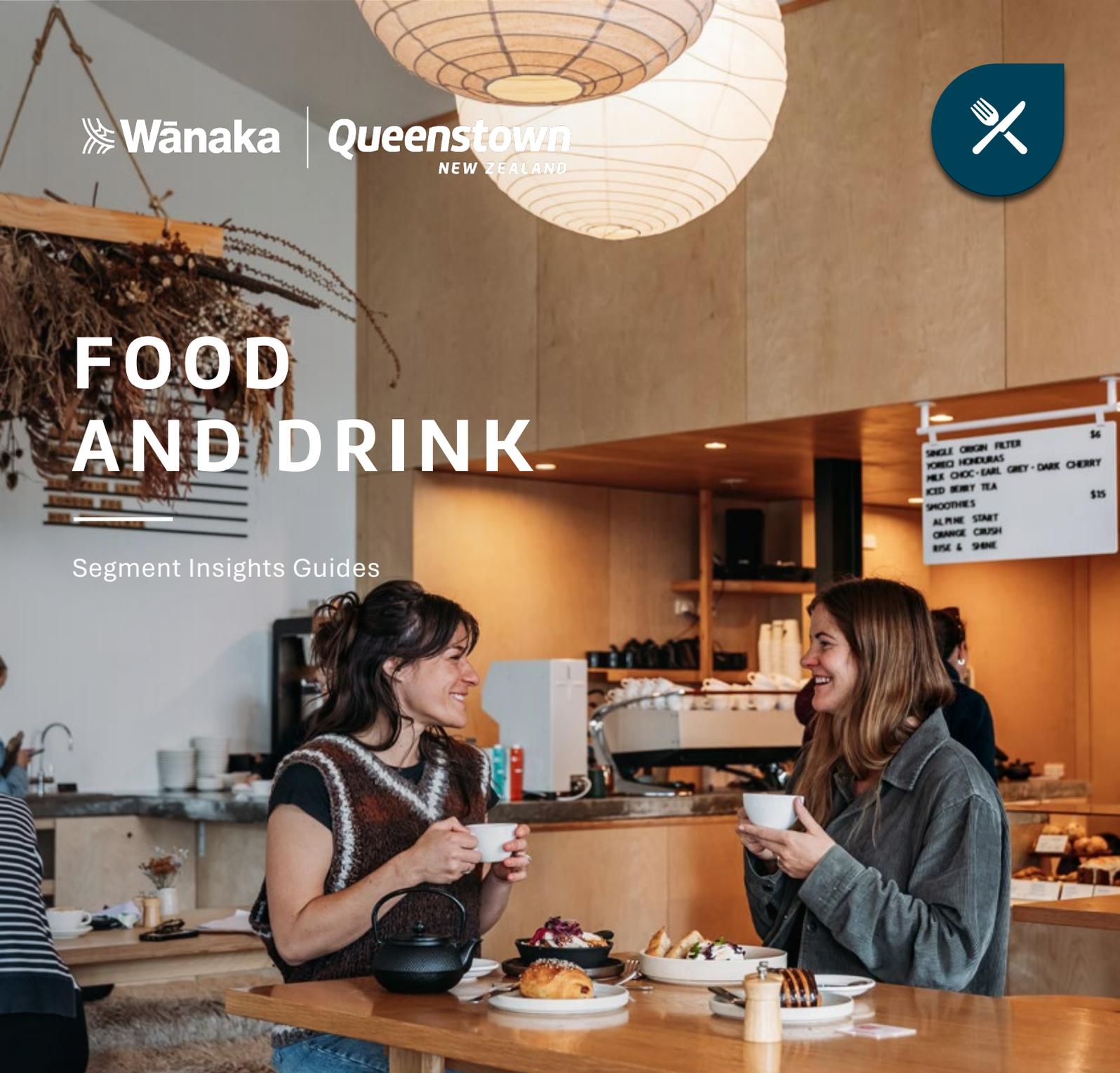




FOOD AND DRINK

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: Since dining at a restaurant or café is a very common activity / experience, only specific subsectors of the food, drink, and hospitality category have been included as survey segmentation allows. At a national level this includes visiting a brewery, gin distillery, vineyard or wine trail, and dining at a top-end restaurant. At a Queenstown Wānaka level it includes winery and wine experiences, and bars and nightclubs.



