

 Wānaka

Queenstown  
NEW ZEALAND



# GOLF

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.



# NEW ZEALAND INSIGHTS

## INTERNATIONAL VISITOR SURVEY INSIGHTS

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

### Participation



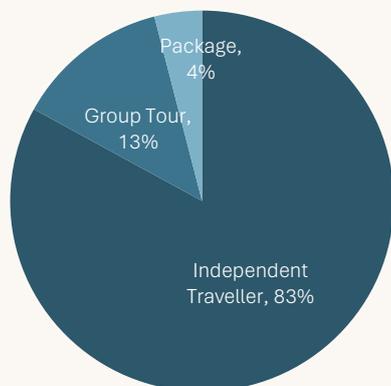
### Top countries of origin

- Australia
- USA
- Singapore
- South Korea

### Average length of stay



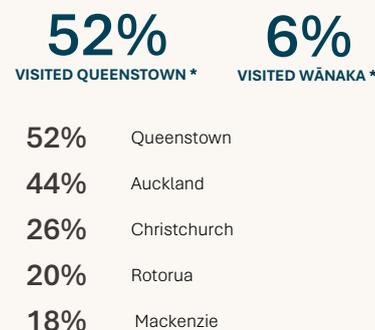
### Travel style



### 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 "playing golf"

# 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: 109. Please note this is a particularly low sample size, as with all survey data please treat any insights as indicative.



# QUEENSTOWN WĀNAKA INSIGHTS

## VISITOR EXPERIENCE INSIGHTS

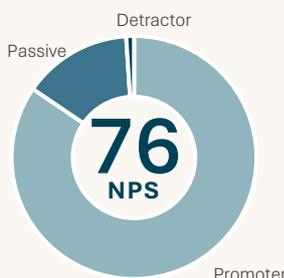
The following insights are drawn from Queenstown Wānaka Visitor Experience Survey\* respondents who participated in golf while visiting the region. It was not necessarily their main reason / motivation for travel to the region. These findings should be interpreted as “visitors to the region who participated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

### Participation

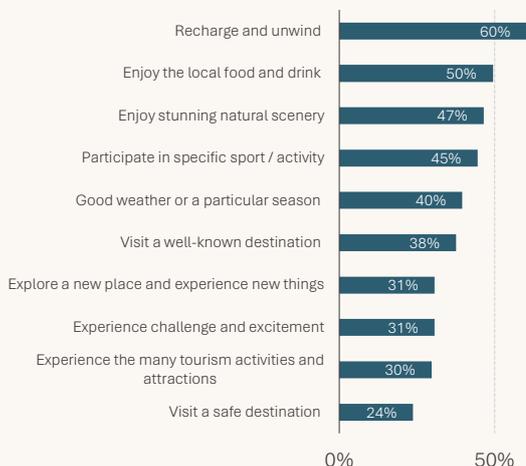


4% of respondents participated in golf while in the Queenstown Wānaka region.

### Net Promoter Score



### Top motivations for visiting



### Locations visited



### Top locations visited

- 74% Queenstown town centre
66% Arrowtown
64% Wānaka town centre
45% Frankton
39% Lake Hāwea

### Intention to return



53% of respondents who included golf in their visit intend to return in the next 12 months.

### Activities undertaken



### Segment activities undertaken

- 68% Walking or hiking
46% Wineries / wine experiences
36% Lake cruising or river activities
28% Biking
24% Art galleries, museums, historic buildings or sites

### Other activities undertaken

- 89% Restaurants/ cafés
66% Shopping
50% Sightseeing
39% Bars, night clubs

\* Visitor Experience category is “participated in golf” 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: 101. Please note this is a particularly low sample size, as with all survey data please treat any insights as indicative.



# TRENDS AND INSIGHTS

Queenstown is established as one of New Zealand's foremost golfing regions, combining championship courses with welcoming community clubs in striking alpine settings. Queenstown offers eight courses, including four championship layouts such as Jack's Point, The Hills, and Millbrook Resort, which regularly hosts the New Zealand Open. With six courses located within a 20-minute drive, players benefit from both variety and accessibility. Wānaka complements this with scenic options at Wānaka Golf Club and Lake Hāwea, where relaxed, community-focused rounds take place against lake and mountain backdrops.

The region continues to evolve, with course expansions, upgraded facilities, and major projects such as Hogan's Gully in Arrowtown and the Glendhu Bay Golf Resort near Wānaka set to further enhance its profile. Together, the two centres deliver a balance of world-class and approachable golfing experiences.

## RISE OF DESTINATION AND EMERGING GOLF TOURISM

The golf tourism market is expanding quickly, valued at US \$25.3 billion in 2024 and projected to reach US \$41.9 billion by 2030 (CAGR ~9.1%). Growth is being driven by golfers seeking premium experiences that combine play with travel, where luxury resorts, championship courses, and cultural or culinary offerings create a full destination package. While established hubs like Scotland, Ireland and Florida remain strong, momentum is shifting toward emerging destinations in Asia-Pacific, the Middle East and Latin America. Rising incomes, new resort infrastructure, and a desire for fresh cultural and sporting experiences are reshaping the map of golf travel, giving travellers more choice and destinations new opportunities to position themselves as high-value golf holiday markets.

## LUXURY STAY-AND-PLAY, IMMERSIVE AND LIFESTYLE-FOCUSED OFFERINGS

Golf travellers increasingly seek premium, immersive experiences that combine world-class courses with luxury accommodation, lifestyle extras (fine dining, wine, spa, culture) and destination access. Rather than simply teeing off, they want a 'stay-and-play' holiday that feels like a fully integrated leisure experience. This trend is especially evident among affluent travellers who view golf trips as part of a high-end lifestyle rather than just sport. Tourism operators are responding by creating packages that appeal to non-golfers travelling with players, or couples where one plays and the other relaxes.

## DIVERSIFYING TRAVELLER DEMOGRAPHICS - WOMEN, YOUNGER PLAYERS AND NEW MARKETS

The profile of golf travellers is broadening. Women are increasingly participating in golf trips, influencing how resort marketing, gear rental, lessons and social experiences are configured. Younger players and travellers from non-traditional golf markets (especially Asia, Latin America) are also entering the mix. For the tourism industry this means golf destinations must adapt their offerings and narrative: more inclusive, socially engaging, and customised. The broadened demographic boosts overall golf-tourism potential.

## TOURNAMENT-DRIVEN AND EVENT-BASED GOLF TRAVEL

Events - major tournaments, pro-am series, regional golf festivals - are increasingly leveraged by destinations to drive tourism. Travellers may plan trips around major championships, celebrity pro-events or themed golf weeks. Beyond simply playing, being part of the event vibe (spectating, engaging in side experiences) adds value. For tourism stakeholders, hosting or aligning with such events can generate spike demand, media exposure, and increased visibility of courses and regions. It also encourages repeat visitation when travellers discover a destination through an event and return for leisure play.

## SUSTAINABLE, ECO-FRIENDLY GOLF RESORTS AND COURSES

Sustainability is becoming a differentiator in golf tourism. More resorts and destinations are adopting renewable energy, smart irrigation, native landscaping, biodiversity programmes and certifications for eco-responsible operation. For golf travellers who care about destination credentials, choosing a course or resort that meets sustainability standards can factor into their decision-making. From a tourism perspective, the embrace of 'green' golf operations aligns with broader sustainable-tourism goals, community relations and environmental care.

# 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