



Arrowtown Chinese Settlement Survey 2013

January 2014



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Executive summary

This report presents the results of a survey carried out by the Department of Conservation (DOC) in Arrowtown during the first three months of 2013. The survey was undertaken to gather information about the demographics, experiences and motivations of both visitors and non-visitors to the Arrowtown Chinese Settlement. A secondary purpose was to test various options for future development of the Settlement (including no development) with current visitors.

Surveying was carried out in two locations. Visitors to the Chinese Settlement were interviewed within the Settlement surrounds while visitors to Arrowtown were interviewed at the Village Green, just off the main street. Survey results gathered from 306 visitors and 256 non-visitors to the Settlement are discussed in this report. Results are compared with those from other recent surveys in Arrowtown and surveys on other DOC managed tracks in Otago and Southland.

The 2013 survey found that there was a roughly even split between male and female respondents at the Chinese Settlement (48% male and 52% female) but slightly more female respondents among non-visitors (46% male and 54% female). Most respondents at both the Settlement (69%) and in Arrowtown (75%) were aged over forty. 14% of respondents at the Settlement were travelling with children which was the highest percentage recorded in the region to date. At both locations almost 75% of respondents came from New Zealand, Australia or the UK. Visitors from the local Otago region made up 8% of respondents. No respondents at the Settlement indicated that they had a physical disability and their absence suggests that there could be some barriers to use at the site.

Levels of commercial use at the Settlement were relatively low with only 7% of respondents being guided. In contrast 93% of respondents at the Settlement and 88% in Arrowtown were independent visitors. Group sizes reflected this with most respondents travelling in groups of two or less.

Just under half of respondents (47%) at the Settlement were motivated to visit by either a general interest in history or an interest in specific aspects of the site such as Chinese history / heritage, gold mining, early New Zealand settler life, or the stone huts. 14% of respondents had decided to visit as they were 'passing by' and 13% said they visited out of curiosity. 22% of respondents at the Settlement were repeat visitors.

Most people surveyed at the two locations were spending either 1-2 hours or a half day in Arrowtown although visitors to the Chinese Settlement were likely to stay longer than non-visitors. 98% of respondents at the Settlement stayed onsite for an hour or less and more than half spent no more 30 minutes.

Most respondents at the Settlement were also likely to be going for a walk while in Arrowtown (85%) and to be visiting cafes (67%). Surprisingly only 35% mentioned visiting the Lakes District Museum, although this rose to 75% after prompting. Other activities that Settlement visitors had done, or intended to do, included visiting shops (39%), visiting the gaol (20%) and going for a bike ride (7%).

A third of non-visitors in Arrowtown were unaware of the Chinese Settlement, while two thirds had heard of it, mainly through signs, information in the museum or travel literature. When the latter were asked why they had chosen not to visit the Settlement, 63% were unable to provide a reason, and the remainder gave reasons such as lack of time or interest or suggested they might visit on another occasion. When prompted however, 69% of non-visitors said that they would visit the Chinese Settlement.

Other than visiting the Settlement the activities undertaken or intended to be undertaken by visitors and non-visitors were very similar. For non-visitors the most common activities to be mentioned were going for a walk (68%), visiting cafes (64%), shopping (43%) and visiting the Lake District Museum (40% but rising to 73% when prompted). Visiting the gaol and bike riding were the activities mentioned least frequently by non-visitors (4% of respondents).

Respondents who visited the Chinese Settlement were generally satisfied and gave their experience a mean satisfaction score of 8.2 out of ten. This was lower than other sites in the region, and nationally satisfaction scores at day or short walks have ranged from 8.1 – 9.2. When visitors were asked what would have made their visit a ten out of ten, the most popular responses related to incorporating artefacts in the buildings and re-creation of the vegetable gardens. The aspects of the experience that respondents at the Settlement liked most included the information and stories (73%) and the historic fabric (44%).

When respondents at the Settlement were asked for their views on a number of potential development options for the site, the most popular option was 'no change' with 82% of respondents liking this option. However, many respondents then went on to like other options also. The next most popular was the option for a storyteller on site (78% liked this idea). A large number (71%) also liked the idea of rebuilding more huts and developing the gardens. A brochure of the site was liked by 64% of respondents. In comparison, at least two thirds of respondents did not like the idea of boardwalks and seating, a picnic area, a visitor centre, more interpretation boards, audio options for information, interpretation via a mobile application, interpretation in another language or with a mobile application, videos or a game. This suggests that the Department should be cautious about these sorts of developments unless there are likely to be clear gains in participation as a result.

The report concludes with the following recommendations:

1. Improve marketing and promotion of the site, including signage.
2. Focus promotion of the site primarily on the domestic and Australian markets.
3. Improve the connection between the Chinese Settlement, the museum and possibly the historic gaol.
4. Consult widely when planning for future visitor experiences on site.
5. Keep redevelopment of the site relatively modest noting that the options that are most appealing to current users are: a guided tour or story teller, rebuilt huts and gardens and a brochure about the site.
6. Improve access for the disabled.
7. Consider developing interpretation that will appeal to children.
8. Consider developing a mobile app or game to appeal to new audiences, especially younger visitors and families.

Introduction

This report presents the results of a survey carried out by the Department of Conservation (DOC) in Arrowtown during the first three months of 2013.

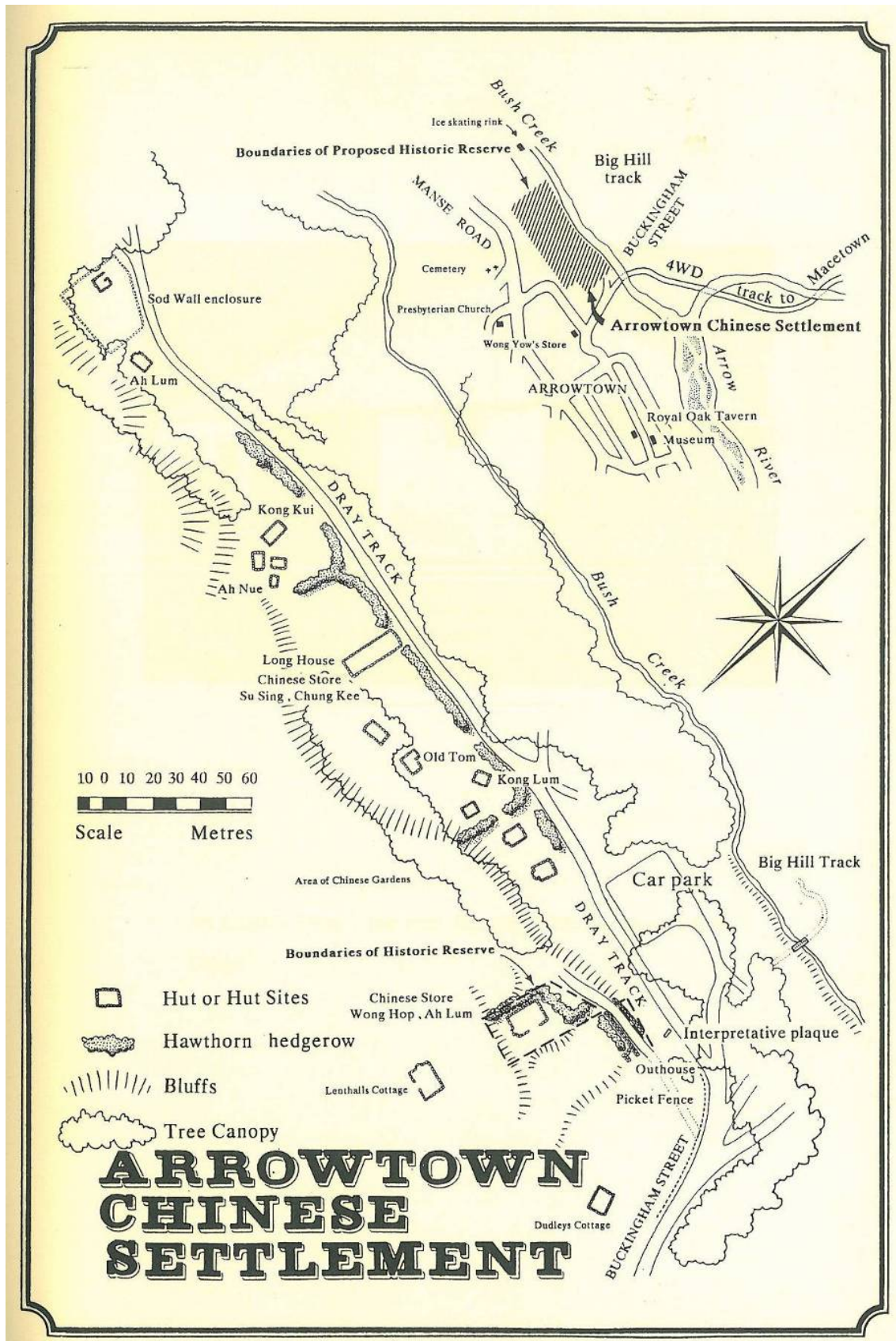
Arrowtown's Chinese Settlement is located on the edge of town, half an hour from Queenstown. In the nineteenth century it was home to a number of Chinese miners, who came to work the Arrow River after the Otago gold rush had passed its peak. The site is significant in Otago and Southland because it "is the *only* place surviving with substantial evidence of a Chinese gold mining settlement" (Ritchie c. 1984). Excavation and site clearance in 1983 revealed the ruins of eleven huts and two rock shelters (see Figures 1 & 2). The site was subsequently interpreted and put forward for a New Zealand Tourism Award in 1990, primarily to raise its public profile (DOC 1990).

