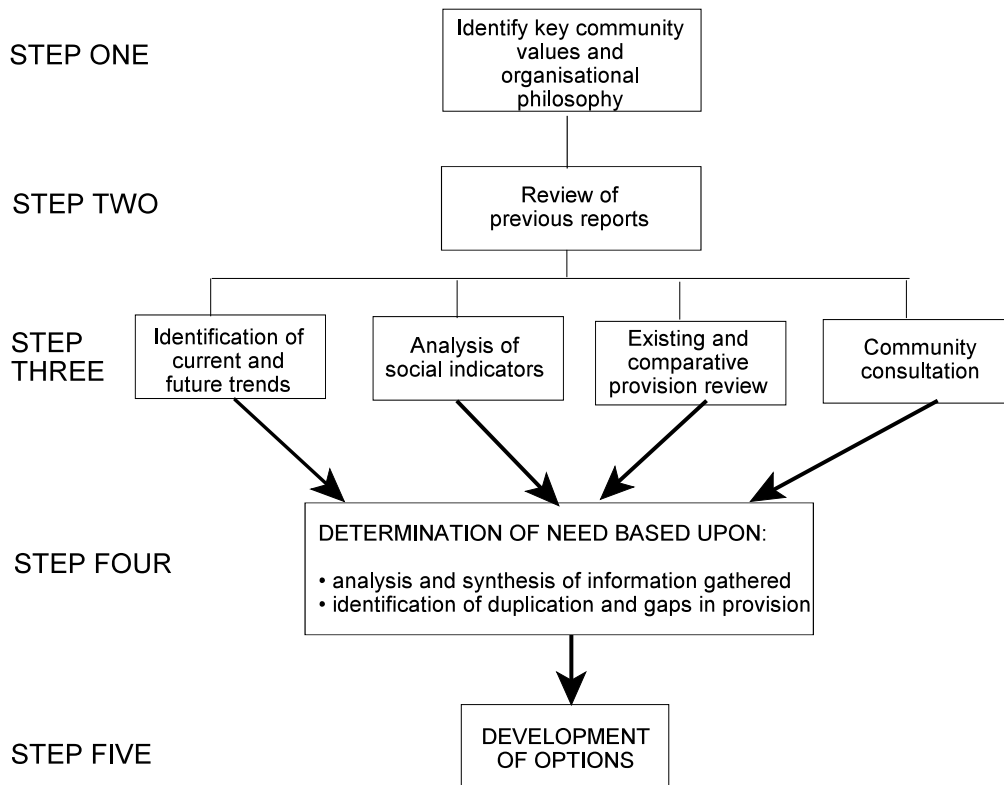


Figure 24. Five step needs assessment process

Source: WA Dept of Sport and Recreation (1997: 8)

### 39. 1998: Community Cultural Planning (Dreeszen/Americans for the Arts, USA)

'Cultural planning' is generally directed at arts activities, but since 'culture' can be interpreted very broadly as being almost synonymous with 'way of life', some cultural planning guidelines, as noted in Nos 30 and 31 above, seek to encompass all forms of leisure including, for example, sport. But Dreeszen's *Community Cultural Planning A Guidebook for Community Leaders*, sponsored and published by the peak organisation, Americans for the Arts, adopts a more traditional definition, although emphasising the strong links between cultural planning and planning in other sectors.

The guidelines suggest a broad five-step process:

1. Preplanning;
2. Community assessment;
3. Goal-setting;
4. Implementation; and
5. Monitoring and evaluation.

Step 2, Community assessment, includes the familiar range of data collection and community consultation. Brief advice is given to analyse the data quantitatively and qualitatively to identify 'key issues'. Step 3, Goal-setting, is concerned with more than setting goals: it encompasses what would generally be called 'plan formulation' and is to be accomplished by 'task forces', 'public meetings' and further stakeholder and public consultation. As with a number of the guidelines

reviewed here, no specific guidance is given as to how the data collected in Step 2 is to be utilised in the goal-setting/plan formulation of Step 3. Overall, it would appear that stakeholder consultation is the most firmly endorsed methodology.

#### 40. 1998/2006: The Tourism System (Mill & Morrison, USA)

In Chapter 5 of *The Tourism System*, on tourism planning, Mill and Morrison (2006) present a 7-step planning process with each step discussed in relation to activities, participants and outcomes. The steps and activities are as follows:

1. Background analysis
  - a. Review government policies, goals, objectives, programs
  - b. Inventory of destination mix elements and components
  - c. Description of existing tourism demand [based on existing data]
  - d. Review of strengths, weakness, problems and issues within tourism
2. Detailed research and analysis
  - a. Resource analysis
  - b. Activity analysis
  - c. Market analysis [visitor surveys and tourism trend analysis]
  - d. Competitive analysis
3. Synthesis and visioning
  - a. Preparation of preliminary position statements
  - b. Preparation of vision statements
4. Goal-setting, strategy selection, and objective setting
  - a. Definition of tourism goals
  - b. Identification of alternative strategies and selection of desired strategies
  - c. Definition of tourism objectives
5. Plan development
  - a. Description of programs, activities, role, and funding [in relation to selected strategies]
  - b. Writing of tourism plan reports.
6. Plan implementation and monitoring
  - a. Plan implementation
  - b. Plan monitoring
7. Plan evaluation
  - a. Measure performance against each goal and objective
  - b. Analyse reasons for non-performance
  - c. Prepare recommendations for future tourism planning processes.

Although public consultation is not identified as a specific task, 'local residents' and tourism industry representatives are mentioned a number of times as 'participants' and a survey of community attitudes to tourism is recommended. Item 4b., development and selection of strategies, is summarised in just half a page.

For the most part the chapter seems to be pitched at national or major regional level rather than local planning. Reference is made to the New Zealand Tourism Planning Kit (No. 44 below), which is one of five one page or half page case studies/exemplars. There is no mention of the relationship between tourist and local resident demand for leisure.

41. 1999: Local Cultural Strategies (DCMS, UK)

The guidelines for Local Cultural Strategies, produced for local authorities in England by the Department for Culture, Media and Sport in 1999, offer the following definition of culture:

Culture has both a material and a value dimension and includes a wide range of activities including arts, media, sports, parks, museums, libraries, the built heritage, the countryside, playgrounds and tourism. (DCMS, 1999: 4)

Unlike other cultural planning guidelines examined, this document clearly indicates that the plans are to cover the full range of leisure which, with the exception of media, would typically be within the remit of local councils. The broad content of the guidelines is summarised in Table 4.

The guidelines encourage local authorities to prepare broadly based strategic plans integrated with their own and other agencies' plans, based on widespread consultation. The guidelines do not, however, constitute a 'manual' on how to prepare a plan, but more detail is provided in the *Planning Policy Guidance 17* (No. 24 above). 'Research' and 'analysis' are necessary, but no detail is given. The implied planning methodology is to identify 'key issues' which arise primarily from a process of consultation with stakeholders, so that an issues approach and stakeholder consultation are the key approaches endorsed.

Table 4. UK: Local cultural strategies – guidelines summary

<p><b>Principles</b></p> <ul style="list-style-type: none"> <li>• based on the 'needs, demands and aspirations of the communities which the local authority serves';</li> <li>• guided by a 'vision for the culture' of the area;</li> <li>• fair access for all as central;</li> <li>• cross-departmental and inter-agency approach;</li> <li>• include 'meaningful active consultation' with stakeholders;</li> <li>• set in the 'wider central and regional government context';</li> <li>• contribute to central government's key objectives;</li> <li>• strategic, including priorities, forward planning and mechanisms for implementation, monitoring, review.</li> </ul>
<p><b>Preparation Stages</b></p> <ol style="list-style-type: none"> <li>1. Preparation</li> <li>2. Consultation A</li> <li>3. Analysis</li> <li>4. Creation</li> <li>5. Consultation B</li> <li>6. Completion</li> <li>7. Launch</li> </ol>
<p><b>Content</b></p> <ul style="list-style-type: none"> <li>• Advocate the benefits of cultural activities - rationale and contribution to wider social/political objectives</li> <li>• Set strategic context - links with other plans</li> <li>• Set local context - data on local population, economy, facilities, participation levels</li> <li>• Identify key cultural issues - results of consultation</li> <li>• Establish broad cultural policies</li> <li>• Action Plan - includes performance indicators and links to Best Value process</li> </ul>

Source: Department of Culture, Media and Sport, 1999

#### 42. 2000: Tourism Development Handbook (Godfrey and Clarke, UK)

The process of preparing a tourism development strategy is presented with eight components:

1. Tourism policy and committee structure.
2. Tourism resource audit. [inventory and evaluation of tourist-related attractions and services in the destination]
3. Tourism market analysis. [use of generic/secondary data on tourist market segments : staying, day-trip, domestic, international, leisure, business, VFR, etc. Groups to be targeted selected according to locally determined 'criteria' and availability of assets]
4. Tourism opportunities and constraints. [re. physical development – related to segments selected in 3]
5. Development goals and objectives.
6. Tourism development action steps.
7. Tourism marketing plan.
8. Monitoring and review procedures.

While public consultation is not listed as a separate component, discussion of the first component includes the involvement of a wide range of stakeholders, including residents. The handbook provides a more detailed 'step by step' framework than most of the other tourism guidelines reviewed, but there are still gaps in the process of selecting tourism development projects, particularly in regard to quantitative aspects.

It is notable that a marketing plan is included: a feature which is generally missing from plans focussed other leisure sectors.

In component 2 there is a brief mention of the fact that some local services, including recreational services, may serve locals as well as tourists.

#### 43. 2001: Tourism and Community Development (Palermo *et al.*, Brazil/Canada)

*Tourism and Community Development: An Approach* was developed by a team of architects from The Federal University of Viçosa and the Federal University of Rio de Janeiro in Brazil and Dalhousie University in Canada. The document does not present a complete planning methodology but 'an approach by which any small community may reasonably consider, from a local perspective, the viability and appropriateness of tourism as a vehicle for community development' (Palermo *et al.*, 2001: 8). It is claimed that the approach can be implemented

... locally, fairly quickly and with a minimum of outside assistance. This is an alternative to the consultant study, to comprehensive community planning and to incomprehensible, blindly extrapolated, economic projections. (Palermo *et al.*, 2001: 32)

The approach is structured by the Supply-Demand-Consequence (SDC) model, as shown in Figure 25.

Implementation of the model involves a series of judgements. Details of how these judgements are to be made are not provided, although it is indicated that 'local politicians, business interests and concerned citizens' (p. 32) can be involved.

