



ADRENALINE

Segment Insights Guides



**EXPLORE BEHAVIOURS,
MOTIVATIONS, AND TRENDS THAT
DRIVE VISITORS TO TAKE PART IN
EXPERIENCES WITHIN THE DISTRICT
AND ACROSS NEW ZEALAND.**

The Segment Insight Guides provide members with an understanding of how visitors engage with activities and experiences in Queenstown and Wānaka. They align with the RTOs' activity segment strategy, targeting high-intent audiences who share the region's values and seasonal interests, supporting sustainable year-round demand and local businesses.

Insights are drawn from reputable regional and national sources, such as the Queenstown Lakes Visitor Experience Survey and New Zealand International Visitor Survey. Variations may occur where data is limited, and some generalisations are based on survey findings.

Note: For consistency with survey categorisation, 'adrenaline activities' in this research includes a variety of terms relating to adrenaline activities including bungy jumping, canyon swing / canyoning, extreme ride e.g. luge, zipline, zorb etc, jet boating, quad biking / 4WD tour, rafting / canoeing / kayaking.



NEW ZEALAND INSIGHTS

INTERNATIONAL VISITOR SURVEY INSIGHTS

The following insights are drawn from International Visitor Survey* holiday respondents who participated in adrenaline activities* while visiting New Zealand. It was not necessarily their main reason / motivation for travel to NZ. These findings should be interpreted as “holiday visitors to New Zealand who participated in participated adrenaline activities tend to show the following characteristics and behaviours”.

Participation



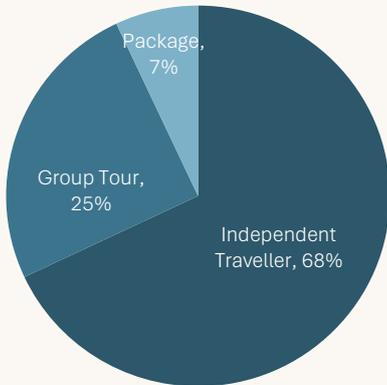
Top countries of origin

- Australia
- USA
- China
- Singapore

Average length of stay



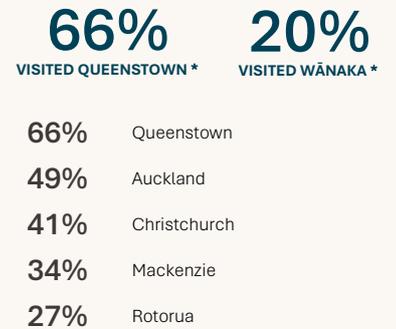
Travel style



Regions visited

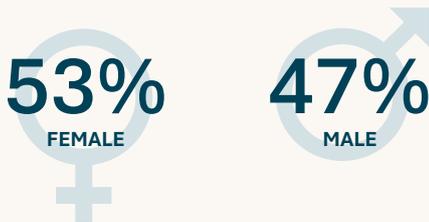


Top regions visited



Share of respondents that stayed at least one night in respective regions. Not additive to 100% as visitors stay in different locations during their trip.

Gender



Average spend per trip



Inclusive of all on the ground costs and international flights

*The International Visitor Survey is designed for national use and has an unknown margin of error when segmented to regional or activity specific analysis. Users are advised to consider values as indicative and not rely on them for important decisions.
* IVS categories are "bungy jumping, canyon swing / canyoning, extreme ride e.g. luge, zipline, zorb etc, jet boating, quad biking / 4WD tour, rafting / canoeing / kayaking" Note the participation rate is a cumulative of people that have included at least one of these activities in their trip.
* If the gender categories do not add to 100%, this reflects respondents who chose not to disclose their gender or who identify with another gender
Source: International Visitor Survey data (year ended June 2025), accessed on 23 September 2025. Time period: 1 July 2024 – 30 June 2025. Sample size: 1419.

QUEENSTOWN WĀNAKA INSIGHTS



VISITOR EXPERIENCE INSIGHTS

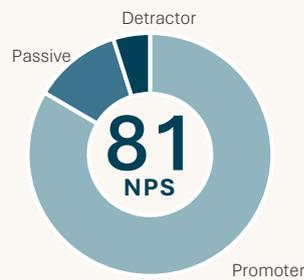
The following insights are drawn from Queenstown Wānaka Visitor Experience Survey* respondents who participated in adrenaline activities while visiting the region. It was not necessarily their main reason / motivation for travel to the region. These findings should be interpreted as “visitors to the region who participated in adrenaline activities tend to show the following characteristics and behaviours”.

Participation

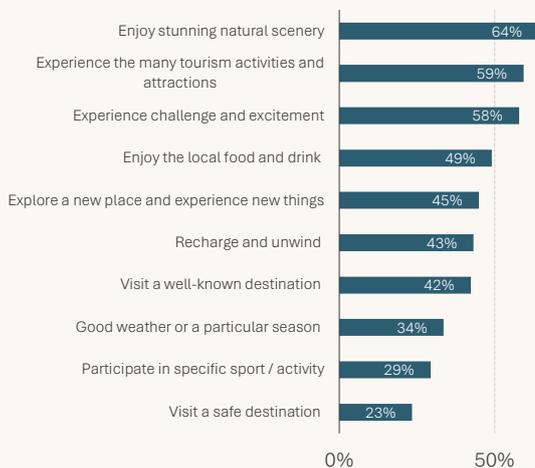


15% of respondents participated in adrenaline activities while in the Queenstown Wānaka Region.