Figure 1: Site excavation by Barry Frankhauser and Andrew Piper (N. Ritchie)



By 2003 the New Zealand Historic Places Trust had registered Ah Lum's store and Ah Wak's schist stone toilet (category 1 and 2), and in the following year both were repaired and restored according to a detailed conservation maintenance report (Gray 2003). To compliment that work, one of the huts and two stone shelters were recreated, and the original interpretation panels were replaced with new stories, in consultation with historian Dr James Ng. Most recently, in October 2012, Arrowtown celebrated 150 years since the discovery of gold in the Arrow River, and held festivities that included live re-enactments at the Settlement.

Figure 2: Sketch map of Arrowtown Chinese Settlement (DOC 1990)



The Arrowtown Chinese Settlement has been identified by DOC as both an historic¹ and a visitor² Icon destination, but little is known about current visitors and their experiences on site (Figure 3). More than 400,000 people visit Arrowtown each year (Lapsley 2013), however, based on DOC counter data, only an estimated 40,000 go to the Chinese Settlement. These facts suggest that the site may not be achieving its full potential.

Figure 3: Visitors at Kong Kui's hut with rock shelters in the background (DOC)



This survey aimed to gather information about the demographics, experiences and motivations of both visitors and non-visitors to the site. A secondary purpose was to test various options for future development (including no development) with current visitors. It is important to note that this did not presuppose any particular future direction or any preference on the part of managers and other stakeholders.

There have been no previous visitor surveys at the Chinese Settlement. Previous surveys in Arrowtown itself have been commissioned by the Arrowtown Promotion and Business Association (APBA) in 2011 and in 2012 (both reported in Lapsley 2013). This report will compare the 2013 surveys with relevant sections of the APBA report, and other surveys at walks managed by the Department in Southland and Otago. Note that throughout the report the Arrowtown Chinese Settlement has been shortened to “Chinese Settlement” or “the Settlement”, while “Arrowtown” refers to the township itself.

¹ Twenty sites that are recognised as iconic examples of New Zealand’s history. These sites are intensively managed to enable visitors to interact with the best examples of events and industries that have shaped and defined New Zealand’s character today (DOC 2012).

² Fifty five of New Zealand’s premier sites chosen as priorities for future investment on the basis that they underpin international and domestic tourism. These sites represent the “must see” destinations on public conservation land.

Method

Between 14 January and 24 March 2013 a Department of Conservation staff member surveyed visitors to two sites; the Arrowtown Chinese Settlement and the Arrowtown township. Visitors to the Chinese Settlement were surveyed within the Settlement surrounds, and visitors to Arrowtown were surveyed at the Village Green, just off the main street (Buckingham Street, see Figure 4). Surveying was carried out over 20 days, and the survey programme was designed so that survey effort was spread evenly across the days of the week, and between the hours of 8am - 6pm. Each day incorporated two shifts of surveying at each of the sites.

Figure 4: Location of the two survey sites



Visitors were approached at both sites on a 'next to pass' basis and asked to participate in the survey. The surveyor interviewed one person from a group or family who was aged 16 years or older, and whose birthday was closest. However, often the person who was most confident at speaking English was 'self selected'. The visitor was told that all responses were anonymous, and that the information collected would be used by DOC to improve the management of the Arrowtown Chinese Settlement. Responses were recorded by the interviewer on a blank questionnaire (see Appendix 1). Possible answers were not suggested, but the surveyor was able to clarify any questions the respondent had.

A pilot survey was carried out in December 2012 to test the methodology and data entry. The pilot highlighted difficulties in surveying more than one person per group in large groups (i.e. more than 6 people), as visitors tended to want to continue their visit and dispersed around the site. Often, it was also difficult to identify whether the group being surveyed was part of a larger coach tour. As a result the survey may include some bias towards smaller groups.

Information was also collected on the weather, the number of people surveyed each day, and the number of and reason for any refusals.

Results

834 visitors were surveyed between the two sites during the 20 day survey period. Weather was very favourable over this time and did not have a significant negative effect on the survey or on visitor activity. Of the twenty days surveyed, only two had rain and the rest were dry, but there was a wide range in temperature and cloud cover described by the surveyor.

A total of 306 questionnaires were completed at the Chinese Settlement. In total 346 visitors were approached for surveying with 40 people refusing to take part. This provided a response rate of 88.4% and an estimated maximum margin of error of 5.6%³. The main reason for refusals was that the visitor did not have enough time, followed by lack of interest. 2.9% of those approached refused because of difficulties speaking English.

At the village green in Arrowtown, 528 visitors were approached with 189 (35.8%) of these refusing to take part. The main reasons for refusal were again a lack of interest or time. 4.4% either stated that they had no English or were noted by the surveyor as having minimal English. In all, 339 questionnaires were completed, giving a response rate of 64.2%.

Asian visitors were over represented in refusals at both survey sites. At the Settlement they made up 8% of visitors who were approached (i.e. respondents and non-respondents), but accounted for 15% of refusals. In Arrowtown, 9% of those approached were Asian but they made up 23% of refusals. The effect of this non-response bias on the overall survey is unlikely to be significant.

The town survey sample was split into groups consisting of either non-visitors (those who had not visited the Chinese Settlement, n=256), or visitors (n=83). Amongst the visitor group, there was a large proportion of locals (n=26) who gave valuable responses, which will be mentioned in the discussion section. However, it became apparent that the “visitors” group differed from those who were actually surveyed at the Chinese Settlement because it was not clear if they had visited the Settlement that day or some time in the past. Because of this, only the data from the non-visitor group will be reported (error margin 6.1%). Their responses provide the core information on why participants had not gone to the Chinese Settlement that day. Table 1 provides details of the two samples that are analysed further in this section of the report.

Table 1: Summary of responses analysed

	Visitors (at the Chinese Settlement)	Non-visitors (in town)
# Respondents	306	256
Error margin	5.6%	6.1%

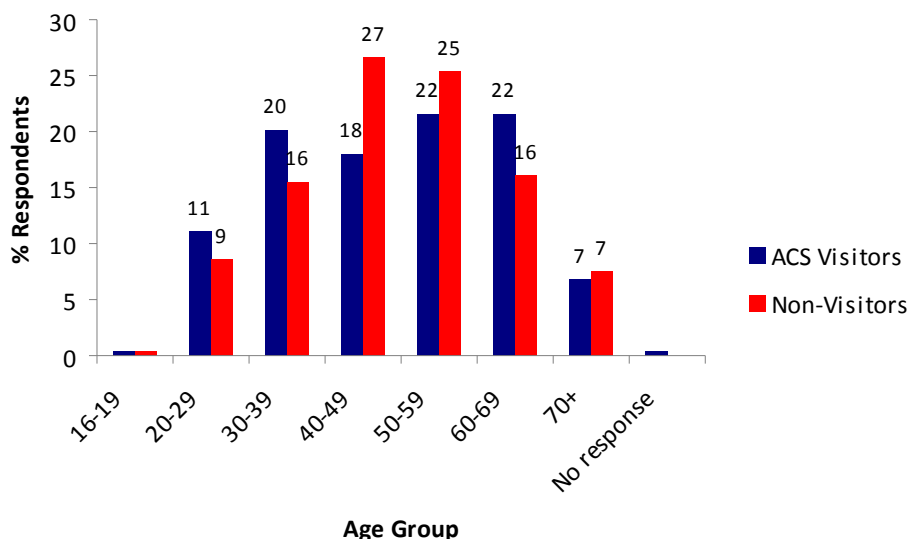
³ The margin of error refers to the potential error arising from sampling when making inferences about a larger population e.g. everyone who visits the Arrowtown Chinese Settlement during the summer season. Error figures should be viewed alongside other information such as response rates, the methodology and the questionnaire used. The figure given is the maximum margin of error and may be conservative. It has been calculated using the formula $(=0.98/\sqrt{\text{sample size}})*100$ and gives the maximum size of the 95% confidence interval for a simple random sample. Few surveys undertaken in recreational settings are truly random so the margin of error figures should be regarded as indicative.

Visitor profile

There was a roughly even split between male and female respondents among those visiting the Chinese Settlement (48% male and 52% female). There were slightly more female respondents among those not visiting (46% male and 54% female).

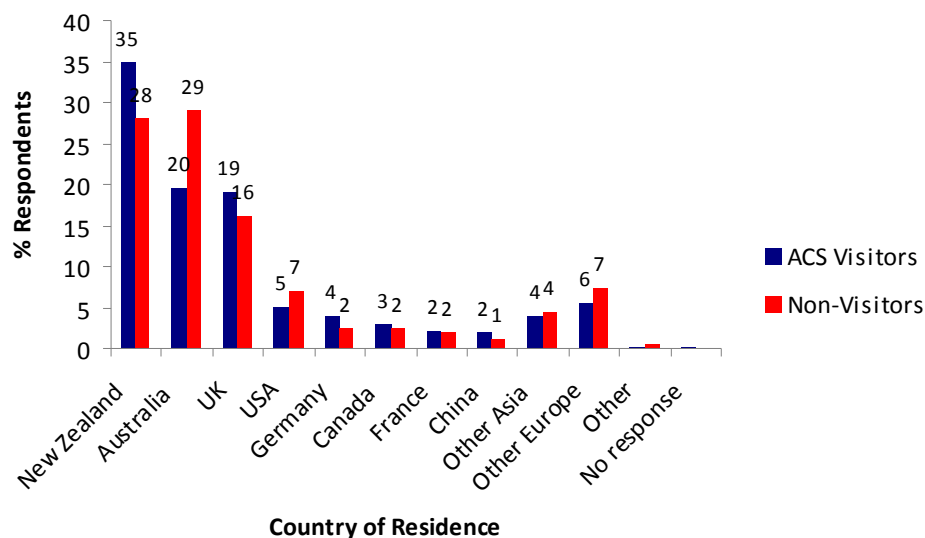
Respondents ranged in age from those in their 20's to those aged 70+ (Figure 5), however the majority of respondents at both sites were aged between 30 and 59.