NEW ZEALAND INSIGHTS

BREWERY, GIN DISTILLERY, VINEYARD OR WINE TRAIL

The following insights are drawn from International Visitor Survey* holiday respondents who visited a brewery, gin distillery, vineyard or wine trail* 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 visited a brewery, gin distillery, vineyard or wine trail tend to show the following characteristics and behaviours”.

Participation



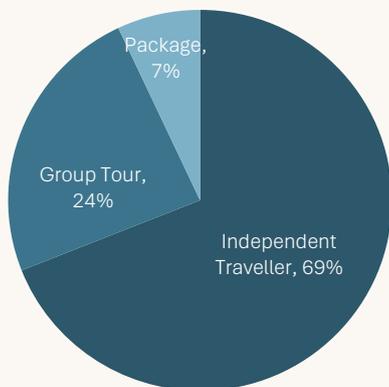
Top countries of origin

- Australia
- USA
- England
- Singapore

Average length of stay



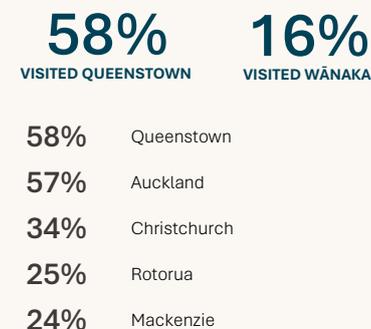
Travel style



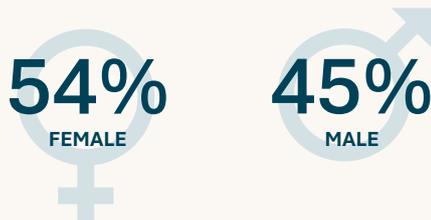
Regions visited



Top regions visited



Gender#



Average spend per category



*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 “visited a brewery, gin distillery, vineyard or wine trail”
 # 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: 1146.



NEW ZEALAND INSIGHTS

DINING AT A TOP-END RESTAURANT

The following insights are drawn from International Visitor Survey* holiday respondents who dined at a top-end restaurant* 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 dined at a top-end restaurant tend to show the following characteristics and behaviours”.

Participation



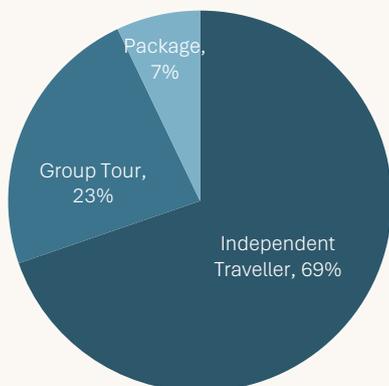
Top countries of origin

- Australia
- USA
- China
- Singapore
- England

Average length of stay



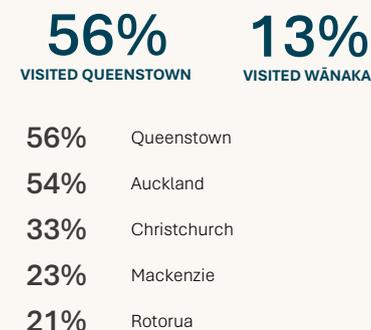
Travel style



Regions visited



Top regions visited



Gender#



Average spend per category



*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 "dined at a top end restaurant"
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: 993.