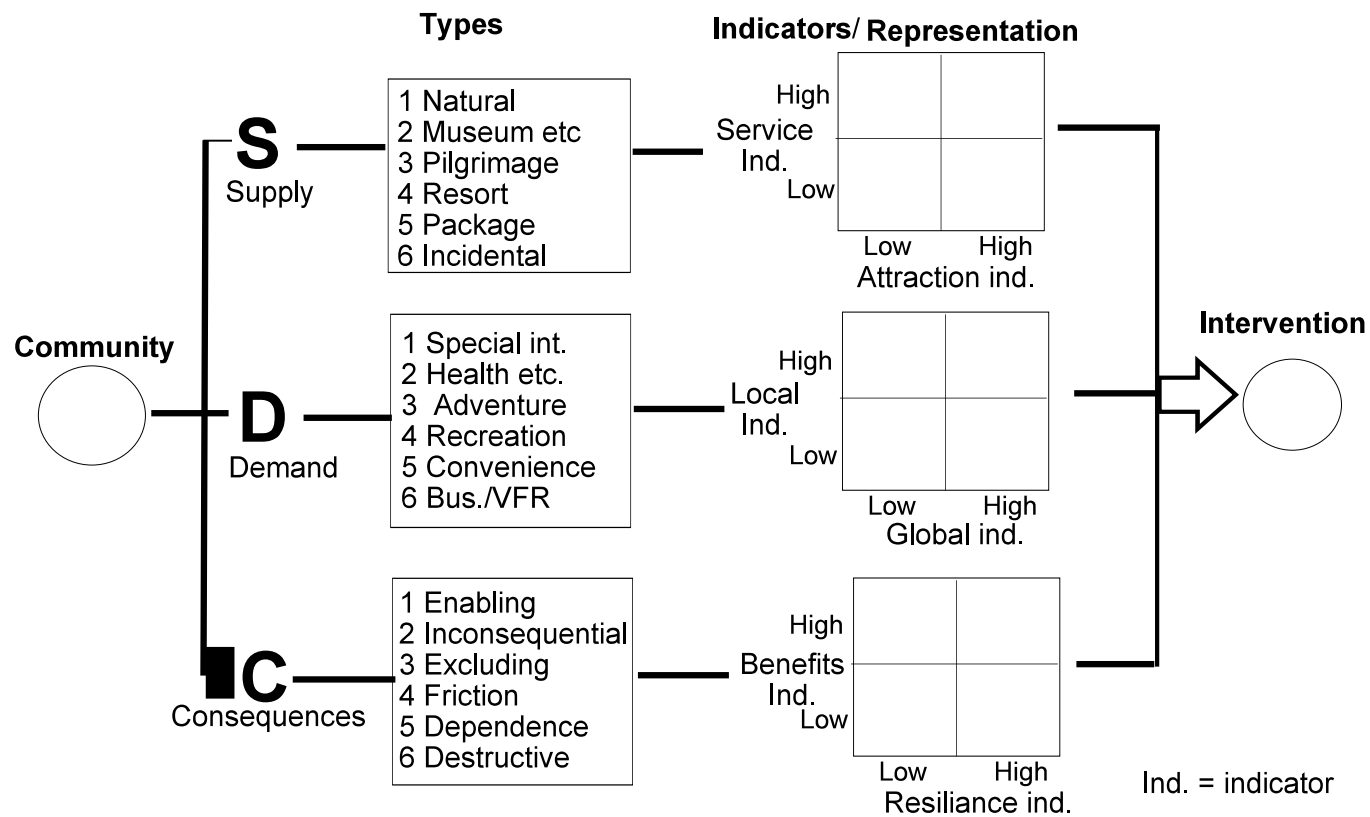


Figure 25. SDC Approach  
 Source: a re-presentation of Palermo *et al.* (2001: 22)



First, it is decided which is the main type of supply/attraction the community has to offer and which type of tourist/demand would be attracted to that type of supply. The 'consequences' of adopting a tourism development strategy involving the selected supply and demand combination must then be assessed, but it is not clear how this can be done in advance of the later analysis or to what extent this might preempt any further analysis. The analysis process involves selection of two 'indicators' in relation to each of supply, demand and consequences and judging them to be 'high' or 'low'. The results are presented in the quadrant diagrams shown to the right of Figure 25. Key indicators must be selected, for example, in regard to supply, a 'service' indicator could be tourist accommodation or water supply while the attraction could be the local beach. The course of action to be followed (intervention) is based on the findings represented in the three quadrant diagrams.

The approach clearly depends on a relatively small-scale and simple context, where a limited number of supply or market factors dominate. Furthermore, it depends on the ability of those involved in the process to reach a consensus on the basis of personal judgements. While the approach is designed for this type of environment, the overall conceptual framework might nevertheless be used to provide a framework for more complex situations involving more complex data collection and analysis and decision-making.

#### 44. 2001: Planning for the Arts: Models & Standards of Provision (Evans, UK)

Graeme Evans' book, *Cultural Planning* (Evans, 2001), contains a chapter entitled 'Planning for the Arts: Models and Standards of Provision'. The chapter does not constitute a set of guidelines as such, but is a review of available techniques. However, Evans suggests that the arts have been neglected in 'town planning proper' and so concludes that 'a review of planning approaches to broader recreation and related amenity provision may offer possible applications to arts and cultural provision, as well as reasons for their different treatment' (Evans, 2001: 110). The review covers the following four groups of methods.

- *Standards* – standards are examined and their well-established advantages and disadvantages considered. Library standards are included in a table along with open space and other recreational standards, but not discussed. In general, it is considered that, largely because of their heterogeneity, the arts are not suited to the standards approach but it is suggested that it is possibly because of their 'exclusion from amenity and planning standards' that they are 'often the poor cousin in municipal leisure provision' (p. 112).
- *Gross demand or comparative approach* – the basis of this is the Gross Demand/Market Share approach discussed above (No. 14) but, apparently because it can involve the use of national or regional participation data, the approach is also seen as 'comparative' and Evans' discussion seems to confuse the method with fixed standards. Overall, it is concluded: the 'major flaw of this approach ... is its reliance on participation as synonymous with 'demand'' (p. 115). This is seen as invalid because it 'ignores unmet demand' which cannot be met because of such constraints as lack of supply or people's lack of information or education. (But, as with any commodity, the level of demand which is satisfied by the market at any point in time is still 'demand', whether constrained or not: this is discussed further in Project Paper 5). Evans goes on to discuss such concepts as 'latent demand' and 'barriers to participation'.
- *Spatial approach and hierarchy of provision* – Spatial approaches based on catchment areas and incorporated into a hierarchy are generally endorsed and also associated with the 'organic approach' (although this term is not used, a diagram almost identical to Figure 11 above is included and attributed to a consultancy report by Evans).

- *Needs and community development approach* – this is a somewhat ambivalent discussion of stakeholder/public consultation and the community development approach (see No. 14 above). Doubts are raised about the likely efficacy of the former because of the public's limited experience of many art forms. Evans appears to endorse a community development approach, linking it with the long-established community arts movement.

#### 45. 2003: Cultural Planning Guidelines for Local Govt (Min. Arts/DLG, NSW, Aust.)

The *Cultural Planning Guidelines for Local Government* were jointly published by the New South Wales Ministry for the Arts and Department of Local Government (Arts NSW/DLG, 2004). The planning process outlined in the document is not presented as an alternative to standards since standards have not been a common feature of planning for the arts – except in the case of libraries (Library Council of New South Wales, 2005).

The following definition of 'culture' is offered:

Culture in its widest sense is about what matters to people and communities. It is about relationships, shared memories and experiences. It is about identity, history and a sense of place. It is about the different cultural and religious backgrounds found in most communities. It is about the things we consider valuable for passing on to future generations. It is our way of connecting the present with the past and the future. ... In these Guidelines, 'culture' has three dimensions: our sense of place, our values and our identity; the material products of creative processes; and our engagement with and participation in creative processes. (Arts NSW/DLG, 2004: 7)

Such a wide definition of culture encompasses virtually all human activity and, indeed, non-human phenomena. Quality of life and 'our sense of place, our values and our identity' potentially involve all aspects of community life. But, as with most of the other cultural planning guidelines reviewed, the ensuing guidelines do not fully reflect this breadth.

A generic nine-step process is outlined, beginning with 'Preparation' and ending with 'Implementation, Monitoring and Review'. Steps 2 and 3, 'Involvement and Research' and 'Analysis' concern us here.

'Involvement and Research' comprises eight components:

- *Wide-ranging strategic review* – primarily a review of existing council policies in cultural and cognate areas, such as: 'urban planning, parks and recreation, tourism promotion, and local employment initiatives'.
- *Generate a 'broader understanding of issues and opportunities across the organisation'* – primarily an intra-organisational consultation process.
- *Community consultation*
- *Quantitative cultural assessment* – community profile and facility inventory.
- *Cultural mapping* – a 'qualitative cultural assessment' indicating 'how people are experiencing their place and culture' and facilities.
- *Research on factors which affect the 'quality of life of a place or community'*. (Seemingly similar to 'cultural mapping').
- *SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis* and 'workshops for cultural development'.
- *Community consultation continued* – including the setting of 'objectives for the development of the cultural plan'.

'Analysis' comprises two components:

- *Review of all the information*
- *Revisit specific objectives set for the plan* – relating to scope and scale determined at the Preparation stage.

As with other sets of guidelines examined, the collection of a large amount of data is recommended but little guidance is provided on just how such information is to be translated into policy. Stakeholder consultation is the main focus of the methodology proposed.

#### 46. 2003: Open Space for Sport/Recreation: Planning Principles (Sport & Rec., Qld)

The Queensland government's document, *Open Space for Sport & Recreation: Planning Principles and Implementation Notes* (Sport and Recreation Queensland, 2003), sets out 19 'Planning Principles for Recreation and Sport', as follows:

1. Recreation setting diversity
2. Natural landscape features
3. Sustainability of recreation
4. Undeveloped open space
5. Recreation and sport in rural areas
6. Open space fragmentation and connectivity
7. Cross boundary strategic planning
8. Regionally significant open space
9. Regional recreation and sport
10. Open space standards
11. Charging for public parks infrastructure and priority infrastructure plans
12. Multiple uses of open space
13. Redevelopment/recycling of land for recreation and sport
14. Eco-tourism and outdoor recreation
15. Compatible recreation activities
16. Recreation and adjacent land uses
17. Facility location
18. Non-motorised recreation trail networks
19. Waterways and riparian corridors

The majority of the topics relate to resource and design issues. The exceptions are topics 7-9, which are concerned with cross-boundary and regional planning issues, and items 10-11, which are concerned with standards.

Advice on cross-boundary and regional issues is primarily concerned with encouragement of councils, other public agencies and sporting bodies to cooperate in producing regional strategic approach to these issues.

The discussion of standards, and the consequences for determination of developer contributions, is caught between two concerns: the viability of standards and the Queensland planning legislative framework.