Figure 5: Age group (n=306 for ACS Visitors, 256 for Non-visitors)



Around two thirds of respondents at both sites were from overseas (Figure 6). New Zealanders were more prevalent among respondents at the Settlement (35%) compared to Arrowtown (28%).

Figure 6: Country of origin (n=306 for ACS Visitors, 256 for Non-visitors)

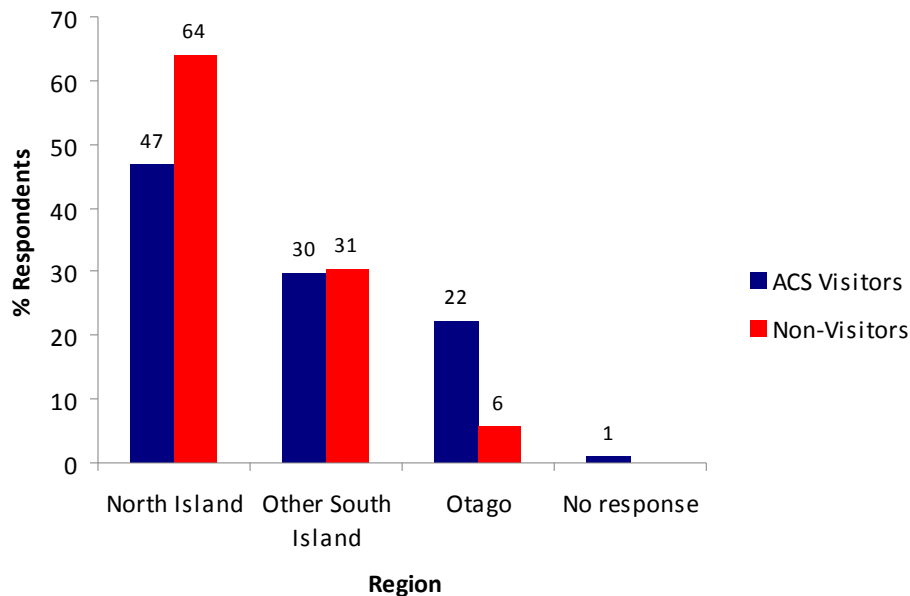


Australia (20% for ACS visitors and 29% for non-visitors) and the UK (19% for ACS visitors and 16% for non-visitors) were the two largest sources of overseas visitors. Chinese visitors made up 2% of respondents at the Settlement and 1% in Arrowtown while visitors from other Asian countries including, Hong Kong, Singapore, Thailand and Taiwan, made up 4% of respondents at both sites. As discussed above the actual proportion of Asian visitors is likely to be slightly higher than this. Despite the significant number of

overseas visitors at both locations, most were from English speaking countries and fewer than 1% had difficulty with the survey or needed an interpreter.

Of the New Zealand visitors to the Chinese Settlement (Figure 7) 47% were from the North Island, 22% were from the Otago Region (three quarters of whom lived in the Queenstown Lakes District), and the remaining 30% were from other areas of the South Island. Of the non-visitors surveyed in the town, an even larger number were from the North Island (63%), and correspondingly fewer from the Otago Region (6%).

Figure 7: Origin of New Zealand respondents (n= 107 ACS Visitors, 72 Non-visitors)



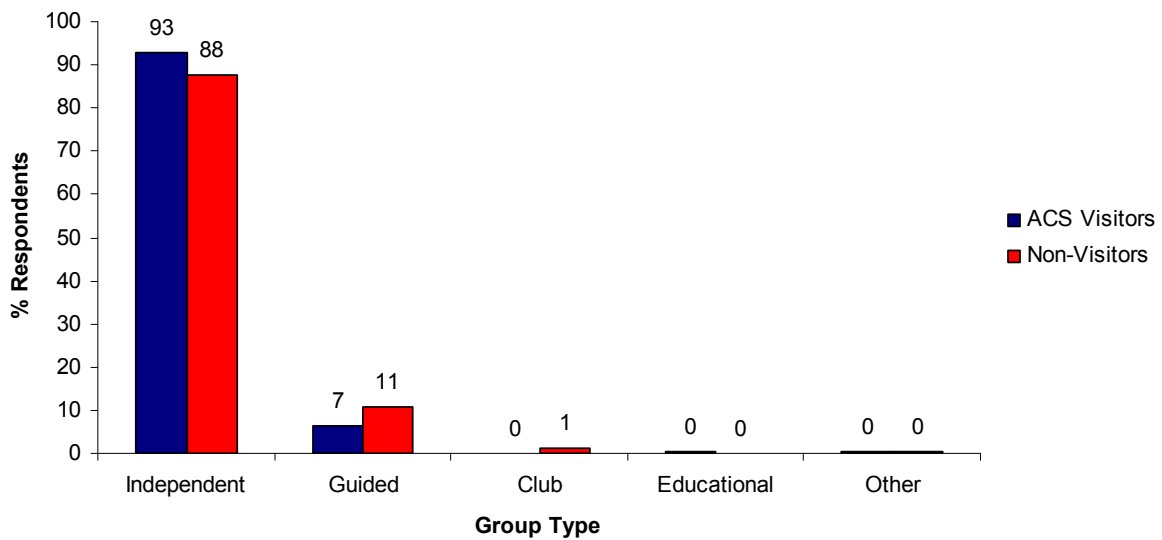
Participants were asked if they had a physical disability and, (for Chinese Settlement visitors) if they had had any problems visiting the site. All participants responded that they did not have a physical disability. There was some informal discussion with the surveyor around the steepness of the track to the top hut posing a problem for disabled visitors, but no one surveyed actually had difficulty themselves.

At the Chinese Settlement, 78% of visitors were visiting for the first time, while the remainder had been before. This question was not presented to non-visitors.

Group characteristics

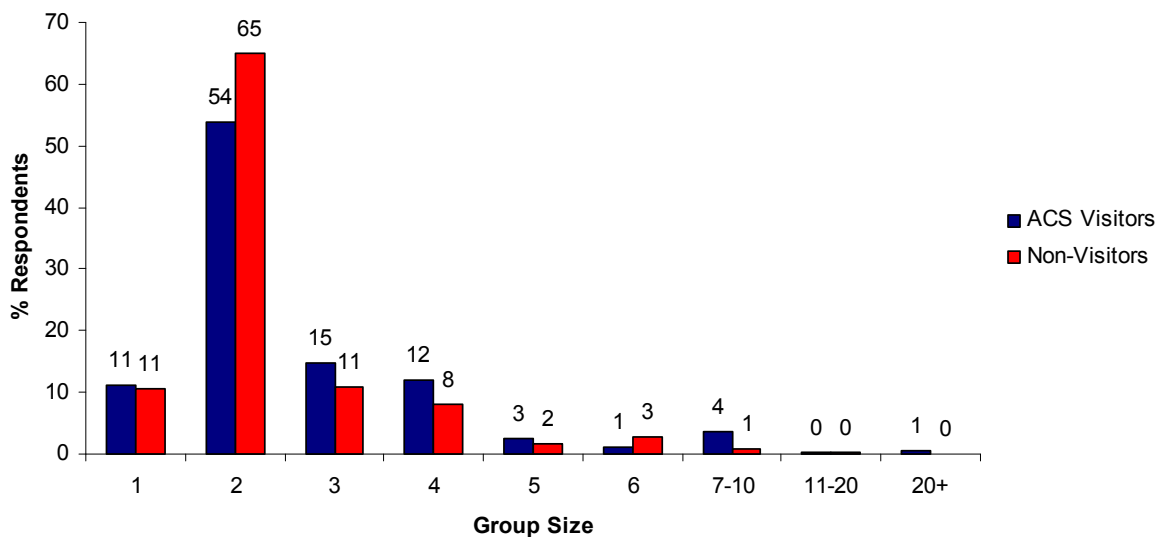
Most respondents, both Chinese Settlement visitors and non-visitors, were visiting independently (93% and 88% respectively, see Figure 8). Organised groups made up 12% of respondents in Arrowtown and 7% at the Settlement. These were predominantly guided visitors.

Figure 8: Group type (n=306 for ACS Visitors, 256 for Non-visitors)



81% of respondents at the Chinese Settlement and 84% of non-visitors indicated that they were part of a small group of between 2 and 4 (Figure 9). At both locations, 11% of respondents were visiting alone. Those visiting in larger groups using buses and mini-vans (i.e. greater than 6) were probably under-reported. The surveyor noticed that these groups tended to break up and often group size was given as the immediate group rather than the larger bus group.