QUEENSTOWN WĀNAKA INSIGHTS

WINERY AND WINE EXPERIENCES

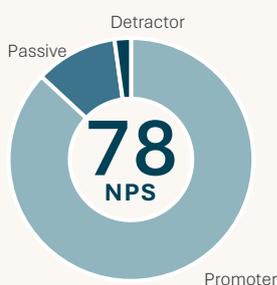
The following insights are drawn from Queenstown Wānaka Visitor Experience Survey* respondents who visited a winery or took part in a wine experience while visiting the region. It was not their main reason / motivation for travel to the region. These findings should be interpreted as “visitors to the region who visited a winery or took part in a wine experience tend to show the following characteristics and behaviours”.

Participation

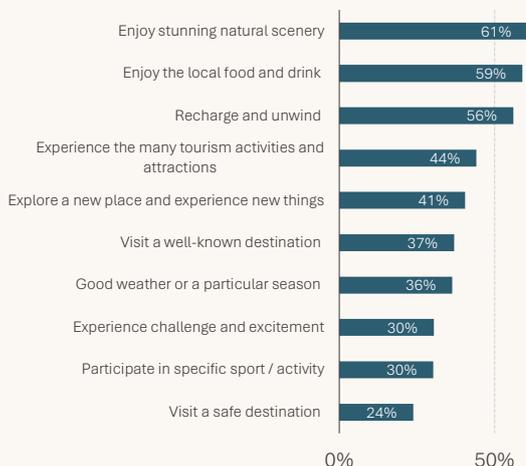


24% of respondents visited a winery or took part in a wine experience while in the Queenstown Wānaka Region.

Net Promoter Score



Top motivations for visiting



Locations visited



Top locations visited

- 90% Queenstown town centre
74% Arrowtown
65% Wānaka town centre
52% Frankton
45% Gibbston Valley

Activities undertaken



Segment activities undertaken

- 66% Walking or hiking
38% Lake cruising or river activities
30% Art galleries, museums, historic buildings or sites
25% Ski or snow activities
23% Biking

Intention to return



43% of respondents who respondents visited a winery or took part in a wine experience in their visit intend to return in the next 12 months.

Other activities undertaken

- 92% Restaurants/ cafés
74% Shopping
65% Sightseeing
47% Bars, night clubs



QUEENSTOWN WĀNAKA INSIGHTS

BARS AND NIGHTCLUBS

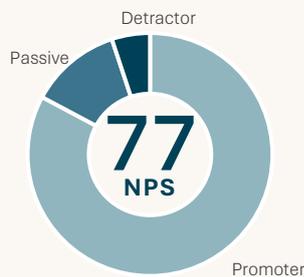
The following insights are drawn from Queenstown Wānaka Visitor Experience Survey* respondents who visited a bar or club while visiting the region. It was not their main reason / motivation for travel to the region. These findings should be interpreted as “visitors to the region who visited a bar or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

Participation

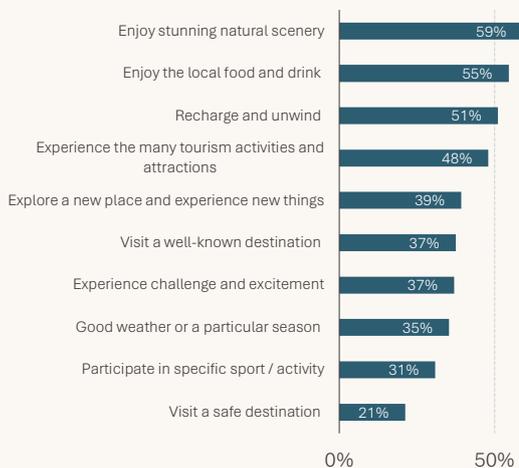


31% of respondents who visited a bar or club while in the Queenstown Wānaka Region.

Net Promoter Score



Top motivations for visiting



Locations visited



Top locations visited

- 88% Queenstown town centre
63% Arrowtown
60% Wānaka town centre
48% Frankton
32% Cardrona Valley

Intention to return



45% of respondents who visited a bar or club in their visit intend to return in the next 12 months.