The document demonstrates an awareness of the limitations of fixed standards, referring to the National Capital Development Commission standards (see Project Paper 1), but advising that 'sole dependence on these standards as the method of provision of land for recreation and sport is

not recommended' (p. 51). The standards are seen, nevertheless, as a 'useful starting point' and ten additional factors to be taken into account are listed. However, most of the factors are concerned with the quality and spatial distribution of open space and the types of activity to be catered for; they do not challenge the quantitative basis of the standards. In an illustrative case-study, a standards of 2 ha/1000 population for 'informal parks' and 2 ha/1000 for 'sporting parks' is presented 'as a generic example based on those currently being applied by a number of local governments in Queensland' (p. 94). No further justification for the standard is offered. At no point is it suggested that taking the other factors into account will affect the overall quantity of open space required.

The Queensland *Integrated Planning Act, 1977*, requires local councils to develop 'Standards of Service' for required infrastructure, including 'public parks infrastructure' (which includes 'open space, recreation and sport') to provide the basis for an 'Infrastructure Charges Schedule' for developer contributions. Thus specification of infrastructure requirements should be based on a level of service to be provided to the population. In the case of recreation one would think that this would relate to a level of recreational activity to be accommodated, in other words, demand: indeed, the document states that the act 'recognises that provision of parks infrastructure should be on the basis of potential demand' (p. 52). But this is not pursued in the document, which divides the 'Standards of Service' into *spatial standards (quantitative)* and *performance standards (qualitative)*. The only guidance on *spatial standards* to be used is the 2+2 ha/1000 referred to in the case-study mentioned above. The *performance standards* reflect the 'other factors to be taken into account', as mentioned above.

#### 47. 2004: Tourism Toolkit for Local Government (Ministry of Tourism, NZ)

The *Tourism Toolkit for Local Government* was prepared for the New Zealand Ministry of Tourism by the Tourism Recreation Research and Education Centre (TRREC) based at Lincoln University, Christchurch. It is an on-line set of guidelines containing four 'toolkits' and 15 'toolboxes', as shown in Figure 26.

Each 'toolbox' follows a common format, with an introduction outlining the purpose and value of the process described, followed by a conceptual overview of the models and/or procedures involved and reference to data sources and existing case studies, particularly those conducted by TRREC.

Of the seven 'toolboxes' in the Situation Analysis Toolkit, three are inventory items. Regarding the other four:

- *Visitor demand toolbox* concerns data collection procedures for estimating current visitor numbers to an area.
- *Visitor satisfaction toolbox* concerns surveying current visitors on attitudes.
- *Economic impact toolbox* presents a conventional model for assessing economic impact of current visitors.
- *Community tourism toolbox* concerns conveying information to the community about the benefits of tourism development and processes for community consultation regarding tourism development proposals.

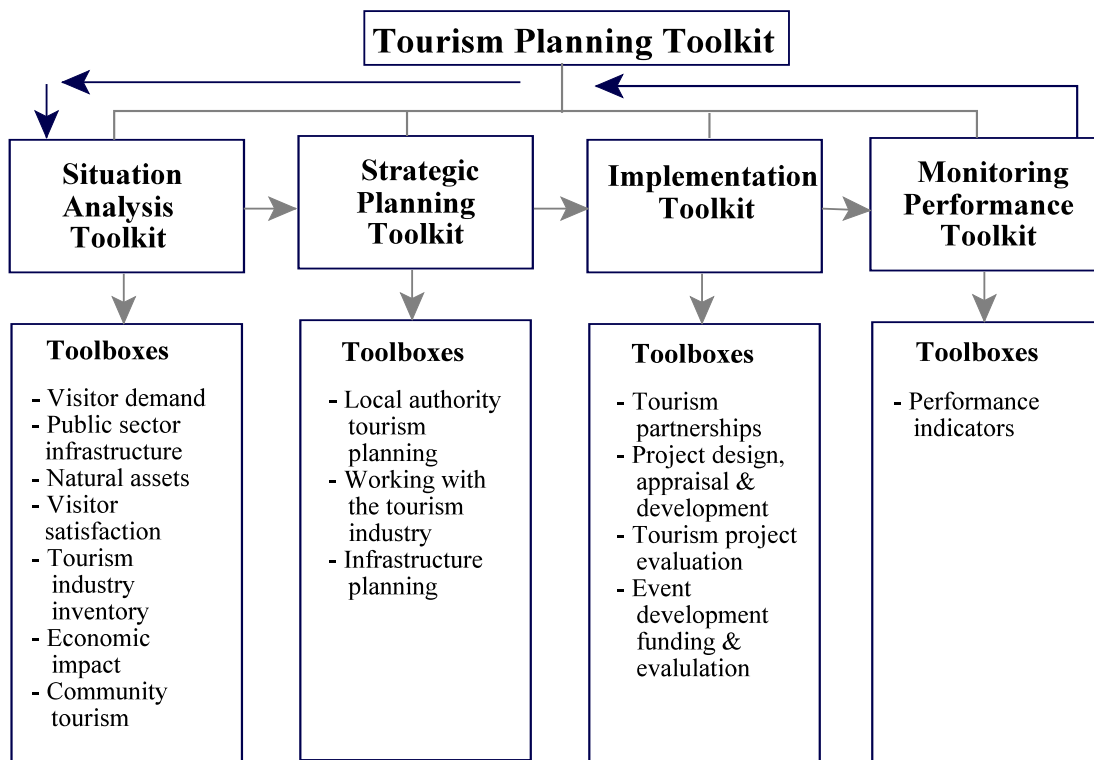


Figure 26. Tourism Planning Toolkit (New Zealand)

Source: Ministry of Tourism (2004)

Among the 'Strategic Planning Toolkit' toolboxes:

- *Local authority tourism planning toolbox* discusses the broad role of local government vis-a-vis other players and the idea that tourism planning has a place within community planning generally. While the toolbox refers to council's general planning activity and, in a diagram, to the benefit of 'improved public facilities', and to possible community fears about congestion, there is no explicit reference to the relationship between visitor and resident use of local leisure resources.
- *Infrastructure planning toolbox* is concerned primarily with funding and secondarily with environmental and engineering issues.

It is possible that key aspects of the toolkit lie in the many case studies referred to, which have not been examined for this review, but the toolkit itself fails to provide specific advice on how to plan for possible tourism futures.

#### 48. 2007: Cultural Planning Toolkit (2010 Legacies Now *et al.*, Canada)

The *Cultural Planning Toolkit* is a joint project of two Canadian organisations: 2010 Legacies Now and Creative Cities Network. It defines *cultural planning* as 'a process of inclusive community consultation and decision making' and notes that it is 'a way of looking at all aspects of a

community's cultural life as community assets' (p. 1). Further defining the scope of the exercise, the report states:

Cultural resources are all the institutions, activities and people in a community through which we express our shared beliefs, customs, rituals and values: the libraries, historical societies, museums, galleries, symphony orchestras, theatres, public parks, community groups, First Nations and ethnic associations, training institutions, sports organizations, colleges and schools, artists, musicians, performers, writers and more ... (2010 Legacies Now, 2007: 5)

Clearly, this includes far more than the traditional 'arts' but, as with other cultural planning guidelines noted above, the detailed guidelines do not reflect this.

A nine-step planning process is presented:

1. *Preparation* (identification of stakeholders, funding and timeframe)
2. *Information gathering and research* (workshops, scan of environmental, social and cultural trends, cultural resource mapping, existing relevant plans/policies)
3. *Assessments and analysis* (analyse data, identify 'opportunities and issues')
4. *Organisation and consultation* (public/stakeholder consultation)
5. *Writing the plan*
6. *Public consultation*
7. *Finalizing and adoption*
8. *Launch*
9. *Implementation, monitoring and review*

These guidelines are as vague as any other reviewed in regard to how 'data' are to be interpreted to produce a plan. The guidance, in its entirety, is as follows:

#### *Quantitative*

- Analyse numeric data (survey results) with counts, averages
- Identify patterns and clusters of data
- Note most frequent responses
- Cross-tabulate findings (eg. compare media habits of non-participants with those of arts attendees)
- Do tests to determine statistical significance of results
- Identify a few key issues for planning in an interim assessment report

#### *Qualitative*

- Identify patterns and themes in transcripts, interviews, focus groups and public meetings, and in narrative responses to open-ended survey questions
- Synthesize key information and issues (2010 Legacies Now, 2007: 24)

Overall, the main focus is on the results of public consultation and identification of 'issues'.

#### 49. 2007: Decision-making Guide (Dept Sport and Recreation, WA, Aust.)

The Western Australian Department of Sport and Recreation document, *Decision-making Guide: Sport and Recreation Facilities*, like the guidelines produced by the same agency in 1997 (see item 34 above), it is primarily a guide to feasibility studies for the development of single facilities, but clearly, as with the 1997 guidelines, the procedures could be applied to a number of facilities and a range of different types of facility, thus, in effect, aggregating to a leisure plan. Strangely, the 2007 document is prominently described as the '1<sup>st</sup> Edition' and contains no reference to the earlier guidelines.

The guidelines describe a process divided into two stages – Stage 1: Intelligence Gathering; and Stage 2: Sustainability Matrix Assessment.

The intelligence gathering process is 'a decision-making tree to guide the collation and interpretation of data as part of a needs assessment process'. It is outlined in a flow chart which, in response to a series of questions, directs the reader to 14 guidelines. These are listed in Figure 27, with my own comments.

Figure 27. Intelligence-gathering process (WA)

Guideline	Comment
1. Project scoping	–
2. Determining facility/prog. catchment/study area	Theoretical catchment area radii are suggested, with modification for travel barriers – but see also 3
3. Auditing existing facilities and programs	Does indicate that potential catchment areas of a new facilities are partly determined by catchment areas of <i>existing</i> facilities, that is, by the areas not covered by the latter; suggests gathering information on seasonal and daily patterns of use but not <i>catchment areas</i> .
4. Demographic analysis	Emphasis is on local/state comparison; only passing reference to local population forecasts.
5. Normative participation/user data	Refers to existing participation data from SCORS, ASC and ABS. The use of the term 'normative' suggests that these are the levels of participation to be planned for locally.
6. Local participation/user data	Discusses club-based participation collected from clubs
7. Standards based gap analysis	Warns against use of 'set standards', but suggests the use of informally established local standards; devotes a whole page to some 'example' standards derived in Perth 'some years ago'. Summarises an example of the use of the Gross Demand method (see 14(2) above) from a Veal Parks and Leisure Australia conference paper (2005).
8. Stakeholder and community engagement program	–
9. Justifying Need	See below.
10. Policy review	Review of existing local and state policies and their relevance.
11. Solutions analysis	A very general discussion of the process of developing alternative approaches to meeting identified 'need'. Item 12 suggests a number of alternatives might be carried forward, but item 13 suggests only one is considered.
12. Concept design	–
13. Cost estimates	–
14. Funding sources	–

Source: WA Dept of Sport and Recreation (2007)

Item 9, justifying need, is of particular interest in the context of this project. It poses six questions – *my comments are in italic*:

- Are there real provision gaps in the study area? (*The meaning of 'real' is not indicated; the use of the word 'gap' seems to relate this to item 7*).
- Does the audit indicate existing programs will meet the demands of the population? (*Despite this being a guideline on justifying 'need', the criterion used here is 'demand'. Nevertheless, this is a key question, but item 3 mentions 'capacity' in passing and refers to collection of data on 'utilisation' but does not clearly suggest that capacity and spare capacity should be identified*).
- Is the population profile suited to the nature of the proposed facility or program?
- Do local participation rates and population forecasts suggest that existing facilities/ programs are inadequate? (*Here 'participation' is the criterion, implying that low participation rates, rather than 'need' indicates inadequate provision of facilities*).
- Does the comparison of population to standards indicate an under supply? (*Indicates a standards approach to planning*).
- Does the proposal have the general support of the community?