Figure 9: Group size (n=306 for ACS Visitors, 256 for Non-visitors)



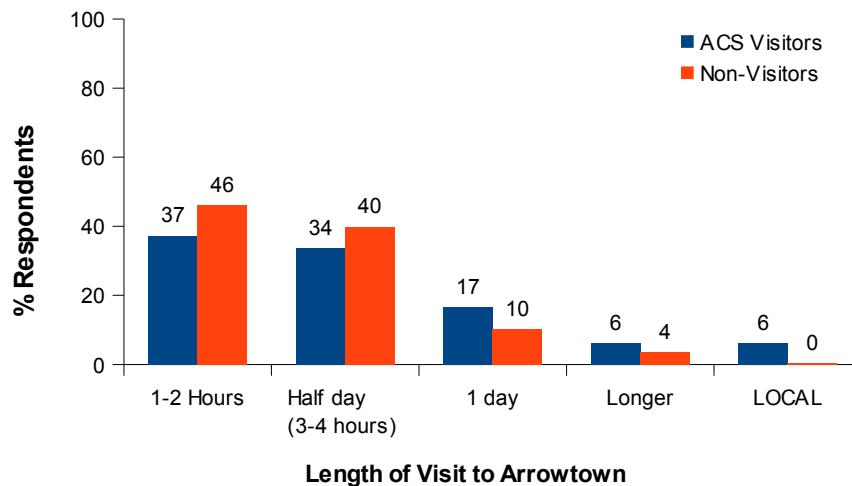
The number of respondents who provided a group size of >6 was 4% at the Chinese Settlement and 12% at Arrowtown. These group sizes could be as large as 40, and three people surveyed in the town were travelling in buses with a group of 105, associated with a club.

14% of individuals surveyed at the Chinese Settlement and 9% of non visitors in Arrowtown were travelling with children (aged under 18). Approximately two thirds of these groups had 1-2 children and one third had 3-4 children. Only one large school group of between 10-20 children was captured in the survey.

Visit characteristics

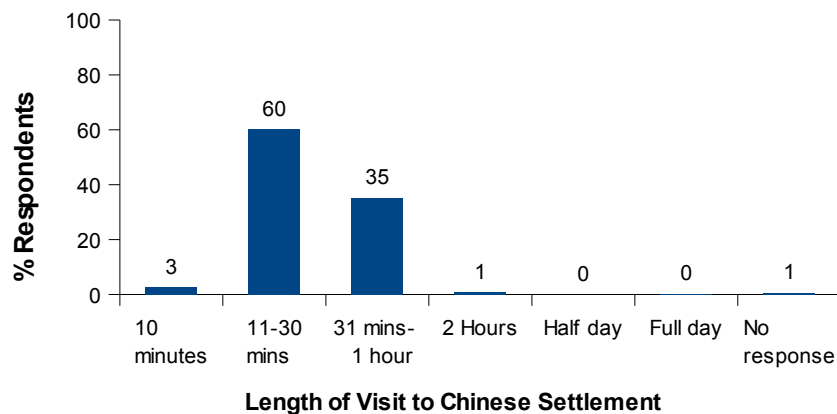
The majority of respondents stated they were staying in Arrowtown for half a day or less (71% for visitors to the Chinese Settlement and 86% for non-visitors, see Figure 10). Just 17% of visitors and 10% of non-visitors were in Arrowtown for the whole day. Very few respondents were staying overnight in Arrowtown.

Figure 10: Length of visit to Arrowtown (n=306 for ACS Visitors, 256 for Non-visitors)



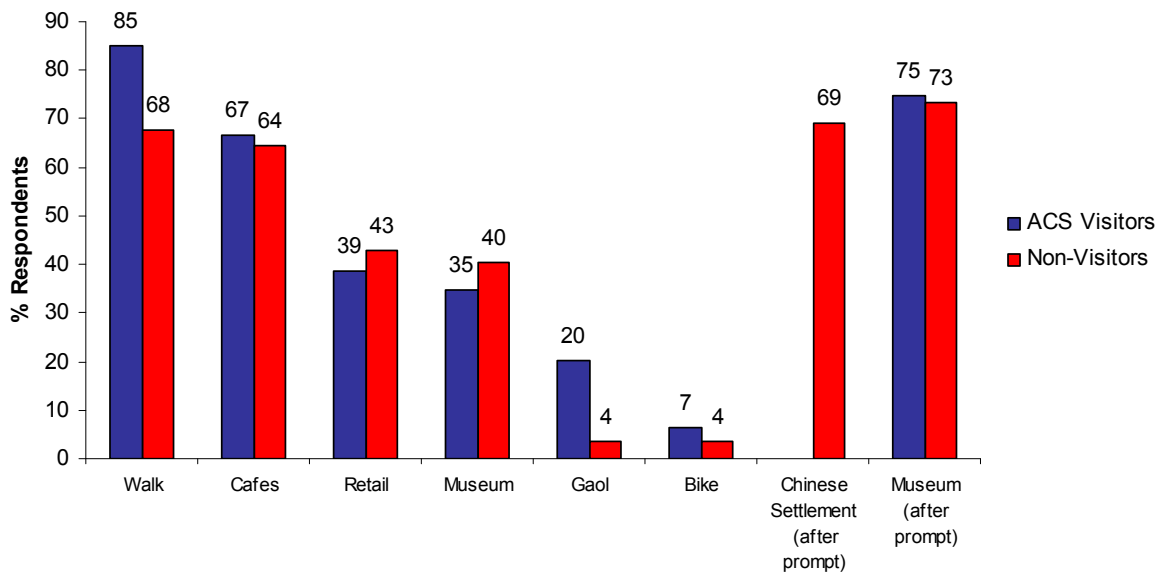
Of those visiting the Settlement, 63% spent up to half an hour and 35% spent up to an hour. A small number (3%) had a very brief stay of up to 10 minutes (Figure 11).

Figure 11: Length of visit to Arrowtown Chinese Settlement (n=306)



Participants were asked what other activities they had done or planned to do while in Arrowtown. Figure 12 below shows how often participants mentioned these common activities; retail and shopping, cafes and restaurants, the historic gaol, the Lakes District Museum, a bike ride or a walk. If they did not mention the Lakes District Museum, they were prompted as to whether they would visit it during their stay, and for the non-visitors whether they intended to visit the Chinese Settlement.

Figure 12: Activities planned or carried out while in Arrowtown (n=306 for ACS Visitors, 256 for Non-visitors)⁴



Most respondents visiting the Chinese Settlement were also likely to be going for a walk while in Arrowtown (85%) and to be visiting cafes (67%). Only 35% mentioned visiting the Lakes District Museum, but after prompting this rose to 75%. 39% said they would be visiting shops, 20% the gaol, and only 7% mentioned going for a bike ride.

For those not visiting the Chinese Settlement, interestingly enough, 69% said they would visit it when prompted. Initially 40% mentioned visiting the Lakes District Museum, but when prompted this again rose considerably to 73%. The most common activities to be mentioned unprompted were going for a walk (68%), visiting cafes (64%) and shopping (43%). Visiting the gaol and bike riding were the least frequently mentioned activities (4% of respondents).

The surveyor also noted other types of activities the respondents may have mentioned that were not listed above. 18% of Chinese Settlement visitors gave additional activities, the most common of these being 'exploring town' (12 comments) or that they were local (9 comments). Of the non-visitors, 21% gave additional responses, however the majority of these were that they had just arrived (16 comments) were unsure as yet what they would do (9 comments), or that they were just 'wandering' or 'looking' (10 comments). At both sites other activities mentioned were golf, gold panning, the Cinema, the Cemetery, cottages and wineries.

Awareness of and reasons for not visiting the Chinese Settlement

Respondents surveyed in the town who stated they had not visited the Chinese Settlement were then asked a few questions in order to find out their reasons for not visiting. Firstly they were asked if they had heard about the Arrowtown Chinese Settlement. 64% had heard of the Settlement (n=164), 36% had not. When queried as to how they had heard about it, the most common response given was signage (31%), followed by the museum (17%), and a book or guide book (12%, the Lonely Planet Guide was specifically mentioned by a third of these respondents). Brochures and tour guides were also mentioned by around 6% (see Table 2).

⁴ A small number of ACS visitors (n = 5) indicated that they were local and did not answer this question

Table 2: Sources of information for hearing about the Arrowtown Chinese Settlement (non-visitors, n=164)

	Count	% Respondents
Signs	51	31.1
Museum	28	17.1
Book/ Guide book	19	11.6
Brochure	10	6.1
Guide	10	6.1
Always knew about it	8	4.9
School	7	4.3
Had been before	7	4.3
Word of Mouth	7	4.3
Bus driver	5	3.0
TV	5	3.0
Map	2	1.2
Friend	2	1.2
Hotel	2	1.2
Internet	2	1.2

Of those who had heard about the Settlement but had chosen not to go, 61 gave reasons for not visiting. The most frequently given reason was that the respondent had 'no time' (39% of those who provided a reason). 28% stated that they had no interest in the Chinese Settlement, and a further 16% said 'not today'. 15% gave bad weather as their reason for not visiting, and 7% said they may visit next time. Most interesting is that 103 (63%) people were unable to provide a reason for not visiting. Discussion with the surveyor suggests that while respondents were aware that the Settlement existed, (because they had seen signs, for example), they did not have sufficient information about it to form any real expectations or opinions. Whatever impression they did have was obviously not enough to motivate them to visit.

There were only a handful of responses relating to the question "If you do plan to visit the Settlement later in this trip, why did you decide to visit?" most of which simply stating that it sounded interesting. Once again, respondents did not seem to have any clear ideas about the Chinese Settlement.