Activities undertaken



Segment activities undertaken

- 61% Walking or hiking
40% Lake cruising or river activities
36% Wineries / wine experiences
27% Ski or snow activities
22% Art galleries, museums, historic buildings or sites

Other activities undertaken

- 90% Restaurants/ cafés
71% Shopping
63% Sightseeing

* Visitor Experience category is "visited a bar or night club" 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: n = 731.



TRENDS AND INSIGHTS

Queenstown and Wānaka offer diverse food and drink experiences that reflect the region's character and produce. Together they feature more than 150 restaurants, cafés, and bars, ranging from fine dining and international flavours to casual eateries and family-friendly options. Menus tend to highlight seasonal, locally-sourced ingredients, with both towns embracing garden-to-plate dining, a strong café culture, and a growing scene of artisan bakeries and gourmet food trucks.

Après and nightlife vary in style. Queenstown offers a vibrant mix of wine bars, local breweries, cocktail lounges, live music venues, and late-night clubs, while Wānaka provides a more relaxed atmosphere with boutique bars, craft breweries, and the iconic Cardrona Hotel. Wine is central to the region's identity. Gibbston, the "Valley of the Vines", is renowned for award-winning Pinot Noir and historic cellar doors, while Wānaka offers boutique, small-scale wineries with intimate tastings often led by the winemakers themselves.

TRENDS

CULINARY EXPERIENCE AS THE CENTRAL TRAVEL DRIVER

Travellers increasingly plan their trips around food and drink experiences rather than simply fitting dining in around sightseeing. One recent survey found that 77% of respondents were interested in planning travel based on a destination's restaurants and dining options, and 70% were willing to travel 30 minutes or more just for a specific meal. This means that bars, cafés, craft breweries, distilleries and restaurants are not ancillary - they are core to the visitor proposition.

LOCALITY, AUTHENTICITY & CULTURAL STORYTELLING THROUGH FOOD

Authenticity in food and drink offerings is more than a trend - it's a requirement of modern travellers. Dining at places that reflect local produce, heritage techniques, family-run kitchens, or region-specific beers or spirits is highly valued. Recent reports highlight how culinary tourism is being reframed as "travel anchored by the plate as much as the place" and that food offers a window into culture. In practice, this means eateries, bars and drink makers that emphasise terroir, local provenance and cultural ties can deliver stronger tourism appeal and memorable visits.

EXPERIENTIAL BARS, BREWERIES & DISTILLERIES AS DESTINATIONS

Beyond meals in restaurants, drink-based venues are increasingly functioning as tourism attractions in their own right. Craft breweries, boutique wineries, small-batch distilleries and cocktail bars are offering tours, tastings, mixology workshops and immersive experiences. This turn articulates the shift where the "drink venue" is part of the itinerary - not just a place to unwind after a day of sightseeing. For destinations, this means incorporating these venues into tourism layering and packaging can bring added value and diversify the visitor offering.

SUSTAINABILITY AND RESPONSIBLE FOOD & DRINK PRACTICES

Sustainability is no longer an additional consideration in hospitality and tourism - travellers are coming to expect environmentally and socially responsible options in their food and drink experiences. From farm-to-table restaurants using local produce and reducing waste, to breweries and distilleries powered by renewable energy, the underlying values of provenance and traceability matter. In tourism terms, destinations that showcase sustainable food ecosystems (such as regenerative agriculture, up-cycling, minimal-waste) can differentiate themselves and respond to consumer values.

DIGITISATION, PERSONALISATION AND SOCIAL SHARING

The food and drink tourism landscape is being shaped by digital tools: platforms where travellers can book meals, tasting tours, masterclasses; apps that highlight trending bars or craft breweries; social media that influences travellers' choices with visuals of food and drink. One hospitality industry report highlighted that digital and tech adoption is a key driver of new guest expectations. For bars, cafés and operators, offering seamless booking, curated tastes and shareable experiences (Instagram-worthy dishes or drinks) supports the modern traveller's behaviour.

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