Guideline 9 then states: 'If at the end of this analysis you have answered NO to one or more of the questions, you should exit the model. Your choices then are to terminate the project on the basis of no need, or re-evaluate the scope of the project and run the model again'. Thus, although multiple methods are used to assess the proposed facility, if any one of them, by its own criteria, produces a negative result, the project is rejected – presumably however positive the results from the other methods.

The Sustainability Matrix is was 'developed to assess the feasibility of facilities and programs'. It consists of 54 criteria, expressed in the form of questions and grouped into 9 weighted categories as follows:

1. Social wellbeing (8 criteria/questions: weighting 13%)
2. Catchment dynamics (5: 9%)
3. Stakeholder and community engagement (8: 12%)
4. Policy (8: 7%)
5. Location (7: 13%)
6. Design (5: 12%)
7. Environment (4: 7%)
8. Operations (4: 15%)
9. (5: 12%)

Answers to each question are rated on a scale of 1-4 and an average score produce for each criterion. The weighted average of the criterion averages results in a 'sustainability rating' for the project. No indication is given as to the basis of the weightings, but it is indicated that communities might develop their own weightings. This can be seen as a form of 'importance-performance' analysis (see Veal, 2002: 110-11; 220-21).

While the Sustainability Matrix is presented as Stage 2 of a single process, the relationship between the two stages is not explained.



## 5. Guidelines: summary

Some of the characteristics of the 42 sets of guidelines reviewed are summarised in Table 5, with details provided in Table 6.

Table 5. Summary of planning guideline characteristics

Type	Category	Number
Country	Australia	14.5*
	Canada	3
	International	2
	New Zealand	2
	UK	9.5*
	USA	12
	Brazil	1
Government/Academic	Government etc.	29
	Academic	15
Main focus	Leisure	11
	Recreation	6
	Culture (arts)	6
	Sport	5
	Tourism	8
	Open space	5
	Parks and recreation	2
	Recreation and sport	1
Demand or need?	Demand	16
	Need	23
	Both demand and need	5
	Neither demand nor need	5

\* Veal (No. 14) completed partly in UK and partly in Australia

There is a degree of consensus across the bulk of these sources that planning for leisure should include:

1. consideration of the context of other strategic planning activities of the council and other relevant agencies;
2. local data and information reflecting local conditions;
3. significant public consultation;
4. a complete inventory of facilities and, in some cases, appraisal of quality, use levels, etc.;
5. a socio-demographic community profile;
6. a survey of residents regarding participation, needs, aspirations and opinions.

A number of issues also arise from the review:

- *Duplication* – in Australia, there seems to be unnecessary duplication of guidelines, particularly at state level, with little if any cross-reference.

Table 6. Planning guidelines etc.: key characteristics

#	Date	Authors	Country	Focus	Need ●/ Demand ○	Data collection						Issues Analysis
						Invent- ory	Com. profile	Facility use	Resdnt survey	Org. survey	Focus grps etc.	
1	1968	Sports Council	UK	S	○	●	●		●			Gross Demand
2	1971	Shivers and Hjelte	USA(A)	P&R	●	●	●			●		No clear method
3	1972	Maw and Cosgrove	UK(A)	L	○	●	●	●	●			Demand model
4	1974	Burton	Can(A)	L	○●	●	●		●			Detail not clear
5	1977	Garrett & Spedding	NZ	R	●	●	●		●	●		Detail not clear
6	1977	Dept of Env., Housing etc..	Aust	L	●	●	●		●	●		Detail not clear
7	1977	Burton/Ellis/Homenuck	Can	OS	○	●		●		●		Detail not clear
8	1977	Lothian	Aust.	CR	○	●		●	●			Gross demand
9	1977/98	Baud-Bovy PASOLP	Int(A)	T	○	●			●*			Detail not clear
10	1978	NSW Dept of Sport & Rec.	Aust	S	○	●	●	●		●		Organic approach
11	1978/86	TTA, USA	USA	T	○	●	●		●*			Detail not clear
12	1979	Ont. Min.of Culture & Rec.	Can	R	●	●	●		●	●	●	Detail not clear
13	1979	Clark & Stankey (ROS)	USA	O		●						Resource-based
14	1980	Gold	USA(A)	L	●			●	●	●	●	Stakeholder cons.
15	1980	Urban Res./Dev. Corp.	USA	R	●	●		●		●	●	Detail not clear
16	1982/02	Veal	UK/Aust(A)	L	○	●	●	●	●		●	Various
17	1983	Kelly	USA(A)	L	●		●					Detail not clear
18	1983/05	Torkildsen	UK(A)	L	○●	●	●	●	●		●	Various
19	1984	NSW Dept Env. Planning	Aust	OS	○●	●	●		●			Detail not clear
20	1985	Bannon <i>et al.</i>	USA(A)	L	●	●	●		●	●	●	Detail not clear
21	1985	Kelsey & Gray	USA	R	○●	●	●		●	●	●	Detail not clear
22	1985	NSW Dept Env./Planning	Aust	OS	●	●		●				Detail not clear
23	1987/90	Marriott	Aust	L	●	●	●		●	●		Detail not clear
24	1990	Sport & Recreation Vic.	Aust	R	●			●		●	●	Detail not clear
25	1991	Steiner	USA	OS		●					●	Detail not clear
26	1991/02	Office of the Deputy PM	UK	L	●	●		●		●		Detail not clear
27	1991/05	Sport England/CCPR	UK	S	○	●			●**			Gross demand
28	1991	Driver <i>et al.</i>	USA	L				●	●		●	Detail not clear
29	1992	NSW DoP/Manidis Roberts	Aust	OS	○●	●	●		●	●	●	Detail not clear
30	1992	Dredge & Moore	Aust(A)	T	○	●					●	Detail not clear
31	1993/98	Inskeep/WTO	Int	T	○	●			●*			Detail not clear

32	1994	Vassiliou <i>et al.</i>	Aust	R	●	●	●		●			Detail not clear	
33	1994/97	Guppy	Aust	C	●	●			●	●		Detail not clear	
34	1995	Grogan and Mercer	Aust	C	●	●	●					Detail not clear	
35	1995/00	Daly	Aust	R & S	○	●	●	●	●		●	●	Detail not clear
36	1996	Mertes & Hall	USA	P&R	●	●	●		●		●		Organic method
37	1996	Scottish Sports Council	UK	S	○	●			●**				Gross demand
38	1997	WA Dept of Sport & Rec	Aust	S	●	●					●		Detail not clear
39	1998	Dreeszen	USA	C	●	●	●				●		Detail not clear
40	1998/06	Mill & Morrison	USA	T	●	●			●**			●	Detail not clear
41	1999	Dept Culture/Media/Sport	UK	L	●	●	●				●	●	Detail not clear
42	2000	Godfrey & Clarke	UK	T	●	●							Detail not clear
43	2001	Palermo <i>et al.</i>	Brazil/Can.	T	●						●		Judgement
44	2001	Evans	UK(A)	C	●								Various
45	2003	NSW Arts & D.Local Govt	Aust	C	●	●	●			●	●		Detail not clear
46	2003	Sport & Recreation Qld	Aust.	OS									Resource-based
47	2004	NZ Ministry of Tourism	NZ	T	○	●	●		●*		●		Detail not clear
48	2007	2010 Legacies Now etc.	USA	C	●	●			●		●	●	Detail not clear
49	2007	WA Dept of Sport & Rec	Aust.	S & R	●	●	●	●	●	●	●	●	Imp.performance
Total					● 30 ○ 19	39	26	8	27	6	16	23	7

L = Leisure, R = Recreation, P&R = Parks and recreation, T = Tourism, S = Sport, OS = Open Space, C = Culture, CR = Countryside recreation (A) = academic.

\* = Estimate of (regional) incoming tourism demand. \*\* Sports teams.

- *Frameworks* – the guidelines invariably present overall planning frameworks listing a varying number of steps in the process; the differences between these frameworks seem to be arbitrary.
- *Definitions and scope* – the guidelines are often confusing or silent as to the definitions being used and their scope in terms of: (a) leisure, recreation, culture, etc.; (b) council, other public, non-profit and commercial provision; and (c) leisure activity taking place inside and outside of the jurisdiction.
- *Definitions of need, demand, etc.* – most reports lack clear definitions of these key concepts and/or are slipshod and confusing in their use.
- *Data analysis* – there is an almost universal lack of guidance on how different sorts of data should be analysed to produce policy outcomes: data disappear into a 'black hole' and a plan or strategy is expected to emerge mysteriously on the other side.
- *Planning models* – a variety of planning models is presented, but the rationale for selection of any one model is rarely made clear.

These issues are addressed in the following section.

## 6. Leisure planning guidelines: issues

### 6.1 Introduction

A number of issues arise from this review. Some will be taken up in the other papers in the series and others will no doubt arise as that work progresses. The issues discussed here are: duplication, particularly among Australian public agencies; steps in the planning process; definitions and scope of leisure, etc.; definitions of demand, need, etc.; data analysis; and planning models.

### 6.2 Duplication

A general feature, particularly of guidelines published by public bodies and some professional organisations, is the failure to refer to earlier offerings; many new publications have sought to 're-invent the wheel'. A few provide references to other sources but fail to discuss their merits or limitations and how the new guidelines are intended to improve on what is available. Academic offerings refer to other academic sources, but only in a few cases to other guidelines.

Since the late 1980s at least five Australian state governments have produced guidelines for local government leisure/recreation/cultural planning. These were compiled by in-house staff, by committees or by consultants. At the time of writing two more are known to be in the process of preparation. These guidelines are not radically different: they tend to be 'variations on a theme'. Indeed, why would they be distinctive? They reflect the 'state of the art' rather than distinctive state requirements. As has been noted in other areas of the public service, there is likely to be considerable waste of resources involved in this apparently unjustifiable duplication.