Experience at the Arrowtown Chinese Settlement

Those who were surveyed onsite at the Chinese Settlement were asked a series of questions around their experience while there. They were first asked how they found out about the Settlement (Table 3). Similar to the non-visitors, the main source was signage (presumably in town) which informed 24% of respondents. Guide books were also a common source of information (18%, again the Lonely Planet guide was specifically mentioned by a third of these). Word of mouth via family and friends was noted by 12% of respondents, and an additional 16% were repeat visitors or locals. 6% were on a guided tour.

Table 3: Sources of information for hearing about the Arrowtown Chinese Settlement (ACS visitors, n=306)

	Count	% Respondents
Signage in town	73	23.9
Guide book / magazine/ catalogue	56	18.3
Family or friend's recommendation	36	11.8
"Have been before"	29	9.5
Are local	20	6.5
Were guided	19	6.2
Info centre / museum	13	4.2
"Always knew about it"	13	4.2
Brochure	9	2.9
"While exploring town"	7	2.3
T.V.	6	2.0
From hotel (not defined)	6	2.0
Map	5	1.6
"Read about it"	5	1.6
Internet	4	1.3
School	3	1.0
Connect-a-bus	3	1.0
Radio	1	0.3
Rental company	1	0.3

The participants were then asked why they decided to visit the Chinese Settlement. The most notable sentiment was that they had either a general interest, or a particular interest in Chinese history / heritage, gold mining, early New Zealand settler life, or the stone huts (a total of 47%, see Table 4). A significant number decided to visit as they were 'passing by' (14%), and out of curiosity (13%).

Table 4: Reason for visiting settlement (n=306)

	Count	% Respondents
Interest in Chinese history/ heritage	60	19.6
General interest	58	19.0
Interest in gold mining/panning	15	4.9
Interest in early NZ settlement life	6	2.0
Interest in stone huts	4	1.3
Were in Arrow town/ region/ passing by	42	13.7
Curiosity	40	13.1
"Been before"	23	7.5
Walking	23	7.5
Recommended to me	21	6.9
Are local	18	5.9
Were guided	7	2.3
General (positive comments)	6	2.0
"Haven't been before"	4	1.3
Beautiful setting	2	0.7
Brought friends	2	0.7
On a school trip	1	0.3
No response	2	0.7

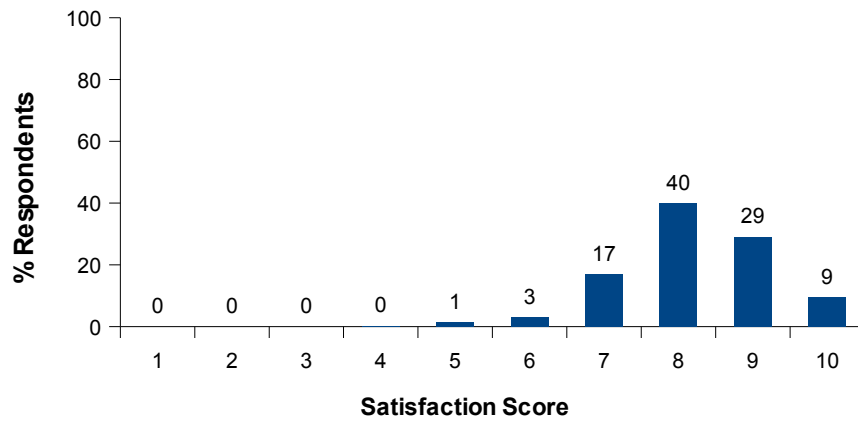
A more in-depth question was then asked; "What did you like **most** about the Arrowtown Chinese Settlement?" A large number of respondents (73%) said they found various aspects of the information and stories provided interesting (see Table 6). Secondly, just under half of the respondents mentioned aspects relating to the historic fabric, in particular the stone huts (25%), how well preserved they were (13%), and that visitors were able to touch them and go inside (4%). 10% of visitors liked the walk aspect the most. A third of respondents mentioned aspects of setting, for example that they liked the peace (10%), authenticity (4%), and the overall feel of the environment, or 'everything' (13%). A small number also appreciated the fact that it was not commercial and didn't cost anything (2%). Respondents often gave more than one aspect that they 'liked most'.

Table 6: Most liked aspect of visit to Arrowtown Chinese Settlement (n=306)

	Count	% Respondents
<i>Interest</i>		
Info panels / info / stories	102	33.3
Chinese history / heritage	83	27.1
“Can see how they lived”	21	6.9
Chinese translation	8	2.6
“Interesting”	5	1.6
Educational for children	4	1.3
<i>Facility</i>		
Huts	75	24.5
Well preserved history	39	12.7
Walking	29	9.5
Can touch and go inside huts	13	4.2
The Ah Lum store	9	2.9
It is free	8	2.6
<i>Setting</i>		
“Everything” / Overall setting	40	13.1
Peaceful	31	10.1
Authentic	13	4.2
Quiet	5	1.6
Is not commercial	5	1.6
“Natural” feel	3	1.0
Unique	3	1.0
Shade / trees	2	0.7

The next question was read out as; “On a scale of 1 to 10, where 1 is ‘very disappointing’ and 10 is ‘couldn't have been better’, how would you rate your visit?” No one gave a response lower than 5, and most rated their visit between a 7 and a 9 (see Figure 13). The mean satisfaction score was 8.2.

Figure 13: Rating of visit out of 10 for those visiting the Arrowtown Chinese Settlement (n=306)



Participants were then asked to think about the question “If you did not rate your visit as 10 out of 10, what would have made it a 10?” The responses provided varied widely and gave an insight into the different ways that visitors would like to see the site developed. Table 7 shows a summarised version of the ideas given, however it is very difficult to categorise these. The most popular theme was that incorporating artefacts into the houses and store, and gold panning equipment would add authenticity and life to the site. 7% also wanted to see the vegetable gardens developed. A large proportion (51%) gave no response and 6% said they 'did not know'.

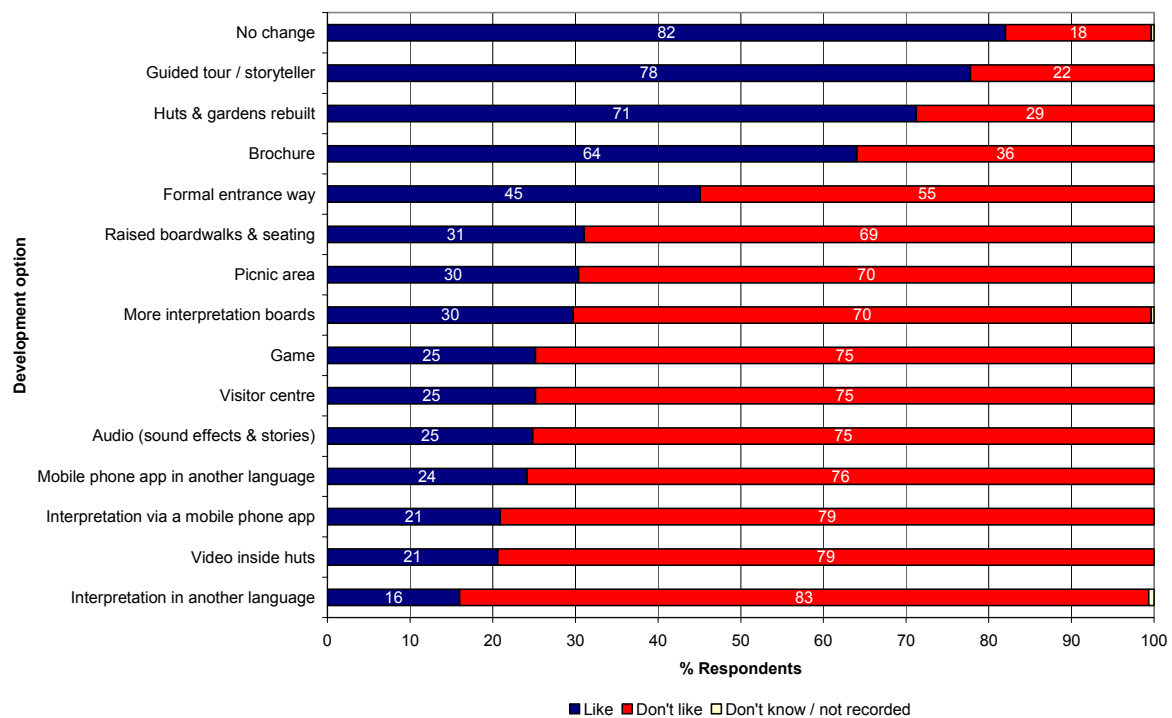
Table 7: 'What would have made your visit a 10 out of 10?' for visitors to the Arrowtown Chinese Settlement (n=306)

	Count	% Respondents
Incorporate some artefacts	47	15.4
Develop vege gardens	20	6.5
Artifacts and information on how they lived	9	2.9
More information on boards	8	2.6
More huts restored	8	2.6
Ok as it is	8	2.6
One hut with more detail (i.e. artefacts)	7	2.3
Artefacts and information on gold panning	6	2.0
"More interactive"	5	1.6
Signage at entrance and finish	5	1.6
More detail in Ah Lum's Store	4	1.3
More detailed maps	4	1.3
More old pictures	4	1.3
Guided tour	4	1.3
Info boards/ stories at each hut	4	1.3
Rubbish bins	4	1.3
Keep maintaining it	4	1.3
More 'life' (i.e. decoration or artefacts)	3	1.0
Info on the gardens	3	1.0
Brochures	3	1.0
More picnic tables/ seating	3	1.0
Link signage with town	3	1.0
Keep it authentic	3	1.0
Clean the info boards	2	0.7
A French translation	2	0.7
Winter/wet facilities	2	0.7
Have a Visitor Centre	1	0.3
A Chinese sculpture	1	0.3
Chinese family tree information	1	0.3
Connect it with the museum	1	0.3
A German translation	1	0.3
Tidy up vegetation on site	1	0.3
Make into a loop track	1	0.3
Challenge/ game for kids	1	0.3
Better advertising	1	0.3
Don't know	18	5.9
No response	156	51.0

Visitor opinions on future options

Respondents were asked how they felt about a specific set of options for development of the Arrowtown Chinese Settlement, with the options of 'like', 'don't like' or 'don't know' provided. The results for this question are presented in Figure 14 below.