Net Promoter Score



Top motivations for visiting



Locations visited



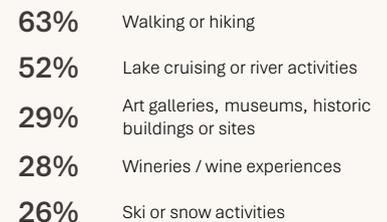
Top locations visited



Activities undertaken



Segment activities undertaken



Intention to return



32% of respondents who included adrenaline in their visit intend to return in the next 12 months.

Other activities undertaken





TRENDS AND INSIGHTS

The Queenstown-Wānaka region is globally recognised as a leading destination for adrenaline and adventure tourism, offering year-round opportunities that cater to both high-energy thrill seekers and those seeking a gentler connection with the outdoors. The area has pioneered many world-firsts in commercial adventure, from bungee jumping and jet boating to tandem skydiving and canyon swinging. It continues to deliver iconic experiences such as Australasia's highest bungee, the world's biggest swing, and the steepest tree-to-tree zipline. Alongside these high-adrenaline activities, the region also offers a wide array of soft adventures, from kayaking, and paddleboarding to guided 4WD journeys through high country landscapes and heli-hiking on alpine ridgelines. Together, Queenstown and Wānaka provide an unparalleled concentration of experiences across the adventure spectrum, cementing the region's reputation as both the birthplace and an ongoing global leader in adrenaline and adventure tourism.

TRENDS

SHIFT TOWARDS ADVENTURE TOURISM FOR BROADER DEMOGRAPHICS

Adrenaline travel is no longer just for young solo thrill-seekers. Research shows growing participation among couples, families, older travellers and multi-generational groups who want "moderated adrenaline" rather than extreme risk. The global adventure tourism market is forecast to grow strongly, driven by these broader demographics - this expansion is prompting operators to adjust operation and offerings, choice of activity intensities and inclusivity, pricing and supportive guides.

DIVERSIFICATION OF SOFT VS HARD ADRENALINE ACTIVITIES

There is an emerging split between "soft" adrenaline / adventure experiences, such as zip-lining, luge rides or guided canyon walks, and "hard" adrenaline / adventure experiences, like canyon swings, bungee jumps and rafting expeditions. Global market data indicates that soft adventure forms the majority of the share, but hard-adventure segments are popular as travellers seek more intense experiences, and Queenstown is one of the global leaders and iconic locations to experience this style of hard adventure.

SUSTAINABILITY, SAFETY AND ENHANCED OPERATOR STANDARDS

Safety protocols and sustainability credentials are now critical in adrenaline-tourism. Consumers expect operators to have up-to-date safety equipment, staff training, certifications and ideally eco-friendly. Given the high-risk nature of many activities, destinations are using strong regulations and safety audits as a selling point. Similarly, the sustainability story - responsible land/water use, trail rehabilitation, noise/light-impact reduction - is increasingly important to conscious travellers and helps differentiate higher-quality operators in a competitive market.

SOCIAL MEDIA INFLUENCE AND SHAREABILITY

The visual nature of adrenaline activities makes them highly shareable on social media. Influencer posts and travel-content snippets are increasingly shaping demand for such experiences. Younger travellers in particular are inspired by what they see on platforms and want "that same shot". This means operators are designing moment-friendly elements (viewing platforms, drone capture, photo packages) to encourage sharing, build word-of-mouth and drive bookings. The visual appeal is becoming part of the product.

HYBRID EXPERIENCES: WELLNESS-THRILL BLENDS AND CUSTOM INTENSITIES

The adventure tourism sector is seeing a strategic shift towards hybrid experiences, a growing trend that layers high-octane activities with recovery-focused wellness and nature connection. This approach caters to the modern traveller seeking both physical exhilaration and mental restoration. This two-pronged approach is driven by younger demographics prioritising transformative experiences that push them out of their comfort zone alongside holistic wellbeing experiences and a chance to intentionally relax and disconnect.

ABOUT

ABOUT THE RTOS

Destination Queenstown (DQ) and Lake Wānaka Tourism (LWT) are the Regional Tourism Organisations (RTOS) responsible for destination marketing, both domestically and internationally, and destination management, delivering selected initiatives from the Queenstown Lakes' destination management plan.

The RTOs' role is to market Queenstown and Wānaka as leading tourism destinations. This focuses on attracting high contributing visitors and supporting the delivery of the destination management plan to ensure we have a resilient and future focused industry, within a thriving community and environment. DQ and LWT communicate and connect with visitors to generate preference for our region and to create understanding of our place and our values. We help businesses to be resilient and prepared for the future through capability building and we engage with our community and show leadership in caring for our place.

The RTO strategy has evolved to support the goals of Travel to a Thriving Future, as well as continuing to support the visitor economy with values aligned marketing, product development and capability building in line with a regenerative tourism future.

ABOUT THE SEGMENTS

The RTOs use a segment-led approach to connect with visitors who are drawn to the region's key activities and experiences and who share similar interests and values. Marketing efforts focus on influencing high-intent audiences, encouraging them to experience Queenstown and Wānaka responsibly, and attracting values-aligned, high-contributing visitors. This approach supports sustainable, year-round demand and benefits a broad range of local businesses.

The segment-led strategy is especially important in the New Zealand and Australian markets, where segments help position and strengthen the destination brands, driving sustainable demand and attracting the right visitors.

SEGMENTS

- Adrenaline
- Biking
- Hiking / walking
- Skiing
- Golf
- Food and drink
- Arts, culture and heritage
- Stargazing