There are mechanisms for coordination of the activities of comparable portfolios between the Australian states and territories and the federal government in the form of the Ministerial Councils. The area review is covered by three such councils: Culture; Sport and Recreation; and Tourism. Under the new era of 'cooperative federalism' is it too much to ask these three bodies to adopt a common approach to producing local planning guidelines?

### 6.3 Steps in the planning process

Table 7 is a first attempt to draw together all the various steps in the planning process suggested in the guidelines reviewed. It is subject to future modification.

In any particular planning exercise, the detail would vary, depending on the particular planning model chosen.

Table 7. Steps in the planning process

Steps	Comment/explanation
<b>1 Terms of reference</b> a. Scope b. Timescale  c. Resources d. Administrative arrangements	Leisure, culture, sport, tourism, open space, etc.; public/ private a. For the planning process. b. Planning horizon(s): 5-years, 10 years? Staffing, budget for the planning process Team(s), steering committee, etc.
<b>2 Review existing/past relevant policies/plans/legal constraints</b> a. This organisation  b. Other organisations	Evaluation of past leisure plans. Social plans, statutory physical plans, corporate strategy, etc., Developer contributions plan. Identify relevant planning zones Especially regional and state government agency plans: sport, outdoor recreation, culture, tourism, etc.
<b>3 Stakeholder consultation</b> a. Within the organisation b. Other statutory agencies c. Other leisure organisations d. General public	May take place at a number of points in the process May be via steering committee. May be via steering/advisory/consultative committee e.g. national, state and local sporting, arts or tourism organisations Including surveys (in conjunction with 7) , focus groups, public meetings
<b>4 Establish mission/goals/principles</b>	In light of 2 and 3 above. May be developed from scratch, or involve a review of earlier versions. May be additional iterations - eg. at step 8.
<b>5 Resource inventory</b> <i>Within the planning area</i> a. Organisation's own facilities/ services } b. Other public sector facilities/ services } c. Non-profit sector facilities/services d. Private sector facilities/services e. Land assessment <i>Outside the planning area</i> e. Regional facilities/services	} } Include location, ownership/management, area/ } capacity, condition (use levels at 7.) } In significant green field and infill areas Public, non-profit and private sector (identify relevant facilities/services at 7.)
<b>6 Community profile</b> a. Past and current b. Future	For whole area and zones Socio-demographic census data + health & crime statistics. Trends. Population projections for planning horizon(s)
<b>7 Past/Current/Future leisure participation patterns</b> a. Local residents: past trends b. Local residents: current participation c. Facility use and users (some data via b. some from management) d. Local residents: future potential participation e. Regional, state, national data e. Visitors (local cross-boundary leisure/work, day-trippers, tourists)	Past surveys.. Current activities (frequency, type, location); opinions, aspirations, constraints. Past and current facility use and user survey data (distinguish locals and visitors). Use vs capacity. Related to demographic change and local, state, national trends (see e.), assuming no supply onstraints. State govt, SCORS, ABS, academic*, etc. If tourism is significant, numbers and activity data required, if not, covered by c.

<b>8 Plan formulation</b>	Adopt appropriate methodology and apply, drawing on above data.** – Physical development plan – Services development plan – Marketing plan
<b>9 Implementation program</b>	May need separate documents - eg. annual Action Plans.
<b>10 Monitoring and feedback</b>	Data collection and reporting commitment related to planning horizons and planning goals/objectives.

\* eg. see Lynch and Veal (2006: 444-45) for national participation projections. \*\* eg. see Project Paper 8

## 6.4 Definitions and scope of leisure, etc.

When individuals or groups of individuals make a decision to take a recreational trip on, say, a Sunday afternoon, they may choose from among a range of alternatives, including, for example:

- a beach – which is an outdoor natural area, offering sporting and informal outdoor recreation, under public management;
- an indoor swimming pool – indoor, sporting/physical recreation, public management;
- an urban park – outdoor designed area, informal outdoor recreation, public management;
- a national park – outdoor natural area, informal outdoor recreation, public management;
- a bowling alley – indoor, sporting/physical activity, commercial management;
- a museum – indoor, cultural activity, public, possibly non-profit, management;
- a stadium – indoor/outdoor, spectator sport, commercial management;
- a pub – indoor, social activity, commercial management; or
- a cinema – indoor, entertainment/cultural, commercial management.

Planning for any one of these activities/facilities should ideally be undertaken in the context of understanding the demand for all of them, since they are all serving the same community and are competing for a share of its stock of leisure time and 'leisure dollars'. The individuals may stay within their local area or travel a considerable distance, so that they become 'day-trippers', and even stay overnight, in which case they become 'tourists'. Day-trippers and tourists often make use of the same leisure facilities as local residents so there is a need for tourist demands and local resident demands to be considered together.

Many of the guidelines reviewed above, and the planning documents that have followed their advice, offer, in their introductory pages, a definition of 'recreation', 'leisure' or 'culture' which would encompass all the activities mentioned above. In practice, however, the plans do not deal with the wide range of leisure activities so defined. The following comments can be made about the guidelines reviewed:

1. A number address only *publicly provided open space* and the activities which take place in it; these activities tend to be referred to collectively as 'recreation', even though not all of recreation takes place in public open space.
2. Few guidelines which purport to deal with 'recreation' deal with planning for *indoor physical recreation activities*, even in relation to activities which can take place both indoors and outdoors (eg. basketball).
3. With the exception of the six documents focussed specifically on cultural planning (excluding No. 36, which refers to 'cultural' strategies, but deals explicitly with the whole of leisure), most of the guidelines do not address planning for the *arts, entertainment or cultural*

*activities*, even though their definitions of 'leisure' and even 'recreation' would encompass these activities.

4. With just one exception, documents specifically concerned with 'cultural planning', while adopting a wide definition of 'culture', going way beyond 'the arts', in practice relate primarily to art-based activities and aesthetic aspects of environmental projects.
5. With one exception (No. 3) guidelines concerned with leisure/recreation/sport/culture invariably ignore *tourism* or assume that it is to be dealt with in a separate planning process, even though locals and tourists invariably share some leisure facilities.
6. Tourism planning guidelines tend to ignore the relationship with local residents' leisure demand, even though locals and tourists invariably share some leisure facilities
7. One of the features of the tourism guidelines is that they invariably recommend the inclusion of a marketing component or a separate *marketing plan*. This is understandable, given the commercial nature of tourism and the fact that the customers for tourism come from outside the local destination planning area, but the total neglect of marketing in even the more recent leisure/recreation/sport/culture guidelines is less understandable. The neglect is no doubt due to the public service tradition in these sectors and may also be a reflection of the recent move to need-based planning models where, logic would suggest, marketing should be unnecessary.
8. While it is widely recognised that the amount of time spent in 'passive' *home-based leisure* may be partially responsible for increasing levels of obesity and associated health problems, and that the trend to smaller backyards and to apartment living limits opportunities for certain forms of home-based leisure, these considerations and the challenges they pose for leisure planning do not feature in the guidelines reviewed.
9. There is ambivalence about the inclusion of *non-profit and private sector facilities and services*, even when:
  - large areas of open space are involved – e.g. golf;
  - facilities and services are provided by all three sectors (public, private and non-profit) – e.g. halls/studios, squash courts, fitness/coaching, multipurpose halls; or
  - exclusively commercial, facilities and services are still clearly part of 'community recreation' – e.g. ten-pin bowling complexes, sports stadia – and can have a significant impact on the social/cultural life of the community – e.g. pubs, licensed clubs, restaurants, cinemas.
10. In particular (and this arises from observation of plans rather than guidelines) few if any local councils are able to provide a complete inventory of public, non-profit and commercial leisure facilities and services in their area.

Part of the reason for this demarcation and fragmentation is the scope of government portfolios (e.g. sport vs arts vs tourism) at national, state and local level. But it is also in part due to a tradition of undertaking recreation/leisure planning only for the services which local councils themselves provide. This is in contrast to planning for other services, such as shopping and industry and commerce, including tourism, where local councils routinely provide the planning context for



private sector activities.<sup>6</sup>

Leisure provision includes non-council providers and, whether planning activity is comprehensive or fragmented, while councils can clearly be expected to plan their own services in detail, there seems no reason for them not to provide a local planning context for all out-of-home leisure activity, including that provided by other agencies in the public sector and by private and non-profit organisations

It should also be noted that, while public planning can deal only with out-of-home leisure activity, home-based leisure is still relevant: for example, childhood obesity is often blamed on excessive, home-based, sedentary activity, which out-of-home physical activity provision is partly designed to counter, and there is arguably a greater requirement for out-of-home facilities for people who live in apartments as opposed to houses with gardens. Logically, therefore, state and local governments should consider trends in home-based leisure when planning for out-of-home leisure. It is noted that one of the NSW sets of guidelines advised councils to take account of 'the amount of private open space (eg. in backyards)', but without indicating how (see No.17).

The British DCMS guidelines (24, 38) reflect another important feature of the documents reviewed: their scope reflects the scope of the commissioning agencies rather than the scope of local government. The British guidelines were commissioned by the Department of Culture, Media and Sport, which also has responsibility for heritage and tourism. With the exception of media, these are all areas where local councils have responsibilities, so it makes sense for them all to be dealt with in one planning process, or at least explicitly related and coordinated processes. In Australia, these areas of responsibility are usually covered by as many as four or five government departments at both state and federal levels, although the NSW state government has recently combined them under one portfolio. Typically they are relatively small components of larger 'super ministries' and tend to be moved every time there is a change of government – or even a reshuffle of ministers. Thus the institutional arrangements in Australia militate against state or federal government producing comprehensive guidelines for local councils to plan for leisure as a whole. But this should not preclude other agencies, such as professional bodies or local government associations, from taking on the task.

The plea being made here is therefore that local planning for leisure – and the guidelines for its – should be comprehensive, covering all aspects of leisure and all sectors of provision.

## 6.5 Definitions of demand, need etc.

A feature of the guidelines reviewed is their failure to fully define such terms as needs and demands even when they are central to the planning process presented. Project Paper 3 addresses the issue of defining concepts such as needs, demands and a number of others and their respective roles in the policymaking/planning process. Four of the key concepts – wants, needs, participation and demand – are addressed through the medium of the diagrammatic representation of the local leisure participation system presented in the companion paper, as shown in Figure 28.

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<sup>6</sup> An interesting example of the impact of public policy on privately provided leisure services was provided recently in Sydney, when the Lord Mayor, who is also a state Member of Parliament, sought to change the state licensing laws to enable small bars to be opened in the city (and the rest of New South Wales) in contrast to the large hotels/pubs which had hitherto been characteristic of licensed premises in the state. The aim was to emulate the 'bar and café' culture of Melbourne and European cities. The cost of obtaining a license was such that only large-scale enterprises, typically with poker machines, could bear the cost. The move was bitterly opposed by the Australian Hotels Association. Initially, the state government opposed the reform, but it later agreed to it (Ciennell, 2007).