Figure 14: Visitor opinion on development options for the Arrowtown Chinese Settlement (n=306)



The respondents generally had very distinct opinions, with very few stating they 'did not know' about an option. The first option, 'No change', was the most liked (82%) However, many respondents then went on to like other options also. The next most popular was the option for a storyteller on site (78% liked this idea). A large number (71%) also liked the idea of rebuilding more huts and developing the gardens. A brochure of the site was liked by 64% of respondents. In comparison, at least two thirds of respondents did not like the idea of boardwalks and seating, a picnic area, a visitor centre, more interpretation boards, audio options for information, interpretation via a mobile application, interpretation in another language or with a mobile application, videos or a game. It is difficult to know whether participants gave the 'don't like' response to these because they were opposed to the idea specifically, or because they thought it was simply unnecessary. Some of the responses given when asked if they had other comments clarify this to some degree, as do other comments given to the surveyor.

Respondents could also provide their own ideas of potential development options. These varied widely. The most notable comment regarded translations for the information on the existing panels (16%). Nine respondents felt an audio translation would be useful, generally noting that it should be in the language of the largest number of visitors. Six respondents thought a mobile translation would be useful, while four mentioned a brochure with translations. One person presented the idea of a QR Code for mobile phones which could direct visitors to a website. A number of respondents (28) wanted a translation in their language, the most common being German (8), French (8) and Japanese (5).

In regards to signage, 10 respondents mentioned that there needed to be more consistency between signage in Arrowtown directing the way to the Settlement. A few (6) felt there should be more information panels at the huts to give stories on the people, on gold panning and everyday life.

A few felt concern over an option for a video. Some (4) felt it should only be in one hut, while others (2) thought it could be in a visitor centre or only at the entrance.

In regards to audio commentaries, respondents commented that they would like these restricted to one hut (4) or in a visitor centre (5), or via a rented listening device (2).

A range of facility options were suggested, 14 respondents saying there could be more seating, and 4 in favour of picnic facilities. Bike racks, rubbish bins, a cover during rain, a loop track, a rail along the track to the top hut, and a board walk to the river were all singular suggestions.

Having a game for children, and restoring the vegetable gardens were a common suggestion, even though these options had already been presented, it is assumed respondents were reiterating their feelings.

Finally, respondents were asked if there was anything else they would like to tell us about their trip. 92% did not provide a response. Most comments echoed those presented above, with the only new idea being that of an event for Chinese New Year.

Discussion

Visitor profile

The visitors in this survey generally reflected the trend found by the APBA which noted that 72% of visitors to Arrowtown were aged forty or over. In the current survey 75% of respondents in Arrowtown and 69% at the Settlement were aged forty or over. There were however, differences between the two sites. More than 50% of respondents in Arrowtown were in the forty to fifty nine age but the ages of visitors to the Chinese Settlement were more evenly spread from thirty to sixty nine.

The percentage of respondents at the Settlement who were travelling with children (14%) was high compared to other DOC managed day or short walks in the region. Surveys undertaken at Ulva Island, the Lake Gunn Nature Walk and Key Summit in Southland along with the Routeburn Track in Otago, have found between 3% and 13% of respondents were travelling with children (Harbrow & Scarfe 2013). In light of this consideration could be given to developing activities or interpretative material that is suitable for children at this site.

Families or school groups were slightly less prevalent among non visitors surveyed in Arrowtown where only 9% were travelling with children. Queenstown Resort College (2012) found a significantly higher proportion of children amongst visitors to Arrowtown (24%), but their survey methodology or timing may have been quite different.

While the APBA found visitors to Arrowtown to be evenly split between New Zealanders and international tourists, this survey found at least two thirds to be from overseas. There were also some minor differences in the details of home countries and regions, although the overall trends were similar. The APBA surveys were carried out in the main street, as opposed to the village green, and it is possible that these locations have some difference in use.

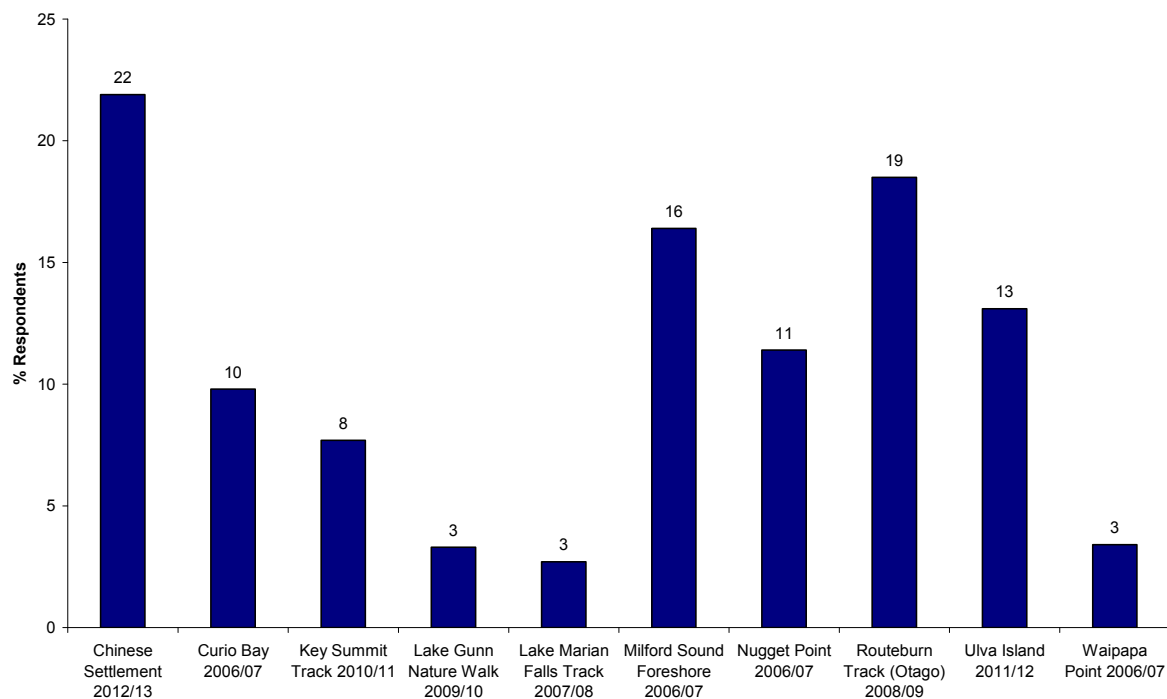
International visitors to the Chinese Settlement were most likely to be from Australia or the UK with smaller numbers from the United States and Germany. It is perhaps unsurprising that inability to speak English did not rate highly as a barrier to participation in the survey, given that most respondents were from English speaking countries (including New Zealand), and it has already been observed that those with the best English were self-selected in the minority groups. Consequently, language is only likely to be a barrier to increased participation at the site if managers wish to attract new visitors for whom English is not their first language.

Nationalities that visit the Chinese Settlement reflect the nationalities that visit Arrowtown, and any change to the target international market for the Chinese Settlement will be most effective if it reflects the aspirations of the community as a whole for tourism in their town.

The Chinese Settlement attracted a slightly higher proportion of New Zealanders than the non-visitor group. It attracted people from both the North and South Islands (47% and 52%) and appeared to have considerable appeal to visitors from within Otago. 22% of New Zealand respondents at the Settlement were from the local Otago region and three quarters of these lived in the Queenstown Lakes District. In contrast, among non-visitors New Zealand respondents were more likely to be from the North Island (64%).

Repeat visits were relatively high compared to the results of other surveys at day visitor sites in the region (Figure 15), which suggests existing use includes a loyal customer base that might be further explored.

Figure 15: Percentage of repeat visitors at selected day visitor sites in Otago / Southland (Harbrow & Scarfe 2013)



The surveyor did not interview anyone with a disability at the Chinese Settlement. It is not known whether this was because it was unsuitable for, or unattractive to, that group (acknowledging that there is a wide range of disabilities). Demand for improved accessibility at this location has not been assessed. The level of disabled use of DOC facilities has been assessed at three other locations in the region (Ulva Island, Fiordland National Park Visitor Centre and the Lake Gunn Nature Walk) and disabled visitors were found to comprise up to 5% of respondents (Harbrow & Scarfe 2013). Assuming these sites are representative of the wider level of demand there would appear to be an opportunity to grow participation by providing for these visitors.

Overall, the profile data suggests that the Settlement currently holds an attraction for the domestic and traditional international markets. Local tourism trends indicate that the Settlement has the potential to receive greater numbers of visitors in the future given the resistance of the tourism market in Queenstown to recent shocks. Despite the effects of the Canterbury Earthquakes and the Global Financial Crisis there has been growth in both international and domestic tourism.

