



HIKING AND WALKING

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, 'hiking & walking' in this research includes the terms walking, hiking, tramping, climbing and trekking.



NEW ZEALAND INSIGHTS

INTERNATIONAL VISITOR SURVEY INSIGHTS

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

Participation



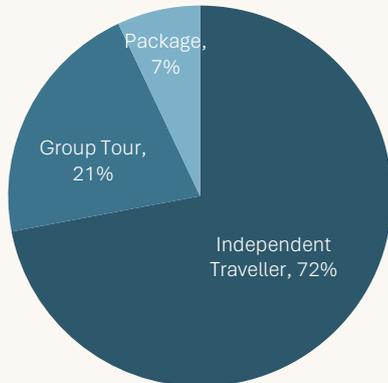
Top countries of origin

- Australia
- USA
- China
- England
- Singapore

Average length of stay



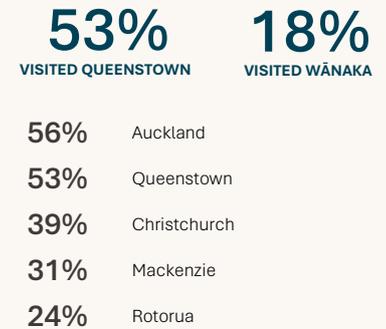
Travel style



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 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 "Went for a walk, hike, trek or tramp"

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: participated in / went for a walk / hike / tramp or trek respondents (n = 3,437)



QUEENSTOWN WĀNAKA INSIGHTS

VISITOR EXPERIENCE INSIGHTS

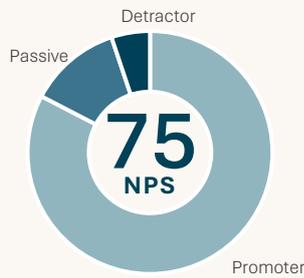
The following insights are drawn from Queenstown Wānaka Visitor Experience Survey* respondents who walking or hiking* while visiting the region. It was not necessarily their main reason / motivation for travel to the region. These findings should be interpreted as “visitors to the region who participated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

Participation



61% of respondents participated in walking and hiking while in the Queenstown Wānaka Region.

Net Promoter Score



Top motivations for visiting



Locations visited



Top locations visited

- 80% Queenstown town centre
71% Wānaka town centre
58% Arrowtown
42% Frankton
35% Lake Hāwea

Intention to return



41% of respondents who included walking or hiking in their visit intend to return in the next 12 months.

Activities undertaken



Segment activities undertaken

- 33% Lake cruising or river activities
25% Wineries / wine experiences
23% Art galleries, museums, historic buildings or sites
20% Ski, snow or ice activities
20% Biking

Other activities undertaken

- 86% Restaurants/ cafés
64% Shopping
61% Sightseeing
31% Bars, night clubs

* Visitor Experience category is "participated in a walk / hike / tramp" 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: 771.



TRENDS AND INSIGHTS

Queenstown and Wānaka offer some of New Zealand's most accessible and rewarding walks, from short lakeside ambles to challenging alpine adventures. Within minutes of each town centre, visitors can step into landscapes of lakes, rivers, beech forest, and dramatic peaks, making walking one of the simplest ways to connect with nature.

Short walks range from gentle garden and lakeside paths to hillside climbs with sweeping views, perfect for all ages year-round. Day walks explore rivers, waterfalls, and ridgelines, with options for independent or guided experiences that add safety and local knowledge. For deeper immersion, multi-day hikes accessible from the region include the Routeburn, Milford, and Kepler Great Walks, as well as several other well-known tracks that venture into Mount Aspiring National Park. Practical services such as transfers, gear hire, guided walks, and heli-hiking ensure these world-class trails are unforgettable.

TRENDS

GLOBAL POPULARITY OF HIKING / WALKING TOURISM

The hiking tourism market is growing strongly, valued at USD \$67.2 billion in 2024 and forecast to reach USD \$126.8 billion by 2033, with annual growth of over 7%. Walking and trekking are becoming central to travel, both as core and secondary activities. In New Zealand, this highlights the importance of the Great Walks and the country's wide network of accessible tracks, which continue to attract strong domestic and international demand for active, nature-based holidays.

HEALTH, WELLNESS AND INCLUSIVE PARTICIPATION

Globally, hiking is being recognised as more than recreation, with strong links to physical health, mental wellbeing, and social connection driving uptake across demographics. Participation is rising among seniors (+7.4%) and younger groups (+5.6%). In New Zealand, this is reflected in the popularity of accessible short walks and challenging multi-day routes. Developing options for different ages and fitness levels will broaden appeal and maintain accessibility.

SHIFTS IN GLOBAL MARKETS AND TRAVELLER ORIGINS

Europe and North America remain strong hiking markets, but the fastest growth is emerging in Asia-Pacific, where adventure tourism overall is expanding rapidly. New source markets are driving demand for guided and entry-level hiking experiences. For New Zealand, this creates opportunities to attract a broader mix of hikers, particularly from Asia, by offering shorter walks, bilingual interpretation, and culturally tailored experiences that diversify beyond the traditional Australian and Western visitor base.

TECHNOLOGY AND INFRASTRUCTURE MAKING HIKING MORE ACCESSIBLE

Digital tools such as navigation apps, booking platforms, and wearable tech are reshaping hiking and trekking, making it easier for travellers to plan, navigate, and share experiences. At the same time, investment in infrastructure - better signage, guided options, and expanded accommodation - is broadening participation and lowering entry barriers. In New Zealand, opportunities lie in enhancing digital maps, weather tools, and hut booking systems to support both independent and guided experiences.

SEARCH FOR AUTHENTIC AND UNIQUE EXPERIENCES

Travellers are increasingly seeking experiences that go beyond recreation, combining physical activity with deeper connections to landscapes and communities. Hiking is consistently ranked among the top adventure activities, fuelled by demand for meaningful outdoor and cultural encounters. In New Zealand, this creates opportunities to promote tracks beyond the Great Walks and integrate māori cultural narratives, local food, and community-based tourism to disperse visitors and strengthen authenticity.

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