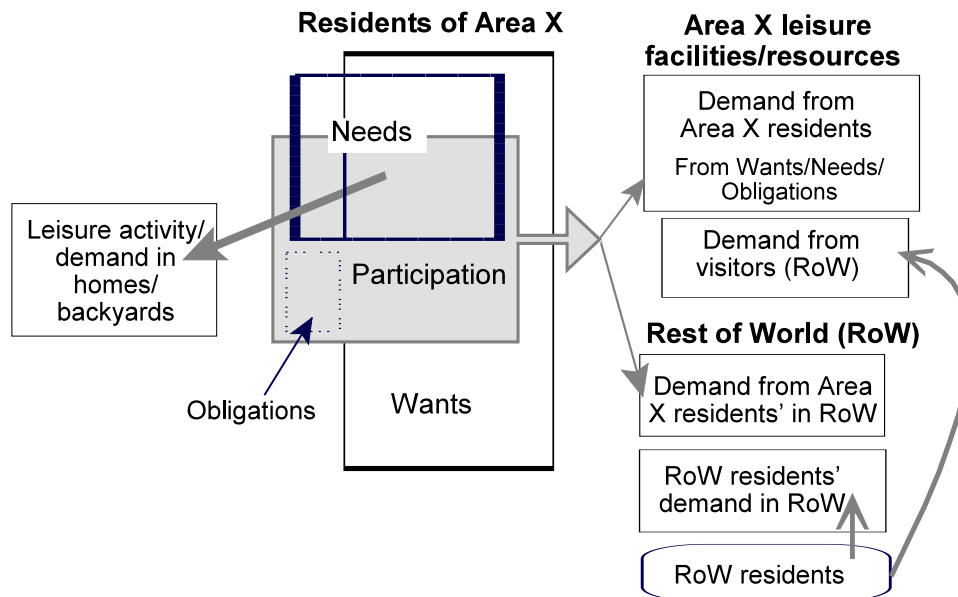


Figure 28. Leisure participation system in Area X

Source: Project Paper 8

The diagram represents the local leisure participation system in 'Area X', which could be the neighbourhood, the local council area, sub-region, region, state or nation, depending on the level of the planning exercise. Its workings can be described as follows:

- The residents of Area X have a set of leisure *wants* and *needs* (the difference between these two concepts is discussed in detail in the companion paper). For the most part, these overlap, that is, most *needs* are also *wants*. However, some needs may not coincide with wants, for example, the requirement to take part in recreational exercise because the doctor has told you to, even though you don't really want to (this is represented in the diagram by that portion of *needs* which does not overlap with *wants*). Need is surrounded by a dotted line because defining such a single boundary for 'need' is problematical.
- Most people also have *obligations*, related to satisfying others' leisure needs/wants (but this *may* involve an element of 'wanting' arising from the desire to please or assist the relevant others).
- Some of these needs/wants/obligations are met by *participation*, while some remain unmet. The focus of much public policymaking in leisure contexts is to address unmet wants/needs/obligations and convert them into participation.
- Participation is spatially distributed in:
  - homes/backyards;
  - the formal or informal leisure facilities and resources of Area X; and
  - the 'rest of the world' outside of Area X.
- Some of the participation of the residents of the 'Rest of the World' takes place in Area X, in the form of visits from relatively local cross-border visitors, or from day-trippers or tourists.
- As a result of these processes, Area X leisure facilities and resources experience *demand*, made up of *local residents' demand* and *visitor demand*.
- Demand may have arisen from *needs*, *wants* or *obligations*.

The companion paper discusses nine key concepts using this diagram as context. A brief summary of the conclusions as regards definitions, are as follows.

- *Leisure wants* are desires to participate in a leisure activity, which may or may not be satisfied.
- *Leisure needs* are:
  - leisure wants which, if denied to the individual, would result in consequences which would be viewed as unacceptable to the individual; and/or
  - leisure participation which, if denied to the individual, would result in consequences which would be viewed as unacceptable by others (eg. the community at large or an elected council).
- *Leisure obligations* are leisure activities undertaken primarily to meet obligations to others.
- *Leisure participation* relates to a specified population of a specified area and is the amount of leisure activity undertaken by that population in a specified period, regardless of where the participation takes place and regardless of whether it has arisen from wants, needs or obligations (usually expressed as a percentage of the population taking part in a week or year).
- *Leisure demand* is the amount of leisure activity accommodated in the facilities and resources of a given area over a specified time period, regardless of the home location of the individuals served and regardless of whether it has arisen from wants, needs or obligations (usually expressed as visits per week or per annum).
- *Leisure preferences* is a term used in economics and marketing to describe the result of leisure choice processes.
- *Leisure opportunities* refer to the formal and informal leisure facilities, services and usable resources available to a specified group of people; however, provision of opportunities should, like provision of facilities, be seen as a means, not an end of leisure policy, since the success of a policy to provide opportunities (or facilities) must ultimately be judged on the basis of the use made of such opportunities (or facilities).
- *Leisure rights* are aspects of leisure which are claimed by individuals or organisations, and/or declared by governments, as entitlements.
- *Leisure benefits* are the positive effects of leisure participation, which may be enjoyed by the participant and/or other individuals and/or by society as a whole.

The word *need* in leisure planning guidelines and plans is often used in the sense of general socio-economic deprivation. Often leisure policy is guided by an overall priority for individuals or areas with high levels of socio-economic deprivation, rather than high levels of leisure need as such. In such circumstances policy is invariably directed at meeting not only the needs of such individuals or areas but also their leisure wants.

## 6.6 Data analysis

While the guidelines invariably call for significant data collection activity, with few exceptions, the outstanding common feature is the lack of detailed advice on how to analyse the data collected. As suggested above, essentially the data appear to disappear into a 'black hole' and a plan or strategy is intended to come out the other side. While guidelines invariably espouse a democratic and transparent process, involving extensive public consultation, the result can, in practice, be profoundly undemocratic since the interpretation of information and relative emphasis given to different sources and types of data take place 'behind closed doors'. The whole process is a mass of paradoxes. On the one hand it appears 'democratic', since it is based on widespread consultation:

'this is what people want'. On the other hand it can appear technocratic: 'the officers/consultants have based their recommendations on analysis of a wide range of data'. But because of the lack of transparency, the officers/consultants can, in fact, preempt the democratic process by, for example, giving particular emphasis to proposals which they anticipate will meet with senior officer or council approval and downplaying or excluding other proposals. All this is hidden behind the curtain of 'data analysis'. There may be nothing wrong with proposals reflecting officer or council views or principles, but this should be explicit, rather than being portrayed as purely responding to public 'needs'.

The obscurity in the process is exemplified by the British Planning Policy Guidance 17 document which, under the heading *Identifying 'Reasonable' Local Expectations*, states:

It is impossible to plan to satisfy all the needs which might be identified in the course of an assessment and this highlights the need to determine 'reasonable' expectations or requirements. This nearly always requires careful judgement, involving a mixture of statistical or objective assessments, using participation data and population details, and community consultations. The statistical assessment should normally come first as it will provide a broad framework of what a 'reasonable' level of provision is likely to be, which it will then be possible to refine in partnership with local people and special interest groups. (Office of the Deputy Prime Minister, 2002: para. 4.22)

The implication is that this is initially an objective process followed by a relatively painless process of 'refinement' in 'partnership' with 'local people and special interest groups'. At no point is the word 'reasonable' defined.

Leisure planning is, of course, ultimately a political process since public resources and powers are involved. But arguably, planning guidelines should seek to clarify the lines between the technical processes of data gathering and analysis and policy decisions, rather than muddy them.

Thus guidelines are needed regarding such things as:

- the respective roles of focus groups, public meetings, surveys of organisations and community surveys, the types of data they generate and how they should be analysed and related to one another;
- the respective roles of wants, needs, demand, etc. in the planning process and how these should be measured;
- the relationship between data on people's wants, needs and aspirations regarding their own leisure and data on their preferences regarding policy options;
- the difference between day-to-day management-related issues and planning-related issues;
- the types of questions which need to be asked to elicit information on wants, needs, aspirations, demand, etc.;
- how socio-demographic and leisure-related data can be analysed to relate to the achievement of different types of goals;
- how the future should be addressed, in terms of demographic, social and economic change and how these relate to leisure wants, needs, demands etc.;
- how non-residents' leisure demands within the planning area and residents' demands met outside the area should be addressed;
- how all the above, and other materials and considerations, come together analytically in the policy-making process.

Clearly a number of these items could merit a manual in their own right. If this advice were

to be followed, it would seem that the days of the 25-page set of guidelines with no references to further technical advice, would be a thing of the past. In the past the costs of producing more detailed guidelines in print form may have been viewed as prohibitive, but today the possibility of web-based publication not only reduces the costs but also facilitates flexibility: that is, sets of guidelines could be built and modified over time. The New Zealand Tourism Planning Toolkit (No. 39) is a possible model in this respect.

## 6.7 Planning models (NB: this typology is updated in Project Paper 8)

Of course none of the above makes sense unless we have a clear understanding of the planning 'model' being operated. Four past and present planning models are presented diagrammatically in Figures 28-31 and Figure 12.

- The limitations of the *standards-based* model (Fig. 29) are well-known.
- The *gross demand* model (Fig. 30) is appropriate for:
  - urban leisure planning for new development areas where, possibly on equity grounds, it is considered appropriate to provide for demand on the same basis as in the existing developed areas – demand estimates are based on current demand in the existing developed areas, but adapted to expected demographic structure; this could, of course, be done simply on the basis of facility/population ratios, but the use of demand enables different facility mixes to be considered;
  - ex-urban outdoor recreation planning for the (mostly informal) outdoor recreation generated by urban populations in rural areas (although a more detailed treatment of supply should ideally be incorporated); 'population' in this case refers to the urban areas where the demand is generated;
  - tourism planning where the demand arises not from an adjacent urban area but from the 'rest of the world' – in this case, rather than themselves estimating total demand from the rest of the world, local planners would make use of regional tourism demand estimates and forecasts from state or national tourism bodies and would consider the 'market share' which they might achieve, in light of data on the existing local market share.
- The *needs-based* model (Fig. 31) is the approach increasingly favoured by governments and planners in recent years. It is problematical because of the practical difficulty in distinguishing needs from wants and, in current versions, because of lack of clarity in the 'analysis' process.
- The *organic* model (see Fig. 12 above) is not a complete planning approach, since it depends on the current existence of facilities and a policy to provide more of the same, or at least similar. It also involves a number of subsidiary studies related to other approaches in my list of 11 – these studies are described in Veal (2002: 141). It is included because it is the only approach which focusses on the use and capacity of existing facilities.