According to the Commercial Accommodation Monitor (Statistics New Zealand 2013b) domestic tourism in the Queenstown region has grown strongly with guest nights increasing by 23.9% between 2008 and 2012. Nationally domestic guest nights grew by only 2.3% over the same period and there were decreases in some South Island regions (e.g. Canterbury -7.8%, Dunedin -10.2%). During 2012 the average level of spend per month by domestic visitors in Queenstown was 23.7% higher than 2008 (MBIE 2013b).

The number of international guest nights in the Queenstown region (Statistics New Zealand 2013b) has also increased slightly (+2.3%) in contrast to a decrease nationally of 10.8% and significant decreases in other South Island regions (e.g. Canterbury -37.7%, West Coast -21.1%, Central Otago -32.0% & Southland -40.4%). Spending attributed to international visitors in Queenstown increased by 11.1% (MBIE 2013c) over this period.

There has been considerable change in the mix of overseas visitors coming to New Zealand since 2008 and there is potential for this to affect visitation to destinations managed by the Department, including the Chinese Settlement. Typically the majority of visitors surveyed on day and short walks managed by DOC have come from New Zealand, Australia, the United Kingdom, the United States and Germany (Harbrow &

Scarfe 2013). However, visitor arrivals from two of these markets (the United Kingdom -35.7% & the United States - 21.3%) declined significantly between 2008 and 2012 (Statistics New Zealand 2009, 2013a) and little recovery is anticipated in the short to medium term (MBIE 2012). At the same time the Chinese market has grown rapidly with visitor arrivals to New Zealand increasing by 86.4% (Statistics New Zealand 2009, 2013a). Chinese visitors made up almost 8% of short term arrivals in 2012 (Statistics New Zealand 2013a) and the number of Chinese visitors to New Zealand is expected to almost triple between 2011 and 2018 (MBIE 2012). Along with the growing Australian market, visitors from China may offset the loss of visitors from the US and UK at some locations.

The extent to which growth in the Chinese market could drive growth in visitor numbers at the Chinese Settlement is not clear cut. There are currently no up to date forecasts of visitor trends at regional level and it would be incorrect to assume that increased visitor arrivals nationally will automatically translate to significant gains for all regions. In fact, current visitor flows suggest that some regions may not benefit as much as others from increased visitor arrivals from China. This is because, at present, Chinese visitors have a very short median length of stay in New Zealand of just four days (MBIE 2013a). Chinese visitors are therefore less likely than other visitors to travel to regions that are distant from Auckland, the main entry port. In contrast visitors from other significant markets have a median length of stay ranging from 6 days for South Korean visitors up to 24 days for visitors from Germany (MBIE 2013a).

Growth in Chinese tourism in Queenstown has still been very rapid with a seven fold increase in spending attributed to Chinese visitors occurring between 2008 and 2012. However, this growth has come off a low base. In 2012, spending by Chinese visitors still only accounted for 2.3% of total electronic card transactions by international tourists in the region. This compares to 3.6% in Auckland and 5.9% in Rotorua, where Chinese tourism is more established (MBIE 2013c).

Chinese visitors also have a lower propensity to visit historic buildings and sites than visitors from some of our traditional markets. According to Tourism New Zealand's Visitor Experience Monitor, the percentage of Chinese tourists visiting historic buildings and sites is relatively low with only 26% doing so in 2011/12 (Tourism New Zealand 2012b). Visits to these sites were much more prevalent among visitors from Germany (57%), the UK (48%) and USA (46%). However there appears to be a reasonably high level of latent demand among Chinese tourists with 48% indicating that they were interested in historic buildings and sites even though they did not visit them (Tourism New Zealand 2012b-e). High levels of latent demand were also evident in the larger Australian market with 50% of respondents in this category (Tourism New Zealand 2012a).

Overall it appears that the large domestic and Australian markets, which already make up the majority of visitors, offer the best opportunities for future visitor growth at the Arrowtown Chinese Settlement. An increase in the number of Chinese visitors to the settlement is also likely given the high level of growth in this market. The Settlement could potentially attract additional visitors from Australia and China especially, if the Department had a better understanding of the factors that help convert interest into visitation.

Group characteristics

Independent travel and small group size are strong features of visits to both Arrowtown and the Chinese Settlement. APBA's studies indicated that 79% of Arrowtown visitors travelled in cars, almost half of which were rented, 10% on public buses and only 6% on a tour coach (Lapsley 2013). While not all tour coaches guide at the Chinese Settlement, other companies offer guiding separately to transport, which probably explains the 7% of respondents who reported they were guided. In contrast some sites in the region including the Routeburn Track day walk, Ulva Island, Curio Bay and the Lake Gunn Nature walk have considerably more commercial activity with more than 20% of respondents at these locations being guided (Harbrow & Scarfe 2013).

The surveyor did report concerns that a proportion of respondents in this survey had not associated themselves as part of the entire bus group they had travelled with, and it is possible that larger groups could have been under reported as a consequence.

The APBA studies suggest a higher percentage of larger groups of six or more (16%), compared to the current study which found 4% at the Settlement and 12% in Arrowtown. However in all studies the vast majority of respondents have been in groups of four or less, predominantly couples.

Visit characteristics

Most people surveyed were spending 1-2 hours or a half day in Arrowtown, with the next largest group spending a full day. These results tallied closely with the APBA report, although this time fewer people were found to be staying longer than a day. Visitors to the Chinese Settlement were likely to spend longer in town than non-visitors.

98% of visitors stayed for an hour or less at the Chinese Settlement, more than half spending between 11 and 30 minutes. Staff perceptions prior to the study were that a large proportion of visitors travelled no further than the first sign (S. Geh pers. comm.), but the surveyor did not observe this behaviour and confirmed that the results are an accurate representation of behaviour witnessed. She did comment that visits were shorter when the weather was wet or cold (Kamila Zenkerova pers. comm.), which is unsurprising at an outdoor location. The study took place during a notably dry summer, and that may have had some influence on the very small proportion of visits which were 10 minutes or less.

The other activities that respondents said they had done or planned to do were mentioned in the same order or popularity by visitors and non-visitors alike. Walking and cafes were more popular than retail and the museum, and the gaol and cycling least popular. There were differences in their relative popularity, however, as walking was much more prevalent with visitors to the Settlement, café visits similar, and retail and the museum (indoor activities) less popular than with non-visitors. The inference drawn is that visitors to the Chinese Settlement chose to spend more time outside, and there is a connection with a theme of exploring, wandering and looking around which appeared in comments. The gaol was also much more popular with Settlement visitors, which is likely to relate to an interest in historic sites, but it is interesting that the museum shows the reverse pattern.

The fact that such a high percentage (69%) of non-visitors did not remember the Chinese Settlement (as a place they planned to visit later) until prompted, and almost as many from both groups omitted the museum until prompted, is striking. It is possible that some respondents only said yes when prompted by the surveyor because they wished to please. Either way, it does seem that for a large number of people those sites were not particularly memorable and lacked a “wow” factor.

Non-visitors to the Chinese Settlement

A third of non-visitors were completely unaware of the Chinese Settlement, while two thirds had heard of it, mainly through signs, information in the museum or travel literature. When the latter were asked why they had chosen not to visit, 63% were unable to provide a reason, and the remainder talked about lack of time or interest or suggested they might visit on another occasion. Similarly, there were only a few vague answers from those who said they would visit later in their trip, about their motivations. The surveyor observed that although people said they had heard about the Chinese Settlement, they didn't seem to have enough information to inform any expectations about the experience, or to decide whether they might enjoy it. Thus they found it hard to justify any decisions either way. This result, though limited in terms of data, is illuminating, and highlights the absence of effective marketing for the Chinese Settlement.

There is also a question around how well connected the Chinese Settlement is with the Museum, and whether there could be mutual benefits in combined marketing and/or experience management. Although the museum offers a more indoor experience, it could extend the historic experience for those whose interest has been stimulated. Further analysis may indicate whether the Chinese Settlement and Museum, marketed as a combined experience, has the potential to extend the length of time visitors spend in Arrowtown as a whole. The historic gaol would also have the potential to contribute to this sort of experience, although this was not explored in the survey.

Visitors to the Chinese Settlement

Visitors to the Chinese Settlement said they found out about it in a wide variety of ways. Most respondents mentioned signage in town (24%), guidebooks (18%) or recommendations from family or friends (12%) the surveyor also noted that a good proportion of visitors had simply “ended up there” or “come across it”, as opposed to having a clear plan to visit the site (K. Zenkerova pers. comm.) She also noted a level of criticism about the town’s signage not providing good directions.

Almost half the visitors (47%) said they were motivated to go there by an interest in some aspect of the history, the most common being a specific interest in Chinese history or heritage (20%). Other responses suggest a theme of “discovery” with 14% attracted because they were passing by or in the region and 13% drawn to the site because they were curious (28%). The things that visitors liked best came through strongly as information and stories (73%), tangible and active aspects of the historic experience (44%), and the setting or atmosphere (27%). The extent to which the historic aspects of the Settlement feature as both a driver for visitation and a highly valued part of the experience is unusual. While surveying at historic sites has been limited to date, visitors at these sites have tended to cite aspects of the natural environment as the most enjoyable aspect of their visit while historic heritage has been of lesser importance. Examples of historic sites where recent surveys have been carried out include the Karangahake Gorge and the Waitawheta and Wairongomai Valleys, in the Kaimai – Mamaku Forest Park (MacFarlane & Zahra 2010, Burness & Zahra 2011) and the Acheron Road on Molesworth Station (Galvin, Morgan & Sidley 2010).

