



BIKING

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, 'biking' in this research includes both trail and mountain biking. DQ and LWT employ distinct and different marketing approaches for each subsector of biking.



NEW ZEALAND INSIGHTS

INTERNATIONAL VISITOR SURVEY INSIGHTS

The following insights are drawn from International Visitor Survey* holiday respondents who participated in a bike ride* 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 a bike ride tend to show the following characteristics and behaviours”.

Participation



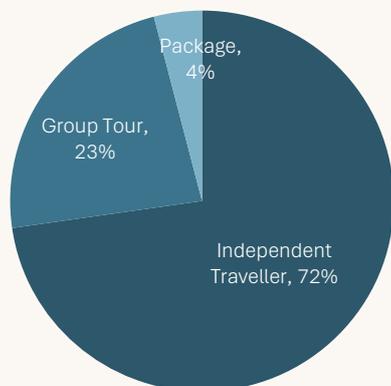
Top countries of origin

- Australia
- USA
- Singapore
- China
- United Kingdom

Average length of stay



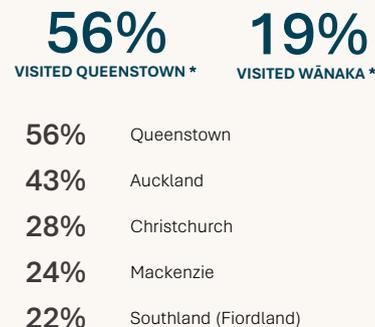
Travel style



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 category is "cycling"
* 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: 385.



QUEENSTOWN WĀNAKA INSIGHTS

VISITOR EXPERIENCE INSIGHTS

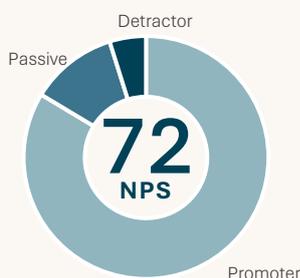
The following insights are drawn from Queenstown Wānaka Visitor Experience Survey* respondents who participated in a bike ride while visiting the region. It was not necessarily their main reason / motivation for travel to the region. These findings should be interpreted as “visitors to the region who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

Participation

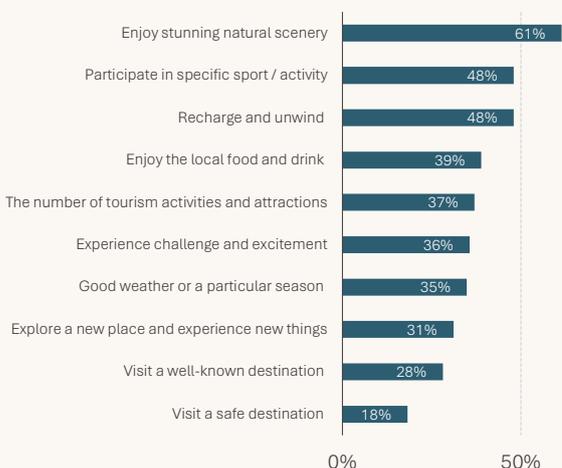


16% of respondents participated in a bike ride while in the Queenstown Wānaka Region.

Net Promoter Score



Top motivations for visiting



Locations visited



Top locations visited



Intention to return



51% of respondents who included biking in their visit intend to return in the next 12 months.

Activities undertaken



Segment activities undertaken



Other activities undertaken



* Visitor Experience category is “participated in cycle / bike ride” respondents
Source: Queenstown Wānaka Visitor Experience Survey, Destination Queenstown and Lake Wānaka Tourism, conducted by Angus & Associates. Time period: 1 July 2023 – 30 June 2025. Sample size: 373.



TRENDS AND INSIGHTS

Queenstown and Wānaka are internationally recognised as leading biking destinations, offering everything from family-friendly trails to world-class downhill. Queenstown's 150km+ Great Rides trail links lakes, rivers, and goldmining towns, while Wānaka's lakefront and riverside trails provide scenic, accessible options for all ages and abilities. Both towns make leisure biking easy with bike hire including e-bikes, guiding, transportation and gear widely available.

For mountain bikers, the Queenstown-Wānaka region is home to three lift-assisted bike parks (Coronet Peak Bike Park, Ben Lomond Trails, Cardrona Bike Park) and the sustainably designed Bike Glendhu in Wānaka. Extensive trail networks, a well-established range of bike hire providers and transportation options, a legendary dirt jump park, and strong local clubs underpin a thriving bike culture, complemented by a lively après-bike scene.

TRENDS

CYCLE TOURISM KEEPS SCALING

Cycle tourism continues to expand as travellers seek active, low-impact ways to experience landscapes and communities. Destinations are packaging purpose-built trails, wayfinding, luggage transfers, and bike-friendly stays into seamless itineraries that attract both experienced riders and interested beginners. Events and bike parks help anchor shoulder seasons, while multi-day routes stimulate regional dispersal and higher per-trip spend. In New Zealand, the Great Rides network and other trail networks position New Zealand well to capture growth, particularly through connected products that link trails, towns, and hospitality.

E-BIKE / E-MTB ADOPTION SHAPING ACCESS AND PRODUCTS

Electric bikes are broadening participation by smoothing elevation and distance, making more routes viable for mixed-ability groups. The popularity of e-MTB is pushing destinations to consider charging, rental fleets, and guidance on track suitability. Operators are adding e-specific tours and skills coaching, while land managers refine classifications and signage to reduce conflict and protect sensitive terrain. Investment in e-bike charging on national trails, plus clear codes of conduct and track grading, can support safe integration and expand market reach without compromising trail values.

PARTICIPATION WIDENS ACROSS AGES AND ABILITIES

Riding appeals to diverse audiences, from families and new riders to older enthusiasts returning to the sport. Health and wellbeing drivers, social riding, and entry-level products are increasing casual participation. Intro clinics, pump tracks, skills areas, and green-blue loops are effective gateways that convert interest into repeat visits.

DIGITAL TOOLS LIFT PLANNING, SAFETY, AND CONVERSION

Navigation apps, digital trail maps, live conditions, and online booking reduce friction across the rider journey. Better data supports capacity management, targeted maintenance, and timely alerts during weather events. For visitors, clarity on grading, time, elevation, and trail etiquette improves safety and satisfaction, and nudges travellers toward guided options or appropriate alternatives on busy days. Consistent digital wayfinding across regions, integrated with hut or shuttle bookings, can smooth peaks, reduce rescues, and convert interest into rideable itineraries.

DESTINATION MODELS DIVERSIFY BEYOND BIKE PARKS

Lift-access parks remain anchors for gravity riding and events, yet many destinations are balancing their portfolios with pedal networks, gravel connectors, and family routes. This spreads riders across grades and seasons, builds resilience to weather, and encourages repeat visitation. Partnerships with local operators, transport providers, and accommodation lift the overall yield. Linking bike parks to surrounding trail hubs and towns, with shuttles and loop itineraries, can grow average length of stay and share benefits across regional economies.

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