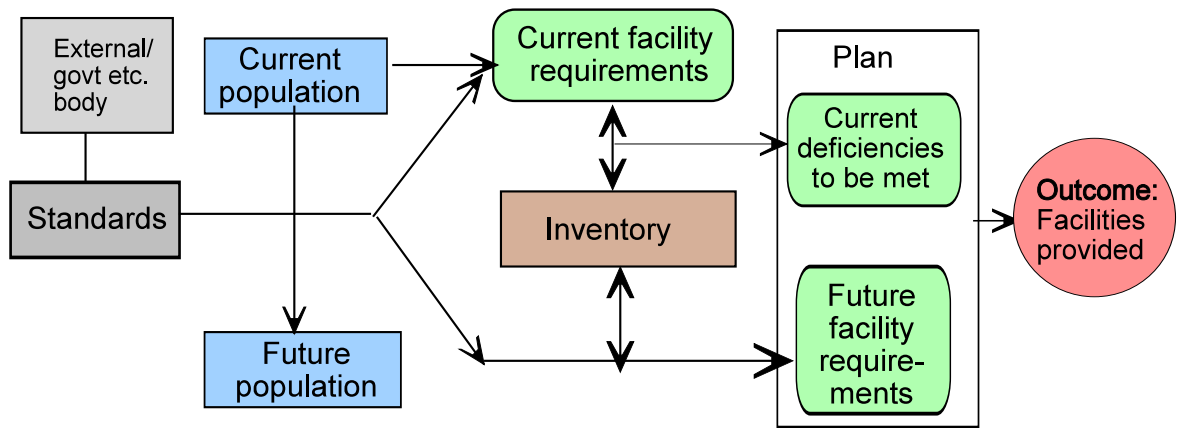


Figure 29. Standards-based model

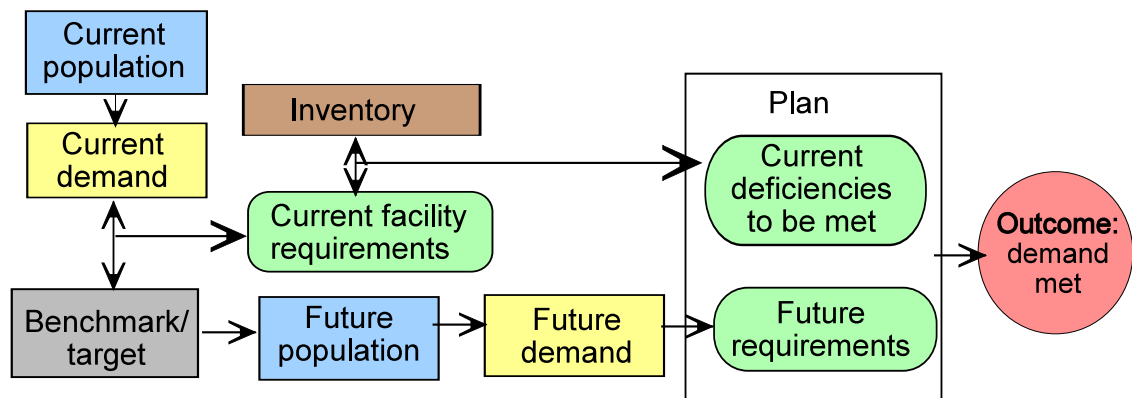


Figure 30. Gross demand model

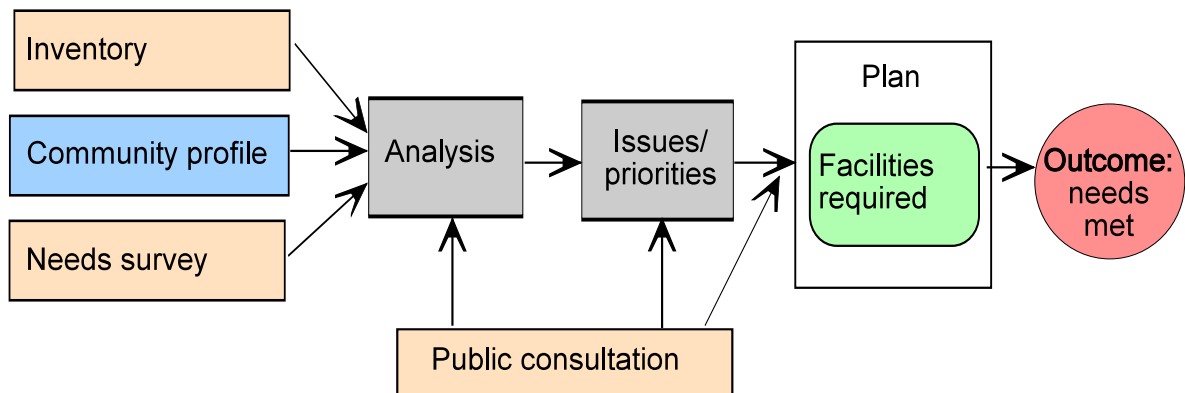


Figure 31. Needs-based planning model

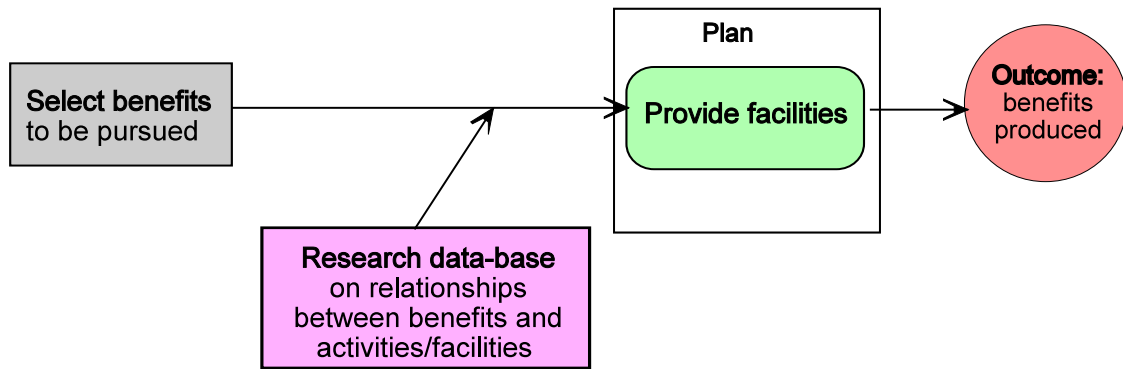


Figure 32. Benefits-based model

- The *benefits-based* model (Fig. 32) appears to be the simplest, but is incomplete as a planning method because there is no apparent mechanism for deciding the quantity of provision.

In each case the gray squares indicate inputs requiring judgement based on political or professional values:

- *standards-based* model: input is provided by external bodies which advise on an appropriate level of provision;
- *gross demand* model: a decision must be made on a suitable benchmark demand indicator – typically a participation rate – to plan for;
- *needs-based* model: once needs have been determined, decisions must be made on which needs to meet and which to reject or defer;
- *benefit-based* model: decisions must be made on which benefits are to be pursued in the planning exercise.

Clearly each of these models has its limitations, some acknowledged in the guidelines literature and some not. A new planning model – or set of models – is required, which encompasses want-based demand as well as need-based demand, which clarifies the data analysis and policy-making process and which is comprehensive in its applicability. Proposals seeking to address these issues are contained in Project Paper 8.

## Acknowledgements

I am grateful to Dr Ken Marriott, of HM Leisure Planning, Melbourne, for many helpful comments on an earlier draft of this paper.

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# Appendices

## Appendix A: Sources Excluded

The following sources were considered for inclusion in this review but were excluded for the reasons given below.

### **Jona Bargun and Avner Arbell: *A Comprehensive Approach to the planning of the Tourism Industry*, 1975**

A short article which outlines an approach to developing a national tourism plan (based on Israel), resulting in a quite elaborate full-page flow-chart but with little accompanying detail.

### **Dianne Dredge and John Jenkins: *Tourism Planning and Policy*, 2007**

'Policy and planning' are discussed in conceptual/theoretical terms in one chapter of this text book, then in three chapters devoted, respectively, to the national, regional and local destination levels. The 'learning objectives' of these chapters indicate that, after reading the chapter, the reader should be able to 'describe', 'identify', 'discuss', 'critically assess', 'understand', 'critically discuss', 'explain', 'identify and discuss' and 'outline and discuss' various topics; with the exception of one example each of 'assess', 'outline' and 'examine', they stop short of active skills, such as 'doing', 'conducting' or 'undertaking'. The chapter contents do not present operational *guidelines* for undertaking planning activity. The concept of demand is not discussed in any detail. Curiously, Dredge's own outline of a 'methodology for a tourism strategy' (Dredge and Moore, 1992), reviewed in this paper, is not mentioned.

### **David L. Edgell, Maria Del Mastro Allen, Ginger Smith and Jason R. Swanson: *Tourism Policy and Planning: Yesterday, Today and Tomorrow*, 2008**

This book provides an extensive overview and commentary on tourism policy and planning, but little advice on how to undertake policymaking and planning projects. It includes a single chapter on 'Strategic Tourism Planning', but this is pitched at a very general level and half of the chapter consists of a case-study a national-level tourism plan for Canada.

### **Phillip Gray and Associates: *Recreation and Sport Policy Development: A Guide*, 1997**

This report provides guidance for policy development at a very general level. It does not provide detailed guidance for preparation of recreation plans.

### **Clare A. Gunn: *Tourism Planning*, 4<sup>th</sup> Edn, 2002**

The first edition of Gunn's (2002) textbook was published in 1979. In the fourth edition, planning is addressed at the regional, destination and site level. For each level there is a chapter on 'concepts' and a chapter of 'cases'. Gunn is best known for his book *Vacationscape* (Gunn, 1997), the first edition of which was published in 1972. This is design-orientated, and this orientation is reflected in his planning book. Following a discussion of spatial concepts, the regional planning concepts chapter presents the Baud-Bovy and Lawson 'PASOLP' model and the first edition of the World Tourism Organisation guidelines, both discussed in their own right in this paper. The destination planning concepts chapter also refers to a number of sources which are separately reviewed in this paper, including Dredge and Moore (1992) and University

of Missouri (1986), but does not appear to give clear endorsement to any one. It is notable that the issue of demand is not considered in any detail in either of these chapters.

**Colin Michael Hall: *Tourism Planning: Policies, Processes and Relationships, Second Edn., 2008.***

This book is theoretical and critical in nature and does not include detailed guidelines on how to develop a plan. For each of the 11 chapters there is a list of objectives, totalling about 50: they indicate that, after reading the chapters, the reader should be able to: define, appreciate, understand, identify, be aware of, reflect and consider a wide range of issues. As with the Dredge and Jenkins volume above, these are all very worthy and necessary attributes for a graduate, but they do not include active skills, such as: conduct, undertake, prepare, examine, analyse, appraise, estimate, plan, construct, compile or create.