In this survey visitors provided multiple and quite specific answers which provide a very clear steer as to the valued aspects of the current experience, which could be built on or lost through potential developments. Low cost was not high on the list, and although opinions on charging were not specifically sought in this survey, the APBA report found that 43% of Arrowtown visitors would pay a “small amount for entry to the Chinese Settlement.” There would be challenges in doing so, however. Although legislation allows charging for facilities in some instances there is a strong underlying principle of free access to public conservation land.

The mean satisfaction score at the Settlement was 8.2 out of ten. Satisfaction at the Settlement was lower than other sites in the region including Ulva Island and the Routeburn Track (8.8), The Lake Gunn Nature Walk (8.7) and Key Summit (8.3) and nationally scores at day or short walks have ranged from 8.1 – 9.2 (Harbrow and Visser 2010, Harbrow & Scarfe 2013). Notably a third of visitors to Ulva Island scored their visit ten out of ten, compared to only 9% at the Arrowtown Chinese Settlement. Satisfaction scores are usually quite high, so subtle differences need to be explored.

When visitors were asked what would have made their visit a ten out of ten, the most popular responses related to incorporating artefacts in the buildings and re-creation of the vegetable gardens. The range of responses was wide, but the themes of added “life” and added information came through. It seems clear that visitors felt the site could be improved, but few of the suggestions were dramatic and some asked for no change or to “keep it authentic”.

Visitor opinions about future options

Visitors were purposely asked if they liked the idea of no change as the first option, and 82% agreed to that. Adding this to the high levels of repeat suggest that the site is operating well for regional visitors with a specialist interest or attachment to the place. On the other hand, most people went on to like several of the potential development options suggested as well. Three of these were liked by a majority of people: a story teller (78%), development of huts and gardens (71%), and a brochure (64%). These tally with the things that visitors liked most about the place and would expand on those aspects of the experience. More detail about how visitors envisage these happening could be teased out via interviews or discussion groups.

An entrance way had mixed responses (45% for it and 55% against), and may relate to comments that some people felt the site lacked orientation or thought it was hard to find, but on the other hand visitors did not like the idea of ostentatious development. So the question of an entrance/arrival point would need to be considered with care, as would additional signage.

Visitor facilities were not particularly popular options, and nor were audio or video media as a means of interpreting the site (and in fact some were concerned about these affecting the experience). Responses about the use of mobile technology were interesting. While they were also unpopular, the surveyor was able to explain some of the reasons given for this. Visitors told her they were not interested in “apps” because a) there was no free wireless internet on site, and b) “apps” take up a lot of space in a phone’s memory. It was suggested that QR codes, which save a link to a website on a phone’s memory, would be a much better option. This would allow people to browse information either on-site if desired, or off-site at a later time convenient to the visitor (and perhaps where internet access is free). A further advantage of providing interpretive content, that is accessible via mobile phones or other portable devices, is the ability to enrich the experience of visitors who want this option without necessarily affecting the experience of those who don’t. This is a contrast to some of the other development ideas listed in the survey. The findings relating to mobile phones have implications for other destinations managed by the Department.

Those who were interested in translations of information were in the minority, but made specific comments about it. As the majority of visitors are English speaking, this may be best facilitated via a web application/QR code, unless there is a wider plan to attract new markets. There may be potential for the museum or businesses to rent out hand held audio devices with similar information to interpretation panels or web pages, in a range of languages, including English.

The option for a game was not popular, although some people suggested a children’s game, so it may be that the adults responding generally only considered this for adult interest. The question of marketing to families would need to be explored fully to assess this idea. Another new idea was to hold an annual event at Chinese New Year, and this could be one vehicle for providing storytellers. The 150th celebrations in 2012 proved successful (Figures 16 & 17), but an annual Chinese event should be explored with representatives of the NZ Chinese community, as well as the Arrowtown community.

Figure 16: Visitors are greeted by an actor playing Ah Lum at the 150th celebrations in October 2012 (DOC)



Figure 17: Actors in costume at the 150th celebrations in October 2012 (DOC)



Local opinions

The local people surveyed in town revealed similar opinions to visitors overall, with a few interesting differences. Their satisfaction scores showed more diverse views on the site, and their comments ranged between making no changes, to the site being scruffy and in need of more restoration. Their three preferred development options were the same as visitors although in reverse order (brochure, restored huts and gardens, storyteller). They were more open to change, although 76% still chose “none” when first asked about development, and there was an even split on the question of boardwalks and seating (which were less popular with visitors). The surveyor reported strong interest from local people during the survey, and it is clear that the Chinese Settlement is important to individuals in the community as well as groups.

Recommendations

1. Improve marketing and promotion of the site, including signage. Currently one third of non-visitors in Arrowtown are unaware of the Chinese Settlement while others appear to have only limited knowledge with which to form a view on it. It is likely that some gains in visitation could be made simply by raising the profile of the Settlement.
2. Focus promotion of the site primarily on the domestic and Australian markets. Other markets are small, declining or are not significant users of heritage sites.
3. Improve the connection between the Chinese Settlement, the museum and possibly the historic gaol. A key motivation for people to go the Settlement is historic interest yet only 35% of respondents at the Settlement mentioned an intention to visit the museum unprompted. A more integrated approach would help achieve our goal of bringing heritage to life and the combined experience could be marketed as a longer heritage experience.
4. Consult widely when planning for future visitor experiences on site. There are diverse local opinions and there is a core of repeat visitors who value aspects of the existing experience. The full range of stake holders needs to be assessed, but will include local groups and associations, tour operators, the museum, and the NZ Chinese community, including descendents of the miners.
5. Keep redevelopment of the site relatively modest. There was significant support for leaving the Settlement unchanged and the site's authenticity and setting were identified as key parts of the experience. Some development options including a visitor centre and audio and video content were disliked by at least three quarters of current visitors. Future development is likely to have the greatest appeal to current visitors if it includes some or all of the following aspects:
 - a. A guided tour or story teller
 - b. Rebuilt huts and gardens.
 - c. A brochure about the site.
6. Improve access for the disabled. The settlement is an ideal place to cater for these visitors given its location on the edge of a busy tourist town and the fact that much of the site is relatively flat. We can expect disabled visitors to be present in Arrowtown but none were recorded at the Settlement. At other front country sites up to 5% of respondents identify as having some form of physical disability so we could expect to see a small increase in participation by providing for these visitors.
7. Consider developing interpretation that will appeal to children. The site appears to have a relatively high level of use by children and families compared to other sites in the region.

8. Consider developing a mobile app or game. Although this option was not popular with existing users, it may appeal to new audiences, especially younger visitors and families. Unlike other development options these could be enjoyed without significantly affect the experience of other users.

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7. What other things have you done or do you plan to do in Arrowtown?

Retail Cafes Gaol LD Museum Bike Walk

Other:

[prompt for museum if not mentioned] After prompt Museum

8a. How long are you staying in Arrowtown? _____

8b. How long was your visit to the ACS? _____

9. Is this your first visit to the ACS? Y / N

10. Who are you visiting the ACS with today?

Indep Guided Club/Org School/Educ Other

14. What age group are you in?

11a. How many people are in your group? _____

11b. How many people are in your group are under 18? _____

12a. Where do you normally live? _____
(country of permanent residence)

12b. If NZ, please tell us where? _____ (NI/SI)

13. What is your gender [surveyor observation] (M/F)?

- 16 - 19
- 20 - 29
- 30 - 39
- 40 - 49
- 50 - 59
- 60 - 69
- 70 +

15. Is there anything else you'd like to tell us about your trip or about the ACS?

16. May we contact you at a later date (by email or phone) to ask your views on possible changes?
(go to notebook)

17. [Surveyor observation, tick one]

- English spoken
- Communication in English difficult
- Translator used

Thank you for your time!

9. What is your opinion of these future options for the ACS?

[try to avoid don't know]

Option	Like	Don't like	Don't know
No change [ask this first but still ask about other options]			
Raised boardwalks and seating			
Huts and gardens rebuilt			
Picnic area			
Visitor centre			
Formal entrance way			
A brochure about the site			
More interpretation boards (story boards)			
Audio (sound effects and stories)			
Interpretation via mobile phone app			
Interpretation in another language (which:)			
Mobile phone app in another language (which:)			
A guided tour / storyteller			
Video inside huts			
A game to play			
Other (describe)			

10a. How long are you staying in Arrowtown? _____

10b. How long was your visit to the ACS (or do you plan to spend)? _____

11. Is this your first visit to the ACS? Y / N

12. Who are you visiting the ACS with today?

Indep Guided Club/Org School/Educ Other

16. What age group are you in?

16 - 19

20 - 29

30 - 39

40 - 49

50 - 59

60 - 69

70 +

13a. How many people are in your group? _____

13b. How many people are in your group are under 18? _____

14a. Where do you normally live (country)? _____

14b. If NZ, please tell us where? _____ (NI/SI)

15. What is your gender [surveyor observation] (M/F)?

17. Is there anything else you'd like to tell us about your trip or about the ACS?

18. May we contact you at a later date (by email or phone) to ask your views on possible changes?
(go to notebook)

19. [Surveyor observation, tick one]

- English spoken
- Communication in English difficult
- Translator used

Thank you for your time!