**John Hepper (ed.) *Recreation and Tourism Land Use Planning in Australia: An Information Manual, 1982***

Despite its promising title, this ring-binder of material does not constitute a set of guidelines for recreation and tourism land use planning. It presents the results of a survey of Australian federal, state and territory governments, conducted by the Division of Recreation of the Education Department of Tasmania to discover what activities they were engaged in regarding recreation and tourism land use planning. For each government, the departments responsible for crown lands, environmental planning, national parks and forestry, sports and recreation, and tourism were approached and asked to provide the following information: 1. Interest and involvement in recreation/tourism land use planning; 2. Current actions, plans and policies; and 3. Future planning ideas. The departmental responses, typically 1-2 pages, are reproduced verbatim.

**Alan Jubenville: *Outdoor Recreation Planning, 1976***

In a chapter on 'The Planning Model', Jubenville presents five planning models, without fully explaining or endorsing any one of them. These are:

- A 'Basic planning model' consists of just three components: inputs, throughputs and output ('model terms'), which correspond to: criteria, constraints and optimization (planning terms).
- 'Steps in the planning process', comprising:
  - a. Establishment of objectives (comprising: 1. Behavioural and demand studies; 2. Public opinion; 3. Potential of the area; and 4. Enabling and secondary legislation);
  - b. Coordination of planning (intra-agency, interagency and private sector);
  - c. Projection of needs;
  - d. Implementation of plans; and
  - e. Reevaluation of plans.
- Concentric circle model – comprising people, resource and planning.
- User-resource relationship model, comprising:
  1. Identify recreation users and resources
  2. Estimate recreation demand and supply
  3. Develop a proposed recreational plan
- Systems planning model, which seems to re-visit the 'Concentric circle model', replacing 'people' with 'user'.

**Peter Murphy: *Tourism: A Community Approach*, 1985**

Murphy (1985) includes three chapters on strategies and planning. However, the main specific planning methodology presented is the Baud-Bovy and Lawson PASOLP model, discussed separately in this review (No. 8).

**Astrid Reynolds: *Developing Local Government Planning Standards for the Provision of Community Services and Facilities*, 1989**

This report addresses the provision of community services for new development areas. 'Library services' and 'Leisure services – sport, recreation and arts' are two of the eight services covered. The paper relates each policy area to a set of eight 'human need/social goal' categories, eight 'principles', nine 'relevant macro-policies' and standards. It does not develop new standards but refers to existing standards. In the case of libraries these emanate from the Library Council of Victoria and the Library Association of Australia. Regarding various leisure services:

- Indoor sport and recreation facilities – no standards
- Public open space, recreation reserves, playgrounds – 'No Australian standards', but refers to the (Vic.) Local Government Act requirement to reserve 5% of land, to two Geelong reports and to the NCDC
- Clubs/organisations – no standards
- Galleries – no standards
- Festivals – no standards

## Appendix B: Leisure Needs Questionnaires

### 1. Marriott, 1990 (see No. 23 above)

Appendix 5 presents a 1983 'Leisure and Recreation Study Household Questionnaire' from the City of Hawthorn, Victoria. Key questions include:

- 2.1 Q. C1 A list of activity qualities is presented (e.g. outdoor, competitive, creative, allowing you to meet people) and respondents asked to indicate how they feel about the quality on a 1-5 scale from 'Dislike greatly' to 'Like a lot'.
- 2.2 Q. D2 A list of 24 parks and gardens and 20 'other (council) sporting and recreation facilities and programmes' is provided and respondents asked to indicate: season of use; frequency of use; quality (from V. good to V. poor).
- 2.3 Q. D3 Reasons for non-use of facilities.
- 2.4 Q. D4 Facilities respondents 'would like to use but can't'
- 2.5 Q. E2. Suggestions for improvements to specific facilities/programmes
- 2.5 Q. E3. A 'shopping list' of 49 facilities is provided with costs of provision and respondents asked to 'spend' up to \$2 million on up to 8 items, listed in order or priority

### 2. McLean, Bannon and Gray, 1999 (See No. 20 above)

McLean, Bannon and Gray (1999) reproduce as an appendix a questionnaire used in a 'Sample Needs Assessment Survey' by the Bloomingdale (Illinois) Parks District. The questions which appear to be directly related to leisure needs, are as follows (the questions are not numbered in the original).

- 1.1 'Listed below are many different types of recreational activities that are enjoyed year around. for each activity, please indicate how much interest YOU have in participating in each activity'. 72 activities + 'other' listed; response categories 'Interested', 'Not interested', 'Not sure'.
- 1.2 'There are many reasons why people cannot, or do not, participate in activities sponsored by the Park District. Please indicate the reasons that you have for not participating (circle all that apply)'. 12 reasons listed.
- 1.3 'Please indicate if you or your family have used any of the Park Districts (sic) in the past year (circle the [code] number of all that apply)'. 7 parks + 'other' listed.
- 1.4 'Please indicate the activity or facility that you have most often used in the neighbouring park district(s)': *I have used the following activity(ies) or facility(ies)* \_\_\_\_\_ [Not clear whether this means areas outside Bloomingdale]
- 1.5 Three questions seeking respondents' views on current and future Park District policies and management practices.

An almost identical questionnaire is presented as used by Forest Preserve District, IL



A Recreation Survey questionnaire for Monroe County Parks and Recreation Department is presented. All questions asked in relation to 'you or members of your household', but separate data not recorded for different members of the household and socio-demographic questions are directed at a mixture of 'you', an individual (marital status, education) 'yourself and another adult' (age) and the household (income, presence of children, persons with disability): thus activity cannot be related to individual socio-demographic data.

- 1.6 Q 2 'How often have you *or members of your household* participated in the following recreational activities during the last 12 months?' (emphasis added). 22 activities listed: responses: not at all, occasionally, frequently.
- 1.7 Q 3 'How often have you or members of your household participated in recreational activities with the following types of people in the last 12 months?' Responses: for each of family members, friends, by myself – not at all, occasionally, frequently.
- 1.8 Qs 4-6: As for question 2, but asked in relation to named facilities in neighbouring district (6), the county (4) and the state (6).
- 1.9 Q7 "How often have you or members of your household use the following types of facilities when you have participated in recreational activities during the last 12 months?' Responses: not at all, occasionally, frequently – for school, university, YMCA, health and country clubs and apartment complex facilities.
- 1.10 Q 8. Question of preferred timing of participation for all/any recreation activities.
- 1.11 Q 9. Preferred format for information about programs.
- 1.12 Q 10-11. Questions about quality of facilities.
- 1.13 Q 12-13. Questions about non-use and constraints
- 1.14 Q 14-18. Attitude questions about importance of facility types.
- 1.15 Q 19-20. Questions about funding/fees
- 1.16 Q 21-26 Demographics.

### **3. Mitra and Lankford, 1999**

In a chapter on 'Questionnaire design for leisure and recreation surveys', a section on 'Existing level of interest and participation' presents a model questionnaire, itself under the heading 'Measuring existing level of interest', as follows:

- 3.1 'RECREATION INTERESTS: Listed below are many different types of recreational activities that can be enjoyed year round. For each activity indicate whether YOU would have an interest in participating in that activity. it is possible that you might not have all the activities and programs available to you in Any City, but please indicate whether you would have an interest in the activities if they were available'.

... List of 41 activities (10 cultural, 31 sports, athletics, aquatics): responses; Yes, No, Don't know.

Under 'Future needs' a model question is presented under the heading 'Measuring future needs', as follows:

3.2 'IDEAS FOR NEW RECREATION SERVICES: The Any City Parks and recreation Department has several ideas for improving and increasing recreational services and opportunities. or each of these listed below, please circle appropriate number to indicate your opinion'.

... List of 36 facilities: with the question: 'Should this be done?' answers; Yes, Not sure, No.

#### **4. Hudson, 1988**

From Appendix 4; 'Sample Mail Survey', relating to the City of Forney:

The first 7 questions ask for responses on specific policy options: 'Should the City of Forney develop a public park?' and 'Should the City of Forney provide a public recreation centre?'

The next 10 questions are about 'Attitudes about parks' and 'Attitudes about recreation', but mostly ask further policy question: whether respondents would support bond issues to purchase land, whether entry fees should be charged etc.

The next two questions concern what facilities should be provided in any park/recreation centre developed.

The final 3 questions area demographics.

In short, the questionnaire does not ask respondents about their leisure needs!

## Appendix C: Cultural Planning

Cultural planning emerges in this review in the 1990s, and includes six of the sets of guidelines:

- 31: Guppy/Australia Council, 1994/97: *Better Places Richer Communities*
- 32: Grogan and Mercer/Arts Queensland/Australia Council, 1995, *Cultural Planning Handbook*
- 36: Dreeszen/Americans for the Arts, 1998: *Community Cultural Planning: Guidebook for Community Leaders*
- 40: Evans, 2000: *Planning for the Arts: Models & Standards of Provision*
- 41: NSW Ministry for the Arts & Dept of Local Government, 2003: *Cultural Planning Guidelines*
- 43: 2010 Legacies Now/Creative Cities Network, 2007: *Cultural Planning Toolkit*

Note that the UK/DCMS local Cultural Strategies document (No. 37) is not included in this list because it uses the term 'culture' differently, as an umbrella term for a wide ranges of leisure services.

In Australia the 1994 Commonwealth *Creative Nation* document brought to prominence the notion of an all-encompassing conceptualisation of 'culture' when it stated:

Culture arises from the community, even when the community may not be fully aware of it. It encompasses our entire mode of life, our ethics, our institutions, our manners and our routines, not only interpreting our world but shaping it. (Commonwealth of Australia, 1994: 1)

But the document immediately anchored itself to a more traditional concept in following the above statement with: 'The most highly developed and imaginative aspects of our culture are the arts and sciences which are fed back to the community by the most talented individuals' (Commonwealth of Australia, 1994: 1).

A number of these documents are at pains to stress that 'cultural planning' is not the same as 'arts planning'. Wide-ranging definitions of culture are adopted, some of which are quoted in the above reviews. Invariably, however, the wide-ranging definitions are not followed-through in the planning guidelines themselves.

Hawkins and Gibson, in discussing the emergence of cultural planning in Australia, suggest that this gap between the rhetoric and the reality of cultural planning is not unusual:

Arts bodies' control over cultural planning discourse has meant that the emphasis is still implicitly on art rather than culture, on galleries and artists' weeks rather than pubs, shopping centres and street life. There is still an enormous hostility towards commercial culture. Arts bodies still implicitly endorse the subsidised over the profitable, the high over the mass. (Hawkins and Gibson, 1994: 219-20)